NUBIAN SQUARE

MARKET ANALYSIS

February 2020

TACC THE AMERICAN CITY COALITION

FXM Associates Economic Planning and Research

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The American City Coalition

Founded in 1994, The American City Coalition (TACC) is a Roxbury-based 501(c)(3) organization committed to providing thought leadership and technical assistance to advance multi-sector and multi-stakeholder partnerships that focus investments to improve the quality of life for Roxbury families.

With Roxbury as a primary focus area, TACC identifies and develops programming and projects that respond to the neighborhood's assets and needs. TACC's work is grounded in objective research, in-depth resident input, and the expertise of local stakeholders; this data and analyses allow TACC to help partners identify unmet community needs. Using an emergent approach, TACC seeks to increase collective impact by aligning the skills of partners within defined program areas and identifying and engaging complementary partnerships and resources.

Three interrelated programs guide TACC's work and reflect the organization's focus on connecting people to place:

- Resident Supports: Connects residents with the essential services and information needed to support health and mobility;
- Economic Development and Asset Development: Advances strategies that strengthen asset and wealth creation pathways; and
- Neighborhood Vitality: Supports multi-sector partnerships that improve the neighborhood environment and facilitate investment.

Reports, data, and further information can be found at: www.tamcc.org.

TACC acknowledges the following individuals and organizations for their contributions to this study:

Residents, business owners, employees, and property owners who participated in focus groups, surveys, and interviews

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I. Executive Summary

Roxbury's Nubian Square is a diverse neighborhood with a unique multifaceted history that is reflected in its rich cultural assets, the wide-ranging talents of its residents, and the dynamic mix of ethnic, independent businesses that now occupy this business district in the heart of the City of Boston. Within the City of Boston and the Commonwealth of Massachusetts as a whole, Nubian Square plays a singular role as the historic center for African American civic, social, and cultural life with a long and varied past as a major commercial center. Nubian Square also features a diversity of households that augurs well for its attractiveness to current and emerging market opportunities.

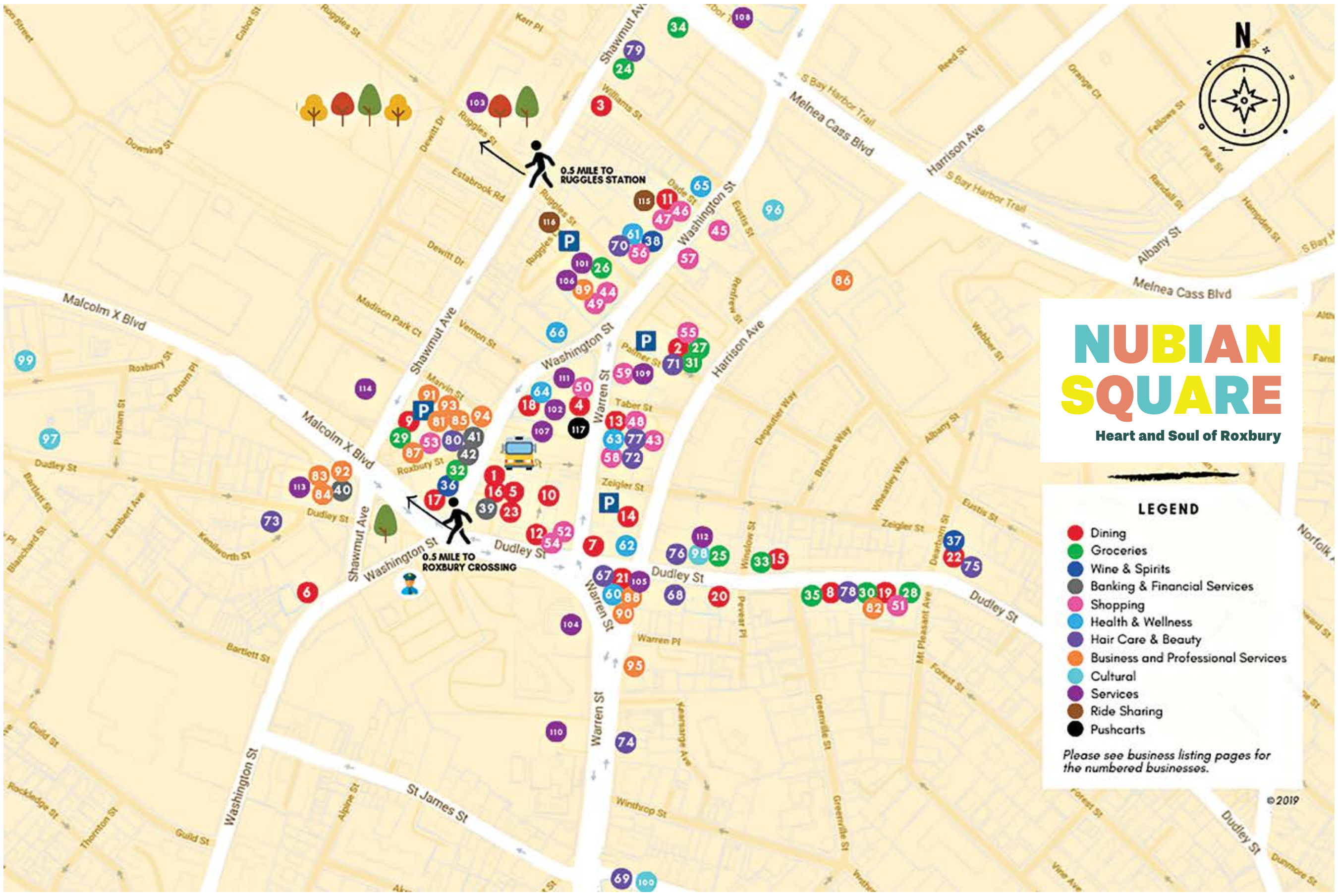
With the magnitude of development and infrastructure investments in the area, it is not an understatement to say that Nubian Square and Roxbury are at a crossroads. Using research conducted in Fall 2019, the *Nubian Square Market Analysis* takes an inclusive approach, documenting current conditions and assets (active community resident groups connected through social media; involved and entrepreneurial businesses; gifted visual and performing artists; and active and invested nonprofits), addressing challenges (business development; wealth creation; and physical connections), and identifying opportunities so that the growth of the community's retail and commercial environment is not left to chance in the face of change.

The goals of the *Nubian Square Market Analysis* are to: 1) identify factors that distinguish Nubian Square as a location capable of attracting and sustaining businesses that will increase the vibrancy as a retail center; 2) recommend specific initiatives and strategies that can increase Nubian Square's vitality as both Roxbury's commercial hub and one of Boston's major community business districts; and 3) inform the discussion that will help recalibrate the conversation about the Square's commercial growth.

This report includes objective information and implementation strategies relevant to a range of stakeholders so existing businesses looking to expand and businesses intending to locate in Nubian Square are aware of economic and cultural variables. Additionally, landlords and retail recruiters will understand how commercial rents compare to those in other markets and the impact rental rates have on the community. Finally, policymakers, residents, and Main Streets have strategies to market the district to businesses ready for expansion into an ethnically and racially diverse community.

The American City Coalition (TACC) conducted this study in collaboration with Roxbury Main Streets, a commercial revitalization organization that provides hands on assistance to businesses in Nubian Square and fosters growth for the next generation of local, minority-owned businesses. TACC contracted the services of the Initiative for a Competitive Inner City (ICIC) and FXM Associates as well as Byrne McKinney & Associates.

To ensure the study encompassed a comprehensive and inclusive approach, including the collection of both quantitative and qualitative data, this report relies on a multitude of primary and secondary data sources. The primary data is largely qualitative and is derived from focus groups with local residents and business owners, surveys of employees, and field notes and interviews of landlords and property owners. These findings are utilized throughout the report to complement and confirm quantitative analyses. The secondary data sources include the CoStar Group (business and leasing activity; actual lease comparisons; trends in commercial real estate); City of Boston (parking); United States Census Bureau's American Community Survey (ACS) five-year data and United States Census Bureau county business patterns; and Esri and Environics Analytics Spotlight Reports (gaps in data from ACS and Census Bureau on demographics; housing; jobs; businesses; and estimates of current conditions and projected demand).



The report utilizes three geographic units of analysis depending on the analysis type: 1) 0.75-mile radius; 2) 1.5-mile radius; and 3) real estate "submarkets" provided by the CoStar Group. These geographic units of analysis are predicated on the idea that people will typically purchase goods and services within the shortest available walking or drive time from where they live.

Since Nubian Square is a unique community and no singular location can be looked to as a comparative or aspirational market, this analysis identified multiple comparison market areas that could provide realistic models and "best practices" for future Nubian Square commercial development. The study uses two types of comparative analysis: 1) Comparative Business Districts: Comparative analyses with the five areas of Ashmont-Fields Corner; Egleston Square; Hyde Square-Jackson Square; Mattapan Square; and Brookline Village are used to place Nubian Square within a context of surrounding business districts and the broader Boston area to better understand and interpret the data; and 2) Analogous Submarkets: Similarly, both office and retail real estate market analyses are presented for Metro Boston overall and for five submarket geographies of Roxbury-Dorchester; Jamaica Plain-South Suffolk; Longwood Medical Area-Mission Hill-Fenway; South End; and Brookline-Newton.

A. Key Findings

The following are key findings from the study's quantitative research and associated analyses:

DEMOGRAPHICS

- Nubian Square has a larger concentration of population and households within 0.75 mile and 1.5 miles and therefore a larger local market than the five Comparative Business Districts. These are key factors in generating economic growth and development, but households must also have sufficient disposable income to support local businesses.
- Between 2000 and 2010, Nubian Square grew at a higher rate (25%) than all other Comparative Business Districts as well as the City of Boston as a whole. Since 2010, Nubian Square has had the second highest growth rate, exceeded only by Hyde Square-Jackson Square. From 2019 to 2024, Nubian Square's population is projected to grow by 5.5%, exceeded only by Hyde-Jackson and Egleston Squares. The pattern portends expansion of the market opportunity for Nubian Square businesses, especially as the growth is trending towards greater economic diversity than experienced historically.
- Nubian Square's population has a lower than average percentage of Millennials, age 24 to 44, but a considerably higher percentage of the younger, under age 23, Generation Z population. The current Nubian Square business mix does not respond to the shifting demographic needs which must be recognized for local businesses to optimize their share of growing demand and fully participate in future opportunities.
- The area within a 0.75-mile radius of the Bruce C. Bolling Municipal Building at 2300 Washington Street in Roxbury has the most racially and ethnically diverse population of the Comparative Business Districts; the vibrancy of its racial and ethnic mix is one of Nubian Square's competitive advantages.
- Nubian Square has, by far, a higher proportion of households with no vehicle (46%) than the five Comparative Business Districts; additionally, it has the second highest percentage of residents who walk to work or work at home (24%), exceeded only slightly by Brookline Village (25%).
- With 21% of all units built since 2000, Nubian Square has a higher percentage of renters and a newer housing stock than the five Comparative Business Districts.

INCOME

- Nubian Square households have relatively low incomes. The area's median household income ($41,448) is lower than the median in the Comparative Business Districts ($55,000) and City of Boston as a whole ($69,160).
- As the younger households in the area age and as the wave of larger-scale, mixed-income residential development now under construction and in the pipeline deliver greater economic diversity to the area, Nubian Square incomes and expenditure potentials are expected to rise, bringing opportunities for a stronger and more vibrant business environment.

BUSINESSES

- Nubian Square has a high percentage of jobs in health, education, and community organizations.[1] This suggests there are a large number of office workers who may be able to support expanded daytime retail and restaurant offerings in Nubian Square.
- Nubian Square has a low share of jobs and few establishments in retail, accommodations, food, arts, entertainment, and recreation-related industries.[2] In focus groups, residents and employees stated that they want to see growth in these sectors in Nubian Square. However, it is important to highlight these low shares of employment, as growth in these sectors may not happen on its own; sector-specific policy and programmatic support for the growth of these industries may be needed.

RETAIL REAL ESTATE

- Retail spending per household is slightly lower than the average of Nubian Square and the five Comparative Business Districts as well as the City of Boston as a whole, reflecting the concentration of younger households and lower median incomes in Nubian Square.
- Much of the commercial space in Nubian Square is characterized as older and in need of modernization. The market area rents are insufficient to support new construction or extensive rehabilitation without subsidy of some sort, including subsidy from higher-yielding market rate rental housing. The blighting influence caused by vacant, dilapidated commercial spaces cannot be overstated for its adverse effect on perceptions of overall value.
- On the flip side of these market conditions, the prevailing lower rents offer opportunities for an eclectic mix of small, independent, entrepreneurial businesses designed to bring new energy to Nubian Square; most of these businesses will need financial assistance for real estate and business start-up/expansion, as well as cooperation from landlords who see the long-term value of expanded and revitalized retail/restaurant activity to their properties notwithstanding lower initial rents.

RETAIL SPENDING OPPORTUNITIES

- A retail spending opportunity/gap analysis identified immediate opportunities to significantly expand existing business sales and/or potential absorption of over 80,000 square feet of retail and restaurant uses based on sales leakage within a 1.5-mile radius of Nubian Square.
- Based on current sales leakages, business opportunities include limited service restaurants and buffets; health and personal care; hobby, toy, and game; hardware; and specialty stores such as meat markets, gift/novelties, and garden centers. The retail spending opportunity/gap analysis does not mean there is no opportunity for growth or improvement outside of these business types, especially for restaurants and entertainment which are expected to draw patrons from outside the local market area.

B. Recommendations

The market analysis led to specific, implementable policies and strategies to realizing residents', business owners', and employees' shared vision: Enliven the Nubian Square Business District for both residents and visitors during the evenings and weekends and support a mixed-use, urban lifestyle environment.

As previously mentioned, with the magnitude of development and infrastructure investments in the area, it is not an understatement to say that Nubian Square and Roxbury are at a crossroads. This study takes an inclusive approach, documenting current conditions and assets, addressing challenges, and identifying opportunities so that the growth of the community's retail and commercial environment is not left to chance in the face of change.

The seven recommendations listed below are a strategic path to realizing the collective vision for the Nubian Square Business District. Informed by current local data, the recommendations address underlying conditions of safety and four core elements requisite to vitality that were adapted from the Main Street America Transformation Strategies approach: economic conditions, placemaking, marketing, and organizational capacity. While many of the recommendations could be implemented in silos, this could work at cross purposes to a more holistic and robust revitalization of Nubian Square. To increase Nubian Square Business District's vitality, the community will need to work collectively with sustained focus and a well-coordinated implementation approach to address these elements.

Overarching Recommendations to Support Safety and Organizational Capacity

Safety and the reactivation of Roxbury Main Streets are overarching themes that run throughout all of the study's recommendations. These two themes emerged out of every segment of the study's research and are palpable in: the shopping pattern of residents for whom Centre Street in Jamaica Plain, not Nubian Square, is the preferred destination due to the mix of shopping options, the availability of parking, and the quality of goods/services; and the concerns of residents and business owners who identify the perceptions of safety and the need for significant streetscape and private property improvements as challenges.

1 Improve perceptions of safety in Nubian Square.

Residents and business owners alike mention safety as a concern in Nubian Square, particularly at night. Although this study does not analyze crime data on Nubian Square and the Comparative Business Districts, the pervasiveness of the perception is sufficient to motivate the need for change. Residents and business owners do not see the presence of a parked police cruiser with its flashing blue lights as a deterrent to undesired activities. Instead, they view it as a warning to residents and visitors of a potential safety or health emergency in the Square and a signal that people should avoid the area. The cruiser also provides a clear indication of where police are not, as well as where they are, encouraging any undesirable activities to occur elsewhere in the Square. Residents and business owners recommend replacing the cruiser with active police foot patrols, which not only add to the sense of safety but also provide opportunities for positive police interaction with the members of the community. Additionally, improved street lighting and street activities that bring increased foot and vehicular traffic into the Square in the evening are seen as enhancing the sense of safety.

2 Reactivate Roxbury Main Streets as the driver of programs and activities.

Roxbury Main Streets continues to have a critical and unique role to play in the revitalization of Nubian Square. A focus on Nubian Square Business District marketing and advocacy is as vital as working with prospective and existing businesses. Actively working with the City of Boston's Office of Economic Development, an adequately staffed Main Street program can: broker positive outcomes between existing and prospective businesses and landlords; expand activities to bring residents and visitors into the district, such as special and regularly recurring events; and continue to expand business capacity building in terms of workshop series and hands-on business assistance to improve business operations. Main Streets should take advantage of the specific opportunities identified in this study to recruit prospective new businesses and, more importantly, provide objective evidence to support marketing and financing for expansion of existing businesses and retail space.

Additional Recommendations to Support Economic Conditions, Placemaking, and Marketing

Five additional recommendations are important components of the strategic path toward the collective vision of Nubian Square:

3 Recognize market opportunities and invest in specific strategies to assist existing retailers to expand while also recruiting retailers to respond to these opportunities.

Roxbury's population density and growth rates bode well for expanding market opportunities, as do residents' relative youth and high degree of ethnic diversity. The current retail mix, however, needs to broaden in order to capture those opportunities. Warehouse clubs and superstores should not be encouraged because they do not fit residents' and business owners' vision for Nubian Square. The table below identifies specific types of retail, service, and event opportunities that should be prioritized to meet demand.

A. Preserve and expand on core retail, such as convenience goods and the daytime lunch trade. The data indicates that Nubian Square ranks fourth among the six Comparative Business Districts in the number of retail establishments. Focus group participants and an inventory of businesses also indicate that Nubian Square has a dearth of local services such as dry cleaning, shoe repair, yoga/fitness, and pet care/grooming that does not meet the needs of residents and employees of local businesses. Residents are already purchasing these services but travel outside of the Nubian Square Businesses District to Washington Mall, Grove Hall, and especially to Jamaica Plain to do so. These types of small businesses are an ideal fit for Nubian Square. This recommendation also includes a strategy to minimize the "creep" of retail businesses along Warren Street and Washington Street in order to reinforce the core of Nubian Square as the shopping district.

B. Expand and attract more destination-driven entertainment/dining options. Of the Comparative Business Districts, Nubian Square has the largest population within a 0.75-mile radius, also making it the densest. Its diverse population is by far the youngest, and it has the largest population under the age of 44. These characteristics, together with Nubian Square's transit advantages, hold a competitive advantage for a vibrant urban entertainment environment. Yet Nubian Square lags Egleston Square, Ashmont-Fields Corner, and Brookline Village in the number of arts, entertainment, and recreation establishments as well as the in the number of accommodation and food services (mostly restaurants) establishments. Focus group participants of all ages identified the need for destination-driven entertainment/dining options.

C. Recognize and capitalize on trends toward a younger and more diverse population. Among the retail uses in demand by younger residents and the diversity of the residents are: health and personal care; hobby, toy, and game; and limited-service restaurants. To complement the business activity, both residents and businesses express the desire for special events on the weekends and in the evenings which would draw young people and families to the Square including concerts, farmers' markets, book fairs, and a variety of ethnic pop-up retail and events.

Retail Opportunities

- Health and personal care store
- Hobby, toy, and game store
- Clothing store
- Specialty store
- Hardware store
- Housewares store
- Other general merchandise stores, including those with an Afrocentric orientation
- Limited-service restaurants
- Sit-down restaurants, especially those with entertainment

Service Opportunities

- Dry cleaner
- Shoe repair
- Other locally-oriented services, including those with an Afrocentric orientation
- Yoga/fitness studio
- Pet care/grooming

Event Opportunities

- Outdoor concerts
- Farmers' markets
- Book fairs
- Ethnic pop-up retail and events
- Cultural events
- Themed experiences: e.g. First Thursdays

D. Recruit an eclectic mix of independent, entrepreneurial businesses designed to bring new energy to Nubian Square. Property owners must be engaged to support such efforts for long-term gains in value. One of the potential growth sectors identified in the retail spending opportunity/gap analysis is "other general merchandise" which includes: specialty stores, hardware, housewares, and clothing—in other words, a mix of products for smaller-niche, independent businesses. In focus groups, residents recommended expanding on Nubian Square's existing Afrocentric niche.

The documented potential growth sectors must be actively promoted to current Nubian Square businesses to increase sales. In addition, to expand the mix of businesses, a top priority should be the marketing of these potential growth sectors to targeted, successful businesses currently located outside of the Square that might be recruited for expansion of their businesses in Nubian Square. However, most of these businesses will need financing assistance for real estate and business start-up/expansion. Specifically excluded are warehouse clubs and superstores, which do not fit residents' and business owners' vision for Nubian Square.

4 Promote increased office space development, particularly above street level.

Businesses and nonprofits with primarily office functions have a high share of employment in Nubian Square and those that currently utilize ground-floor space might find upper-floor space more attractive if it were suitably developed. This would free-up more first-floor space for retail and related uses. In addition, increased upper-floor office space development could support expansion of office-using industries in the Square; with Class A[3] office space at a premium in the City of Boston, increasing the inventory will meet any demand, particularly from proximate clusters[4] such as healthcare and biotechnology associated with Boston Medical Center. Coworking spaces, which do not necessarily require significant upgrades to existing spaces, may also be viable for upper-floor spaces, taking advantage of the superior public transportation accessibility as well as the Square's relatively low rents.

5 Increase market rate residential development while preserving existing affordable housing.

The current mix of housing in Nubian Square is heavily skewed to low- and moderate-income housing, which is critically needed in Boston's housing market. Nevertheless, neighborhoods such as Nubian Square are home to a disproportionate share of lower-income residents whose incomes cannot support the number and variety of retail businesses desired by residents overall. Additionally, the area's low household income limits the ability of local residents by themselves to support the higher rents that would be charged to retailers for renovated space or new construction.

Increased local market rate housing would be beneficial to help achieve the desired *retail balance* in Nubian Square. Based on market demand, market rate housing is supportable and will help achieve feasibility for development projects whose program and goals can include affordable, as well as market rate housing, and expanded retail activity. The current "one third/one third/one third" formula used in recent procurements in Nubian Square does not support a robust retail mix and should be revised to allow for 50% market rate housing. At the same time, Nubian Square's existing affordable housing must be preserved so that low- and moderate-income residents can continue to live in a centrally located, transit-accessible neighborhood and share in the benefits of revitalization. More affordable housing also needs to be built in other centrally located and transit-accessible neighborhoods in the City of Boston and elsewhere in Metro Boston.

6 Improve the public realm and shared amenities.

Many of the public realm and amenity elements that make for a successful business district are either missing or in short supply in Nubian Square. When residents speak about the reasons they shop in other districts, they cite a comfortable pedestrian environment, one with shade trees, seating options, proximity to parking, ease and sense of safety crossing the street, and clear signage. The following recommendations respond to the area's public realm and amenities needs:

A. Significantly improve the Massachusetts Bay Transportation Authority's (MBTA) investment in Nubian Station and in Nubian Square. Residents and business owners view the MBTA's Nubian Station as a source and significant contributor to the general sense of disinvestment in Nubian Square. It contributes to the negative perceptions of the Square through the general neglect, and lack of basic maintenance and upgrades. The maintenance of MBTA bus stops are also a concern: for example, the stop at the gateway to Nubian Square and the Roxbury community at the intersection of Melnea Cass Boulevard and Washington Street is not cleaned; and the stop at the intersection of Ruggles Street and Washington Street has been missing a pane of glass for the past year. The lack of maintenance and upgrades affect the quality of life of residents, businesses, and commuters. It reduces confidence in the MBTA and is evident when compared to the maintenance and upkeep of the covered bus stops in Downtown Boston, the South End, and Jamaica Plain.

B. Develop a parking strategy. This study's parking analysis and the comments of both residents and businesses identify a need for additional parking. There are few public parking spaces available for Nubian Square visitors. There is additional pressure related to proposed future developments in the area that could further limit access to public parking. In focus groups, residents and business owners highlight their increasing frustration with access to parking and their concerns about the impact of future development on an already inadequate parking system. Suggested interim measures to improve parking include providing access to the Blair Lot from Washington Street and designating a location for business employees to park in order to minimize the long-term utilization of street parking.

C. Eliminate "blighted" properties and facades. There has been strong public investment in the area, including the construction of the Bruce C. Bolling Municipal Building, the upgrade of Dudley Street, and the anticipated reopening of the renovated Roxbury Branch of the Boston Public Library. Nubian Square is also home to many businesses and property owners who have a strong sense of civic pride which is manifested in the high level of maintenance and cleanliness of their own storefronts as well as the cleaning and sweeping of sidewalks adjacent to their businesses.

However, some property owners with vacant storefronts do not provide adequate maintenance. The property at the former Edison building at the intersection of Warren Street, Dudley Street, and Harrison Avenue, as well as the Dartmouth Hotel Apartments, 2255 Washington Street, and 2219 Washington Street are all prime examples of poorly maintained properties. In addition to maintenance, the use of solid roll-up grates destabilize the business district by sending a message that the area is unsafe, and a place of disinvestment and urban decay.

These properties require an unprecedented level of scrutiny by the City of Boston to assist Nubian Square in making the necessary strides toward strengthening the business district, increasing businesses profitability, and branding the district as a strong and welcoming gateway to the Roxbury community.

D. Develop a streetscape, lighting, and signage program. In addition to the "blighted" properties, focus group participants highlight their concern that other storefronts have signage that is outdated and inappropriate and in need of an upgrade. Traffic calming measures are also necessary, particularly for the higher-speed arteries such as Warren Street where fast-moving traffic inhibits pedestrians from crossing and reduces access to businesses. Street furniture that provides residents and visitors comfortable places to sit, as well as other amenities, will help to reinforce the streets as a place. Additionally, current wayfinding signage is inadequate; business owners identify the need for wayfinding signage to public parking lots and to key buildings and sites to increase connectivity.

7 **Implement a well-designed and coordinated Nubian Square marketing strategy.**

Nubian Square has strong but unrealized assets that need to be leveraged in order to build an authentic brand identify that is rooted in the Square's:

- History as an entertainment and dining hub for the City of Boston;
- Abundance of cultural, racial, and ethnic diversity, grounded in but not limited to its historic Afrocentric identity, which makes it a welcoming environment for residents and visitors alike;
- Progressive, influencer-driven outlook with pop-ups and curated brands that demonstrate that Nubian Square is "not your grandmother's shopping district;" and
- Eclectic mix of independent, entrepreneurial operators in an environment where rents are low enough to allow experimentation and dynamic change.

This branding should be supported by a well-design and coordinated marketing strategy that includes special events, seasonal themes, cultural history, and collateral material aimed at Roxbury neighborhood residents, local visitors, conventioneers, and tourists. Though initial steps have been taken, this branding and marketing needs to be expanded and should include a strong online presence which is carried on all local business websites.

C. Conclusion

The recommendations set forth in the *Nubian Square Market Analysis* were not developed in isolation and must be implemented using a multifaceted approach that is carefully coordinated with planned public and private investment in Nubian Square.

Over the next five years, the City of Boston will be investing $12 million in street and sidewalk reconstruction along Washington Street and Warren Street in Nubian Square. Together with the construction at 135 Dudley Street (former B2 Police Station site), 2147 Washington Street, and 40-50 Warren Street, the resulting impact of these projects on traffic, construction equipment, closed/narrowed sidewalks, and limited parking may create a state of upheaval and turmoil in Nubian Square that increases pressures on existing businesses.

These recommendations and the construction impacts on businesses highlight both the need for a coordinated approach to the revitalization of Nubian Square and a strong advocate to shepherd the implementation of the recommendations over the short- and long-term.

The City of Boston's Office of Economic Development can play a vital and pivotal role in fully strengthening Nubian Square's retail and commercial environment. With its proven organizational capacity, the Office of Economic Development should be the active and fully-present managing entity, addressing the core elements of safety and economic conditions, and marketing and coordinating all public activities in Nubian Square by:

- Working with Main Streets and businesses to improve the business climate in Nubian Square while protecting and promoting public investment in the public realm;
- Coordinating the MBTA Police and Boston Police to increase both the sense and perception of safety in Nubian Station and in Nubian Square; and a complete and thorough upgrade of Nubian Station, opened in 1993;
- Marketing the Square both within the City of Boston but also to regional visitors, conventioneers, and tourists;
- Working aggressively to understand which small businesses in other business districts are ready to expand and for which the diversity and eclectic mix in Nubian Square would be an asset; and
- Giving "blighted" properties an unprecedented level of scrutiny to eliminate the effect their current conditions have on Nubian Square.

Nubian Square and Roxbury as a whole abound with assets which need to be acknowledged and celebrated in both the business offerings and community events in the Square. The *Nubian Square Market Analysis* identifies the foundational aspects that can assist in the rejuvenation of Nubian Square.

II. Introduction and Background

Roxbury's Nubian Square is a diverse neighborhood with a unique multifaceted history that is reflected in its rich cultural assets, the wide-ranging talents of its residents, and its dynamic mix of ethnic, independent businesses that now occupy this business district in the heart of the City of Boston. Within the City of Boston and the Commonwealth as a whole, Nubian Square plays a singular role as the historic center for African American civic, social, and cultural life with a long and varied past as a major commercial center. Nubian Square also features a diversity of households that augurs well for its attractiveness to current and emerging market opportunities.

The *Nubian Square Market Analysis* compiles and analyzes: current data on Nubian Square's demographic and economic profile with a focus on its retail and other commercial markets; corresponding data on nearby Comparative Businesses Districts; and input from local residents, businesses, and community stakeholders. The analyses estimate current and potential demand for retail activity and inform a set of actionable recommendations that support the goal of fulfilling Nubian Square's potential as a unique, special, and diverse place by showcasing it as the "Heart & Soul of Roxbury" and the historical Black and minority community in Boston and the Commonwealth of Massachusetts.

During the mid-nineteenth century, an expanded trolley car system and elevated rail line helped the commercial center of Nubian Square (previously Dudley Square) flourish. By the early-twentieth century, the Square was a vital retail center with movie theaters, a bowling alley, and department stores; Ferdinand's, the largest furniture store in New England, anchored the Square and attracted shoppers from around the region. The demolition of the elevated train service to Nubian Square in the 1980s together with larger macro-demographic shifts and policies of urban renewal targeting Black/Brown and low-income communities have meant that the Square has struggled to match the height of commercial success in the early-twentieth century.

Today, Nubian Square is a diverse community based on race, ethnicity, and language and remains an active transportation hub; over 43,000 passengers travel through the Nubian Station MBTA bus terminal daily.[5] Public investment restored and redeveloped the long-vacant Ferdinand

Building into the Bruce C. Bolling Municipal Building as the headquarters of Boston Public Schools with ground-floor retail space at a cost of $120 million. The pace of private investment has increased. In 2019, the 130 room Residence Inn by Marriott opened and reports a 90% occupancy; the Franklin Institute of Technology announced plans to move its campus to Nubian Square, constructing a new building to support both administrative staff and programs. Within the next five years, over 80,000 square feet of retail space will be completed and occupied within Nubian Square and this number does not include square footage from the city-owned parcels (Blair Lot, Nawn Factory, and Parcel 8) currently in the developer selection process.

With the magnitude of development and infrastructure investments in the area, it is not an understatement to say that Nubian Square and Roxbury are at a crossroads. This analysis takes an inclusive approach, documenting current conditions and assets (active community resident groups connected through social media; involved and entrepreneurial businesses; gifted visual and performing artists; and active and invested nonprofits), addressing challenges (business development; wealth creation; and physical connections), and identifying opportunities so that the community's retail and commercial environment is not left to chance in the face of change.

The community faces a range of urgent challenges:

- Business Development: Nubian Square has a dynamic mix of 197 ethnic and culturally diverse businesses. Thirty percent of businesses are immigrant-owned, including restaurateurs from Somalia and Nigeria. Although there are strong, long-term businesses, Nubian Square has seen an increase in vacancies. These create the impression of a business district in distress. Additionally, in focus groups: businesses have reported Saturdays as a slow day, unlike other business districts which report increased Saturday sales; residents indicate a need for regular, quality, predictable activity in a safe environment to draw them and their families into Nubian Square.
- Physical Connections: The Nubian Square Business District as well as the abutting John Eliot Square Historic District hold a unique history and culture; however, these assets are not being leveraged to draw shoppers into the business district. While the Commonwealth's recent investment in the Roxbury Heritage State Park and the newly opened Residence Inn by Marriott are attracting new visitors and 43,000 daily passengers pass through Nubian Station, few visitors or residents walk through Nubian Square to shop. Little to no weekend or evening activity contributes to the perception of Nubian Square being a dormant business district.

Even in the face of documented challenges, Nubian Square has the potential to become a strong business district; *Nubian Square Market Analysis* presents recommendations for viable, implementable, and specific retail and commercial uses that will enliven Nubian Square and support a mixed-use, urban lifestyle that supports Roxbury residents, expands its regional draw, and continues to reinforce Roxbury as a historic and cultural destination.

The American City Coalition (TACC) conducted this analysis in collaboration with Roxbury Main Streets, a commercial revitalization organization that provides hands on assistance to businesses in Nubian Square and fosters growth for the next generation of local, minority-owned businesses. TACC contracted the services of the Initiative for a Competitive Inner City (ICIC) and FXM Associates. ICIC is a national nonprofit research and advisory organization based in Roxbury with a mission to drive economic prosperity in America's cities through private sector investment to create jobs, income, and wealth for local residents. FXM Associates is a consulting firm specializing in economic development planning, including the revitalization of older commercial districts. FXM Associates engaged Byrne McKinney & Associates, a specialized real estate consulting firm based in Boston.

The goals of the *Nubian Square Market Analysis* are to: 1) identify factors that distinguish Nubian Square as a location capable of attracting and sustaining businesses that will increase the vibrancy as a retail center; 2) recommend specific initiatives and strategies that can increase Nubian Square's vitality as both Roxbury's commercial hub and one of Boston's major community business districts; and 3) inform the discussion that will help recalibrate the conversation about the Square's commercial growth.

This analysis includes objective information and implementation strategies relevant to a range of stakeholders so existing businesses looking to expand and businesses intending to locate in Nubian Square are aware of economic and cultural variables; landlords and retail recruiters will understand how commercial rents compare to those in other markets and the impact rental rates have on the community; and policymakers, residents, and Main Streets have strategies to market the district to businesses ready for expansion into an ethnically and racially diverse community.

III. Methodology

To ensure the study encompassed a comprehensive and inclusive approach, a variety of data sources and analytic methods were employed. These included the collection and analysis of both quantitative and qualitative data through surveys, field notes, focus groups, and other relevant secondary source data.

This methodology stems from the need to respond to four driving research questions:

1. What is the existing and potential retail demand in Nubian Square based on spending of surrounding residents and employees?
2. What are the strengths and weaknesses of the existing business mix of Nubian Square?
3. What factors make a strong, sustainable business district within the surrounding areas?
4. How can these findings be implemented for Nubian Square in the near- and long-term?

A. Data Sources

This report includes both quantitative and qualitative data, and relies on a multitude of primary and secondary data sources. The primary data are largely qualitative and are derived from:

- Focus groups of local residents and businesses;
- Surveys of employees; and
- Field notes and interviews with landlords and property owners.

These findings are utilized throughout the report to complement and confirm quantitative analyses. The secondary data sources include Esri, Environics Analytics Spotlight Reports, CoStar Group, Claritas Pop-Facts Premier, City of Boston, United States Census Bureau's American Community Survey (ACS) five-year data, and United States Census Bureau county business patterns. The CoStar Group data centers on business and leasing activity, collecting information on actual lease comparisons and trends in commercial real estate. The City of Boston data provided an overview of parking in Nubian Square. Esri, Environics Analytics, and Claritas data complement gaps in data from the five-year

ACS/United States Census Bureau on demographics, housing, jobs, businesses, and estimates of current conditions and projected demand.

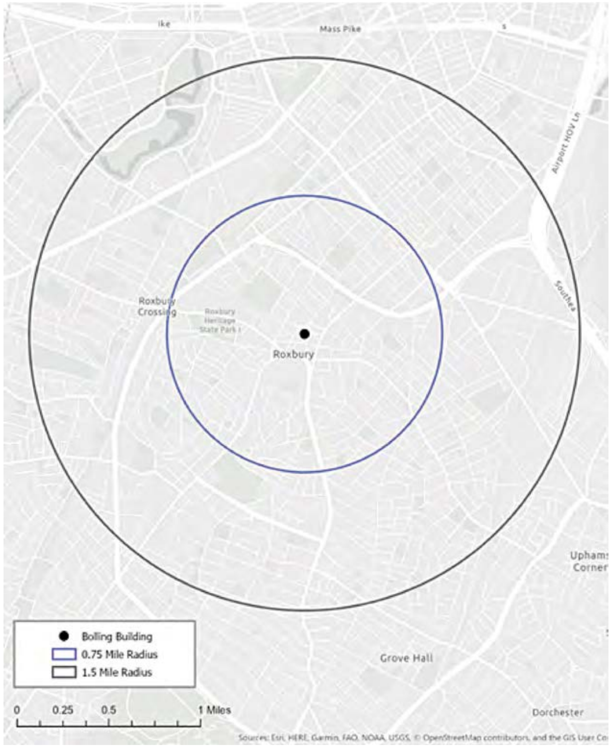
B. Geographic Definitions

The report utilizes three geographic units of analysis depending on the analysis type: 1) 0.75-mile radius; 2) 1.5-mile radius; and 3) real estate "submarkets" provided by the CoStar Group. These geographic units of analysis are predicated on the idea that people will typically purchase goods and services within the shortest available walking or drive time from where they live. Retailers generally define market areas in terms of drive times, with a 15-minute drive time considered the maximum time consumers would be willing to drive for all but the largest stores and store types.

Radii: 0.75-Mile and 1.5-Mile

Due to the nature of the (mostly small) businesses in Nubian Square, the density of population in the area, and the proximity of other Comparative Business Districts, an area described by circles within 0.75-mile and 1.5-mile radii, capture the Square's business activities. The 0.75-mile radius is also the well-recognized customer walk zone, while 1.5 miles represents a secondary, but still important, local market area for residents traveling for goods and services by car or transit. For Nubian Square, the Bruce C. Bolling Municipal Building located at 2300 Washington Street defines the center of the radii. Figure 3.1 shows the 0.75-mile and 1.5-mile radii. Unless otherwise stated, the report analysis is based on the 0.75-mile radius.

Figure 3.1: 0.75-Mile and 1.5-Mile Radii from the Bruce C. Bolling Municipal Building



Submarkets

The "submarket" geographies supplied by the CoStar Group provide a broader unit of analysis to nest Nubian Square in the context of the Roxbury-Dorchester real estate submarket. CoStar's submarkets utilize geographic definitions that real estate brokers typically use and provide specific data such as current and historical absorption, vacancies, and market rents.

C. Comparative Analyses

Since Nubian Square is a unique community and no singular location can be looked to as a comparative or aspirational market, the *Nubian Square Market Analysis* identifies multiple comparison market areas that could provide realistic models and "best practices" for future Nubian Square commercial development: 1) Comparative Business Districts; and 2) Analogous Submarkets that cover a larger land area and help to inform an understanding of retail and office trends.

Comparative Business Districts

Rather than simply describing Nubian Square's demographic and business characteristics, comparative analyses are used to place Nubian Square within a context of surrounding business districts and the broader Boston area to better understand and interpret the data. These five comparison areas are:

- Ashmont-Fields Corner;
- Egleston Square;
- Hyde Square-Jackson Square (a.k.a Three Squares);
- Mattapan Square; and
- Brookline Village.

The geographic definitions for the Comparative Business Districts parallel the 0.75-mile and 1.5-mile radii definitions used for Nubian Square. In the others, MBTA station locations were used as center points.

Analogous Submarkets

Similarly, real estate assessments are undertaken for each of the commercial submarkets, defined to capture the competitive perspective of real estate owners and tenants, rather than the perspective of retail consumers/customers (the district walk-zone). To this end, both office and retail real estate market analyses are presented for Metro Boston overall and for the following Analogous Submarket geographies defined by CoStar for use by brokers and other real estate professionals:

- Roxbury-Dorchester;
- Jamaica Plain-South Suffolk;
- Longwood Medical Area-Mission Hill-Fenway;
- South End; and
- Brookline-Newton.

See Appendix D for maps of each geography.

D. Focus Groups, Surveys, and Stakeholder Interviews

To supplement the quantitative market analyses, the report utilizes findings from a number of semi-structured focus groups, formal surveys of employees, and key stakeholder interviews. This provided an opportunity to both ground and test any quantitative discoveries in the lived experiences of the community. These qualitative findings are interwoven throughout the *Nubian Square Market Analysis* to complement the respective section. See Appendix A for a full overview of focus group themes and findings, as well as the survey questions distributed to employees.

Resident Focus Groups

Two focus group sessions were held with 10 Roxbury residents on the evenings of October 29 and November 6, 2019; through questions and conversations, the focus groups sought to shed light on residents' current use of Nubian Square, their perceptions of assets and issues, and potential strategies to ameliorate the issues. Participants ranged in age from 25 to 75 year olds; were both renters and owners of their homes in Roxbury; and one participant has lived in Roxbury for 75 years.

Business Focus Groups

Two business focus groups were held on the mornings of October 30 and November 6, 2019 for a total of eight participants. To ensure a holistic conversation, a range of local Nubian Square business owners were recruited and included restaurants, clothing stores, food services, as well as general retail. These sessions sought similar insights as the resident focus groups. In addition, questions were added to understand perceptions of the leasing environment, employee recruitment, and barriers/opportunities for expansion.

Surveys

A survey was conducted to understand the reasons why local employees choose to/choose not to patronize Nubian Square businesses, and understand their consumer preferences and their perceptions and visions of Nubian Square's commercial/retail offerings. Over 20 surveys were conducted using SurveyGizmo and were distributed to employees working in Nubian Square. Respondents were primarily from governmental offices, nonprofit organizations, retail, and other sectors of employment that exist with the Square. Fifty percent of employees surveyed were also Roxbury residents.

Interviews

Phone interviews were conducted with Nubian Square landlords (including the two community development corporations) and Main Street managers from Comparative Business Districts to understand the rental price points, the types of businesses interested in locating in their business districts, and the specific strategies used to attract and retain businesses.

Study Limitations

While some survey responses from employees were conducted in person and on location, several were reported through snowball sampling of employees sending out the survey to other employees. All responses are not verified by other means. Lastly, data from the CoStar Group around vacancy rates does not include those vacancies where unoccupied space is not marketed for lease.

IV. Demographics and Income

Understanding the demographics and income of residents can help inform the types of retail and related businesses that can best meet the needs of current residents and identify Nubian Square's competitive features. Demographic and income data sources included Claritas Pop-Facts Premier (2019 Current Year Estimates), Esri Community Profile (Nubian Square), Esri Detailed Age Profile (Nubian Square), Esri Disposable Income Profile (Nubian Square), and Esri Retail Demand Outlook (Nubian Square). See Appendix C for a full overview of demographic and income data.

Nubian Square incomes are expected to rise, creating opportunities for a stronger and more vibrant business environment. Median household incomes are projected to grow 22% by 2024. With higher projected household incomes, as well as population growth, comes greater potential spending power from local residents to support Nubian Square's future retail and service offerings.

Indicator		Statistics
Age	Nubian Square has the youngest population of the Comparative Business Districts.	• Nubian Square is home to 39,714 residents, while the average population of the six areas studied is 34,516. • The population is also growing and is anticipated to increase by 11.6% by 2024. • There are 22,474 residents per square mile in Nubian Square, higher than the City of Boston as a whole (14, 386). • The median age of residents is 29 years old; younger than the median age of the Comparative Business Districts (35 years old). • The median age of Nubian Square is projected to remain the same through 2024.
Race and Ethnicity	Nubian Square is racially and ethnically diverse. This is one of Nubian Square's most competitive features and future plans for the Square must preserve and strengthen this diversity.	• Black (not Hispanic or Latinx)[6] residents make up the largest share of Nubian Square's population. • The Black population share is much higher in Nubian Square (41.8%) than in the City of Boston as a whole (24%). • Nubian Square is also home to a large Hispanic or Latinx population (22%) as compared to the City of Boston as a whole (19%).
Income	Economic well-being, as measured by the poverty rate, the unemployment rate, and median household income is lower in Nubian Square than in Boston as a whole.	• Median household income for Nubian Square is $41,448, over $27,000 less than both the City of Boston as a whole and Comparative Business Districts. • Average discretionary income, measured as income after taxes and essential expenses such as rent, utilities, and healthcare costs, is currently just over $29,000 per resident. • The poverty rate is approximately 50% higher in Nubian Square than in Boston as a whole.
Educational Attainment	Educational attainment is lower than in Boston as a whole; fewer residents have high school diplomas.	• Educational attainment (age 25+) is lower in Nubian Square than in Boston as a whole. • The percentage of population with less than a high school diploma is higher in Nubian Square compared to Boston. • The percentage of residents with bachelor's degrees is only slightly lower than in Boston as a whole.

V. Nubian Square Businesses

Employment and the makeup of businesses and business activities currently in Nubian Square are an important component of this market analysis. The relative concentration of employment in Nubian Square by industry as compared to the City of Boston as a whole and Comparative Business Districts, as well as the connectedness or clustering of interconnected businesses, sheds light on Nubian Square's competitive advantage.

A. Business Clusters and Employment

Clusters are groups of closely related and interconnected businesses that operate within a specific geography and benefit from their geographic proximity. The companies operating within a cluster are connected by a shared workforce, supply chains, and technologies. Clusters can have a significant impact on the survival and growth of small businesses[7,8] and well-designed cluster development strategies can further stimulate startups and job growth.[9,10]

Clusters in a particular geographic area are those activities in which that area specializes. Clusters are measured using a location quotient (LQ) which is calculated as the cluster's share of total employment in Nubian Square divided by its share of employment in the City of Boston as a whole.

- Very strong clusters are those with a LQ greater than 1.5;
- Strong clusters are those with a LQ greater than 1 but less than 1.5; and
- Activities with a LQ less than 1.0 are not considered a cluster as there are fewer jobs than in the city as a whole and thus not currently an area of specialization.

Very strong and strong clusters are critical to identify as they point to Nubian Square's competitive advantages as compared to other geographic locations. For purposes of this analysis, Nubian Square is defined as the area within a 0.75-mile radius of the Bruce C. Bolling Municipal Building, located at 2300 Washington Street.

Table 5.1 provides a list of Nubian Square's very strong and strong clusters and are those industries that make up a higher percentage of total employment in the Square than in the City of Boston as a whole with a LQ greater than 1.0. See Appendix B for additional detail.

Table 5.1: Clusters in Nubian Square (2019)[11]

Clusters	Employment in Nubian Square	Employment in City of Boston	LQ
Local Education and Training	8,786	9,885	16.7
Leather and Related Products	44	60	13.8
Environmental Services	60	173	6.5
Biopharmaceuticals	235	1,645	2.7
Distribution and Electronic Commerce	819	9,158	1.7
Local Health Services	15,292	176,945	1.6
Automotive	6	105	1.1
Local Community and Civic Organizations	2,410	38,914	1.2
Local Real Estate, Construction, and Development	1,987	36,547	1.0

Concentration of Employment

Nubian Square has a high percentage of jobs in health, education, and community organizations and a low percentage in retail, hospitality, arts, entertainment, and related industries.

Nubian Square has several industries with higher shares of employment than in the City of Boston as a whole. The share of employment in private elementary and secondary schools and job training services is over 1,600% higher than in the city as a whole. The share of employment in health-related industries (including hospitals, clinics, and biopharmaceuticals) is also very high in Nubian Square. This high percentage of employment may be due to the fact that Nubian Square is defined as including parts of Boston

Medical Center and the Boston University Medical Campus. The high share of employment in these industries suggests there are a large number of office workers who may be able to support expanded daytime retail and restaurant offerings in Nubian Square.

Nubian Square has a much lower percentage of employment in retail, restaurants, and hospitality businesses than the City of Boston as a whole. The share of employment in retail businesses in the Square is 27% lower than in the city as a whole. The percentage of Nubian Square's employment in restaurants and hospitality establishments is about half that of the city as a whole. Nubian Square also has a lower percentage of employment in arts and entertainment-related industries than the city as a whole. Nubian Square's share of employment in performing arts-related businesses is 32% lower than the citywide share. Employment in entertainment and media-related businesses is 18% that of the city as a whole.

Because in focus groups residents and employees identified these sectors as ones they wanted to see grow in Nubian Square, it is important to highlight these low shares of employment as growth in these sectors may not happen on its own. Sector-specific policy and programmatic support for the growth of retail, restaurants, hospitality, arts, and entertainment establishments may be needed.

Business Mix

Nubian Square has relatively few retail, accommodations, food, arts, entertainment, and recreation establishments. Nubian Square has the third smallest number of business establishments in retail, accommodation, and food services among the six Comparative Business Districts (Figure 5.2). The Square's total number (151) of establishments in these industries is less than the average (212) among the Comparative Business Districts.

Nubian Square also has fewer than average establishments in arts, entertainment, and recreation compared to the Comparative Business Districts (Figure 5.3). It has the third fewest establishments in these industries with Egleston Square having the most and Mattapan Square the fewest.

Figure 5.2: Total Retail Establishments, Nubian Square and Comparison Areas, 2019

Figure 5.3: Arts, Entertainment, and Recreation Establishments, Nubian Square and Comparison Areas, 2019

B. Residents' and Business Owners' Perceptions of Nubian Square's Current Business Offerings

Residents and businesses highlighted areas of need and unmet demand in Nubian Square.

Retail, Accommodations, and Food

Residents and, perhaps surprisingly, business focus group participants suggest that the current retail mix lacks variety and needs calibration to match community desires. Nubian Square shoppers understand from first-hand experience this study's findings that Nubian Square has a low concentration of employment in retail establishments compared to the rest of the city, which has hurt perceptions of the district as a place to shop. Focus group participants describe a need for:

More Diversified Retail Offerings/Retail Mix

"There's not enough diversity in the offerings. It's not a place for people to stop at...they just pass through."

Service Businesses

"But when I was a teenager, there was a printing company and a cleaners and there was Ferdinand's Furniture. We had some things. You can tell the difference and when you came you were here for a while. A Nubian Notion was here, and now there's the check cashing place.... There's not a lot of service here."

Sit-Down Restaurants

"More of an evening attraction, such as the Mission Hill Grill. There just isn't an option here to have a drink."

"The biggest complaint I've heard from residents is that there's no place to sit [at the restaurants].... My family looks for meals and sit-down establishments."

Arts and Entertainment and Community Events

Often associated with evenings and weekends, arts and entertainment's weaker retail performance for Nubian Square in relation to the Comparative Business Districts reflects focus group concerns about lack of retail offering; however, the weaker performance in this cluster may not reflect its potential demand.

Residents spoke to the lack of designated spaces for arts and events, as well as the need for evening offerings and recurring community programming that is outdoors and family friendly:

Designated Spaces

"...[M]y friend wants to do dancing stuff and there's nowhere to have it outside of churches."

Evening Offerings

"If there's something at night that would be great to go."

Community Programming and Events

Residents showed dissatisfaction with the lack of programming for events in the Square, a likely factor of the limited retail evenings and weekends storefront hours. Several residents mentioned the events they attend outside of Nubian: "We went to Jamaica Plain [for Halloween], the whole district was participating in the festivities. They had the haunted house and businesses all got involved with that. It would be great to do that in my own neighborhood. This neighborhood should be enlivened during the holidays."

Importantly, there was general consensus among resident focus group participants for recurring events that were outdoors and were family friendly: "I would like to see outdoor events that happen here. Things that bring people out. I would like to see a Nubian Square market happening year round. I would love to see something connecting the history and culture of the neighborhood happen more regularly. More outdoor events that are family friendly."

Businesses also spoke about the lack of late-night and weekend opportunities, and suggest current weakness in Nubian Square's overall performance creates a self-perpetuating cycle. Weaker sales make it difficult for current businesses to open during times that would subsequently attract more customers to Nubian Square, and make it a desirable corridor for new businesses to open to create a more interesting and wider retail mix. Business focus group participants spoke to this cycle:

Weekend Sales

"Because we're not staffed fully, I am not open on Saturday. We didn't have enough sales to open then. I would like the opportunity to be open on a Saturday and receive the benefits from when there are events on the weekends."

"For a retail shop, Thursday through Sunday should be our busiest days, but they're not."

C. Owned vs. Leased Space

A large majority of Nubian Square's businesses rent their spaces. There are few self-owned business spaces, relative to the number of leased business spaces, which tend to cluster near Malcolm X and Melnea Cass Boulevards. Self-ownership can signify greater stability for a business due to limited influence from speculation or rent increases. Ownership can be a powerful tool for a business district to withstand market pressures from chain stores; however, property ownership can be challenging for smaller businesses. The importance of rental space for Nubian Square businesses indicates some form of rent-burden support must play a central role in any strategies for retail revitalization in Nubian Square.

VI. Commercial Real Estate Market

The leasing environment of retail and office space in Nubian Square is important because rents, real estate inventory, and broader real estate trends inform the approach for growing and expanding commercial business. Commercial rents are low in Nubian Square compared to other parts of the city. These low rents present both challenges and opportunities for the growth of Nubian Square.

An analysis of the retail and office real estate markets documents current conditions and places this information in the context of neighborhood and regional trends. The intent is to inform the discussion that will help recalibrate the conversation about Nubian Square's real estate growth and better ensure that aspirations can be supported by the market conditions and economic development policy.

The Metro Boston retail market supports over 236 million square feet of space with another 5 million square feet of inventory expected for delivery in the next five years. Nubian Square and other retail hubs such as South Bay and Grove Hall are nested in the Roxbury-Dorchester Real Estate Submarket (Figure 6.1) of the Metro Boston market. The Analogous Submarkets located within the Metro Boston market that were analyzed in this study are Roxbury-Dorchester; Jamaica Plain-South Suffolk; Longwood Medical Area-Mission Hill-Fenway; South End; and Brookline-Newton. See Appendix D for maps of each geography.

A. Retail Real Estate Market

The Roxbury-Dorchester Submarket has the following key characteristics:

Size

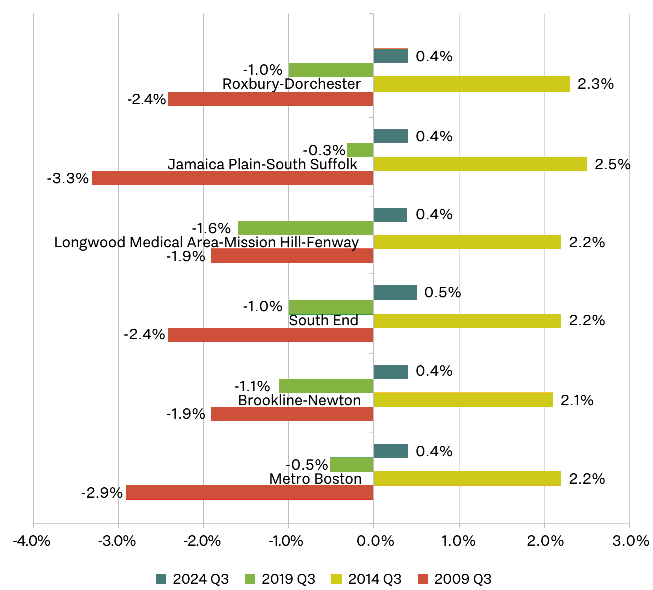
It supports the largest inventory of retail space (5.5 million square feet) of any of the five Analogous Submarkets, although these were not necessarily the largest in the Metro Boston market. The 0.75-mile walk-zone around Nubian Square represents about 15% (868,000 square feet) of the submarket retail inventory.

Rents

Retail market rents have been stable to declining market-wide since 2014, a function of broad trends in brick and mortar retail outlets. Projections indicate stable to a small increase (approximately 0.5% per year) in retail rental rates in the Roxbury-Dorchester Submarket, which parallels the other Analogous Submarkets.

Figure 6.1: Roxbury-Dorchester Real Estate Submarket[12]

Figure 6.2: Retail Rental Growth Trends, 2009-2024



Roxbury-Dorchester retail rents are on par with the Metro Boston average. However, retail rents in Roxbury-Dorchester are the lowest of the Analogous Submarkets at just under $25 per square foot; and retail sales volumes per square foot (imputed from retail rents) for Roxbury-Dorchester, while generally consistent with the Metro Boston market average, are among the lowest of the Analogous Submarkets. This is a reflection of the fact that much of the existing space is characterized as older and in need of modernization. The challenge is to compete with modern space available in other Analogous Submarkets; but low rents also limit an owner's ability to earn enough on their properties to maintain and modernize them. The advantage is that low rents can attract start-up businesses and other retailers that cater to more modest income households and, as retail rents in the city continue to climb, low rents can be a marketing opportunity.

Figure 6.3 is a summary of leasing activity specific to Nubian Square and reflects 40 leases in the past 10 years. With a few notable exceptions, rents have generally been in the low- to mid-$20s, most with concessions (two to three months free), most have been small (under 2,000 square feet), and with terms of five years. These rent figures represent triple net (NNN) leases which include real estate taxes, building insurance, and maintenance in the rent.

As shown in Figure 6.4, one of Nubian Square's strongest retail competitors described in Chapter VII: Retail Spending Opportunities is Centre Street in Jamaica Plain. Jamaica Plain has a leasing summary with rents at or above $35 per square foot (asking rents are higher), most with concessions (four months free), most have been small (under 2,000 square feet), and have reflected terms of five years in duration. This insight is provided from 20 leases over the past 10 years. These rent figures represent NNN leases.

Vacancy

Retail vacancies in all the Analogous Submarkets have generally been under 5% since 2010, with rates for Roxbury-Dorchester tracking among the lowest—as rents are low and act to the Roxbury-Dorchester Submarket's advantage. Within the 0.75-mile radius there is 860,000 square feet of retail vacancy. The data does not include a substantial inventory of unoccupied space that is not marketed for occupancy for a variety of reasons including poor condition, ownership circumstances, or other factors.

Figure 6.3: Nubian Square Leasing Activity

NNN Asking Rent Per SF
$22.42

NNN Starting Rent Per SF
$20.57

NNN Effective Rent Per SF
$20.07

Average months rent free
2.0

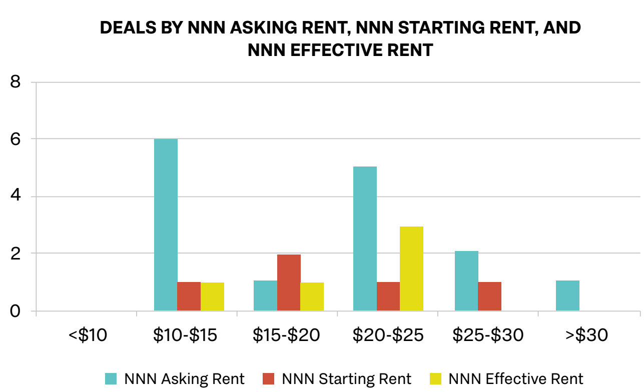


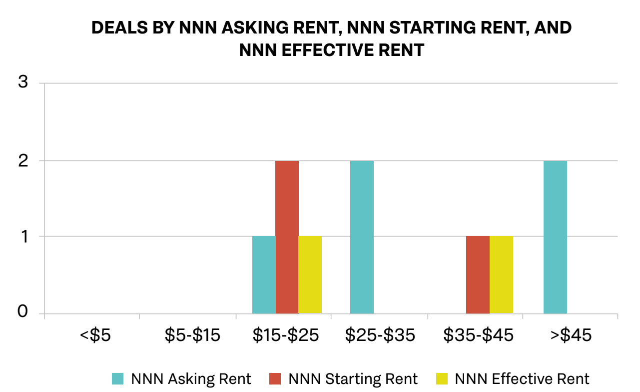
Figure 6.4: Jamaica Plain Leasing Activity

NNN Asking Rent Per SF
$35.01

NNN Starting Rent Per SF
$26.30

NNN Effective Rent Per SF
$26.63

Average months rent free
4.0



To capture those vacancies where unoccupied space is not marketed for lease, an inventory was conducted in late-2019. Using the boundaries defined by Boston Main Streets that capture the core of Nubian Square, roughly 270,000 square feet of retail and service space exists, and around 13% (approximately 35,000 square feet) of that space is vacant. All but two of the properties are in visible locations on Washington Street. This includes the most visible space, 2255 Washington Street. The blighting influence of these spaces cannot be overstated and must be addressed if real change is to occur.

Overall, low Roxbury-Dorchester Submarket rents (below $25 per square foot) have clearly been a boon to the vacancy rate (2.5%) which is low; however, rents also signal low sales volumes and potential weakness in underlying demand, meaning that the amount of space in the Roxbury-Dorchester Submarket is likely greater than can be effectively supported in healthy condition.

To put it another way, retail space in a healthy condition would likely require higher rents, requiring higher sales volumes, and requiring higher household incomes to support greater demand. The strongest Analogous Submarkets are those which support a concentration of retail in a contiguous, walkable, pedestrian friendly environment, or that support a substantial, centrally located parking inventory that allows for convenient access by car. Generally, these automobile-centric examples involve grocery-anchored shopping districts or managed centers. Centre Street in Jamaica Plain was identified by residents as their preferred shopping district due, in part, to meeting these criteria.

B. Office Real Estate Market

According to data compiled and analyzed by the CoStar Group, the Metro Boston office market supports over 346 million square feet of space with another 23 million square feet of inventory expected for delivery in the next five years. The most recent 2019 fourth-quarter report published by the CoStar Group states that:

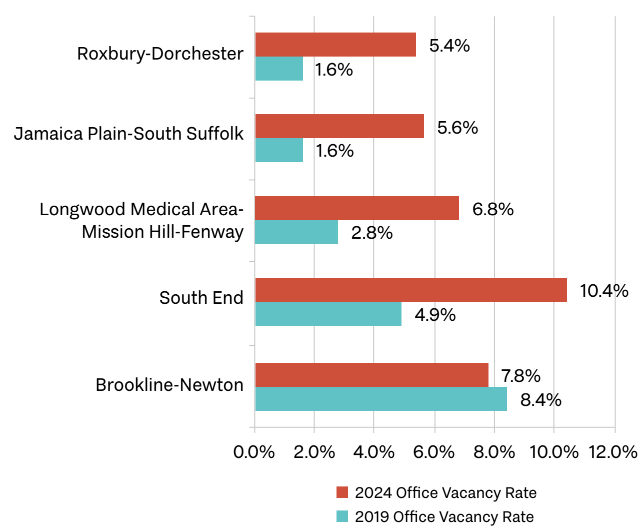
...[O]verall performance is strong, driven by rapidly expanding tech and biotech firms, being drawn to large blocks of space in the central business district, the Seaport, Cambridge, North Allston, and suburban markets such as Somerville, Waltham, and Watertown, where the quality of environment needed for employee retention and recruitment can be accommodated.

In the City of Boston, quoted NNN rents have reportedly become the norm, as have percentage bumps above 2%. While rents are likely to continue their rise in the near term, Boston is a tech-heavy economy, and rent declines [in those sectors] during economic slowdowns are typically sharper than in other markets.

On the supply side, deliveries [of new space] for the next several quarters are expected to be minimal, aiding the near-term vacancy forecast. However, a supply threat looms in 2021 and beyond. Millions of square feet have broken ground in 2019, including three towers in the central business district alone, meaning the market's supply peak has likely yet to hit Metro Boston. While much of the space underway is already committed, risks may come from backfill space [space made available when tenants move into new space] when the economic outlook may be murkier than it is today.

Commercial markets are highly cyclical and tend to be especially sensitive to external economic shock. The office real estate market boomed in all Analogous Submarkets in 1999 and 2014 but no district was unscathed during the 2009 Great Recession. Unlike its stable retail counterpart, forecasts for the next five years portend a 1% annual rent decline resulting from the projected increase in office vacancy documented in Figure 6.5.

Figure 6.5: Office Vacancy Trends in Analogous Submarkets, 2019 and 2014



Size

Of the Analogous Submarkets, Roxbury-Dorchester has a relatively low office inventory (<4 million square feet), where 45% of the total inventory is within the 0.75-mile walk-zone from the Bruce C. Bolling Municipal Building. Fully a third of the Roxbury-Dorchester inventory comprises older Class C space.[13] The Roxbury-Dorchester Submarket is closer in size to Jamaica Plain-South Suffolk (<1 million square feet) and the South End (<4 million square feet). These three office Analogous Submarkets are very small by comparison to Boston's prime central business district and have historically been unable to compete for a meaningful share of Metro Boston's growing office demand because of their smaller and older inventories; more difficult access to the regional labor market; and a more limited choice of quality restaurants, and other midday and after-work opportunities. The size of the Longwood Medical Area-Mission Hill-Fenway and Brookline-Newton Submarkets (both supporting over 8 million square feet) reflect their historic appeal to fast-growing healthcare and life sciences sectors.

Rents

Reflecting its relatively small inventory size, office rents in the Roxbury-Dorchester Submarket are among the lowest of the Analogous Submarkets, with current rents at just over $30 per square foot. In Nubian Square, the leasing environment does not deviate too far from its larger submarket. Based on 50 deals in the Square over the past 10 years, rents have generally been in the high-$20s to low-$30s per square foot, most with concessions (one to two months free), with small deals (under 5,000 square feet), and with terms under five years in duration. The Square's average rents are in fact slightly higher than Roxbury-Dorchester's total average, yet it also has slightly lower vacancy rates as well. Rents reflect public sector economic development supports and are not indicative of private sector market rates achievable in the Square today—which are substantially less—in the mid- to high-$20s per square foot gross.

Vacancy

Many of the largest office buildings in Nubian Square are owned by the City of Boston or nonprofits; the lower rents (under $35 per square foot) may play a role in the relatively low vacancy rates for the Roxbury-Dorchester Submarket—generally under 10% since 2010; however, the highly stable (and less prone to market disruption) public occupancies that dominate the tenant mix in Nubian Square are likely a greater influence on its lower vacancy rates at below 1%. Note that like retail, the data does not include a substantial inventory of those vacancies where unoccupied spaces—much of it on uninhabited upper floors—are not actively being marketed for occupancy for a variety of reasons including poor condition, ownership circumstances, or other factors.

C. Future Conditions

Nubian Square has comparatively low rents for both retail and office real estate. Though potentially beneficial for tenants, this also indicates low sales volumes for these businesses. Lower rents (i.e. lower sales) will attract smaller, newer businesses which can be a selling point in recruitment as a space for newer, unique businesses; however, these types of tenants are unlikely able to fund fit-out costs without some form of subsidy. Office-using businesses are relevant as they fuel upper-floor occupancy, which can help offset a landlord's costs to maintain ground floor retail establishments and generate employee spending at the ground floor retail.

The broader market suggests rents above $50 per square foot are now necessary to support the cost of new Class A office construction. The Longwood Medical Area-Mission Hill-Fenway Submarket is the only one reaching that threshold, where the competition among healthcare and life sciences users is bidding up prices to well over $50 per square foot. South End is close behind, with rents above $40 per square foot. Review of leasing activity in Nubian Square suggests that rents in the mid- to high-$20s are normative.

Like retail indicators, office rents provide a warning signal about the health of the market, which cannot support the development of new, modern space at these rent levels. For locations like Nubian Square, this underscores the importance of economic development policy commitments such as those demonstrated by the institutional investment into the Bruce C. Bolling Municipal Building to aspirations for future office growth in the Square.

VII. Retail Spending Opportunities

Retail spending opportunity/gap analysis is a tool used by major retail stores and restaurants to gauge market demand and competition within a specified geographic area. It presents a snapshot of the current consumer spending on various retail categories within a specified geographic area alongside actual retail store sales in those same categories within the same geographic area. See Appendix G for additional detail.

Where expenditures by households in the market area exceed sales in that market area, a gap or opportunity exists for new or existing stores within the market area to "capture" more of those household expenditures. This loss of potential sales is also called "leakage." Conversely, where market area household expenditures are less than actual sales for a category, it indicates that stores in that category already attract consumer dollars from outside the market area and the opportunity to draw more retail activity may be more limited, or may require greater effort.

The gap analysis does not mean there is no opportunity for growth or improvement outside of these sectors, but is simply an evidence-based understanding of what is missing from the area from a consumer perspective. Additionally, the presence of a gap is no guarantee of a business's future success; the gap does, however, provide a picture of current business opportunity for existing retailers to increase their competitiveness by capturing a greater share of customer purchases in existing stores and for new retailers to locate or expand facilities to take advantage of unmet customer demand.

A. Spending vs. Sales: Retail Leakage

In order to gain a deep understanding of the opportunity gap in Nubian Square, the study breaks down spending versus sales in a variety of ways:

Residential Households and Daytime Employees

In order to see the complete picture of retail sales in Nubian Square, it is important to look at retail spending by both residential households as well as daytime employees:

- Residential Households: Total retail spending per Nubian Square household is slightly lower than the average of the Comparative Business Districts and the City of Boston overall, reflecting the concentration of younger households and lower median incomes detailed in Chapter IV, Demographics and Income.
- Daytime Employees: Residential spending does not provide a complete picture of sales, and employees must be accounted for. For example, the retail business sales per residential household in Nubian Square is above the average for the Comparative Business Districts, although lower than the City of Boston overall—which indicates spending from daytime employees and visitors.

0.75-Mile and 1.5-Mile Radii

Table 7.1 provides a glance at Nubian Square's specific spending versus sales profile at the 0.75-mile radius and at the 1.5-mile radius:

- 0.75-Mile Radius: The aggregate retail demand ($627,950,785 in Total Retail Expenditures) exceeds aggregate retail supply ($579,412,096 in Total Retail Sales) by $48,538,689 which suggests some opportunity for new or expanded business activity.
- 1.5-Mile Radius: Residents are clearly buying less ($3,404,213,305 in Total Retail Expenditures) than local businesses are selling ($4,455,470,188 in Total Retail Sales), indicating that businesses are attracting customers ($1,051,256,883) from outside the area.

Table 7.1: Overview of Nubian Square Retail Market Areas

	0.75-Mile Radius	1.5-Mile Radius
Population	41,255	184,236
Total Employees	28,590	197,607
Median Income	$39,659	$51,318
Total Retail Expenditures	$627,950,785	$3,404,213,305
Total Retail Sales	$579,412,096	$4,455,470,188
Total Opportunity Gap	**$48,538,689**	**($1,051,256,883)**

Comparative Business Districts

Figure 7.2 provides a comparison of spending versus sales in Nubian Square with the five Comparative Business Districts. When the per household sales by business in Nubian Square is compared to the five Comparative Business Districts, Nubian Square households exceed the average; when the per household spending is compared, it is slightly less than average. However, the spending totals hide sector-level variations, meaning some sectors have opportunities for growth while others do not meet the demand.

The quantitative analysis of retail leakage in Nubian Square is confirmed through the shopping habits of residents who overwhelmingly describe how they bypass Nubian Square to shop in nearby business districts (e.g. Centre Street, Brookline Village, and Cambridge) because:

- Other districts include "convenience, parking, and diversity" in their business district;
- In Cambridge, "there's every type of shop you can imagine on Mass Avenue—supermarkets, restaurants, Goodwill, Staples. I'm a fan of that area.... I think the student population helps. There's a lot of diversity there and I really like that."
- On Centre Street there is a good retail mix where one can shop at several different kinds of retail during one trip.

Additional qualitative information came from employees who total over 28,000 and 197,000 for the 0.75-mile and 1.5-mile radii respectively. A survey was designed and distributed to employees of office and retail businesses in Nubian Square and yielded important information about employees' shopping habits:

- 80% purchase lunch during their work hours and 62% purchase breakfast during their work hours; however, these numbers do not necessarily indicate spending on meals in Nubian Square.
- Over 20% of employees surveyed say they rarely purchase their meals in the Square during work hours indicating a potential leakage to outside neighborhoods. While this leakage may be harming current business sales, it signals an opportunity for current businesses to capture this demand.

Figure 7.3 further breaks down the frequency of employee shopping in Nubian Square specifically.

Figure 7.2: Total Retail Spending and Sales per Household, Nubian Square and Comparison Areas, 2019

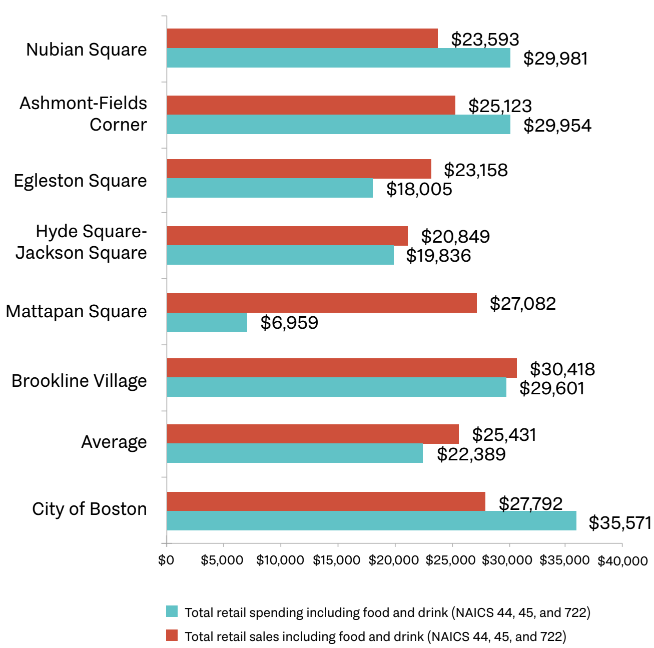
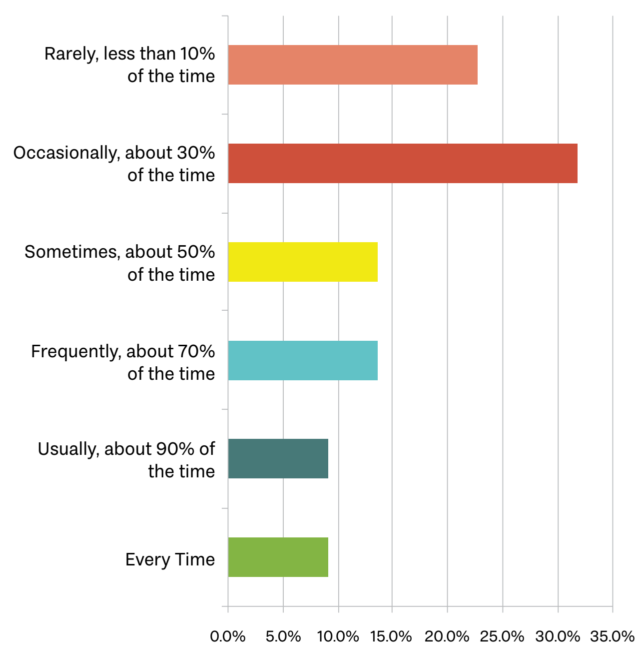


Figure 7.3: Survey Question: During your work hours, do you purchase food in Nubian Square? If so, how often:



B. Opportunity Gap: Growth that Responds to Current Retail Leakage

Within the 1.5-mile radius, residents are clearly buying less ($3,404,213,305 in Total Retail Expenditures) than local businesses are selling ($4,455,470,188 in Total Retail Sales), indicating that businesses are attracting customers from outside the area. This analysis sheds light on sector-specific retail opportunities with the potential to reduce the retail leakages within those sectors.

Data-Identified Opportunities

Data in Table 7.4 reveals the sector-specific opportunities for growth within the 1.5-mile radius of Nubian Square as determined by FXM Associates. It projects that consumer expenditures (demand) exceed actual store sales (supply) within the Nubian Square retail market area. The analysis shows where the gaps between supply and demand are sufficiently large to indicate an opportunity to capture sales leakages, either through better sales performance in existing stores, location of new stores, or expansion of existing businesses. The market areas for these sectors are most likely to be within a 1.5-mile radius of Nubian Square. The final column in Table 7.4, Project Annual Demand Growth from 2019, shows estimated growth rates for the retail categories over the next five years.

There are options for new Nubian Square businesses to keep residents shopping in the Nubian Square Business District in the following sectors:

- Limited-service restaurants and buffets;
- Hobby, toy, and game;
- Nursery and garden center;
- Hardware;
- Small grocery and meat markets;
- Health and personal care; and
- Gifts and novelties.

If only a quarter of the total leaked expenditure potential or "opportunity gap" went to support new square footage, between 78,560 and 148,520 square feet (17 and 31 stores, respectively) of additional business activity could potentially be borne by 2019 resident and employee spending within a 1.5-mile radius of Nubian Square. To put the opportunity gap in context, approximately 80,000 square feet will be available in Nubian Square in the next five years.

The largest sector by opportunity for growth is "limited-service restaurants" with 16,000 square feet. Note that these opportunity gaps are not indicative of a lack of retail in this and other specific sectors, but simply an outline of current spending outside of Nubian Square, which could be captured by existing or new businesses.

Resident- and Business-Identified Opportunities

Resident and business focus group participants readily offered specific suggestions to fill the opportunity gap in Nubian Square based on their own understanding of the need:

- "Fitness center, coffee shop, nail salon, everyday things. Restaurants, places for lunch, dinner, if I want to grab a cocktail after work."
- "Space where there could be a pop-up in conjunction with local restaurants to create an evening event."
- "... [N]eed a mix of everything like cleaners."

These suggestions for new or expanded retail to fill this opportunity gap align with the findings from Chapter V, Nubian Square Businesses, that demonstrate Nubian Square lacks diversity in its retail offerings, and has a weak cluster for service, accommodations, and food.

C. Conclusion: Preserve and Expand

A successful response to filling Nubian Square's retail opportunity gap must include strategies for business retention and improved profitability for those that have already invested in the Square; additionally, the response must signal that investing in Nubian Square is a smart economic decision and a safe place to do business for new enterprises that may be seeking opportunities to innovate, expand, or relocate.

Most Nubian Square stakeholders intuitively understand the issues facing the Square and offer potential solutions from both within and outside of the community to break the cycle of poor sales performance. These sentiments signal a desire for change, but also anxieties that future change may result in a loss of character and racial and ethnic diversity.

Table 7.4: Retail Opportunities in Nubian Square Retail Market Area, 1.5-Mile Radius: 2019 and 2024 Projected

Retail Stores	Market Area Gap 2019	Supportable Square Feet 2019	Supportable Square Feet 2024	Range of Potential Square Feet of New or Expanded Business Activity 2019		Range of Potential Number of Stores 2019		Range of Potential Square Feet of New or Expanded Business Activity 2024		Range of Potential Number of Stores 2024		Projected Annual Demand Growth from 2019
Furniture Stores (NAICS 4421)	$14,061,379	39,721	47,666	5,000	10,000	1	2	5,000	10,000	1	2	3.72%
Floor Covering Stores (NAICS 44221)	$10,423,068	27,286	32,470	4,100	8,200	1	2	4,100	8,200	1	2	3.47%
Hardware Stores (NAICS 44413)	$4,234,178	16,540	19,517	–	5,000	0	1	–	5,000	0	1	3.45%
Nursery, Garden Center, and Farm Supply Stores (NAICS 44422)	$18,838,654	73,588	87,570	6,400	9,600	2	3	6,400	9,600	2	3	3.46%
Grocery Stores (NAICS 4451)	$62,291,628	96,877	111,408	20,000	40,000	1	2	20,000	40,000	1	2	2.81%
Meat Markets (NAICS 44521) Specialty Foods SPSF	$4,098,482	10,645	12,241	–	3,500	0	1	–	3,500	0	1	2.87%
Other Health and Personal Care Stores (NAICS 44619)	$11,584,805	36,090	42,947	4,100	12,300	1	3	8,200	12,300	2	3	3.57%
Hobby, Toy, and Game Stores (NAICS 45112)	$8,336,270	15,240	17,831	2,287	4,574	1	2	4,574	6,861	2	3	3.24%
All Other General Merchandise Stores (NAICS 452319)	$23,737,043	104,767	121,530	20,000	30,000	2	3	20,000	40,000	2	4	2.99%
Gift, Novelty, and Souvenir Stores (NAICS 45322)	$5,718,714	17,488	19,762	2,673	5,345	1	2	2,673	5,346	1	2	2.50%
Limited-Service Restaurants (NAICS 722513)	$44,492,739	135,649	157,352	12,000	16,000	6	8	14,000	18,000	7	9	3.00%
Cafeteria, Grill Buffets, and Buffets (NAICS 722514)	$3,669,241	11,187	12,977	2,000	4,000	1	2	2,000	4,000	1	2	3.00%
Total Gap	**$211,486,200**	**585,077**	**683,270**	**78,560**	**148,520**	**17**	**31**	**86,947**	**162,807**	**20**	**34**	

In order to balance the needs of existing and new businesses and maintain the character of Nubian Square in the face of change, stakeholders describe the importance of:

Using a Family-Friendly Approach

Utilize a family-friendly approach that reflects the demographic findings that Nubian Square is younger than other Comparative Business Districts and the city as a whole. One resident concisely makes this point, "Where the kids go, the parents go."

Embracing Business Diversity

When identifying new businesses to complement the existing business mix, keep a community orientation that responds to the needs of the area's diverse population by race, ethnicity, and age. Existing business owners feel that it is important for new businesses "to be connected in certain ways to the community." "The ideas need to interface with the existing community and for the new folks coming into Roxbury. I think that's why [a chain restaurant] just wasn't a good fit at the time."

Keeping an Afrocentric Focus

Continue to emphasize the Square's history as an important place for Black and Brown residents. "I'm just wondering whether the places we like or go, will it influence the notion of [Nubian Square] being very ethnic? There's a need to make sure [Nubian Square] stays Afrocentric."

Welcoming Pedestrians

Studies show that pedestrians spend more on average per retail trip than by other modes, indicating the value of fostering an environment that encourages walking through the Nubian Square Business District as opposed to driving from place to place.[14] Understanding modal impacts on spending behavior is important to filling in retail and demand gaps and attracting these customers to Nubian Square.

Expanding Mixed-Income Housing

Retail growth cannot occur without an increase in actual spending from the neighborhood. Chapter IV, Demographics and Income, provides insights into the high concentration of subsidized, low-income housing units. This is an asset for Nubian Square as an affordable community within the urban core; however, the lower spending from high concentrations of lower incomes, without a mix of middle and higher incomes, can lower sales for a retail center like Nubian Square. Existing businesses understand these dynamics better than anyone. One restaurant owner describes their situation: "I do have plans to expand at the location I'm at. I want to include dinner but would also need to have guests with more disposable income." Several business focus group participants have positive feelings towards the new mixed-income developments in Nubian Square; however, this is not without a concern for maintaining the Square's character.

Increasing Business-to-Business Sales

Nubian Square has a large office inventory and an existing base of commercial occupants and large nonprofits that goes beyond the retail sector. Some businesses see the potential to expand their business-to-business sales, stating that they "want to get more business from the nonprofits and other businesses…."

Expanding Cross Promotion

Business owners highlighted the untapped opportunity to work together to cross promote and familiarize customers to other businesses in the Square. "I love [business name]…however, it becomes the only destination in [Nubian Square]. I've had people walking by saying that they come here all the time for [business name] and say that they didn't know we were [also] here." Another business echoed this pattern stating, "There are events…but not enough conversation about the [other] businesses here…[we have] many businesses, but people don't know they're there."

Marketing the Business District

Encouraging cohesion and cooperation among varying businesses is no small feat and will require shared organizational support and marketing. The City of Boston's Office of Economic Development must be a driving force to support business expansion into the Square and to market the Square to conventioneers and tourists. Roxbury Main Streets can continue to be the force to "brand up and market up" the Square's current businesses.

VIII. Public Realm, Parking, and Safety

Nubian Square has the potential to be one of the strongest retail markets of the six Comparative Business Districts; improvements to the public realm, parking availability, and perceptions of safety will have immediate and tangible effects on increasing pedestrian activity and creating a more active and robust retail environment.

Current conditions in Nubian Square provide an immediate opportunity to promote increased pedestrian activity. With a housing density of 11.1 units per acre, Nubian Square already has a large residential population and is more densely populated than the areas around 61% of all MBTA transit stations,[15] providing a strong base of potential shoppers. Of the Comparative Business Districts analyzed, Nubian Square has the highest proportion of households with no vehicle (46%) and the second highest percentage of stakeholders who walk to work or who work at home (24%). Additionally, Nubian Station is an active transportation hub in the center of the business district, serving 43,000 passengers on an average weekday. By 2024, Nubian Square's population is expected to grow by 4,600 residents.

Improvements to the public realm, parking availability, and perceptions of safety play a significant role in capturing the demand and increasing retail sales.

A. Public Realm

While Nubian Square may have a higher rate of non-car users, the comparatively lower sales described in Chapter VII, Retail Spending Opportunities, may be partly a consequence of its lack of pedestrian investments[16] and resulting leakage. Pedestrians and transit riders are an important group as studies have shown pedestrians on average spend more on retail in business districts than drivers;[17] additionally, public realm improvements and increased safety provisions from vehicles increase pedestrian visit duration and encourage increased spending.[18]

In Boston and around the globe, neighborhoods are embracing Complete Street Guidelines[19] that prioritize people over cars and work to advance projects that use design to enhance the character of a place and increase connectivity between people and the built environment.

Complete Streets are more than bike lanes, crosswalks, sidewalks, and vehicle lanes; they are buildings that engage the people in the right of way. Well-designed plazas, squares, and greens are framed by landscape design and architecture that relates to local culture, history, and climate. New urbanists have long advanced the idea that the public realm ties cities together and is a potential source of joy and inspiration to all citizens. Former Bogota Mayor Enrique Peñalosa may have said it best: "Great public space is a kind of magical good. It never ceases to yield happiness. It is almost happiness itself." [20]

Investing in great public space has the potential to create a safe and comfortable shopping experience that reduces leakage to other geographic areas. This investment needs to go beyond just sidewalks and crosswalk signals and take a more holistic approach; the public realm as a whole is a key issue to creating a vibrant business district. Current public realm conditions in the Nubian Square Businesses District are contributing to retail leakage with residents traveling to Comparative Business Districts, namely Jamaica Plain, that strike the right balance in providing residents with a safe and comfortable shopping experience.

Focus group participants point to the following associated reasons for not frequenting Nubian Square:

- Poor storefront signage;
- Vacant retail space with roll down grates;
- Few shade trees;
- Narrow and unsafe sidewalks;
- Inadequate crosswalks and lighting;
- No street furniture;
- Poorly maintained MBTA structures; and
- Speeding vehicles.

The lack of infrastructure investment in Nubian Square's public realm deters current residents or new shop5ers from stopping and exploring the business district on foot. One business participant states, "...[W]e need crosswalks for people to cross and get into my building." Another suggests, "You need foot traffic after 6 p.m. To get people, you need to have people. If the street is empty, you don't feel comfortable being the only one." Participants' imagery of Nubian Square is as a thoroughfare for vehicles, "It's so busy on Washington Street and it's so fast that you're not going to see the businesses."

Business owners and residents describe some of the areas that need improvement in order to create great public spaces in the Nubian Square Business District and have a positive impact on the retail environment; many of these ideas tie into concerns around a sense of safety in the Square:

Grated Storefronts

Referencing 2255 Washington Street as an example of a vacant property not marketed for lease, one business focus group participant points to grated vacant property as a contributing factor to blight: "You see a grate on the property and it's not aesthetically pleasing. It's disappointing to see...."

Storefront Signage

"Upgraded [storefront] signage would be great if they could get in with the sign program at the city."

Street Furniture

Residents suggest increasing the amount of street furniture.

Public Art

"...[P]ublic art that's engaging and beautiful" through a placemaking plan. Consistently, forms of beauty and art remain key points for improving Nubian Square's public realm.

Wayfinding Signage

Wayfinding signage would help to increase accessibility and visibility and positively contribute to parking access and a coordinated marketing and branding strategy. "There's city signs [in other neighborhoods] letting you know where there are public restrooms or parking available."

Furthermore, many residents and business participants feel the public space in Nubian Square is unfriendly at night because of poor lighting due to vacant and closed storefronts as well as a lack of street lighting:

Lighting

A business focus group participant reasons, "If the place on the front of the Bolling Building were there, it would be a beacon of light."

Findings from Chapter V, Nubian Square Businesses, identify low sales as a challenge for opening on weekends or evenings. With fewer businesses opening during these times, the streetscape is darker due to limited storefront lights, creating a self-perpetuating cycle of inactivity during these times.

B. Parking

While the pedestrian experience is paramount, driving and subsequently parking needs remain an essential component of a healthy business district. Unless more publicly accessible parking spaces are made available, Nubian Square business growth will be stymied due to a limited customer base; residents who are committed to "shopping local," as well as potential visitors from other neighborhoods, will drive to other shopping districts for their goods and services. The walking distances and public transit markets—whether for local residents or employees—are not adequate to support the current-, desired-, and potential-levels of retail, restaurant, entertainment, cultural, and other activities.

Parking Inventory

Figure 8.1 shows there are few public parking lot options for visitors to the Nubian Square Business District.

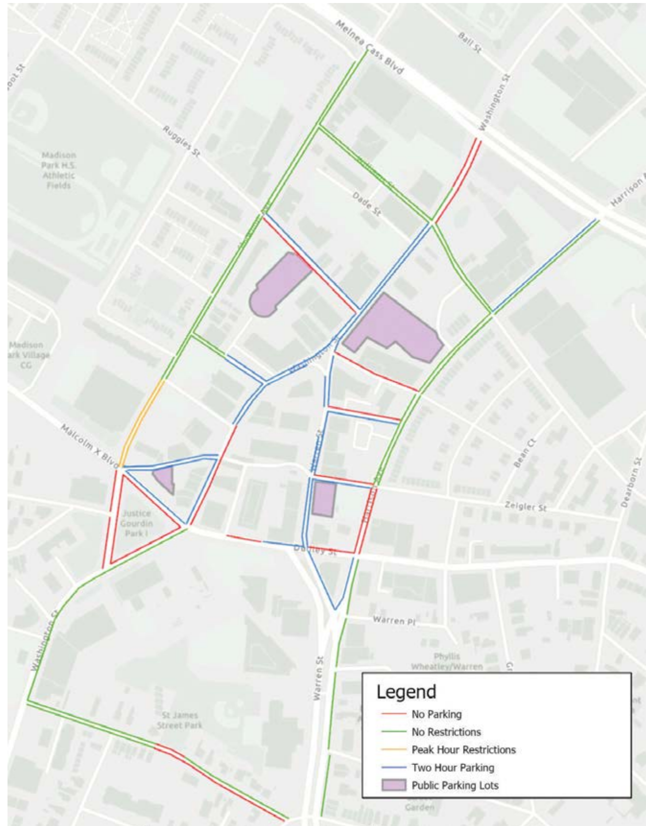
Business owners and residents express the need for additional public parking to support Nubian Square's ability to attract and sustain a customer base. One business participant explains, "Parking is a tremendous issue and people circle and take an extra 10 to 15 minutes." One resident furthers this perspective, "People won't show up because they know they won't find a parking spot." Additionally, residents express frustration about searching for parking and about business patrons parking in residential neighborhoods.

Employee Parking

The parking needs of employees are especially challenging for the Nubian Square Business District's parking inventory since employees are more inclined to park for longer periods of time, potentially preventing shoppers from parking in close proximity to businesses. Of the 20 Nubian Square employees surveyed, 47% drive to work, and 43% either walk or take public transit. High employee driving rates can create a parking challenge by limiting available parking spaces for new or existing shoppers from the neighborhood or region who prefer to travel to Nubian Square by car.

Employee surveys and focus group conversations with businesses indicate that for those who drive, limited parking is a primary concern, with many employees and business owners parking in residential neighborhoods and walking to the business destinations.

Figure 8.1: On-Street and Off-Street Parking Inventory in Nubian Square



Wayfinding Signage

The lack of wayfinding signage may further limit customers ability to locate available public parking. One business owner explains, "For the businesses, signage [for parking and bathrooms] is really important. It should say welcome to Nubian Square, letting people know where parking is." Another business points out specific concerns about the Blair Lot, the business district's largest public lot, "There's a huge lot, the Blair Lot, and it's all fenced in when you drive down Washington Street. The gate is locked. If I were in front of that building as a store, I'd be [unhappy]. You have to swing around the back and the lot is very visible." Well-designed wayfinding signage can improve the parking climate as well as other public realm conditions.

Demand

Parking is, and will continue to be for the foreseeable future, an essential infrastructure for success. Additional pressures on parking will come from development spurred by the City of Boston's designation of developers for four parcels of land; the anticipated developer designations for three additional parcels; proposed private and institutional developments; the unmet parking needs of employees and visitors of Boston Public Schools; as well parking demands for well-attended evening meetings at the Bruce C. Bolling Municipal Building.

C. Safety

Perceptions of safety are a key factor in expanding the customer base and encouraging new or returning shoppers to spend their dollars in the Nubian Square Business District rather than elsewhere in the surrounding area.

Focus group participants agree that both the reality and the perceptions surrounding Nubian Square's safety are damaging to business sales and customer and civic experience. Perceptions are important to note, as criminology research suggests "fear of crime generally occurs at higher rates than recorded victimization."[21]

Regardless of real crime levels, focus group participants feel the current police presence and approach in Nubian Square actually heightened the sense of danger—likely pushing drivers and transit riders through Nubian Square to the next closest business district, instead of stopping to enjoy the Square and explore its retail offerings. In particular, businesses have issues with the emergency police lights and the overall police presence stating, "It's like a war zone with the [police] lights." Another business owner says, "Others will see a police car and wonder what's going on."

Nubian Square has a police presence from both the MBTA Transit Police and the Boston Police Departments. Addressing issues surrounding safety is vital to creating a healthy retail environment, especially in a manner that understands community contexts; a more coordinated approach between the MBTA Transit Police and Boston Police is needed. Most focus group participants agree the police presence is necessary, but offer new approaches to promote a healthier and more welcoming environment. A consistent issue highlighted by participants about the police is the use of cars over walking a beat. Instead of flashing police cars, one focus group participant suggests, "There could be more beat cops and I don't want more harassment but I would want to see friendlier police outside the station to keep people moving along. You need it to a degree now and there needs to be some more sensitivity training with the police." Residents and businesses show a desire to work with the police to create more effective community policing that would improve perceptions of safety, and make passersby excited to shop and enjoy the amenities in Nubian Square.

D. Multifaceted Approach

Effective solutions for Nubian Square's Business District must be threefold: 1) improve the public realm to increase pedestrian activity; 2) conduct a parking inventory, including the parking proposed in the new developments and; 3) improve the perceptions of safety in the Square. Nubian Square already has the potential to be a strong and active business district, however, key public realm and safety issues have pushed potential shoppers away from their closest neighborhood retailer to Comparative Business Districts, namely Jamaica Plain.

The poor state of Nubian Square's public realm was repeatedly mentioned by focus group participants, specifically around vacant buildings with old and dilapidated grates; lack of quality signage for both businesses and public spaces; outdoor furniture; increased street lighting to increase safety; and wayfinding. Improving the public realm based on these specific findings will help attract residents to walk to Nubian Square and activate its streetscape, as well as attracting the drivers seen speeding through the Square to slow down, and even stop to shop.

These drivers cannot stop to shop if parking is unavailable. Focus group participants suggest that parking is not an easy task in Nubian Square, and surveys of employees suggest a high rate of employee parking usage leaves spots full for extended periods; furthermore, several lots within the Square are expected to see development that will affect Nubian Square's current parking situation. A full analysis must be conducted to completely understand the parking supply and demand based on current and future projections.

Finally, the perceptions around lack of safety highlighted by all focus group participants suggests this is a key deterrent for capturing the demand. Perceptions of safety were harmed by several key factors including: parked police cars with flashing blue lights; poor pedestrian safety infrastructure such as crosswalks and signals; and dark or nonexistent lighting at night. These areas must be addressed to encourage new or returning shoppers to shop in Nubian Square versus other Comparative Business Districts that have greater perceptions of safety.

IX. Key Findings, Recommendations, and Conclusion

The vision articulated for Nubian Square is no different from the aspirations for lively and busy neighborhood business districts across the City of Boston: a place which draws residents and visitors to browse, shop, eat, and socialize with their friends and neighbors; a place with business and community activity during the evenings and on weekends; a place that builds on the neighborhood's history and culture; a place that is easy to navigate, and is welcoming, clean, and safe.

The goals of the *Nubian Square Market Analysis* are to: 1) identify factors that distinguish Nubian Square as a location capable of attracting and sustaining businesses that will increase the vibrancy as a retail center; 2) recommend specific initiatives and strategies that can increase Nubian Square's vitality as both Roxbury's commercial hub and one of Boston's major community business districts; and 3) inform the discussion that will help recalibrate the conversation about the Square's commercial growth.

Roxbury has a strong set of assets: a growing population and number of households; a relatively young population; some residents with disposable income; residents who believe in supporting local and community businesses; and racial and ethnic diversity. Nubian Square's assets also include: access to a large number of commuters at Nubian Station; proximity to historic buildings and an increasing number of community and cultural spaces; a large number of small, invested, and activist businesses owners; and businesses with a regional draw.

The recommendations provide numerous insights and implications for policymakers, business and property owners, brokers, and residents. They suggest how Nubian Square can break its long pattern of underperforming relative to market opportunities and local community aspiration as well as how Nubian Square can begin to grow to meet the needs of residents and become a more welcoming location for small businesses.

It is not an understatement that very intentional and coordinated efforts by the City of Boston, the MBTA, the Commonwealth of Massachusetts, local businesses, nonprofits, community development corporations, property owners, the hospitality industry, and visitor bureaus will be required to realize the vision and implement the strategies.

A. Key Findings

The following are key findings from the study's quantitative research and associated analyses:

DEMOGRAPHICS

- Nubian Square has a larger concentration of population and households within 0.75 mile and 1.5 miles and therefore a larger local market than the five Comparative Business Districts. These are key factors in generating economic growth and development, but households must also have sufficient disposable income to support local businesses.
- Between 2000 and 2010, Nubian Square grew at a higher rate (25%) than all other Comparative Business Districts as well as the City of Boston as a whole. Since 2010, Nubian Square has had the second highest growth rate, exceeded only by Hyde Square-Jackson Square. From 2019 to 2024, Nubian Square's population is projected to grow by 5.5%, exceeded only by Hyde-Jackson and Egleston Squares. The pattern portends expansion of the market opportunity for Nubian Square businesses, especially as the growth is trending towards greater economic diversity than experienced historically.
- Nubian Square's population has a lower than average percentage of Millennials, age 24 to 44, but a considerably higher percentage of the younger, under age 23, Generation Z population. The current Nubian Square business mix does not respond to the shifting demographic needs which must be recognized for local businesses to optimize their share of growing demand and fully participate in future opportunities.
- The area within a 0.75-mile radius of the Bruce C. Bolling Municipal Building at 2300 Washington Street in Roxbury has the most racially and ethnically diverse population of the Comparative Business Districts; the vibrancy of its racial and ethnic mix is one of Nubian Square's competitive advantages.
- Nubian Square has, by far, a higher proportion of households with no vehicle (46%) than the five Comparative Business Districts; additionally, it has the second highest percentage of residents who walk to work or work at home (24%), exceeded only slightly by Brookline Village (25%).
- With 21% of all units built since 2000, Nubian Square has a higher percentage of renters and a newer housing stock than the five Comparative Business Districts.

INCOME

- Nubian Square households have relatively low incomes. The area's median household income ($41,448) is lower than the median in the Comparative Business Districts ($55,000) and City of Boston as a whole ($69,160).
- As the younger households in the area age and as the wave of larger-scale, mixed-income residential development now under construction and in the pipeline deliver greater economic diversity to the area, Nubian Square incomes and expenditure potentials are expected to rise, bringing opportunities for a stronger and more vibrant business environment.

BUSINESSES

- Nubian Square has a high percentage of jobs in health, education, and community organizations.[22] This suggests there are a large number of office workers who may be able to support expanded daytime retail and restaurant offerings in Nubian Square.
- Nubian Square has a low share of jobs and few establishments in retail, accommodations, food, arts, entertainment, and recreation-related industries.[23] In focus groups, residents and employees stated that they want to see growth in these sectors in Nubian Square. However, it is important to highlight these low shares of employment, as growth in these sectors may not happen on its own; sector-specific policy and programmatic support for the growth of these industries may be needed.

RETAIL REAL ESTATE

- Retail spending per household is slightly lower than the average of Nubian Square and the five Comparative Business Districts as well as the City of Boston as a whole, reflecting the concentration of younger households and lower median incomes in Nubian Square.
- Much of the commercial space in Nubian Square is characterized as older and in need of modernization. The market area rents are insufficient to support new construction or extensive rehabilitation without subsidy of some sort, including subsidy from higher-yielding market rate rental housing. The blighting influence caused by vacant, dilapidated commercial spaces cannot be overstated for its adverse effect on perceptions of overall value.
- On the flip side of these market conditions, the prevailing lower rents offer opportunities for an eclectic mix of small, independent, entrepreneurial businesses designed to bring new energy to Nubian Square; most of these businesses will need financial assistance for real estate and business start-up/expansion, as well as cooperation from landlords who see the long-term value of expanded and revitalized retail/restaurant activity to their properties notwithstanding lower initial rents.

RETAIL SPENDING OPPORTUNITIES

- A retail spending opportunity/gap analysis identified immediate opportunities to significantly expand existing business sales and/or potential absorption of over 80,000 square feet of retail and restaurant uses based on sales leakage within a 1.5-mile radius of Nubian Square.
- Based on current sales leakages, business opportunities include limited service restaurants and buffets; health and personal care; hobby, toy, and game; hardware; and specialty stores such as meat markets, gift/novelties, and garden centers. The retail spending opportunity/gap analysis does not mean there is no opportunity for growth or improvement outside of these business types, especially for restaurants and entertainment, which are expected to draw patrons from outside the local market area.

B. Recommendations

The market analysis led to specific, implementable policies and strategies to realizing residents', business owners', and employees' shared vision: Enliven the Nubian Square Business District for both residents and visitors during the evenings and weekends and support a mixed-use, urban lifestyle environment.

As previously mentioned, with the magnitude of development and infrastructure investments in the area, it is not an under- statement to say that Nubian Square and Roxbury are at a crossroads. This study takes an inclusive approach, documenting current conditions and assets, addressing challenges, and identifying opportunities so that the growth of the community's retail and commercial environment is not left to chance in the face of change.

The seven recommendations listed below are a strategic path to realizing the collective vision for the Nubian Square Business District. Informed by current local data, the recommendations address underlying conditions of safety and four core elements requisite to vitality that were adapted from the Main Street America Transformation Strategies approach: economic conditions, placemaking, marketing, and organizational capacity. While many of the recommendations could be implemented in silos, this could work at cross purposes to a more holistic and robust revitalization of Nubian Square.

To increase Nubian Square Business District's vitality, the community will need to work collectively with sustained focus and a well-coordinated implementation approach to address these elements.

Overarching Recommendations to Support Safety and Organizational Capacity

Safety and the reactivation of Roxbury Main Streets are overarching themes that run throughout all of the study's recommendations. These two themes emerged out of every segment of the study's research and are palpable in: the shopping pattern of residents for whom Centre Street in Jamaica Plain, not Nubian Square, is the preferred destination due to the mix of shopping options, the availability of parking, and the quality of goods/services; and the concerns of residents and business owners who identify the perceptions of safety and the need for significant streetscape and private property improvements as challenges.

1 Improve perceptions of safety in Nubian Square.

Residents and business owners alike mention safety as a concern in Nubian Square, particularly at night. Although this study does not analyze crime data on Nubian Square and the Comparative Business Districts, the pervasiveness of the perception is sufficient to motivate the need for change. Residents and business owners do not see the presence of a parked police cruiser with its flashing blue lights as a deterrent to undesired activities. Instead, they view it as a warning to residents and visitors of a potential safety or health emergency in the Square and a signal that people should avoid the area. The cruiser also provides a clear indication of where police are not, as well as where they are, encouraging any undesirable activities to occur elsewhere in the Square. Residents and business owners recommend replacing the cruiser with active police foot patrols, which not only add to the sense of safety but also provide opportunities for positive police interaction with the members of the community. Additionally, improved street lighting and street activities that bring increased foot and vehicular traffic into the Square in the evening are seen as enhancing the sense of safety.

2 Reactivate Roxbury Main Streets as the driver of programs and activities.

Roxbury Main Streets continues to have a critical and unique role to play in the revitalization of Nubian Square. A focus on Nubian Square Business District marketing and advocacy is as vital as working with prospective and existing businesses. Actively working with the City of Boston's Office of Economic Development, an adequately staffed Main Street program can: broker positive outcomes between existing and prospective businesses and landlords; expand activities to bring residents and visitors into the district, such as special and regularly recurring events; and continue to expand business capacity building in terms of workshop series and hands-on business assistance to improve business operations. Main Streets should take advantage of the specific opportunities identified in this study to recruit prospective new businesses and, more importantly, provide objective evidence to support marketing and financing for expansion of existing businesses and retail space.

Additional Recommendations to Support Economic Conditions, Placemaking, and Marketing

Five additional recommendations are important components of the strategic path toward the collective vision of Nubian Square:

3 Recognize market opportunities and invest in specific strategies to assist existing retailers to expand while also recruiting retailers to respond to these opportunities.

Roxbury's population density and growth rates bode well for expanding market opportunities, as do residents' relative youth and high degree of ethnic diversity. The current retail mix, however, needs to broaden in order to capture those opportunities. Warehouse clubs and superstores should not be encouraged because they do not fit residents' and business owners' vision for Nubian Square. The table below identifies specific types of retail, service, and event opportunities that should be prioritized to meet demand.

A. Preserve and expand on core retail, such as convenience goods and the daytime lunch trade. The data indicates that Nubian Square ranks fourth among the six Comparative Business Districts in the number of retail establishments. Focus group participants and an inventory of businesses also indicate that Nubian Square has a dearth of local services such as dry cleaning, shoe repair, yoga/fitness, and pet care/grooming that does not meet the needs of residents and employees of local businesses. Residents are already purchasing these services but travel outside of the Nubian Square Businesses District to Washington Mall, Grove Hall, and especially to Jamaica Plain to do so. These types of small businesses are an ideal fit for Nubian Square. This recommendation also includes a strategy to minimize the "creep" of retail businesses along Warren Street and Washington Street in order to reinforce the core of Nubian Square as the shopping district.

B. Expand and attract more destination-driven entertainment/dining options. Of the Comparative Business Districts, Nubian Square has the largest population within a 0.75-mile radius, also making it the densest.

Its diverse population is by far the youngest, and it has the largest population under the age of 44. These characteristics, together with Nubian Square's transit advantages, hold a competitive advantage for a vibrant urban entertainment environment. Yet Nubian Square lags Egleston Square, Ashmont-Fields Corner, and Brookline Village in the number of arts, entertainment, and recreation establishments as well as the in the number of accommodation and food services (mostly restaurants) establishments. Focus group participants of all ages identified the need for destination-driven entertainment/dining options.

C. Recognize and capitalize on trends toward a younger and more diverse population. Among the retail uses in demand by younger residents and the diversity of the residents are: health and personal care; hobby, toy, and game; and limited-service restaurants. To complement the business activity, both residents and businesses express the desire for special events on the weekends and in the evenings, which would draw young people and families to the Square including concerts, farmers' markets, book fairs, and a variety of ethnic pop-up retail and events.

Retail Opportunities

- Health and personal care store
- Hobby, toy, and game store
- Clothing store
- Specialty store
- Hardware store
- Housewares store
- Other general merchandise stores, including those with an Afrocentric orientation
- Limited-service restaurants
- Sit-down restaurants, especially those with entertainment

Service Opportunities

- Dry cleaner
- Shoe repair
- Other locally-oriented services, including those with an Afrocentric orientation
- Yoga/fitness studio
- Pet care/grooming

Event Opportunities

- Outdoor concerts
- Farmers' markets
- Book fairs
- Ethnic pop-up retail and events
- Cultural events
- Themed experiences: e.g. First Thursdays

D. Recruit an eclectic mix of independent, entrepreneurial businesses designed to bring new energy to Nubian Square. Property owners must be engaged to support such efforts for long-term gains in value. One of the potential growth sectors identified in the retail spending opportunity/gap analysis is “other general merchandise” which includes: specialty stores, hardware, housewares, and clothing—in other words, a mix of products for smaller-niche, independent businesses. In focus groups, residents recommended expanding on Nubian Square’s existing Afrocentric niche.

The documented potential growth sectors must be actively promoted to current Nubian Square businesses to increase sales. In addition, to expand the mix of businesses, a top priority should be the marketing of these potential growth sectors to targeted, successful businesses currently located outside of the Square that might be recruited for expansion of their businesses in Nubian Square. However, most of these businesses will need financing assistance for real estate and business start-up/expansion. Specifically excluded are ware- house clubs and superstores, which do not fit residents’ and business owners’ vision for Nubian Square.

4 Promote increased office space development, particularly above street level.

Businesses and nonprofits with primarily office functions have a high share of employment in Nubian Square and those that currently utilize ground-floor space might find upper-floor space more attractive if it were suitably developed. This would free-up more first-floor space for retail and related uses. In addition, increased upper-floor office space development could support expansion of office-using industries in the Square; with Class A[24] office space at a premium in the City of Boston, increasing the inventory will meet any demand, particularly from proximate clusters[25] such as healthcare and biotechnology associated with Boston Medical Center. Coworking spaces, which do not necessarily require significant upgrades to existing spaces, may also be viable for upper floor spaces, taking advantage of the superior public transportation accessibility as well as the Square’s relatively low rents.

5 Increase market rate residential development while preserving existing affordable housing.

The current mix of housing in Nubian Square is heavily skewed to low- and moderate-income housing, which is critically needed in Boston’s housing market. Nevertheless, neighborhoods such as Nubian Square are home to a disproportionate share of lower-income residents whose incomes cannot support the number and variety of retail businesses desired by residents overall. Additionally, the area’s low household income limits the ability of local residents by themselves to support the higher rents that would be charged to retailers for renovated space or new construction.

Increased local market rate housing would be beneficial to help achieve the desired retail balance in Nubian Square. Based on market demand, market rate housing is supportable and will help achieve feasibility for development projects whose program and goals can include affordable, as well as market rate housing, and expanded retail activity. The current “one third/one third/one third” formula used in recent procurements in Nubian Square does not support a robust retail mix and should be revised to allow for 50% market rate housing. At the same time, Nubian Square’s existing affordable housing must be preserved so that low- and moderate-income residents can continue to live in a centrally located, transit-accessible neighborhood and share in the benefits of revitalization. More affordable housing also needs to be built in other centrally located and transit-accessible neighborhoods in the City of Boston and elsewhere in Metro Boston.

6 Improve the public realm and shared amenities.

Many of the public realm and amenity elements that make for a successful business district are either missing or in short supply in Nubian Square. When residents speak about the reasons they shop in other districts, they cite a comfortable pedestrian environment, one with shade trees, seating options, proximity to parking, ease and sense of safety crossing the street, and clear signage. The following recommendations respond to the area's public realm and amenities needs:

A. Significantly improve the MBTA's investment in Nubian Station and in Nubian Square. Residents and business owners view the MBTA's Nubian Station as a source and significant contributor to the general sense of disinvestment in Nubian Square. It contributes to the negative perceptions of the Square through the general neglect, and lack of basic maintenance and upgrades. The maintenance of MBTA bus stops are also a concern: for example, the stop at the gateway to Nubian Square and the Roxbury community at the intersection of Melnea Cass Boulevard and Washington Street is not cleaned; and the stop at the intersection of Ruggles Street and Washington Street has been missing a pane of glass for the past year. The lack of maintenance and upgrades affect the quality of life of residents, businesses, and commuters. It reduces confidence in the MBTA and is evident when compared to the maintenance and upkeep of the covered bus stops in Downtown Boston, the South End, and Jamaica Plain.

B. Develop a parking strategy. This study's parking analysis and the comments of both residents and businesses identify a need for additional parking. There are few public parking spaces available for Nubian Square visitors. There is additional pressure related to proposed future developments in the area that could further limit access to public parking. In focus groups, residents and business owners highlight their increasing frustration with access to parking and their concerns about the impact of future development on an already inadequate parking system. Suggested interim measures to improve parking include providing access to the Blair Lot from Washington Street and designating a location for business employees to park in order to minimize the long- term utilization of street parking.

C. Eliminate "blighted" properties and facades.
There has been strong public investment in the area, including the construction of the Bruce C. Bolling Municipal Building, the upgrade of Dudley Street, and the anticipated reopening of the renovated Roxbury Branch of the Boston Public Library. Nubian Square is also home to many businesses and property owners who have a strong sense of civic pride which is manifested in the high level of maintenance and cleanliness of their own storefronts as well as the cleaning and sweeping of side- walks adjacent to their businesses.

However, some property owners with vacant storefronts do not provide adequate maintenance. The property at the former Edison building at the intersection of Warren Street, Dudley Street, and Harrison Avenue, as well as the Dartmouth Hotel Apartments, 2255 Washington Street, and 2219 Washington Street are all prime examples of poorly maintained properties. In addition to maintenance, the use of solid roll-up grates destabilize the business district by sending a message that the area is unsafe, and a place of disinvestment and urban decay.

These properties require an unprecedented level of scrutiny by the City of Boston to assist Nubian Square in making the necessary strides toward strengthening the business district, increasing businesses profitability, and branding the district as a strong and welcoming gateway to the Roxbury community.

D. Develop a streetscape, lighting, and signage program. In addition to the "blighted" properties, focus group participants highlight their concern that other storefronts have signage that is outdated and inappropriate and in need of an upgrade. Traffic calming measures are also necessary, particularly for the higher-speed arteries such as Warren Street where fast-moving traffic inhibits pedestrians from crossing and reduces access to businesses. Street furniture that provides residents and visitors comfortable places to sit, as well as other amenities, will help to reinforce the streets as a place. Additionally, current wayfinding signage is inadequate; business owners identify the need for wayfinding signage to public parking lots and to key buildings and sites to increase connectivity.

7 Implement a well-designed and coordinated Nubian Square marketing strategy.

Nubian Square has strong but unrealized assets that need to be leveraged in order to build an authentic brand identify that is rooted in the Square's:

- History as an entertainment and dining hub for the City of Boston;
- Abundance of cultural, racial, and ethnic diversity, grounded in but not limited to its historic Afrocentric identity, which makes it a welcoming environment for residents and visitors alike;
- Progressive, influencer-driven outlook with pop-ups and curated brands that demonstrate that Nubian Square is "not your grandmother's shopping district;" and
- Eclectic mix of independent, entrepreneurial operators in an environment where rents are low enough to allow experimentation and dynamic change.

This branding should be supported by a well-design and coordinated marketing strategy that includes special events, seasonal themes, cultural history, and collateral material aimed at Roxbury neighborhood residents, local visitors, conventioneers, and tourists. Though initial steps have been taken, this branding and marketing needs to be expanded and should include a strong online presence which is carried on all local business websites.

C. Conclusion

The recommendations set forth in the *Nubian Square Market Analysis* were not developed in isolation and must be implemented using a multifaceted approach that is carefully coordinated with planned public and private investment in Nubian Square.

Over the next five years, the City of Boston will be investing $12 million in street and sidewalk reconstruction along Washington Street and Warren Street in Nubian Square. Together with the construction at 135 Dudley Street (former B2 Police Station site), 2147 Washington Street, and 40-50 Warren Street, the resulting impact of these projects on traffic, construction equipment, closed/narrowed sidewalks, and limited parking may create a state of upheaval and turmoil in Nubian Square that increases pressures on existing businesses.

These recommendations and the construction impacts on businesses highlight both the need for a coordinated approach to the revitalization of Nubian Square and a strong advocate to shepherd the implementation of the recommendations over the short- and long-term.

The City of Boston's Office of Economic Development can play a vital and pivotal role in fully strengthening Nubian Square's retail and commercial environment. With its proven organizational capacity, the Office of Economic Development should be the active and fully-present managing entity, addressing the core elements of safety and economic conditions, and marketing and coordinating all public activities in Nubian Square by:

- Working with Main Streets and businesses to improve the business climate in Nubian Square while protecting and promoting public investment in the public realm;
- Coordinating the MBTA Transit Police and Boston Police Departments to increase both the sense and perception of safety in Nubian Station and in Nubian Square; and a complete and thorough upgrade of Nubian Station, opened in 1993;
- Marketing the Square both within the City of Boston but also to regional visitors, conventioneers, and tourists;
- Working aggressively to understand which small businesses in other business districts are ready to expand and for which the diversity and eclectic mix in Nubian Square would be an asset; and
- Giving "blighted" properties an unprecedented level of scrutiny to eliminate the effect their current conditions have on Nubian Square.

Nubian Square and Roxbury as a whole abound with assets that need to be acknowledged and celebrated in both the business offerings and community events in the Square. The *Nubian Square Market Analysis* identifies the foundational aspects that can assist in the rejuvenation of Nubian Square.

Appendix A: Summary of Focus Groups Findings and Survey Questions

RESIDENT FOCUS GROUP THEMES RELEASED 11.22.19

Two focus groups were held with Roxbury residents on the evenings of October 29, 2019 and November 6, 2019; through questions and conversation, the focus groups sought to shed light on residents' current use of Nubian Square, their perceptions of assets and issues, and potential strategies to ameliorate issues. Participants ranged in age from Millennials to 75. Participants were both renters and owners of their homes in Roxbury; some were life-long residents, while others were recent arrivals.

All participants have a commitment to the long-term viability of both the Roxbury community and Nubian Square. The primary desire of the participants is to see Nubian Square restored to its function as the neighborhood's business and cultural center—a place where they can shop for their family, while also meeting their neighbors and friends. The general consensus is that Nubian Square has been neglected for too long: this is evident in Nubian Station's current state of disrepair. Other than the community's human wealth and the construction of the Bruce C. Bolling Building, residents struggle to identify assets. Concerns about issues and disinvestment are identified far more readily. The lack of quality and variety of goods and services leads residents to neighboring business districts where they can: park and shop; get most of their family shopping done in a single trip; and shop at a range of stores. These neighboring business districts also provide: a friendly and welcoming ambiance; Saturday or holiday street activity/festivals; and a public realm that contributes to the sense of comfort, safety, and security.

In the face of increased development, residents want to maintain their sense of community, one in which the stores and/or ownership is Afrocentric. Residents also listed the types of stores they felt would continue to draw them into Nubian Square to shop and browse.

A. Nubian Square's Assets

Residents were asked to identify Nubian Square's assets. Participants see Roxbury and Nubian Square residents as an underutilized asset to the business district. Several participants identify the City of Boston, Commonwealth of Massachusetts, and private institutions as important assets to the neighborhood and they should strengthen their connections to the community.

- *"**The people that come through it**. If there were services that were required for most communities, as well as eateries in most areas, or the cultural aspect of the area when it's enhanced are all benefits. It's like a sleeping giant."*
- *"...[N]ow I utilize Nubian Square, I would use some things. I would get my keys done and get **[hair products]** here, but the assets aren't promoted or invested in. I don't want those to be ignored."*
- *"I think the **history of this neighborhood** is an asset.... I think the intergenerational aspect of this community [is an asset]. Also, the fact that we have an optometrist in the community is a valuable asset and I think it's great. Also, I grew up when there was a disinvestment in Nubian for so long...I grew up without a lot of what others of you here had. I feel like there are assets it just depends on what you're looking for. I get my scarves from the Somali shop around the corner. These assets aren't promoted or there aren't investments in these assets. I don't want those to be ignored."*
- *"Whether people are crossing paths or interacting with each other is an asset."*
- *"One of the things I feel strongly about is that the folks who operate the restaurants in this area, they need to use our people. It bothers me when they come into this building [Bolling]...you see people from outside of the city."*

- *"I think this building **[Bolling Building] is an asset**. I like the fact that it's in the heart of the Black community and we are the biggest consumers of the schools. I like there being a lot of programs for the kids.... I can't wait for the library but it's about time we upgraded it like libraries in other communities. I like that we have a post office here, and there was a long time we didn't have one."*
- *"Location. The **library**, I am excited for it. It has a historic designation as a space and there's a strong history. Hibernian Hall also is an asset as it's a cultural center...."*
- *"Things happening in the **[Bolling Building]**, you have the Roxbury Innovation Center, and they offer free computer classes that don't get talked about enough. You get families here as well in the [Bolling Building] and they may change their perception of the area."*

B. Lack of Diverse Options/Uses

Many residents find that the lack of an appropriate mix of retail options prevents them from shopping in the Square.

- *"We had an ongoing joke about what's in Roxbury. It's all schools, churches, and hair salons. We don't have doctors and dentists."*
- *"**The food deserts here are so bad in and around [the Nubian Square] area**. I like [business name] and their prices don't compete with Stop & Shop as they're a little bit higher. The food deserts in Roxbury, Dorchester, Mattapan are pretty horrific. There needs to be more supermarkets."*
- *"But when I was a teenager, there was a printing company and a cleaners and there was Ferdinand's Furniture and we had **[a great mix of retail stores]**. They're all the sneaker places and cheaper clothing **[stores]**. I was happy to see [business name] come because of their reputation but it's hit or miss. You can tell the difference and when you used to come to **[Nubian Square]**, you were here for a while. A Nubian Notion was here, and now there's the check cashing place, and cheap little stores that are overpriced. **There's not a lot of service here**. Nothing to stop for."*
- *"I too came from the old Dudley, but the bottom line is that Nubian needs to be revitalized. T**hey need a mix of everything like cleaners and [other shops]**. How many people are satisfied with the options here?"*
- *"When I think of downtown, and thinking about all the things that I go grocery shopping for, you need to be able to get those [items] in the community. When I lived in Georgia, I never needed to leave the community. We have Chase coming to the community but **it's like the fourth bank here**. **I would love to have an ice cream store here**."*
- *"More of an **evening [restaurant]**, such as Mission Hill Grille. **There just isn't an option here to have a drink**. We have a beer hall now, Backlash, but it's a little out. Having a space where they could be a pop-up with local restaurants could be an evening event. There's no community board for me to know what's going on in Nubian Square every night."*
- *"To have places that sell subs and grilled items, they are thriving, but **nothing really healthy**. I have diet restrictions and would prefer to eat here, but there's nothing available. As I get older, all that heavy, greasy, spicy food is sort of killing me."*
- *"**I am not into take-away foods all the time** and would like tablecloth establishments from time to time. If I go out to enjoy myself, I want the ambiance to be appealing and I haven't found that in Nubian Square."*
- *"The biggest complaint I've heard from residents is that **there's no place to sit [at the restaurants]**.... **My family looks for meals and sit-down establishments**. We haven't eaten outside of those **[sit-down restaurants]**."*
- *"**There's not enough diversity in the offerings**. **It's not a place for people to stop at—they just pass through**."*
- *"I automatically go to BJs for certain things for the quantity and it's something I use all the time. I go to the Stop & Shop because I know the layout. I go to Tropical for ethnic stuff...."*
- *"The **quality of the product is very bad** but there's only a Stop & Shop. I had an event where I had to pick up juice for an Urban League event and the products were all about to expire, and I think a lot of the products in the community need to be improved."*

- *"I drive through Roxbury all the time. There's nothing that is a service that I am able to make use of as Nubian Square stands presently."*
- *"I drive through Nubian Square all the time. People text or call me and tell me about the events going on here, and of course this building is here.... **Nothing to stop for**."*
- *"I am a walker. I am down here for the post office, the [business name], and I am hoping they grow. I like the concept. Walgreens I appreciate. I don't live too far so I appreciate it's **walking distance**. It varies when I need to come here for whatever I need. I go to the Walgreens near the YMCA because its prices are lower than the one here but I come to community events."*
- *"I come often. Most of the time I come, it's for non-work reasons such as social and community reasons. It varies."*

C. Leakage to Jamaica Plain, Brookline, South End, and Beyond

Residents overwhelmingly appreciate the assets of Jamaica Plain's (JP) Centre Street corridor, Egleston Square, and other business districts. Participants identify the qualities that draw them to these specific shopping districts: diverse options, parking availability, and quality of goods/services.

- *"**JP** and the primary reason is **convenience, parking, and diversity**. There are a lot of options to eat, and for example, hardware stores—there are two in JP...."*
- *"I try to stay in Nubian Square. I'm in JP and Centre Street. I will go to the drug store there and I like Boomerangs. I go to Chilicates and JP Licks—most of the eateries there."*
- *"I will go to Legal Seafoods or Doyles for dining. I like going to Darryl's or Slade's in the **South End** ... I don't go over to South Bay to eat, as **I like tablecloths and napkins**."*
- *"I like to go wherever, but I go to **Mission Hill** and there's a lot of hidden gems in the South End. Shopping wise, Egleston has nice things, like tailors, nail salons, and boutiques. We have a nail salon here in Nubian Square..."*
- *"It depends. If I were going by myself, I would probably go to Brookline to **Coolidge Corner**. Depending on who I am with, JP, there are a lot of little neighborhoods redeveloping and they are focused on the food...."*
- *"I go to **Chestnut Hill** for The Cheesecake Factory, but I even go to Hyde Park. Sometimes I go to JP."*
- *"I do dry cleaning on Centre Street. I go to Brookline and I also...[go to] **Washington Park Mall**. For shoe repair, I go to Brookline. For shoes, I go to Brookline but nothing here."*
- *"Cambridge. There's **every type of shop you can imagine** on Mass Ave. Supermarkets, restaurants, Goodwill, Staples. I'm a fan of that area.... I think the student population helps. There's a lot of diversity there and I really like that. There's always something new in Harvard Square and things are always changing."*

D. The Physical Environment

Some residents feel that Nubian Square is a thoroughfare, and not a place to stop. Those who do stop, do so to be connected to community events and because of the short walking distance to events. There is near consensus among focus group participants that Nubian Square is not pedestrian friendly; residents offer some solutions to improve that experience.

1 Safety

Residents state safety as a concern; focus group participants feel the current police response is inadequate.

- *"I think it's a waste of money. Police officers have a lot to do and money could be spent in better ways. We have things happening all over the city...shootings should be a priority." [Police car stationed in Nubian Square] was never addressed until people from the Bolling Building were being bothered. People in the community where I'm [from don't] say anything, they just watch. They see the way the treatment is for different groups."*

2 Improving the Pedestrian Experience

There is a strong desire for improving the pedestrian experience; participants suggest traffic calming, better lighting, and improving the overall physical environment.

- *"When you think about the Square in the warmer months, it would be nice to have a **place to sit outside and have somewhere like the park**. There's no green space in Nubian Square in addition to trees for landscaping."*
- *"There are municipal buildings but why is there no greenery around the buildings. We need **[public art]** as well. It would make people want to be in the community and appealing. You look at the police station and the fact that they didn't replaced the trees; they are dead and there are flowers around them. Living in a community is like living in a house and there are things you do to **[maintain it]**."*
- *"**Just things that make it more people friendly**. It's not just one thing but a bunch of things. Certainly, you need something that makes it pleasant to come down here. I echo others vision of things they'd like to see here. You have to fill in the gaps here and then people would come here to spend."*
- *"Really creating a placemaking plan for the neighborhood. Where there are spaces for people to be and connect. **Outdoor furniture and public art that's engaging and beautiful**. The **walkability of the neighborhood around safety, accessibility, and cleanliness**. The sidewalks."*
- *"The timing of the lights crossing [the streets] and the missing bricks [in the sidewalks]. I walk, bike, and ride the bus here. **You see the elderly struggle here**. The public services in place need to be respectful. I've called the MBTA about that. We have a community that's very diverse and representative of the young and old."*
- *"Nubian Square does not have disability structures. When you look at a ramp or an accessible area, there's a blacktop and it's awful to see people struggle with it."*
- *"I think it would be great to have **better lighting in Nubian Square**."*
- *"Having a place to sit and relax. I [like to] watch people and hang around. **Having [a place to sit and relax] feels more like home versus get-in and get-out**. I can sit at Soleil for hours and enjoy myself."*
- *"I went to a play there recently. I try to go to places that are accessible. It's a bit different at Hibernian Hall and it's **not very well lit**. I don't necessarily want to be out too late at night. I am interested in the jazz club that's opening and it **should bring more light**."*
- *"We have a series of **buildings that are vacant**. **If those looked like places you want to walk to, I wouldn't mind**. I would shop at a small business if there were other amenities. The valuable spaces next to the station are empty.... I would shop on that block if there were things I wanted."*

E. "A Place for Us"

Some residents speak to the lack of family and community-oriented spaces in Nubian Square. Focus group participants find that most restaurants are take-out with limited options for familial/community dining.

- *"I'm just wondering whether the places we like or go, will it influence the notion of Nubian Square being very ethnic? There's a need to make sure the Square stays Afrocentric in terms of the people that live here."*
- *"For me, it's about the kids. We have no gymnastics programs and there's no places for kids to get training and you can do study programs but the nature of the community makes you not feel comfortable walking to different parts of the area. You don't go to every street. Lots of kids don't go to parts of the city. Everyone goes to Nubian Square, but there needs to be more programs for the kids around art, painting and music.* ***Where the kids go, the parents go****."*
- *"One part is there being a real value placed on community voice and community experience.... Usually that is the after-thought. The vision is created and then the community voice and their experience is thought about and integrated.... I think that the approach should be different in terms of these ideas. I'm always sitting at the table.... I'm usually the voice for the community but I'm only one person in a community with different experiences. We can't represent everyone. So, gathering and figuring out how to gather that information is a challenge. What I hear consistently is that* ***people want to have a sense of belonging and that where they live is important****.... You can say these are the things that I want...but if the police aren't responding to your calls in your neighborhood or your employer isn't listening, then you're not going to be able to affect change."*

- *"The [Bolling Building] has the room on the sixth floor and that should be advertised more.* ***They raised the cost in the last two years and it should be available for birthday parties and receptions****. In the Urban League, we use it for events we have but there needs to be places for birthday parties and showers. People need to feel that the community is for them and that there are spaces for any activity they have."*
- *"I like there being a lot of programs for the kids.* ***I would like to see the contracts and the people who work here represent the community****."*
- *"In terms of being able to find a space that serves multiple purposes* ***whether it's for family dining, social gatherings, we don't have that in the neighborhood****. I would like to have the [business name] times ten, because I think that diversity lends for a variety of things to happen in the district. I think space is also an issue. Each of them are so different and it's about your preferences. Sometimes I want a patty, soul food, or a Haley House cookie. It's something that connects with my identity, living and growing up in this neighborhood."*
- *"****I am not into take-away food all the time*** *and would like tablecloth establishments from time to time. If I go out to enjoy myself, I want the ambiance to be appealing and I haven't found that in Nubian Square."*
- *"I liked what they [business name] did with retraining returning citizens. I hope I can contribute to its reopening which is moving in that direction because I think beyond the food,* ***we need places that do several things*** *such as meeting. I see that more and more in Upham's Corner than I do in Nubian Square.... I come from a time when the Square was hopping! You had Blair's Foodland and Woolworths, but to see it where it is now is pretty shameful."*

F. Parking

The parking in Nubian Square is less than ideal and often leads to residents exploring other commercial districts with more (or more convenient) parking.

- *"One of the reasons I go to Brookline and JP is that I can park my car and everything is right there."*
- *"We need some kind of parking mechanism such as meters or a parking lot."*
- *"**I can usually find a spot but it's rough**. Looking at JP, they have about three parking lots."*
- *"If we're losing parking spaces, we need to connect with business owners on their parking."*
- *"I think around the engagement especially with meetings here that people won't show up because **they know they won't find a parking spot**. Even the spaces that were little secrets are gone. Something needs to really be done about the parking because it limits shopping but also people engaging here."*
- *"I have a friend who likes [business name] and there's often no place to park. **It deters you from coming to Nubian Square. How many spaces are there for the handicapped?** It's a deterrent. If you have kids in your car, you can't find a place to park and you'll go somewhere like South Bay. They have all the stores as here and there's parking."*
- *"JP. And the **primary reason is convenience, parking** and diversity. There's a lot of options to eat, and for example, hardware stores, there are two in JP. You have options and parking and it's a habit."*

G. Need for Weekend and Evening Community Events

Residents are supportive of more community events that bring together local businesses, residents, visitors, artists, and other creatives.

- *"I would like to see outdoor events that happen here. Things that bring people out. **I would like to see a Nubian Square market happening year round**. I would love to see something connecting the history and culture of the neighborhoods happen more regularly. More outdoor events that are family friendly."*
- *"One of the best ones I've attended was one [TACC] was involved in with the arts. The turnout was great. **I'd like to see more events supporting the arts and our history**. People are going outside the community to find connections and people aren't tapping into it. I think if people sat and thought about it, there'd be a lot of different celebrations of people, places, and things around here. To find connections, we have serious connections here and people from all over. The diversity is crazy and we're not doing the kinds of things we need to do in order to celebrate that diversity."*
- *"Certainly, street festivals. **Music and film festivals. I'd like to see some kind of street festivals with music and arts sort of like Beantown**."*
- *"It would be great to have **an annual event, but something as simple as sitting down with some friends, listening to music and talking would work**. That's one of the things we need and we need a variety, not just one. My friend lives near the waterfront; they have events where they **bring in restaurants and do sampling** and they do fireworks. It's just the everyday things that make life easy and offer the opportunity to relax. Anything in another community, that's what we want here."*
- *"[Business name] was great in trying to bring some level of activity for Halloween. That was amazing, but because we went to JP, the whole district was participating in the festivities. They had the haunted house and businesses all got involved with that. It would be great to do that in my own neighborhood. This neighborhood should be enlivened during the holidays. **A lights or winter festival**. It brings vitality to the district. Whether it's the holidays or kicking off the fall season. We're in a neighborhood where there were orchards, and it would be nice to have family friendly events happen in the neighborhood where young people could learn about the history."*
- *"Maybe a **concert or local talent offerings**. If there's something where people could bring friends."*
- *"SOWA. I was trying to do a Nubian Square SOWA. It's very animal/family friendly."*

H. Clothing Resists Online Shopping

The focus group participants have mixed views about online shopping. Many purchase clothing in person while they are more likely to purchase other items online.

- *"Most things I purchase online are **household items or gifts**. I like to see my clothes before buying them so that's when I go into a retail store."*
- *"I do some online shopping but **like to see articles in person, especially clothing**. When I buy something online and like it, I like to stick with it."*
- *"I don't do a ton of online [shopping]. Sometimes I see a piece of clothing, or shoes, or books that I'll buy."*
- *"I do a lot of online shopping. I think we would benefit from a locker where we could get things shipped. What I find is that when I used to live in Allston, that was an excuse to stop and get a coffee or donuts. It was a purchase opportunity as a consumer."*
- *"I try not to. **I like dealing with human beings**. I'd rather go to a gas station and pay someone to pump my gas. I would not want to feel like I'm taking someone's job by relying on technology."*

I. Recommendations for Complementary Businesses

Residents have extensive knowledge of surrounding business districts, and recommend both specific businesses, as well as types of uses that should come to Nubian Square. Retail and service recommendations include a hardware store, shoe repair, dry cleaning, toy stores, pet stores, handmade goods, and flower shop. Restaurants/dining suggestions include bakeries, ice cream shop, cafe/breakfast spot, pizza, bars/pubs/late night dining, and a wine shop.

- *"There's a **houseware store [Kitchenwitch] near the Purple Cactus** [in JP]."*
- *"**Boing, Flour, Upper Crust Pizza**."*
- *"**Milkweed** in Mission Hill. They have a good mix of breakfast, lunch, and dinner but can also have wine and beer. It serves the need for any little event.*
- *There's a place called **Giselle's**; she does flowers out of her house. **Julie's Frozen Dessert** in East Boston. The store has a mix of South American candies. I think we could have a place like that here."*
- *"Lotus Flowers, before Jimmy retired."*
- *"**House of Culture** on Columbus Avenue.... We need a Victoria's Diner.... If there's something at night that would be great to go."*
- *"A good **pizza place**."*
- *"**Nathálie's in Fenway** and they have wines from all over the place. You can rent out the space for a price and they'll set up cocktail spaces."*
- *"A good **wine shop**."*
- *"A **pet store** with a grooming store or dog wash."*
- *"**Zena's store** allows you to buy local community handmade items and it would be great if there was a shop dedicated to selling these types of items."*
- *"They need a mix of everything like **cleaners** and [other shops]."*
- *"We have Chase coming to the community but it's like the fourth bank here. **I would love to have an ice cream store here**."*
- *"More of an evening attraction, such as **Mission Hill Grille**. There just isn't **an option here to have a drink**. We have a beer hall now, Backlash, but it's a little out. Having a space where they could be a **pop-up with local restaurants** could be an evening event."*
- *"If I wanted to buy **art supplies or something to be creative**, I have to go to South Bay. If you can encourage someone to do that…it's the arts district of the city and my friend wants to do dancing stuff and there's nowhere to have it outside of churches."*
- *"For cleaners, I go to Grove Hall. I have a guy that picks up my laundry (Grove Hall Cleaners). Pricing is great because it takes the pressure off of me to physically take it."*
- *"I go all over the place for a cobbler. That's something we desperately need."*

BUSINESS FOCUS GROUP THEMES RELEASED 11.22.19

The business focus groups held in Nubian Square on October 30, 2019 and November 6, 2019 yielded a range of themes, some of which will be familiar to those who know the area. Overall, the business owners are very connected to the community and want to see Nubian Square thrive. However, businesses feel the impacts of speeding vehicles, loitering, dim lighting, open drug use, and vacant/grated storefronts are impediments to attracting both employees and customers.

Businesses voiced a strong need to maintain the community's ethnic identity and to support the expansion of that identity. Importantly, participating businesses feel the pressure of increased residential speculation on their market, but have yet to see significant increases in sales. This leads to their overall support of new mixed-income development, yet apprehension remains due to fears of increased interest by corporate chains. Business owners suggest it is their unique circumstances (low-cost lease, etc.) that allow them to stay in Nubian Square in the current economic environment.

The lack of attention to the physical environment (e.g. grates, vacancies, sidewalks) and the need to invest in job seekers, specifically job readiness/soft skills, are significant concerns; all participants agree that these elements need to be addressed to make the business district welcoming to visitors. Additionally, businesses agree that improved marketing is a paramount need. Marketing needs to occur through multiple channels including: Saturday and evening community activities, signage, lighting, social media, traffic calming, as well as better connections between the existing businesses in Nubian Square to promote each other and local events in the area.

Below, the key themes with related quotations from participating businesses provide additional detail and a vision of an ideal Nubian Square through the eyes of the current business community.

A. Activist Ownership

For several owners, the impetus for moving their business to Nubian Square comes from a desire to improve and enliven the Square. Many owners have personal histories that connect them to the Square emotionally.

- *"What created the opportunity to have my business was that this community embracing me. Mel King and the field embraced me and fought for rights and equal opportunity. They weren't giving me the same opportunities in West Medford. There were true minority people here wanting to help me.... I'm very supportive of Roxbury Main Streets and the things that make this place what it is."*
- *"I know the history of Nubian Square and when the opportunity came, I wanted to be a part of this. We had a restaurant in Grove Hall in 1996 and for me it was a reflection of happy times with my mother and* ***being a part of something—a new vision.****"*
- *"We've had offers to leave but it was never a thought to leave Nubian Square."*
- *"I've been in Nubian Square all my life and thought it would be a good idea [to open a business here].... It was more of that—being in Nubian Square."*
- *"It's family run, and* ***we wanted to choose a place where we had roots.****"*
- *"I've always had a relationship with Nubian Square, with my first memory and touch point being A Nubian Notion. It was where we would go for black people stuff. I came out of a career in retail management...[we] were intentional about the challenge before us. Something that would be unique for the neighborhood...It didn't start off as* ***reigniting the community****...."*
- *"It made sense to do something in our community especially* ***for us by us****."*

B. Family/Community-Oriented

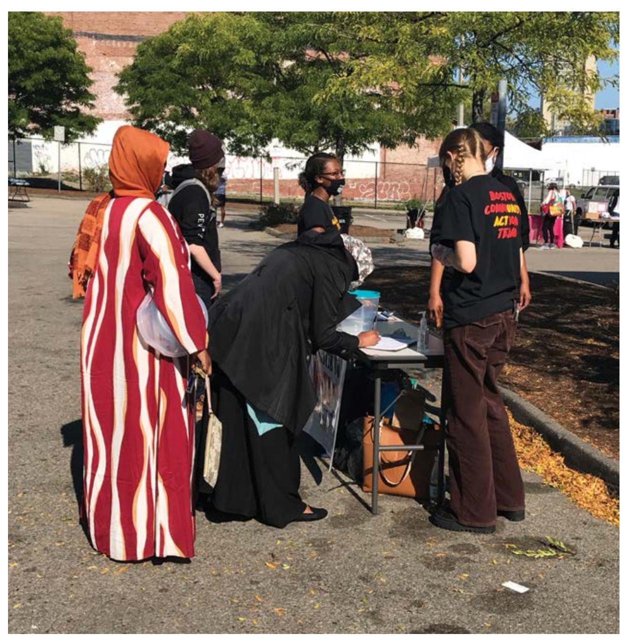
Participants see a need to push for more black- and minority-owned businesses and to provide spaces for and by the residents of Roxbury that reflects their tastes. Businesses need to be rooted in the community to be successful in the age of Amazon.

- *"The ideas **need to interface with the existing community and for the new folks coming into Roxbury**. I think that's why Tasty Burger just wasn't a good fit at the time. A... **mom and pop burger shop, however, would be more niche and creative**."*
- *"It's difficult because you're competing **in the era of Amazon. You have to be connected in certain ways to the community**."*
- *"Even **when I go to DC or Brooklyn there is stuff for us and we don't have that here**.... [We need] brunch and restaurants...places to walk and have a drink or just sit and listen to music."*
- *"We grew up in an age where households were more stable and there were **more black-owned businesses**. A Nubian Notion was always the staple store you would come to. Music was a big thing...children's books came from A Nubian Notion. Getting a sub at Joe's or going to Spinale's. The library was **always a place for us**. You could hang out and wait for your parent to come pick you up."*
- *"I think for me, it has to be more. **I need to know who the owners are**. I'm tired of people opening a business here where people are **taking their money back to Quincy**. I take my cleaning to Jackson Square. Need some good and healthy eateries."*
- *"**All of the franchises will want to get in and as a small shop, what will happen when those come in? How would we brand up and market up the businesses her?**"*

C. Negative Impacts from Perceptions of Nubian Square

Businesses face challenges to hiring and attracting customers as a result of the negative perceptions of Nubian Square. While focus group participants agree there is some validity to these perceptions, others find them to be exaggerated and outdated.

- *"The perception and reality of Nubian Square. Sometimes that perception is reality. We've had two long-term employees and they're appreciated. There's a safety concern."*
- *"It's been hard to get people to show up for interviews. It's the generation. The market as well. **The image of Nubian Square has to do with employment. It has to do with what they've heard or see**."*
- *"I grew up in a generation that didn't allow me to go to Nubian Square unless my elders were with me. The El was there. **It's those over the age of 45 that discourage people from doing business here**. There's the idea that there's a "Nubian Square Standard"...The people saying things are basing it off things that happened 20 to 30 years ago. We don't have a problem getting people from outside the community but we need to build the community. Once we can reeducate the group between 45 to 65 and let them know they could come back here, then they will allow the younger people to come back down here."*
- *"We met with [business name], and they kept mentioning safety. **There's a perception and a reality and both**. There's an epidemic that's been allowed to run rampant in our community. There was positive flow when we first opened...but as time has passed it's like we've gone backwards."*



D. Improving Business-to-Business Connections and Marketing

Owners seek to increase business-to-business interactions in the Square, both transactions and marketing. Some focus group participants see this as an asset and the strongest reason to remain in Nubian Square.

1 Business-to-Business Connections

- *"That's what I need help with. Getting some **support from the city to work with major management companies to shop local** and give my company a chance."*
- *"We open on Saturday and are one of the only businesses open. **There are events there but not enough conversation about the businesses there**... people don't do the whole walk around thing. There are many businesses but people don't know they're there."*
- *"What comes with those developments is **telling the residents to support what's local**. We won't want to see people come here to sleep and drive somewhere else."*
- *"I love [business name]...however, it becomes the only destination in Nubian Square. I've had **people walking by saying we come here all the time for [business name] and say that they didn't know we were there**. I send people to other boutiques and [business name].... I've had customers weekly say that they didn't know it was a black-owned business...that's an image problem and people being educated that there are businesses of color that employ local residents. We have to address it."*
- *"Some people come from the courthouse and I've gotten a few more police officers. I hosted...a couple nights ago and there was a shooting nearby. **I wanted to get more business from the nonprofits and other businesses but many don't want to walk through Nubian Square**."*
- *"There's a lot of foot traffic in the lobby [of the Bolling Building] and **if there were signs with the names of the businesses that would help**."*

2 Marketing

- *"As long as we can be a part of it, **with all the residential buildings, there needs to be a marketing kit from Nubian Square inviting them and helping people find their way around**. We should talk to management companies and different groups to create what people want to see in those things."*
- *"That requires work from the city and business owners...and has to be more positive than negative. It's harder to work toward something positive and we have to figure out solutions. People are so frustrated with Nubian Square that they only talk about the problems."*
- *"You don't have to have everything be new.... There's plenty of available spaces...but this community has been allowed to rot for 50 years. Retail is different... when white flight happened and when all the malls took up our space. **Have to think about what success is out there and bring that into our district so we're not left with places like Payless**."*
- *"It's all points. Wherever you're coming from. Other neighborhoods have an **entering sign to say you're here**...but it would have to be something unique. Something that lets people know that there's a center...."*
- *"The issue of parking and bathrooms. Signage for the businesses is really important. It should say welcome to Nubian Square. **Letting people know where parking is**. There's city signs letting you know where there are public restrooms or parking available."*

E. The Physical Environment/Public Realm

When discussing important neighborhood/site characteristics, the business owners agree that the high traffic volume can hurt business in Nubian Square, as vehicles speed through and the area is used as a thoroughfare and not a place to stop and walk around. Focus group participants suggest traffic calming and marketing through signage as parts of the solution.

1 Safety Concerns

Business owners agree that safety is of concern and has a major impact on business due to factors such as loitering and drugs. Participants suggest solutions such as increasing beat cops and decreasing use of police lights to create a calm, welcoming environment.

- *"At my location, **there's loitering**. There could be **more beat cops and I don't want more harassment but I would want to see friendlier police outside the station** to keep people moving along. You need it to a degree now and there needs to be some more sensitivity training with the police."*
- *"Some of the things we need are more police, but when walking with the businesses, I learned that there are two beat cops and that's not enough to help create the environment we want. The drug use and the policies around drug use, vacancies, and homelessness are not in sync with what the community is experiencing. The policy toward them is not in a way that prevents them from coming to Nubian Square and it's driving business away."*
- *"**It's like a war zone with the [police] lights** and you get that feeling. It bothers me."*
- *"I get that it's mental health and addiction. Every other week, I get cursed at inside my business, and who wants to come back and experience that environment. I had someone in front of my business with an open bottle.... **I think the police officers need to come out of these cars and walk**."*
- *"Some people will see it and not stand in front of my business. **Others will see a police car and wonder what's going on**. The loitering and things that have happened have moved but they are still there. I see needles and blankets and there's a [park] near us that people gather."*
- *"We all know the video that went out and residents and businesses called Boston City Hall.... The car will sit there in front of Citizens Bank and 90% of the time they're in the car."*
- *"There's an epidemic that's been allowed to run rampant in our community. There was a positive flow when we first opened...but as time has passed it's like we've gone backwards."*

2 Traffic Calming

Business owners agree that the high traffic volume hurts business as speeds are high and the area is used as a thoroughfare and not a place to stop and browse.

- *"I think Nubian Square is uniquely located because we have access to South End and Jamaica Plain but people don't stop. There's a lot of people that come through whether it's driving or on the bus. We have the flow of bodies.... People are just coming through and don't know what's here. It doesn't let people know that there's shops there."*
- *"Where I'm at, we **need crosswalks for people to cross and get into my building. Public signage**. There's a button push and kids are coming down the street but there's nothing to control the traffic.*
- *"It's so busy on Washington Street and **it's so fast that you're not going to see the business without stopping**. If I'm driving down Washington Street, you can't see to the right or left or the signage.... As a businessperson, when you cross over Melnea Cass, you keep going [so] as not to crash."*
- *"The speed at which people come down the street is insane."*
- *"Nubian Square isn't a destination location but more a transit location and people will just browse and leave."*

3 Improving Pedestrian Experience

Focus group participants express a strong desire to create a better pedestrian experience and to increase foot traffic using multiple strategies (e.g. traffic safety and lighting, decreasing grates on vacant buildings, artwork).

- *"You **need foot traffic after 6 p.m. To get people, you need to have people. If the street is empty, you don't feel comfortable being the only one**. [I] would love to be open after 6 p.m., but there's no one here."*

- *"**You see a grate on the property and it's not aesthetically pleasing**. It's disappointing to see.... Upgraded signage would be great if they could get in with the sign program at the city."*
- *"When you're walking down the street after 6 p.m. past Washington Street and **it's dark, there's not much open and well lit**."*
- *"If the place on the front of the Bolling Building were there, it would be a beacon of light."*
- *"Lighting is a big issue. When you come here at night, it's really dark and doesn't encourage people to walk around. We're tired of...the space next to Walgreens.... It's an eyesore. Even if they painted over it, that would be nice. **Crosswalks are really important.**"*
- *"If we could plug in Nubian Square and have the whole thing lit up, it would be so much better."*
- *"**Sidewalks need to be improved**; amenities like landscaping and beautification need to be improved."*
- *"**With art, you have to change the brand and environmental state for people to see the district as walkable, inviting, or safe**."*
- *"In my head, I'm walking down West Broadway in Southie...they're thriving...they have a dentist, a bakery, little restaurants. There's no vacancy and it looks nice. One Saturday, it looked nice and we went and walked around there."*
- *"One of the issues here in Nubian Square is the mix of things that are on the ground floors. **You can't have nonprofits be on ground floors**. The schools are stopping cannabis businesses from opening up here. There needs to be more micro-spaces. It's never going to work the way it is right now. You have to get artists in here."*

F. Parking

Most business owners agree that parking is a serious issue, arguing that the spots are often in inconvenient locations, turnover is low, and the lack of parking leaves customers circling around for a long time looking for a spot. The city-owned Blair Lot should be accessible from Washington Street.

- *"Some customers Uber. Most drive or walk. **Parking is definitely an issue**...people circle and take an extra 10 to 15 minutes. I park on the street, and when I get in [later], that's two hours after other employees get in. I usually park in Orchard Gardens because there's space but I will usually park immediately to get to my store."*
- *"I have spots parallel to the side of my building and I have employees park on the street to have customers there."*
- *"**Parking is an issue. I hear all the time from customers** but one employee drives and the rest take public transportation."*
- *"I take the bus usually, but will park in the lots for the Chinese restaurants. I hear a lot about parking from our customers. I take the bus because I got many tickets being on Warren. For customers, it's a big issue."*
- *"When people want to come in, they have to circle around and can't quickly come in from the South End. There's a huge lot, the Blair Lot, and it's all fenced in; when you drive down Washington Street, the gate is locked. If I were in front of that building as a store, I'd be pissed. You have to swing around the back and the lot is very visible."*
- *"We have 130+ rooms. We thought that people wouldn't drive much but we're **seeing a lot of driving**...more than 50% and all of the employees...it's tough. They complain about it but we offer them some alternate solutions. **No one ever says they're not coming back because of parking**."*
- *"We don't have parking and I'm upset as a business owner. I'm upset since the **city decided to earmark parking for the school workers**.... There's a hairdresser on the block of Citizens Bank and you can't get your hair done because you can't park."*

G. Employee Soft Skills

All of the business owners state they have issues with new employees lacking soft skills (e.g. communication, attire); they are more successful training employees in hard skills.

- *"I would not recommend going to a job interview looking or smelling like you've just come from a party. We all have the same challenges. I don't think anyone would say they don't have that problem but it's a larger issue than perhaps what we're looking at here. We hire them and train them, and outside of that core group of 15 to 20, the longevity is between a year and year and a half but some turnover within weeks."*
- *"Most people don't have the soft skills for the job—**how to conduct yourself for an interview, being on time**. It's the soft skills that really pin people up. **Hospitality is key in the food industry**. You don't have your personal conversations in front of customers. The training is part of not being ready for the job, and if there was a place for soft skills to be implemented I would like that. I can teach people how to cook, but there are hurdles with the other things."*
- *"**There is a need for a training center**. Many people come in and ask questions about hiring. **It's soft skills**. The ordinary hello/how are you doing, there's a need for that. I don't know if it's this community because I don't interview and see where they're coming from but it's there."*
- *"Soft skills, plan, prepare, execute. I'm in a customer service base and preparing for work and how to get there are big. Many I see have records."*
- *"Soft skills are a major issue. The **ability to talk to customers and supervisors**. People show up in ripped jeans and t-shirts and it's deplorable."*
- *"There's a need for ESL and we're doing management training to provide them with skills for raises and promotions."*

H. Support for Outdoor/Evening Family/Community-Oriented Events

Participants discussed the issue of remaining open during the weekends and a desire to expand their hours into the weekend and evenings. This is not a universal concern, as some businesses (sector dependent) have strong sales on weekends. Several owners indicate a desire to participate in events in the Square, and suggest specific ideas such as a jazz festival, a movie night, and a farmers market. Focus group participants also mentioned issues with current weekend/community events that do not draw neighborhood residents or have a limited spending impact on Nubian Square.

- *"Because we're not staffed fully, I **am not open on Saturday. We didn't have enough sales to open then**. I would like the opportunity to be open on a Saturday and receive the benefits from when there are events on the weekends."*
- *"We have events on Saturdays but we have game nights at night. **Many people come through Nubian Square but not many shop here**."*
- *"Most people who came to that...[the Boston Book Festival] were from outside the neighborhood. It was mostly white people there. One thing we tried to impress upon [the Boston Book Festival] is that the culture is different on Sundays. Most people go to church and we wanted to let them know the event may not fare as w,ell on Sunday but it did. When it was on Saturday, there was more local presence. **The biggest complaint was that there was nothing to eat or open to eat**.... On the weekends it is really trashy around here. I cleaned the street around me then."*
- *"Jazz festivals like the South End. When Darryl [Settles] first came up with the idea to have a festival in the street, it was interesting. **Something that makes people think that they're being seen**."*
- *"In Codman Square, there are movies and farmer's markets. **Many young people come and play and are outdoors**."*
- *"I loved the book fair, more educational things. Cultural activities such as women's group empowerment events. Fairs, family activities. One thing that was successful was when we took over the parking lot and held an event. **It's just us believing in what we want to see and making it happen**."*

- *"Having events that bring people in bulk is nice. Getting the restaurants to do a food tour or something like that. An outdoor music event in the summer. I participated in Nuestra's event at Bartlett Yard as well.* ***Having youth and children events to get the adults out****."*
- *"I think the work ahead of us has to be so intentional that the community has to change.* ***There's thought that it is what it is and not what it could be****. Planning intentional events so residents will come out and elders will come out...that requires work from the city and business owners."*
- *"I think the summer had some fun events. Michael Bivins of New Edition...and that was very lively. The crowd and celebrity and feeling you get is spectacular."*
- *"There are events that could happen...it's a matter of marketing and understanding who the demographic is. I'm really about the resident-led initiative."*

I. Leasing Environment

Some owners describe their ability to stay in Nubian Square due to low rent tied to exceptional situations. Owners express concern over the speculative increases in rent that do not match the realities of Nubian Square today.

- *"My circumstances are different and I was there before the new landlord and I bid against them [to purchase the building] but there were financial challenges to getting the building. The landlord raised the rent three times but now the* ***new landlord has promised not to raise the rent while I'm there****. I pay about $40 per square foot." "If I had one wish, I wish I had some security. The owner said as long as I'm there, he wouldn't raise but he could sell the building at any point."*
- *"We're in somewhat of a good situation. It's* ***cheaper than at our [former location]****. Even in the three years we've been here, it's still cheaper. For 15 years, I have the option to be there and it increases each year. Even with that, it's still cheaper.* ***Not until the tenth year will it equal what we used to pay****. We pay about $20 to $21 per square foot."*
- *"I'm negotiating my lease now. I think a lot of landlords are looking at real estate* ***without context or hoping to reap the benefits of Nubian Square****."*
- *"Madison Park Development Corporation doesn't want to do the office space out of fear of a lack of tenants but it keeps us impoverished and not able to scale up. A* ***sliding scale or fee rental agreement*** *is what would assist people to be in these spaces."*

J. People as Assets

Some business owners think younger people should be in more positions of leadership as they are the ones to likely support these businesses, and make the neighborhood "cool." There is sentiment that the youthful presence around Nubian Square has been lost and it has hurt businesses. The intergenerational aspect of the neighborhood is seen as underutilized potential.

- *"**The leadership in the community needs to be more of a baton passed leadership**. Politicians that have been in their positions for 30 years, and its disjointed. It's very difficult when you don't have some of the things you mentioned, like an entertainment license.... The youth energy is going to move us forward."*
- *"**You want the cool things, you have to have artists and students**. The key drivers like coffee shops but things that are bustling like the Flour bakeries. It has to be someone from this community."*
- *"It's those over the age of 45 that discourage people from doing business here... The people saying things are basing it off things that happened 20 to 30 years ago. We don't have a problem getting people from outside the community.... [Unless] **we can reeducate the group between 45 to 65 and let them know they could come back here, the younger people can't come back down here**."*

K. Support for Development

Some of the owners have positive feelings towards the new mixed-income developments and the potential increase in customers with disposable income. Some argue that there is too much residential affordability in the new developments due to Nubian Square's high concentration of subsidized units. Additionally, some owners are concerned about corporate chains renting on the ground floor and consuming this new customer base; they want to see support for local retail growing into these spaces.

- *"It's probably going to take gentrification and people moving in. I think once more people come to live here, it will change who lives here and the type of businesses that come here. People don't want to walk a mile for something to eat."*
- *"For a retail shop, **Thursday through Sunday should be our busiest days but they're not**."*
- *"I do have plans to expand at the location I'm at. **I want to include dinner but would also need to have guests with more disposable income**."*
- *"The **parcels that are coming I would embrace**. Everyone tells me to hold on but no one has a business to just hold on. I have to survive in the climate that's here. To open up at night, the Square is not a destination, and I want to have cocktails and other appetizers. I want to see the development."*
- *"The 30/30/30 model is no longer going to work. If you have developers dependent on low-income tax credits, like community development corporations, we end up with more of the affordable housing than wealth creation opportunity and perhaps not having...[adult children] move back into the community.... When you're entrenched with 70% of the population on the lower end of housing, **you need to be deliberate on offering market rate housing and folks who can support business**."*
- *"Until we're tied to not having a restricted income mix, we won't have the traffic."*

L. Recommendations for Complementary Businesses

Business owners were asked to identify either specific businesses or the types of businesses that would complement the retail mix in Nubian Square.

- *"We need more spaces like Hyde Square in Jamaica Plain."*
- *"Fitness Center, coffee shop, nail salon, everyday things. Restaurants, places for lunch, dinner, if I want to grab a cocktail after work." [Millennial participant]*
- *"Oasis Vegan, Trader Joe's, Bread Gourmet, bakery, little restaurant like on West Broadway."*
- *"You're not going to get a Tasty Burger to be supported here. A...**mom and pop burger shop however would be more niche and creative**. I like the optical shop."*
- *"**More places to eat and there's a need for [restaurants] after 3 p.m.** You get tired of steak and cheeses and pizza. [Business name] is opening up soon but when there's more selection, there's more business."*

EMPLOYEE SURVEY

DEMOGRAPHICS

1. Please provide your employer type.
Select one:
( ) Banking & Financial Services
( ) Business & Professional Services
( ) Dining/Restaurant
( ) General Retail Shopping
( ) Government Agency
( ) Grocery Store/Market
( ) Hair Care & Beauty
( ) Health & Wellness Services
( ) Nonprofit Institution
( ) Wine & Spirits
( ) Other - Write In: ___________________________

2. Are you a resident of Roxbury?
( ) Yes
( ) No

3. What is your age?
( ) less than 16 years old
( ) 16-17 years old
( ) 18-24 years old
( ) 25-34 years old
( ) 35-44 years old
( ) 45-54 years old
( ) 55-64 years old
( ) 65-74 years old
( ) 75 years or older

4. What is your total household income?
( ) Less than $10,000
( ) $10,000 to $19,999
( ) $20,000 to $29,999
( ) $30,000 to $39,999
( ) $40,000 to $49,999
( ) $50,000 to $59,999
( ) $60,000 to $69,999
( ) $70,000 to $79,999
( ) $80,000 to $89,999
( ) $90,000 to $99,999
( ) $100,000 to $149,999
( ) $150,000 or more

TRANSPORTATION AND PARKING QUESTIONS

5. How do you typically get to Nubian Square for work?
Select one:
( ) Walk
( ) Drive
( ) Take public transportation
( ) Drive/take public transportation equally
( ) Other - Write In: ___________________________

6. How important is access to parking to your working in Nubian Square?
( ) Not at all important
( ) Slightly important
( ) Moderately important
( ) Very important
( ) Extremely important

7. How important is access to public transportation (MBTA, buses, etc.) to your working in Nubian Square?
( ) Not at all important
( ) Slightly important
( ) Moderately important
( ) Very important
( ) Extremely important

8. How important is access to parking to your shopping or buying services in Nubian Square?
( ) Not at all important
( ) Slightly important
( ) Moderately important
( ) Very important
( ) Extremely important

9. How important is access to public transportation (MBTA, buses, etc.) to your shopping or buying services in Nubian Square?
( ) Not at all important
( ) Slightly important
( ) Moderately important
( ) Very important
( ) Extremely important

SATISFACTION WITH RETAIL OFFERINGS IN NUBIAN SQUARE

10. How satisfied are you with the available selection of retail offerings in Nubian Square?
( ) Very Dissatisfied
( ) Dissatisfied
( ) Satisfied
( ) Very Satisfied

11. How satisfied are you with the quality of retail offerings in Nubian Square?
( ) Very Dissatisfied
( ) Dissatisfied
( ) Satisfied
( ) Very Satisfied

12. How satisfied are you with the price of retail offerings in Nubian Square?
( ) Very Dissatisfied
( ) Dissatisfied
( ) Satisfied
( ) Very Satisfied

MEAL PURCHASES

13. During your work hours, do you purchase any of the following meals? Please check all that apply.
[ ] Breakfast
[ ] Lunch
[ ] Snacks
[ ] Dinner
[ ] Other - Write In: ___________________________
[ ] I don't buy any of my meals during the workweek

14. During your work hours, how often do you buy meals?
( ) Once a week
( ) Twice a week
( ) Three or more times a week
( ) I never buy meals during the workweek.

15. During work hours, how much do you typically spend on meals?
( ) $0
( ) $1-$10
( ) $11-$25
( ) $26-$50
( ) $51-$75
( ) $76-$100
( ) More than $100

16. During your work hours, how often do you typically buy your meals in Nubian Square? Select one:
( ) Never
( ) Rarely, less than 10% of the time
( ) Occasionally, about 30% of the time
( ) Sometimes, about 50% of the time
( ) Frequently, about 70% of the time
( ) Usually, in about 90% of the time
( ) Every time

17. During work hours, how much do you typically spend on meals in Nubian Square?
( ) $0
( ) $1-$10
( ) $11-$25
( ) $26-$50
( ) $51-$75
( ) $76-$100
( ) More than $100

18. During your work hours, where do you go to buy meals outside of Nubian Square? Check all that apply:
[ ] Allston/Brighton
[ ] Back Bay (Copley Square, Commonwealth Avenue Mall, Newbury Street)
[ ] Beacon Hill
[ ] Braintree/South Shore Plaza
[ ] Chinatown/Leather District
[ ] Dorchester
[ ] Downtown Boston
[ ] Fenway Kenmore
[ ] Hyde Park
[ ] Jamaica Plain
[ ] Mattapan
[ ] Mission Hill
[ ] North End
[ ] Quincy (North Quincy, Quincy Center, West Quincy)
[ ] Roslindale
[ ] Roxbury
[ ] South Boston
[ ] South End

[ ] West End
[ ] West Roxbury
[ ] Other - Write In: ____________________________

GOODS & SERVICES

19. During your work hours, how often do you buy goods and services (other than meals)?
Select one:
( ) Once a week
( ) Twice a week
( ) Three or more times a week
( ) Never

20. During your work hours, how much do you typically spend on goods and services (other than meals)?
( ) $0
( ) $1-$10
( ) $11-$25
( ) $26-$50
( ) $51-$75
( ) $76-$100
( ) More than $100

21. During your work hours, how often do you buy your goods and services in Nubian Square?
Select one:
( ) Never
( ) Rarely, less than 10% of the time
( ) Occasionally, about 30% of the time
( ) Sometimes, about 50% of the time
( ) Frequently, in about 70% of the time
( ) Usually, in about 90% of the time
( ) Every time

22. During your work hours, how much do you typically spend on goods and services (other than meals) in Nubian Square?
( ) $0
( ) $1-$10
( ) $11-$25
( ) $26-$50
( ) $51-$75
( ) $76-$100
( ) More than $100

23. During your work hours, where do you shop for goods and services (other than food) outside of Nubian Square?
Check all that apply.
[ ] Allston/Brighton
[ ] Back Bay (Copley Square, Commonwealth Avenue Mall, Newbury Street)
[ ] Beacon Hill
[ ] Braintree/South Shore Plaza
[ ] Chinatown/Leather District
[ ] Dorchester
[ ] Downtown Boston
[ ] Fenway Kenmore
[ ] Hyde Park
[ ] Jamaica Plain
[ ] Mattapan
[ ] Mission Hill
[ ] North End
[ ] Quincy (North Quincy, Quincy Center, West Quincy)
[ ] Roslindale
[ ] Roxbury
[ ] South Boston
[ ] South End
[ ] West End
[ ] West Roxbury
[ ] Other - Write In: ____________________________
[ ] I don't buy goods and services during the workweek

24. On the days when you are not working in Nubian Square, how often do you shop here?
( ) Often
( ) Sometimes
( ) Seldom
( ) Never

25. On the days when you are not working in Nubian Square, how much do you typically spend here?
Select one:
( ) $0 per day
( ) $1-10 per day
( ) $11-$25.00 per day
( ) $26.00-$50.00 per day
( ) More than $50.00 per day

YOUR SHOPPING PREFERENCES - IN NUBIAN SQUARE

26. During your work hours, where do you typically buy your meals in Nubian Square? Please list the names of the businesses.

____
____
____
____

27. During your work hours, what types of goods and services (other than meals) do you typically buy in Nubian Square?

____
____
____
____

28. During your work hours, where do you typically buy goods and services in Nubian Square? Please list the businesses.

____
____
____
____

29. On the days when you are not working here in Nubian Square, what goods and services do you typically buy here?

____
____
____
____

30. On the days when you are not working here in Nubian Square, where do you buy goods and services here? Please list the businesses where you make your purchases.

____
____
____
____

YOUR SHOPPING PREFERENCES - OUTSIDE OF NUBIAN SQUARE

31. During your work hours, why do you choose to buy meals in neighborhoods outside of Nubian Square?

____
____
____
____

32. During your work hours, where do you go to purchase goods and services (other than meals) outside of Nubian Square?

____
____
____
____

33. During your work hours, what types of goods and services (other than meals) do you buy outside of Nubian Square?

____
____
____
____

YOUR FINAL THOUGHTS AND IDEAS ON NUBIAN SQUARE

34. Describe your perception of Nubian Square's current retail offerings. What three words come to mind?

____
____
____
____

35. List the types of businesses you would like to see open up in Nubian Square over the next five years. For example, what is your favorite non-chain business that you frequent that you would like to see open up in Nubian Square?

____
____
____
____

36. What changes would you like to see happen in Nubian Square that would make you feel more comfortable walking around this area?

____

____

____

____

Thank You!

Appendix B: Cluster Analysis

Identifying the factors that support existing businesses and those that are instrumental in attracting new businesses are key to understanding the assets and barriers to maintaining and expanding the commercial base. Additionally, knowing the stakeholders' needs provides a clearer understanding of the potential and issues facing Nubian Square.

Clusters are groups of closely related and interconnected businesses that operate within a specific geography and benefit from their geographic proximity. The companies operating within a cluster are connected by a shared workforce, supply chains, and technologies. Clusters can have a significant impact on the survival and growth of small businesses[26, 27] and well-designed cluster development strategies can further stimulate startups and job growth.[28, 29]

Strong clusters in a particular geographic area are those in which that area specializes. Table B.1 provides a list of Nubian Square's strong clusters and are those that make up a higher percentage of total employment in the Square than in the City of Boston as a whole. Strong clusters are important to identify because they identify Nubian Square's competitive advantages as compared to the rest of the City of Boston. For purposes of this analysis, Nubian Square is defined as the area within a 0.75-mile radius of the Bruce C. Bolling Municipal Building, located at 2300 Washington Street, Roxbury, MA 02119.

Table B.1: Strong and Very Strong Clusters in Nubian Square (2019)[30]

KEY:

Very Strong	Clusters with LQ greater than 1.5

Strong Clusters	Employment (2019)
Automotive	6
Biopharmaceuticals	235
Distribution and Electronic Commerce	819
Environmental Services	60
Leather and Related Products	44
Local Community and Civic Organizations	2,410
Local Education and Training	8,786
Local Health Services	15,292
Local Real Estate, Construction, and Development	1,987

There are nine strong clusters in Nubian Square, with five of those categorized as "very strong" (those with a location quotient greater than 1.5). Distribution and electronic commerce, which includes warehousing and storage, wholesale goods, and electronic shopping, is very strong in Nubian Square. Local health services, which includes hospitals, healthcare provider offices, and drug stores, is also very strong in the area. The strength of this cluster may be due to the geographic definition used for this research. Parts of Boston Medical Center and the Boston University Medical Campus lie within the 0.75-mile geographic radius. The strength of the biopharmaceuticals cluster may also be explained by our geographic definition.

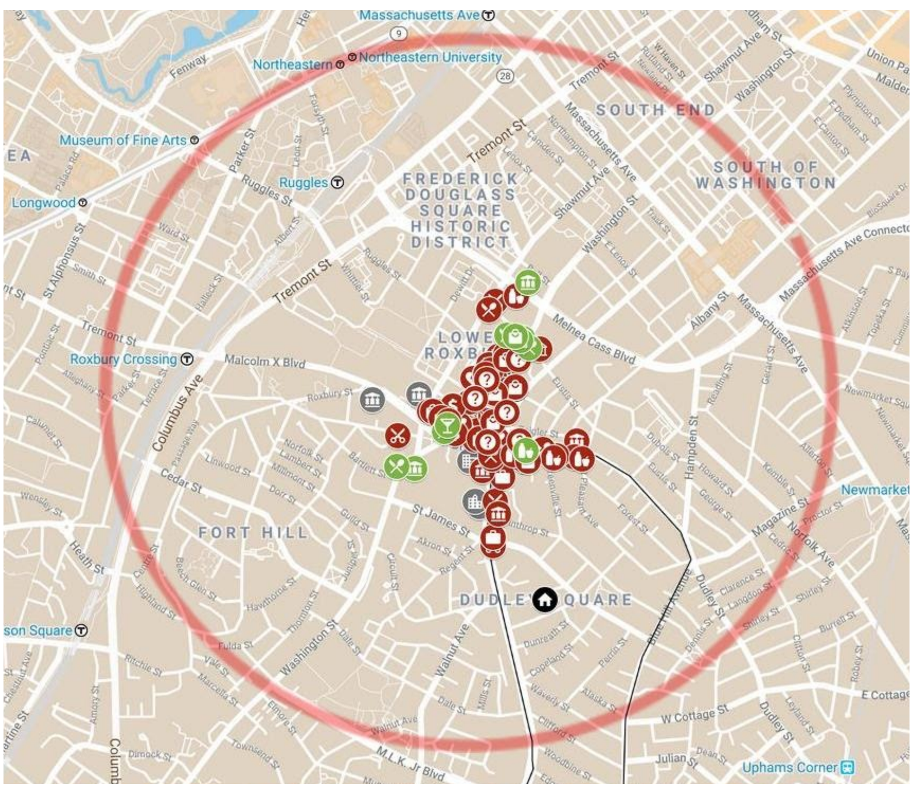
Other strong clusters in Nubian Square include local education and training (including elementary and secondary schools, job training, and recreational services), local community and civic organizations, which includes social service, religious, and labor organizations, and local real estate, construction, and development, which includes real estate services, contractors, and other construction-related activities. Environmental services, which includes waste processing, collection, and management services, is also very strong in the area.

It is important to note from this analysis the absence of retail-, hospitality-, and arts-related clusters from Nubian's Square's identified strong clusters. Business owners, employees, and residents frequently identified these types of businesses as much needed in the area. The local hospitality establishments, local retailing of clothing and general merchandise, performing arts, and local entertainment and media clusters were all relatively weak in Nubian Square compared to the rest of Boston.

Figure B.2. maps the lease/ownership mix of retail businesses in the Nubian Square area with icons for each type of business featured in Nubian's retail market.

Many of the retail business spaces in the Nubian Square area are leased. There are few self-owned business spaces in the neighborhood relative to the leased business spaces. The analysis revealed that the self-owned businesses tended to cluster near the northern edge of the Nubian Square neighborhood near Malcolm X and Melnea Cass Boulevards.

Figure B.2. Nubian Square Retail Businesses and 0.75-Mile



INSTITUTIONS

Nubian Square
Federal
Nonprofit
Nonprofit
City of Boston
State

LEASED BUSINESSES

Banking
Health/Wellness
Business & Professional Services
Services
Shopping
Cultural
Vacant
Dining
Wine & Spirits
Food
Hair Care/Beauty

SELF-OWNED BUSINESSES

Dining
Services
Food
Shopping
Health/Wellness
Wine & Spirits

Appendix C: Nubian Square Demographics

Table C.1: Existing (2019) and Projected (2024) Demographic Characteristics of Nubian Square[31]

		Nubian Square (0.75-mile radius)	Nubian Square (1.5-mile radius)	City of Boston
2019 Population		**39,714**	**180,251**	**696,576**
Low	**2024 Projection**	43,322	193,942	–
	% Change from 2019	9.1%	7.6%	–
Mid	**2024 Projection**	44,329	194,962	–
	% Change from 2019	11.6%	8.2%	–
High	**2024 Projection**	45,335	195,981	–
	% Change from 2019	14.2%	8.8%	–
Population Density				
2019 Population Density, per square mile		**22,474**	**25,500**	**14,386**
Low	**2024 Projection**	24,515	27,437	–
Mid	**2024 Projection**	25,085	27,581	–
High	**2024 Projection**	25,654	27,726	–
Population by Age				
Age 0 – 17 (2019)		**17.6%**	**14.6%**	**17.3%**
	2024 Projection	17.2%	14.3%	–
Age 18 – 24 (2019)		**26.0%**	**24.6%**	**15.1%**
	2024 Projection	25.3%	23.7%	–
Age 25 – 34 (2019)		**16.7%**	**20.6%**	**18.7%**
	2024 Projection	16.8%	20.4%	–
Age 35 – 44 (2019)		**11.3%**	**11.4%**	**14.3%**
	2024 Projection	11.8%	12.1%	–
Age 45 – 54 (2019)		**9.9%**	**9.2%**	**11.8%**
	2024 Projection	9.8%	9.0%	–
Age 55 – 64 (2019)		**8.7%**	**8.8%**	**10.2%**
	2024 Projection	8.4%	8.5%	–
Age 65+ (2019)		**9.7%**	**10.8%**	**12.5%**
	2024 Projection	10.7%	12.0%	–
Median Age (2019)		**28.5%**	**29.6%**	**34.3%**
	2024 Projection	29.3%	30.5%	–

		Nubian Square (0.75-mile radius)	Nubian Square (1.5-mile radius)	City of Boston
Population by Race/Ethnicity (2019)				
Asian		**5.9%**	**10.2%**	**9.5%**
Black		**41.8%**	**25.9%**	**24.0%**
Hispanic or Latinx		**27.5%**	**22.7%**	**20.5%**
White		**33.1%**	**47.6%**	**52.1%**
Other		**19.1%**	**17.8%**	**14.4%**
Population by Gender				
Male (2019)		**48.6%**	**48.3%**	**48.1%**
	2024 Projection	48.6%	48.4%	–
Female (2019)		**51.4%**	**51.7%**	**51.9%**
	2024 Projection	51.4%	51.6%	–
Population Aged 25+ by Educational Attainment (2019)				
Less than High School Diploma		**18.2%**	**14.5%**	**14.0%**
High School Diploma Only		**22.6%**	**18.5%**	**20.9%**
Some College, No Degree		**16.0%**	**12.5%**	**12.6%**
Bachelor's Degree		**21.8%**	**25.3%**	**26.7%**
Poverty, Unemployment, and Income				
Poverty Rate (2019)		**25.6%**	**24.0%**	**16.7%**
Unemployment Rate (2019)		**8.6%**	**6.1%**	**5.1%**
Median Resident Household Income (2019)		**$41,448**	**$51,393**	**$69,160**
	2024 Projection	$50,615	$61,726	–
	% Change from 2019	22.1%	20.1%	–
Average Resident Household Income (2019)		**$80,430**	**$93,562**	**$106,389**
	2024 Projection	$96,484	$108,633	–
	% Change from 2019	20.0%	16.1%	–
Average Resident Household Disposable Income (2019)		**$56,036**	**$63,445**	–
Average Resident Household Discretionary Income (2019)		**$29,452**	**$32,655**	–

Appendix D: Analogous Submarket Profiles

The Analogous Submarkets located within the Metro Boston market that were analyzed in this study are Roxbury-Dorchester; Jamaica Plain-South Suffolk; Longwood Medical Area-Mission Hill-Fenway; South End; and Brookline-Newton. Appendix D includes the retail real estate submarket maps of these sourced from the CoStar Group. CoStar's submarkets utilize geographic definitions that real estate brokers typically use. Retail and office real estate submarket maps are available at http://www.costar.com/about/submarket-maps.

Figure D.1: Roxbury-Dorchester Real Estate Submarket

Figure D.2: Jamaica Plain-South Suffolk Real Estate Submarket

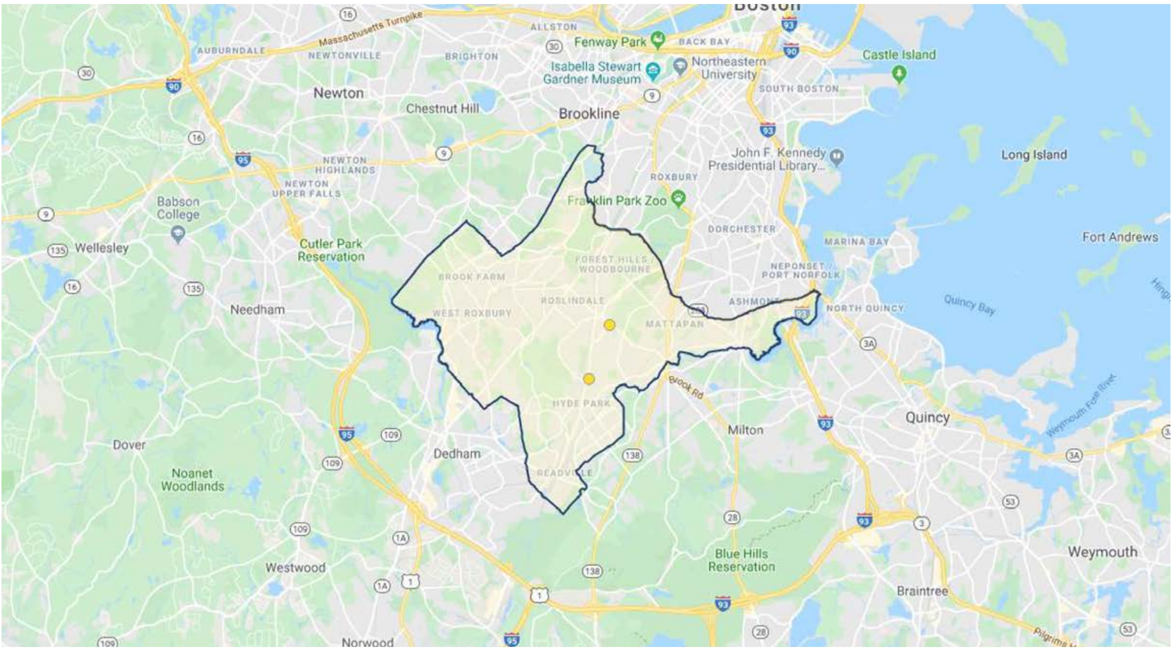


Figure D.3: Longwood Medical Area-Mission Hill-Fenway Real Estate Submarket

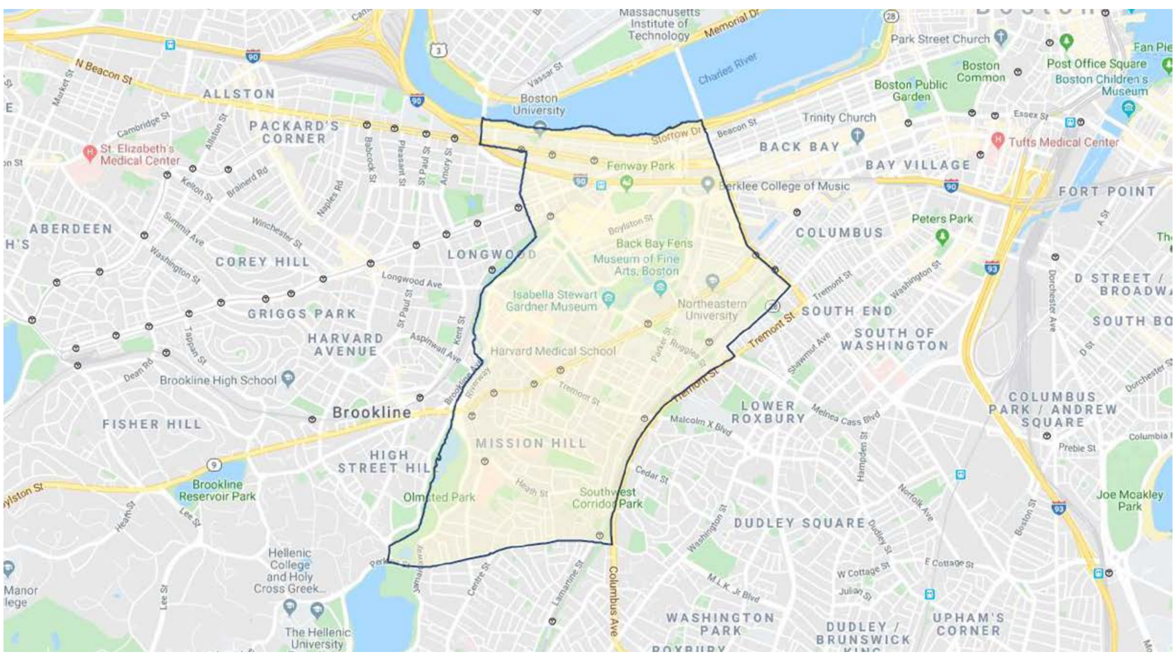


Figure D.4: South End Real Estate Submarket

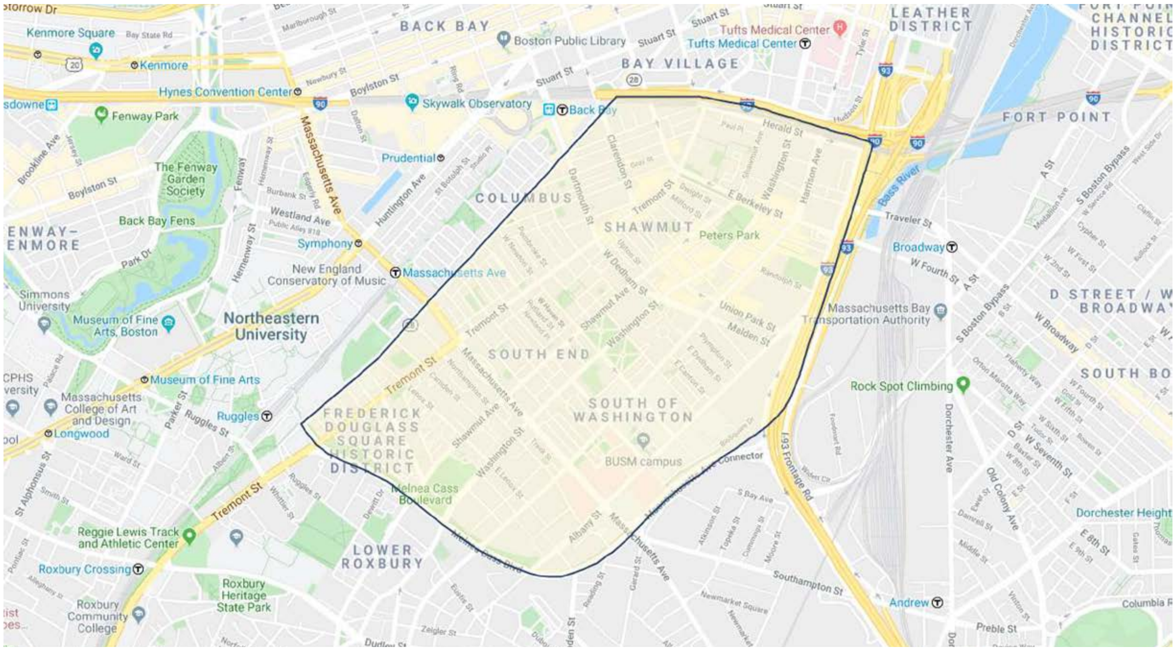
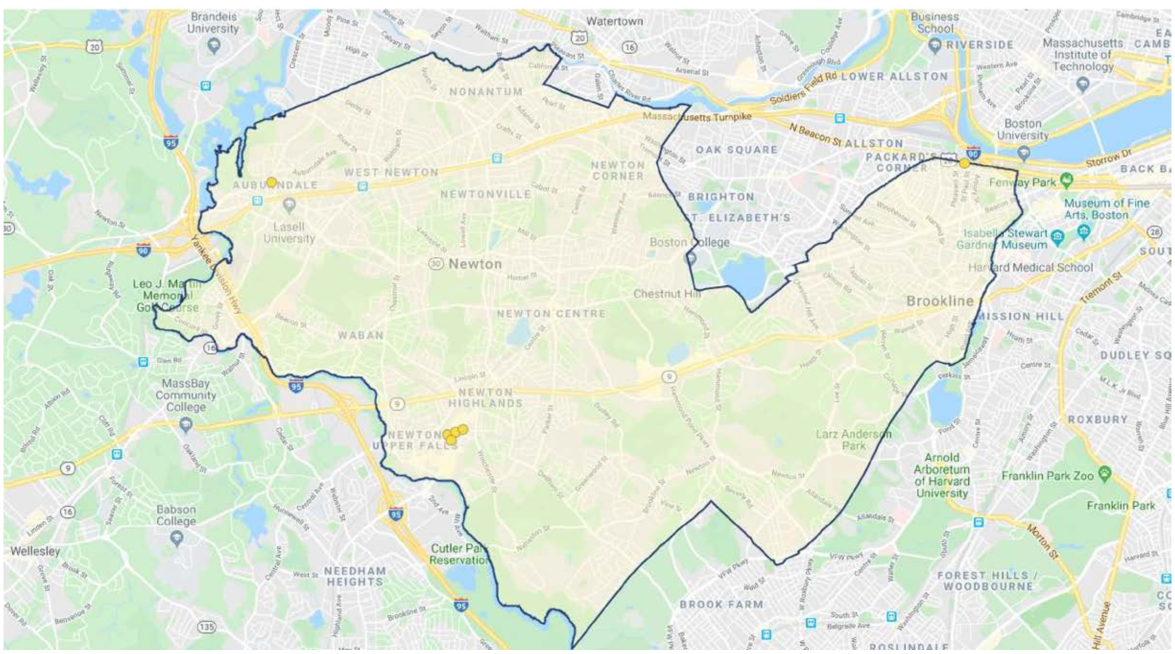


Figure D.5: Brookline-Newton Real Estate Submarket



Appendix E: Comparative Analysis: Business Districts

This analysis compiles demographic, housing, business, and real estate market data for Nubian Square as compared with other nearby commercial districts including Egleston Square, Ashmont-Fields Corner, Hyde Square-Jackson Square, Mattapan Square, and Brookline Village. The commercial district comparisons were selected by the study team for the express purpose of highlighting the interplay between the business mix and localized demand expressed in each location and to assess related differences and impacts associated with the underlying business and real estate economics of each.

The study team determined that the comparative profiles of consumer demand and business mix for each of the competitive commercial districts would be defined by a 0.75-mile radius of the center of each area, reflecting the approximate size and customer walk zone for each district. In the case of Nubian Square, the Bruce C. Bolling Municipal Building, at 2300 Washington Street, Roxbury MA 02119 defines the center of the radius. In the others, MBTA station locations were used. Although data were also collected for an area defined by 1.5 miles of each center point, for purposes of the demographic and business profiles, the 0.75-mile radius was determined to best define an areas' characteristics.

Real estate assessments were also undertaken for each commercial submarket, defined to capture the competitive perspective of real estate owners and tenants, rather than the perspective of retail consumers/customers (the district walk-zone). To this end, both office and retail real estate market analyses were conducted for Metro Boston overall and for the Roxbury-Dorchester, Jamaica Plain-South Suffolk, Longwood Medical Area-Mission Hill-Fenway, South End, and Brookline submarkets. A comparative summary of the commercial market features of each submarket in relation to Nubian Square is presented.

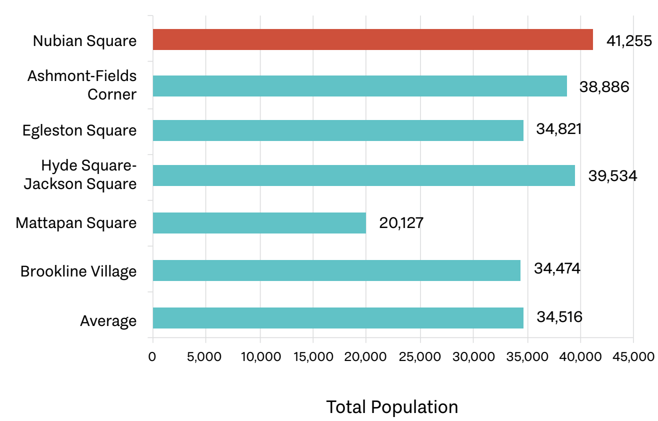
Comparable lease studies further narrowed the analysis to capture specific rental activity and pricing within the commercial corridors running through each competitive district under study, and providing a more nuanced picture of the competitive analogues from a real estate perspective. The corridors analyzed include: Columbus Avenue and Washington Street to and through Egleston Square; Dorchester Avenue to and through Ashmont to Fields Corner; Centre Street from Jackson Square to Hyde Square and from Hyde Square to South Street; Blue Hill Avenue and River Street to and through Mattapan Square; and Harvard Street to and through Brookline Village.

A. Demographic Profiles

Population and Household Trends

Economic growth is closely tied to growth in population and households that comprise the demand for goods and services in the area and a source of labor for area businesses. As shown in Figure E.1 below, Nubian Square compares very favorably with the comparison areas with regard to population size within a 0.75-mile radius of the center of each area.

Figure E.1: Total Population, Nubian Square and Comparison Areas, 2019



More importantly, however, Nubian Square compares favorably with regard to projected rates of population growth, as shown in Figure E.2. Nubian Square's projected growth rate over the next five years is 5.5%, while the average for all areas is 4.9%. Only Egleston Square and Hyde Square-Jackson Square are expected to have higher growth rates.

The household is the other basic unit of consumption and labor (among many other things). Here as well, Nubian Square exceeds the average in both number and expected growth rates as shown in Figure E.3.

Figure E.2: Historical and Projected Population Change, Nubian Square and Comparison Areas

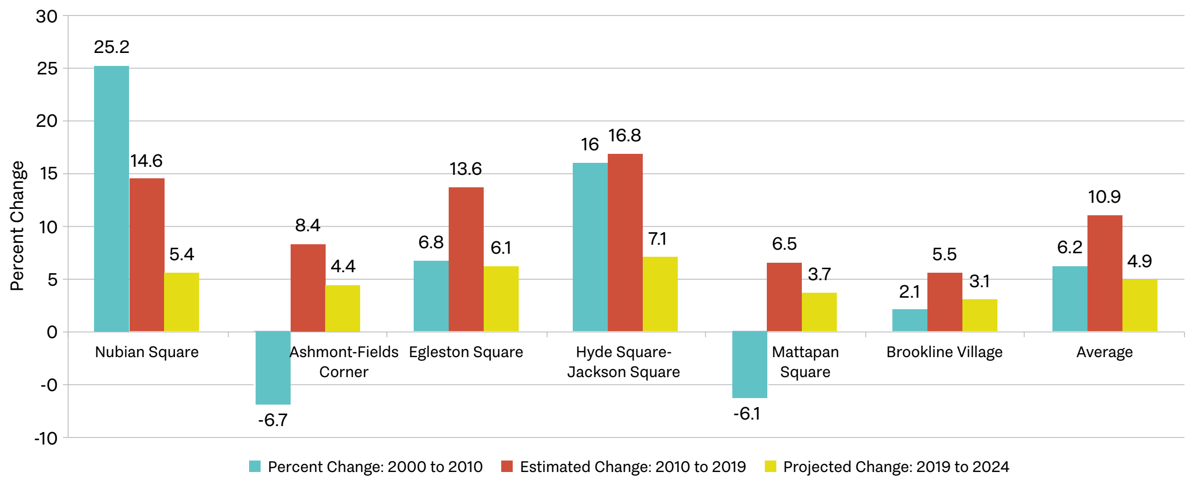
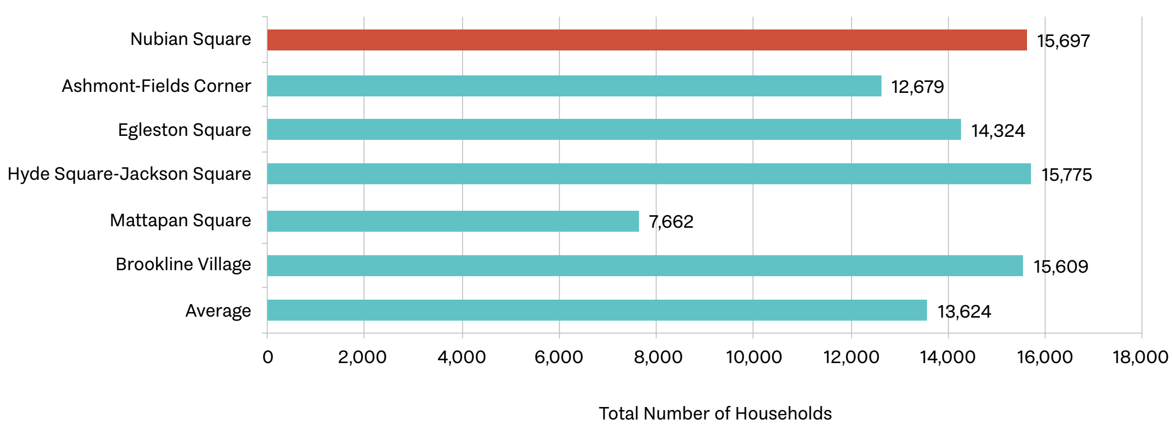


Figure E.3: Total Number of Households, Nubian Square and Comparison Areas, 2019



Households Sizes

With regard to household size, there is not a large variation across the areas; Nubian Square area households are roughly on par with the average size.

Median Age and Generational Dispersion

Looking to future development, having a relatively young population is an advantage, and here as well, Nubian Square compares favorably, with the youngest median age of all the areas at 29 years. The average median for the six areas is 35.

Figure E.4: Persons per Household, Nubian Square and Comparison Areas, 2019

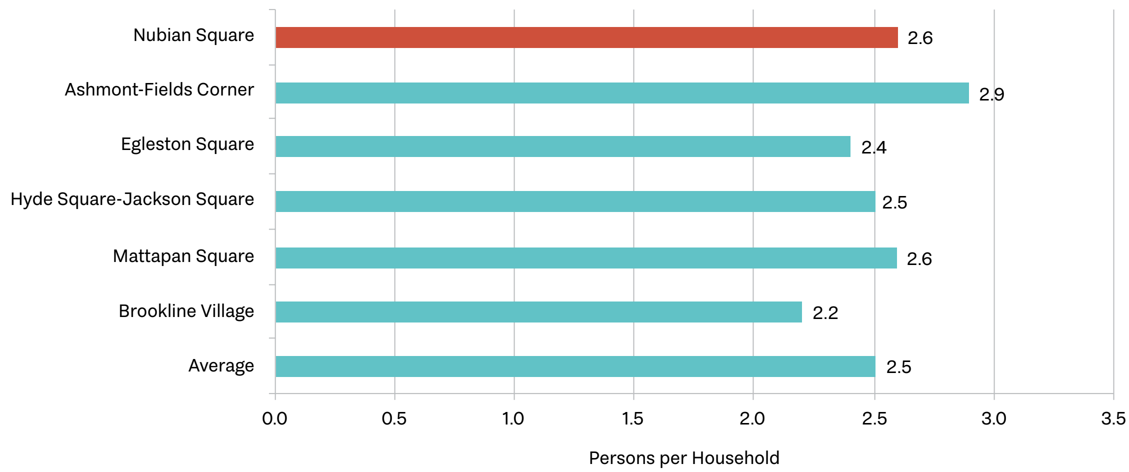
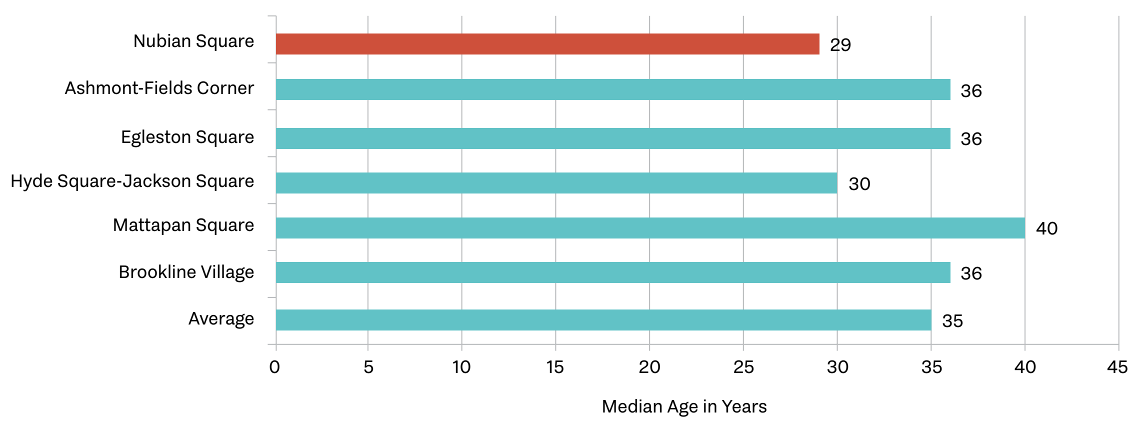


Figure E.5: Median Age, Nubian Square and Comparison Areas, 2019



If one considers the key demographic targets as Millennials and Generation Z, Nubian Square once again has an advantage, particularly with regard to Generation Z. These categories are roughly defined in Figure E.6 as ages 25 to 44 for Millennials and under age 25 for Generation Z.

Population Diversity

Another way to characterize the population of the areas compared is by language spoken at home. Figure E.7 shows that English predominates in all the areas, with Spanish second in the Nubian Square area and on average; however, a substantial proportion of the population age five and over (9%) speaks an Indo-European language.

Figure E.6: Percentage of Population Under Age 25 vs. Age 25 - 44, Nubian Square and Comparison Areas, 2019

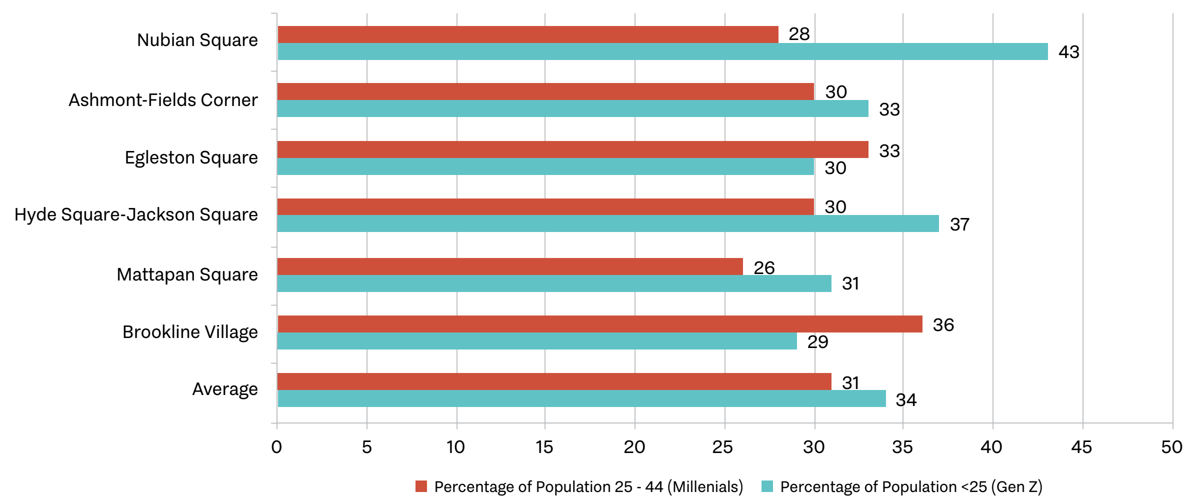
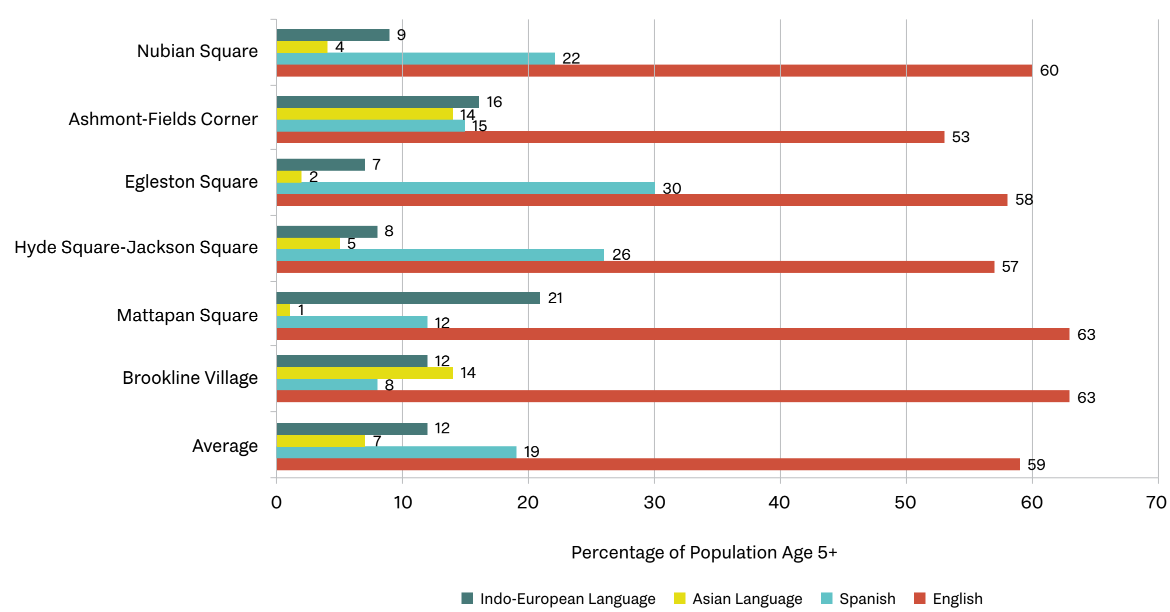


Figure E.7: Languages Spoken at Home, Nubian Square and Comparison Areas, 2019

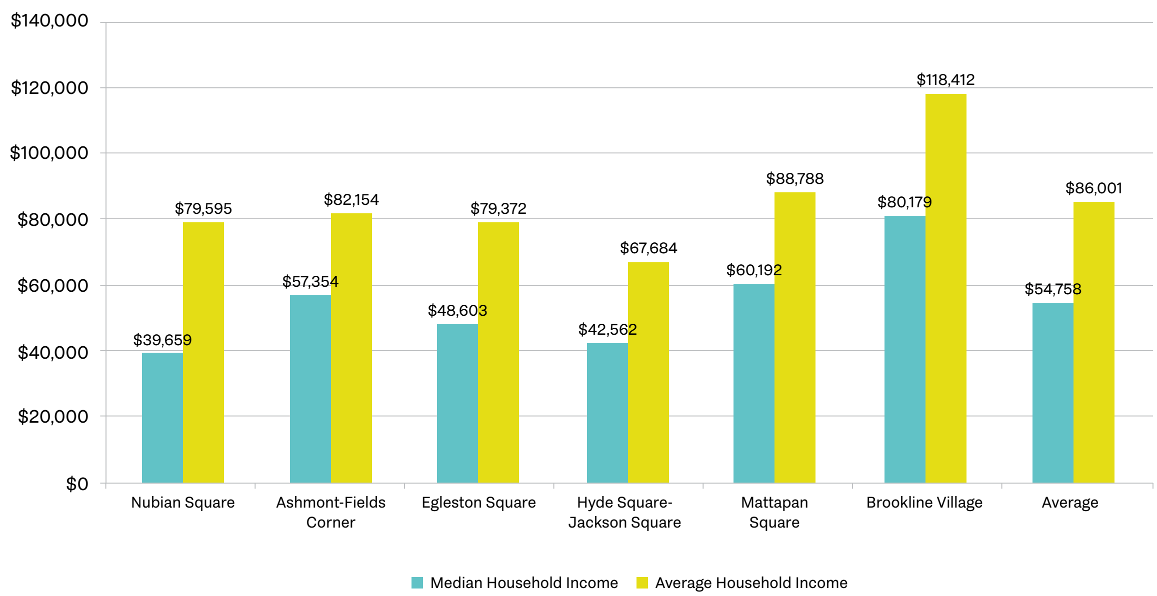


Household Income

Income is a key variable in assessing economic and other opportunities. Figure E.8 shows that Nubian Square households lag behind the other areas with regard to both average and median household incomes, no doubt correlating with the general youth of its population and households, among other factors.

Households within the Nubian Square walk-zone have the lowest median and second lowest average income of the six areas examined. The median is a better measure of relative incomes, as it represents the midpoint of the income range, with half of households having more income and half less. The average obscures often substantial inequalities among incomes.

Figure E.8: Median and Average Household Incomes, Nubian Square and Comparison Areas, 2019



Labor Force Characteristics

The education profile in Figure E.9 shows that the Nubian Square area holds a slightly lower than average proportion of the population age 25 and older with a bachelor's degree or higher, but also has the second lowest share with less than a high school diploma with only Brookline Village lower.

Resident Occupational Characteristics

White collar employment is by far the most common type of employment for residents of all six areas, as shown in Figure E.10. Well over half of the employed population of all areas except Ashmont-Fields Corner are categorized as white collar.

Figure E.9: Level of Education, Nubian Square and Comparison Areas, 2019

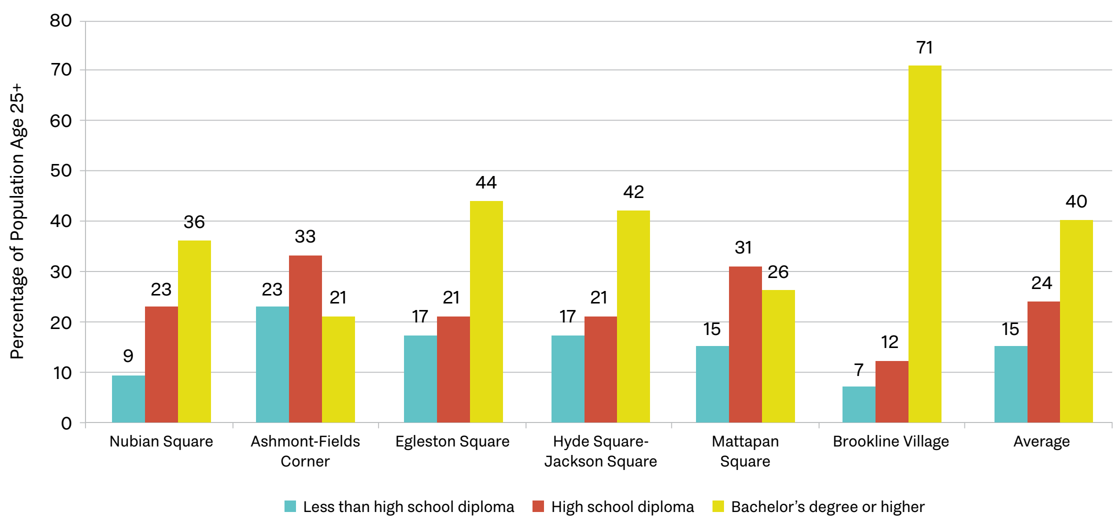
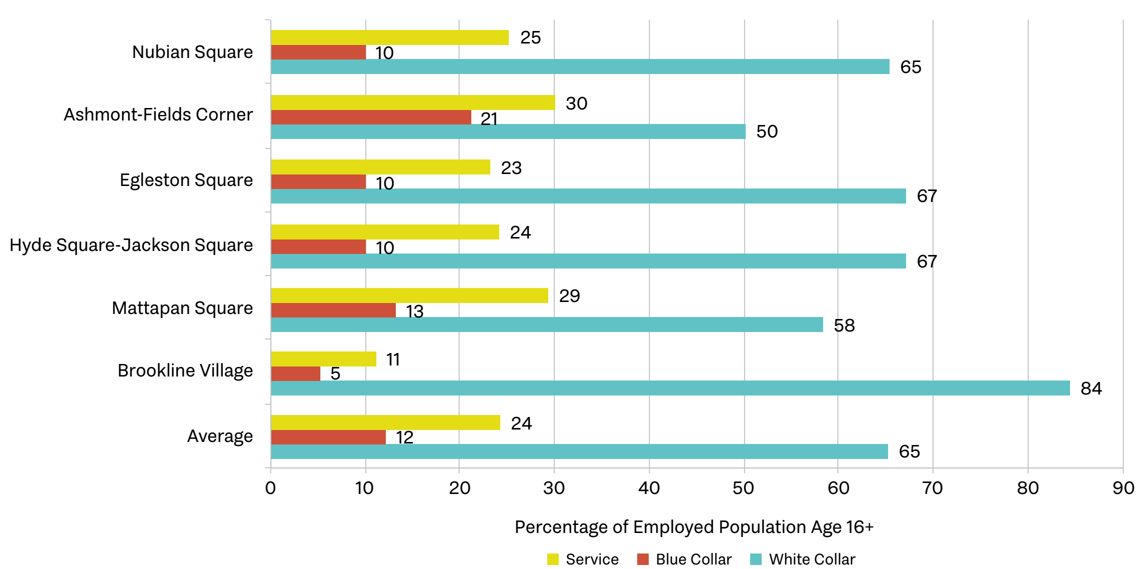


Figure E.10: Type of Employment, Residents of Nubian Square and Comparison Areas, 2019



Travel times to work are all over 30 minutes, except for Nubian Square employees, whose average travel time is just 30 minutes, compared to employees from Mattapan Square, who spend almost 45 minutes getting to work, the longest of all six areas.

Additional support for these travel times is found in an examination of employees' modes of travel to work, shown in Figure E.12. Twenty four percent of Nubian Square employees walk to work or work at home, by far the largest proportion of all the areas except for Brookline Village, at 25%. Nubian Square and Brookline Village employees also have the two lowest shares of those who drive alone to work, 29% and 27% respectively, compared to the average of 37% for all the areas. Public transportation is heavily used in all areas, with Nubian Square's usage at 37% close to the average for all areas.

A substantial proportion of households have no vehicle at all. As Figure E.13 below shows, Nubian Square residents are the least likely to own a vehicle, 46% compared to the areas' average of 35%. Mattapan Square has the lowest proportion of households with no vehicle, which tracks with residents' propensity to drive alone to work, shown in Figure E.12.

Figure E.11: Travel Time to Work, Residents of Nubian Square and Comparison Areas, 2019

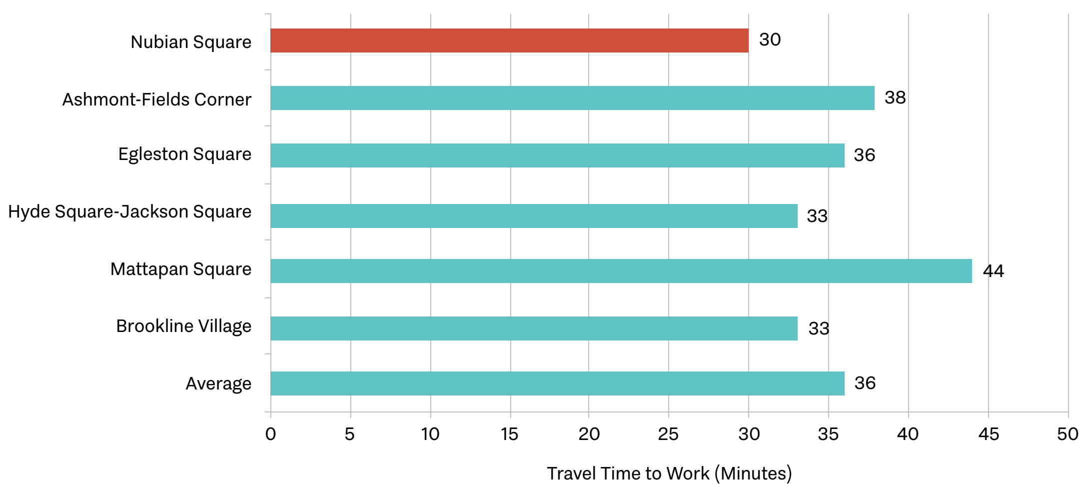


Figure E.12: Means of Transportation to Work, Nubian Square and Comparison Areas, 2019

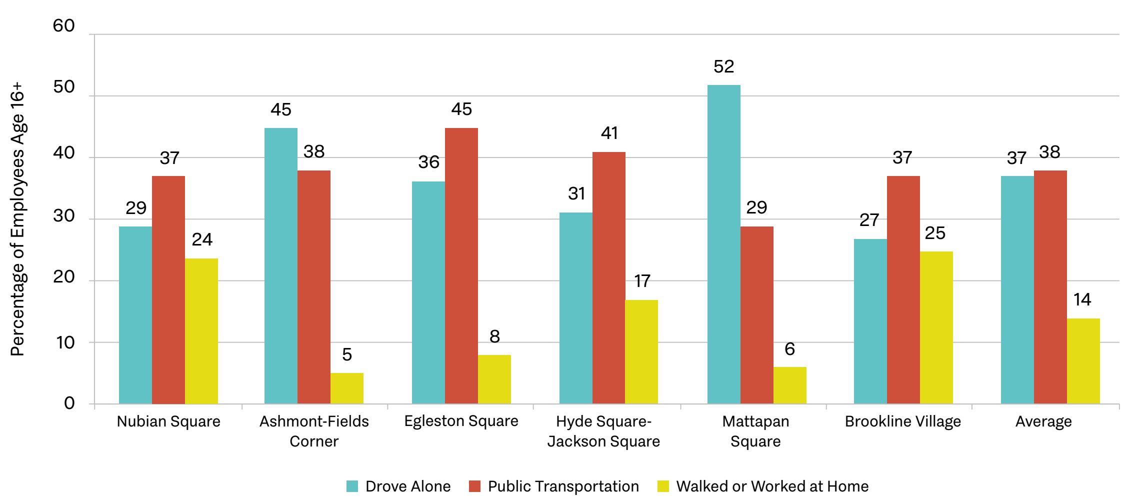
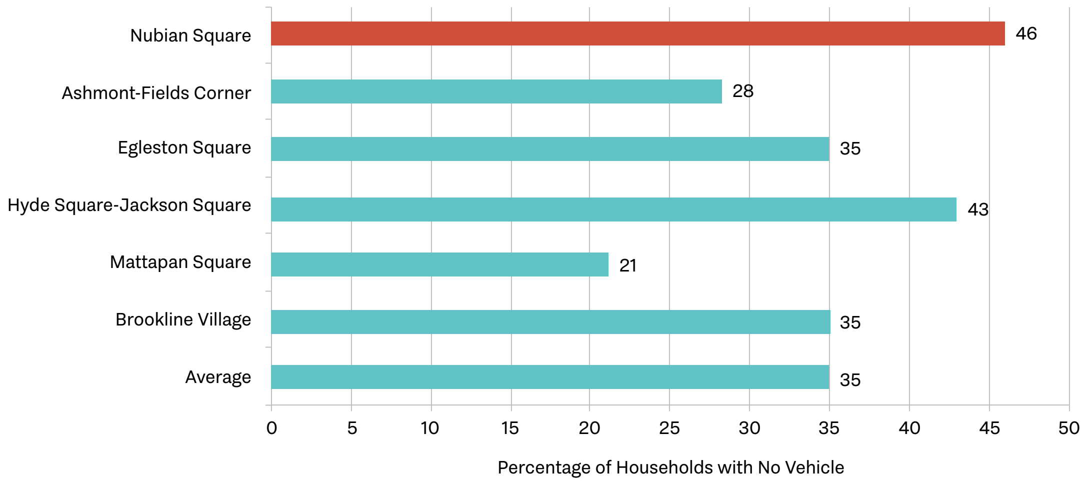


Figure E.13: Percent of Households with No Vehicle, Nubian Square and Comparison Areas, 2019



B. Housing Profiles

Housing Supply

Figure E.14 displays the areas by total number of housing units. The Hyde Square-Jackson Square area has the most units, followed closely by Nubian Square and Brookline Village.

Housing Tenure Type and Duration

Nubian Square households have the strongest propensity to rent of all the areas: 79% are renters compared to the average of 68%. Mattapan Square has the highest proportion of owner-occupants, as shown in Figure E.15.

Figure E.14: Total Housing Units, Nubian Square and Comparison Areas, 2019

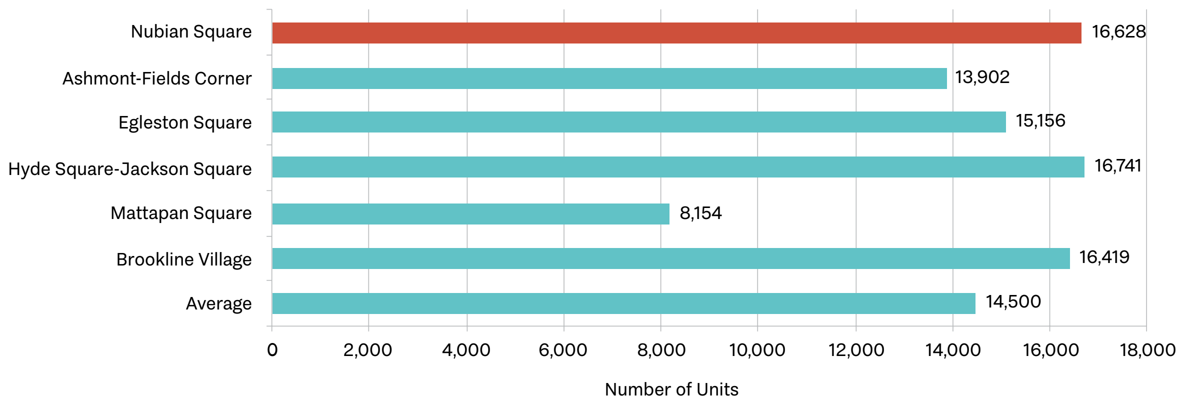
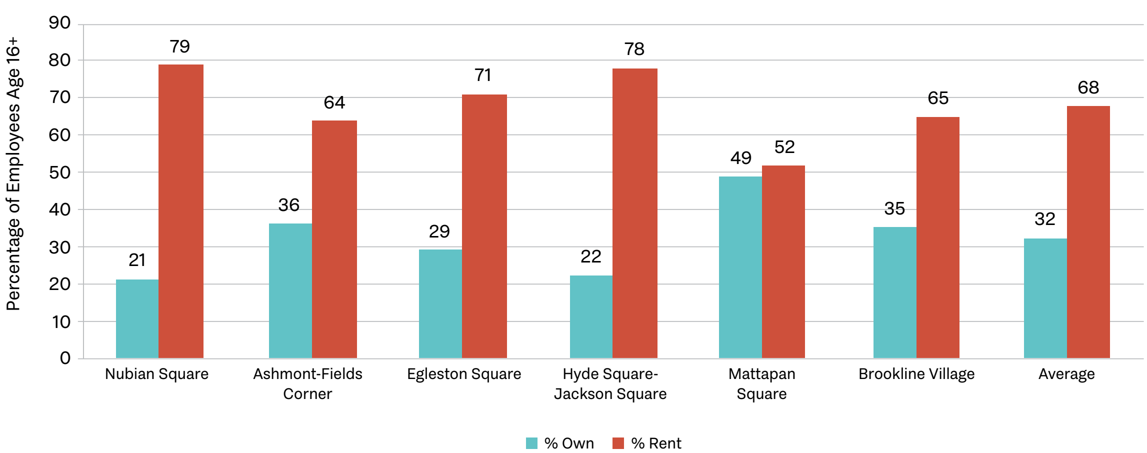


Figure E.15: Tenure (% Own and % Rent) of Occupied Housing Units, Nubian Square and Comparison Areas, 2019



Lengths of residence usually differ for owners and renters, with owners tending to remain in their homes longer than tenants, and that is the case in all areas analyzed. As Figure E.16 shows, Nubian Square households, both owners and renters, have lengths of residence about equal to the average.

Home Values

For those occupants who do own their homes, however, home values in the Nubian Square area are slightly higher than average for the six areas: $606,000 compared to $566,000. Only Brookline Village values are higher.

Figure E.16: Average Length of Residence, Nubian Square and Comparison Areas, 2019

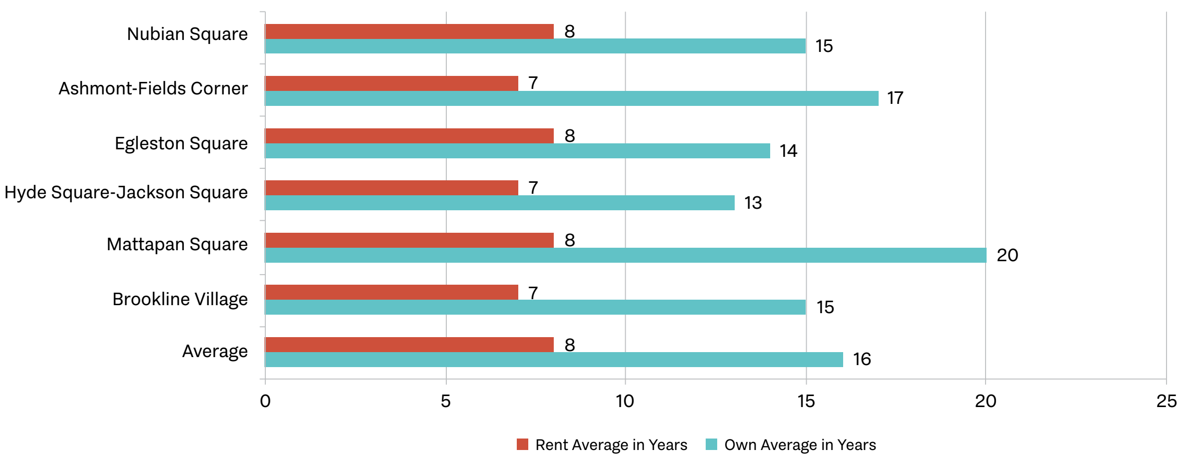
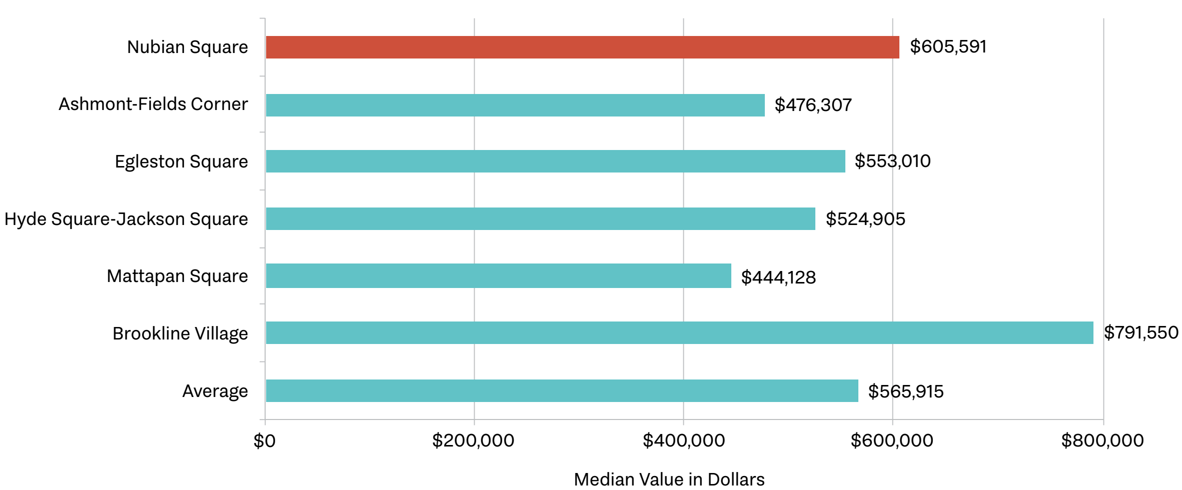


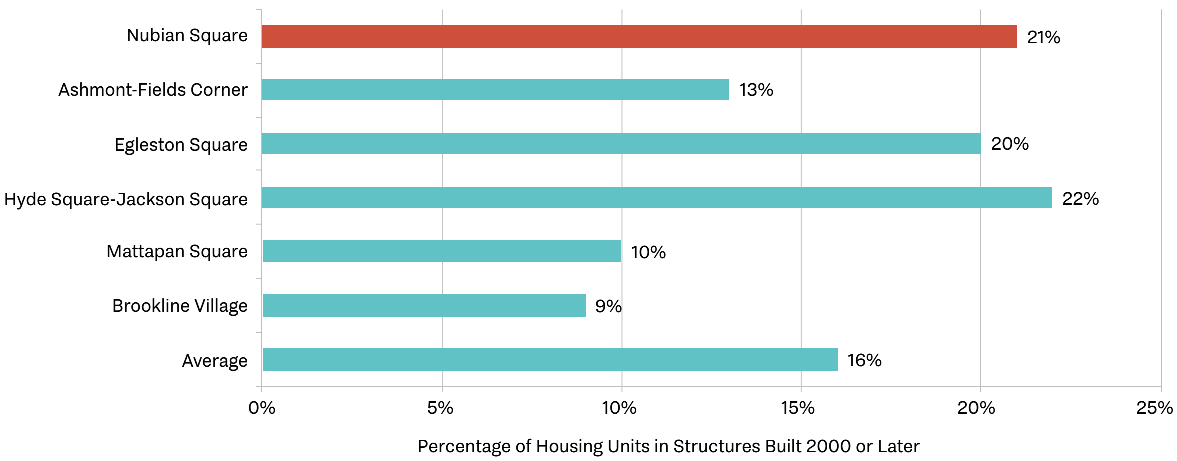
Figure E.17: Median Value of Owner-Occupied Housing Units, Nubian Square and Comparison Areas, 2019



Age of Housing Stock

The age of the housing stock is often related to average values. Figure E.18 shows that Nubian Square has the second largest share of units in structures built in the year 2000 or later. Brookline Village has the smallest. Note, however, that these proportions include rental units as well as owner-occupied units.

Figure E.18: Percentage of Housing Units in Structure Built 2000 or Later, Nubian Square and Comparison Areas, 2019



C. Business Profiles

Major Business Sectors

The following three tables present a broad-brush view of all commercial activity in Nubian Square and each of the comparison areas. Table E.19 compares numbers of establishments, Table E.20 compares numbers of employees, and Table E.21 compares sales. At this two-digit NAICS level, not much beyond general observations can be made. For example, in Nubian Square and Brookline Village, the healthcare and social assistance sector leads all others in establishments, employment, and sales. In Nubian Square, the large majority of businesses in this sector are ambulatory care, although hospitals employ more people and bring in larger sales. In Brookline Village, hospitals and ambulatory care are the biggest employers, but ambulatory care generates far more sales. A second key sector in all areas is other services, which includes such things as repair and maintenance, personal services, and religious institutions.

Table E.19: Number of Establishments by Major Sectors, 2019[32]

Sectors		Nubian Square	Ashmont-Fields Corner	Egleston Square	Hyde Square-Jackson Square	Mattapan Square	Brookline Village
23	Construction	67	246	144	46	20	57
31-33	Manufacturing	21	52	43	8	8	17
42	Wholesale Trade	39	46	46	22	2	15
44-45	Retail Trade	151	424	370	125	46	156
48-49	Transportation and Warehousing	24	68	55	15	17	14
51	Information	47	85	95	31	16	38
52	Finance and Insurance	67	177	158	57	23	94
53	Real Estate and Rental and Leasing	109	180	236	94	22	113
54	Professional and Technical Services	121	206	229	74	38	150
55	Management of Companies and Enterprises	1	–	4	2	–	4
56	Administrative and Waste Services	40	114	119	44	19	62
61	Educational Services	84	91	137	53	12	71
62	Healthcare and Social Assistance	1,443	655	1,374	579	73	4,690
71	Arts, Entertainment, and Recreation	29	56	73	27	8	32
72	Accommodation and Food Services	121	195	250	87	16	138
81	Other Services, Except Public Administration	243	660	623	192	94	215
92	Public Administration	29	26	48	23	1	47
99	Unassigned	189	289	385	116	30	235
Total All Industries		**2,607**	**3,255**	**3,956**	**1,456**	**414**	**5,866**

In Nubian Square, the largest employers after healthcare are educational services and public administration. These large employment sectors are important for the resources, both human and financial, that they bring to the Square.

The retail sector is important to all areas. It is the second largest employer in Ashmont-Fields Corner, Hyde Square-Jackson Square, Mattapan Square, and Brookline Village and generates the largest sales in Mattapan Square.

Table E.20: Number of Employees by Major Sectors, 2019[33]

Sectors		Nubian Square	Ashmont-Fields Corner	Egleston Square	Hyde Square-Jackson Square	Mattapan Square	Brookline Village
23	Construction	1,153	1,877	1,055	426	75	319
31-33	Manufacturing	463	385	824	184	71	224
42	Wholesale Trade	421	487	493	181	7	115
44-45	Retail Trade	1,458	4,457	4,937	3,333	535	3,132
48-49	Transportation and Warehousing	692	650	963	318	113	222
51	Information	435	896	750	210	91	576
52	Finance and Insurance	521	710	833	348	97	300
53	Real Estate and Rental and Leasing	693	1,043	1,473	526	135	744
54	Professional and Technical Services	1,434	1,664	2,306	1,045	160	1,132
55	Management of Companies and Enterprises	8	–	50	16	–	35
56	Administrative and Waste Services	318	697	741	265	99	379
61	Educational Services	10,491	2,194	3,850	1,803	407	2,147
62	Healthcare and Social Assistance	11,281	6,202	14,595	8,106	582	65,172
71	Arts, Entertainment, and Recreation	227	625	632	170	17	215
72	Accommodation and Food Services	1,338	2,282	2,583	934	142	1,904
81	Other Services, Except Public Administration	1,505	3,485	5,508	2,865	506	1,938
92	Public Administration	3,714	974	5,788	1,968	10	2,583
99	Unassigned	302	193	457	219	68	114
Total All Industries		**32,439**	**27,667**	**41,603**	**20,730**	**3,037**	**78,554**

Table E.21: Number of Establishments by Major Sectors, 2019[34]

Sectors		Nubian Square	Ashmont-Fields Corner	Egleston Square	Hyde Square-Jackson Square	Mattapan Square	Brookline Village
23	Construction	$285,086,000	$695,316,000	$426,857,000	$157,051,000	$22,322,000	$82,318,000
31-33	Manufacturing	$224,677,000	$64,046,000	$666,875,000	$162,816,000	$18,631,000	$42,438,000
42	Wholesale Trade	$675,308,000	$1,903,294,000	$1,139,267,000	$286,887,000	$10,306,000	$142,579,000
44-45	Retail Trade	$659,843,000	$1,785,800,000	$1,340,528,000	$817,542,000	$331,812,000	$1,082,246,000
48-49	Transportation and Warehousing	$50,313,000	$96,246,000	$77,439,000	$17,096,000	$15,647,000	$10,074,000
51	Information	$90,898,000	$232,859,636	$247,503,000	$79,304,000	$47,682,000	$124,826,000
52	Finance and Insurance	$244,334,000	$289,094,000	$362,547,000	$151,160,000	$43,365,000	$101,003,000
53	Real Estate and Rental and Leasing	$244,161,000	$304,699,000	$514,162,000	$207,432,000	$59,069,000	$137,171,000
54	Professional and Technical Services	$199,514,000	$275,716,200	$440,457,000	$204,467,000	$31,467,000	$184,698,000
55	Management of Companies and Enterprises	$7,102,000	$0	$44,388,000	$14,204,000	$0	$22,242,000
56	Administrative and Waste Services	$58,582,729	$105,479,486	$112,288,243	$47,218,243	$17,122,000	$48,372,243
61	Educational Services	$41,473,253	$42,296,352	$66,886,628	$30,768,951	$5,094,401	$48,372,243
62	Healthcare and Social Assistance	$2,431,948,460	$788,638,800	$883,130,100	$883,130,100	$70,946,000	$6,759,113,500
71	Arts, Entertainment, and Recreation	$31,710,800	$49,333,600	$24,275,667	$883,130,100	$1,903,000	$15,700,067
72	Accommodation and Food Services	$104,589,000	$190,422,000	$196,524,000	$71,194,000	$10,536,000	$136,669,000
81	Other Services, Except Public Administration	$115,983,630	$275,646,290	$338,401,990	$162,124,155	$43,463,980	$84,275,908
92	Public Administration	$14,493,733	$12,090,667	$23,905,400	$11,876,743	$528,000	$18,456,001
99	Unassigned	$11,616,000	$10,176,667	$20,190,400	$10,082,000	$4,128,534	$7,759,160
Total All Industries		**$5,459,523,872**	**$7,098,887,364**	**$6,881,529,628**	**$4,175,524,549**	**$729,366,381**	**$9,022,693,551**

Retail Sector Details

The following sections will examine key sectors more closely. Besides retail trade, these sectors include arts, entertainment, and recreation; accommodation and food services; and other services. These sectors offer the kinds of goods and services that offer potential to enliven and activate underused parts of the Square and are areas that residents have expressed a desire to see more of in the Square.

The first set of figures compares the Retail Trade sector in each area by number of establishments, employment, and sales. Nubian Square has fewer retail establishments than the average. Mattapan Square has the fewest; Ashmont-Fields Corner the most.

A similar pattern holds for total retail employment, with Ashmont-Fields Corner and Egleston Square having the largest numbers of employees, Mattapan Square the fewest, and Nubian Square well below the average.

As shown in Figure E.24, total retail sales total retail sales follow a similar distribution, with Nubian Square the second lowest.

Figure E.22: Total Retail Establishments, Nubian Square and Comparison Areas, 2019

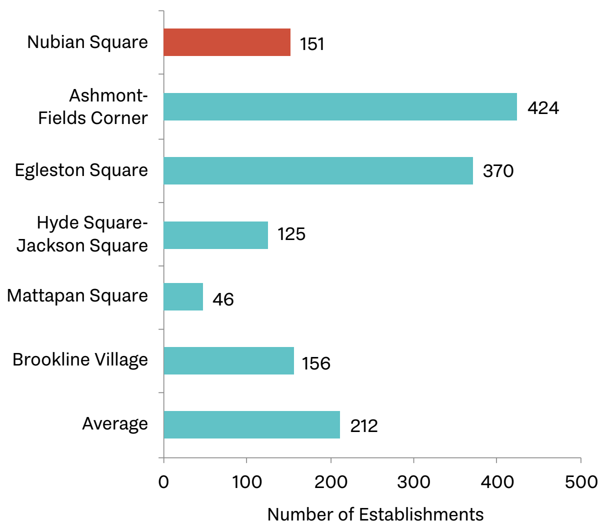


Figure E.23: Total Retail Trade Employment, Nubian Square and Comparison Areas, 2019

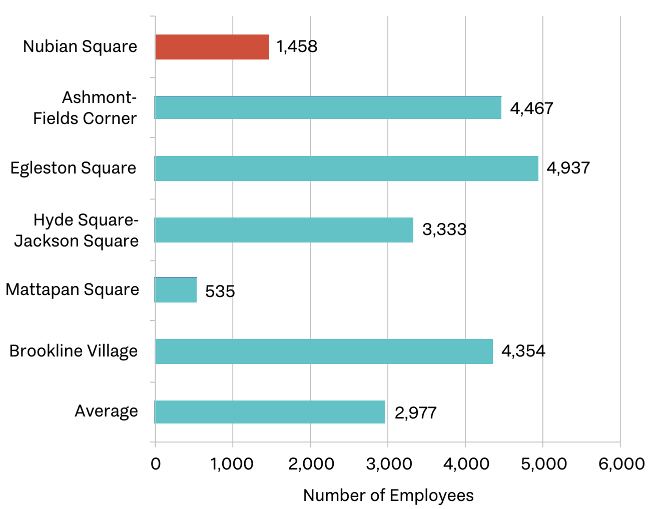
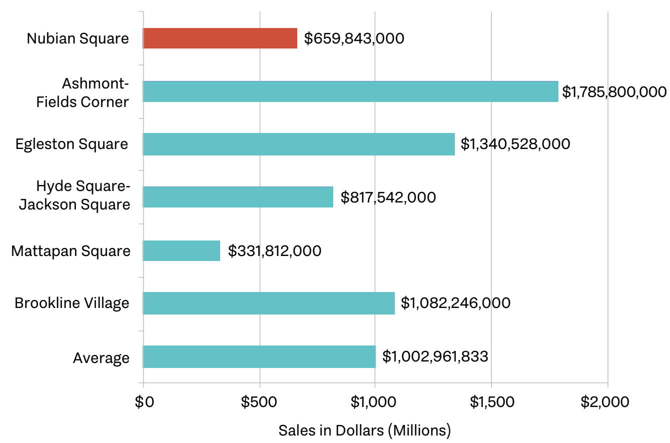


Figure E.24: Total Retail Trade Sales, Nubian Square and Comparison Areas, 2019



Arts, Entertainment, and Recreation Sector Detail

Arts, entertainment, and recreation are not large sectors, but they are important to keeping the Square active during non-work hours and days. As seen in Figure E.25, Nubian Square has fewer than average establishments in this sector, with Egleston Square having the most and Mattapan Square the fewest.

As shown in Figure E.26, Nubian Square's employment in this sector also lags the average but is still the third highest of the six areas, behind Ashmont-Fields Corner and Egleston.

As shown in Figure E.27, sales in this sector in Nubian Square exceed the average, but not by a large margin. Here again, Ashmont-Fields Corner and Egleston Square are the leaders with Nubian Square ranking third.

Figure E.25: Arts, Entertainment, and Recreation Establishments, Nubian Square and Comparison Areas, 2019

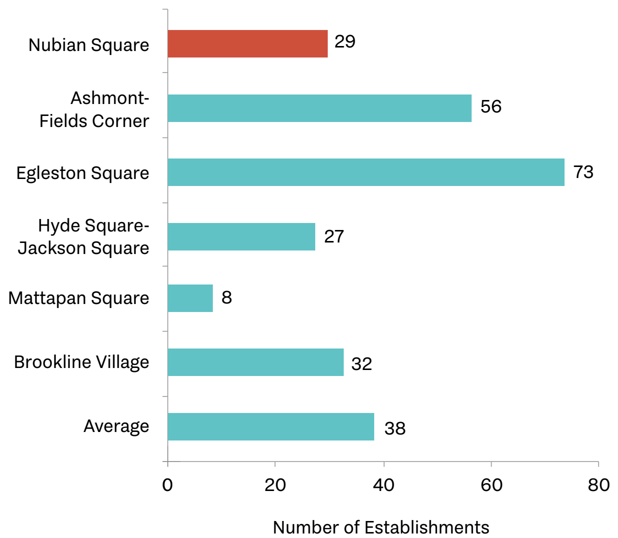


Figure E.26: Arts, Entertainment, and Recreational Employment, Nubian Square and Comparison Areas, 2019

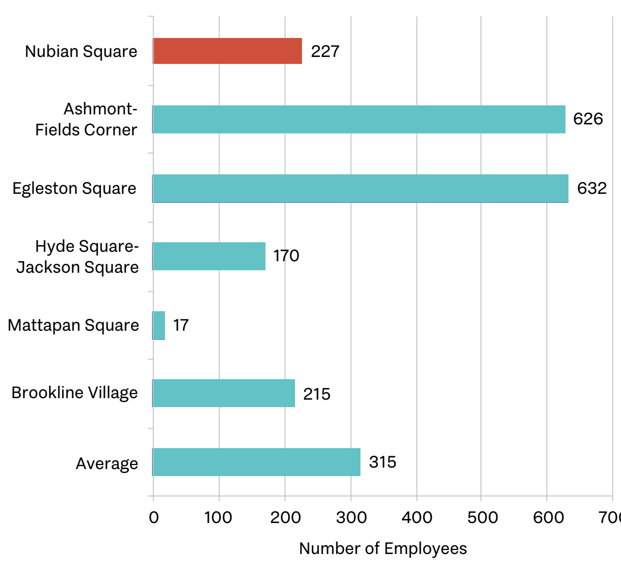
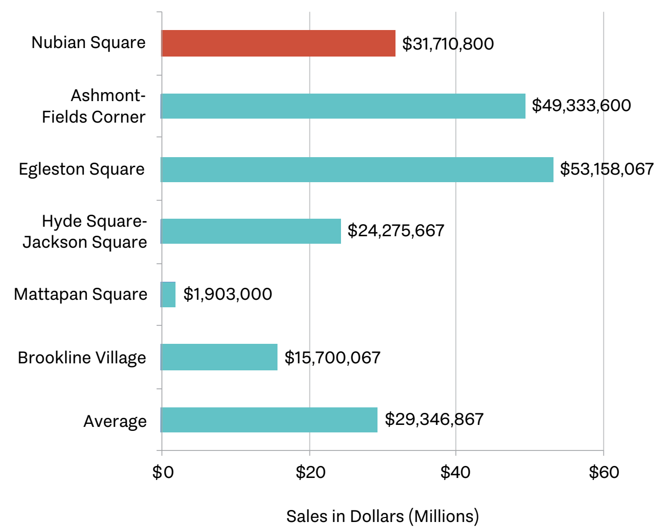


Figure E.27: Arts, Entertainment, and Recreation Sales, Nubian Square and Comparison Areas, 2019



Accommodation and Food Services Sector Detail

Accommodation and food services provide activity during work and non-work hours and are a key component of a vibrant center. As shown in Figure E.28, Nubian Square has slightly fewer establishments than the average, with the third lowest number. Egleston Square has the most.

Figure E.29 tracks employment in this sector, displaying similar trends across the geographies.

As shown in Figure E.30, sales in this sector are by far the highest in Ashmont-Fields Corner. Brookline Village is second. Nubian Square is third, but exceeds the average.

Figure E.28: Accommodation and Food Services Establishments, Nubian Square and Comparison Areas, 2019

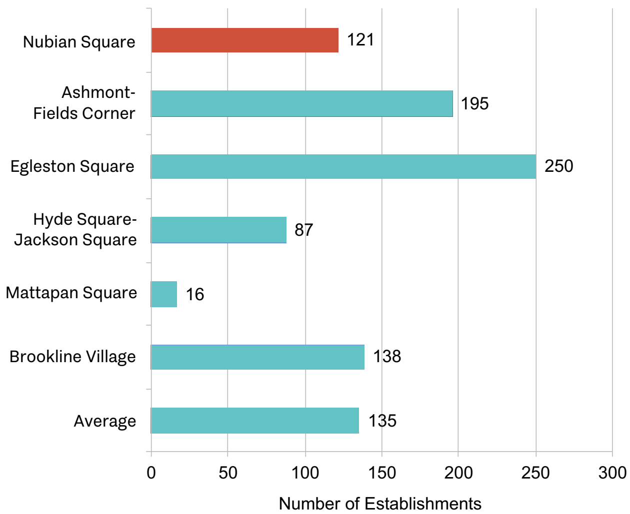


Figure E.30: Total Accommodations and Food Services Sales, Nubian Square and Comparison Areas, 2019

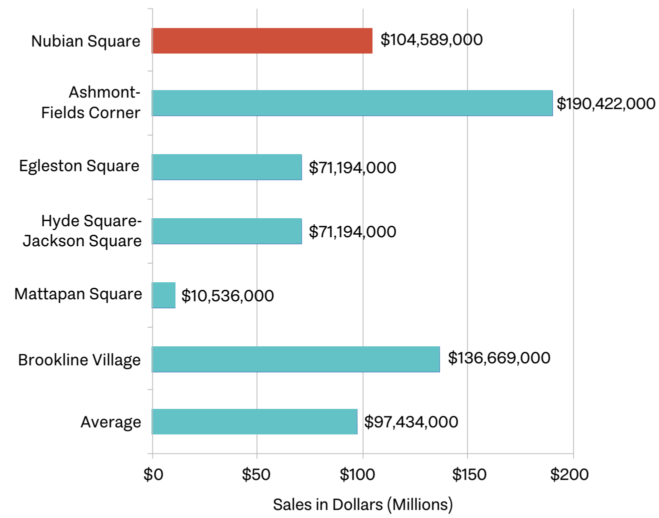
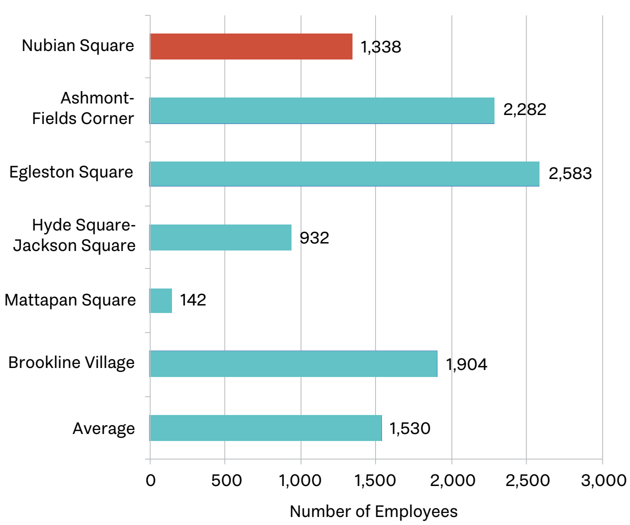


Figure E.29: Accommodation and Food Services Employment, Nubian Square and Comparison Areas, 2019



Other Services Sector Detail

Finally, other services is defined in the NAICS system as follows: Establishments in this sector are primarily engaged in activities such as equipment and machinery repairing, promoting or administering religious activities, grantmaking, advocacy, and providing dry cleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services. Private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household are included in this sector.

This sector would cover the kinds of small, independent businesses that could be valuable additions to the Nubian Square residential and business community. As shown in Figure E.31, Nubian Square currently ranks third among the six areas with regard to numbers of establishments engaged in these activities.

In employment, however, Nubian Square ranks second from the bottom, as shown in Figure E.32.

In business sales for other services, Nubian Square is below the average for the areas. Egleston Square is the clear leader by this measure, as shown in Figure E.33.

Figure E.31: Other Services Establishments (Except Public Administration), Nubian Square and Comparison Areas, 2019

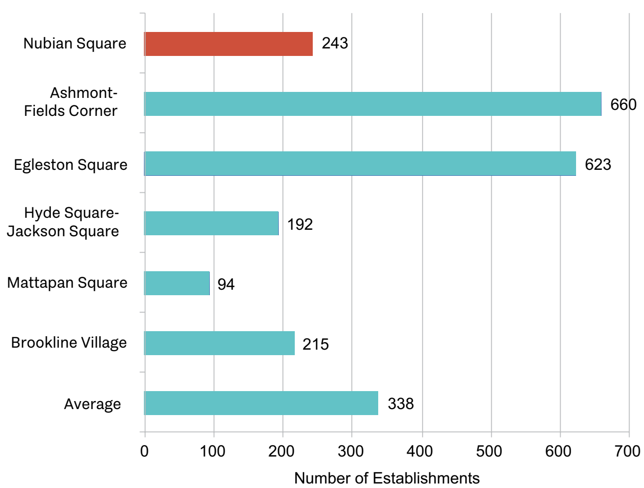


Figure E.33: Total Other Services Sales (Except Public Administration), Nubian Square and Comparison Areas, 2019

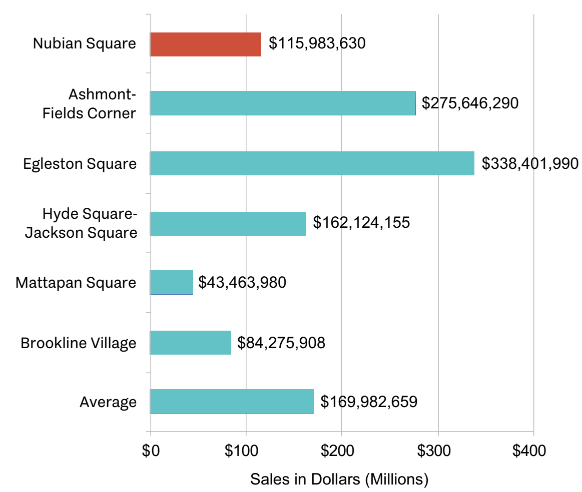
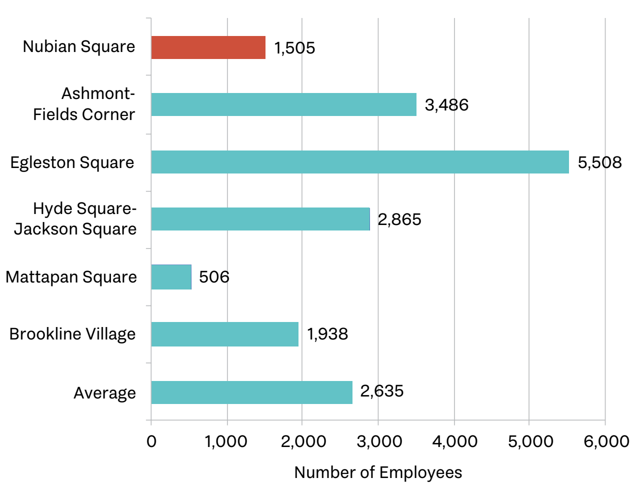


Figure E.32: Other Services (Except Public Administration) Employment, Nubian Square and Comparison Areas, 2019



Office Using Sector Detail

Office using businesses are of interest as they fuel upper-floor occupancy and generate employee spending. The market for office space in Boston is, however, highly competitive, with a wealth of newly-built facilities offering amenities which are difficult to build or renovate at the rents that can be achieved in Nubian Square.

For purposes of this analysis, these businesses are defined as NAICS codes 51 through 56: information; finance and insurance; real estate and rental and leasing; professional and technical services; management of companies and enterprise; and administrative.

As shown in Figure E.34, in number of office using establishments, Nubian Square is below the comparison areas' average.

In employment, however, Nubian Square, with its concentration of large public and nonprofit establishments, exceeds the average and is second only to Egleston Square. See figure E.35.

Figure E.34: Office Using Establishments, Nubian Square and Comparison Areas, 2019

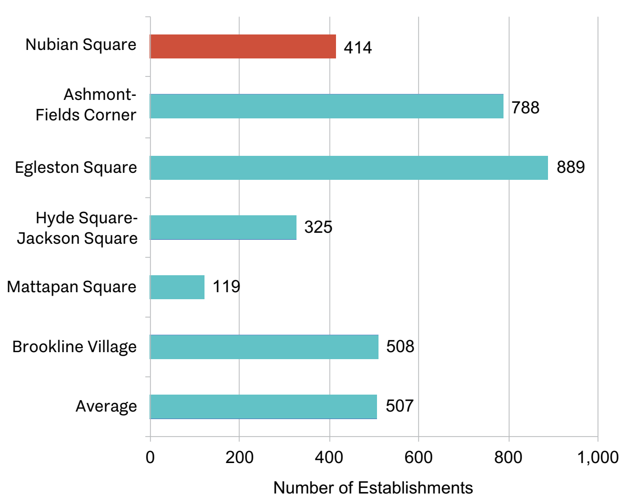
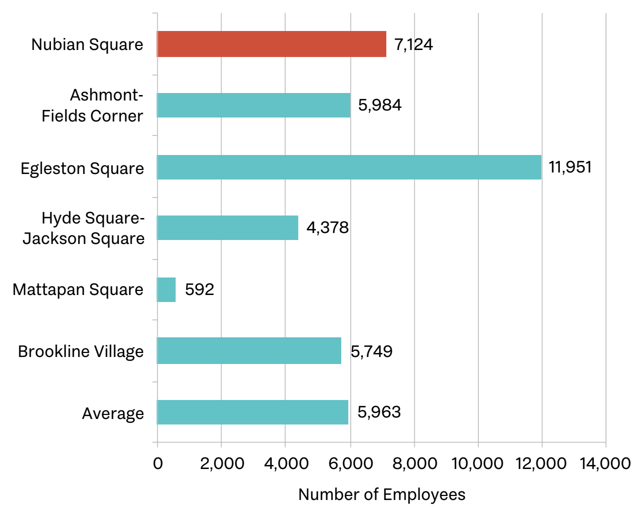


Figure E.35: Office Using Employment in Office Establishments, Nubian Square and Comparison Areas, 2019



Similarly, as shown in Figure E.36, Nubian Square office using businesses generate sales that exceed the average and are exceeded only by those in Ashmont-Fields Corner.

Household Spending and Business Sales Comparisons

Existing household spending patterns in the Nubian Square area are compared to spending patterns in the other areas below. Figure E.37 shows total retail spending, including food and drink sales, but excluding motor vehicle related spending and non-store retail spending, since these latter categories do not support a vibrant community retail scene.

The per household spending is shown against total business sales, which would include some sales to households from outside the areas. City of Boston figures are included for an additional point of comparison.

Nubian Square households exceed the average in per household sales by businesses in the area, but per household spending is slightly less than the average.

Figure E.36: Total Sales of Office Using Businesses, Nubian Square and Comparison Areas, 2019

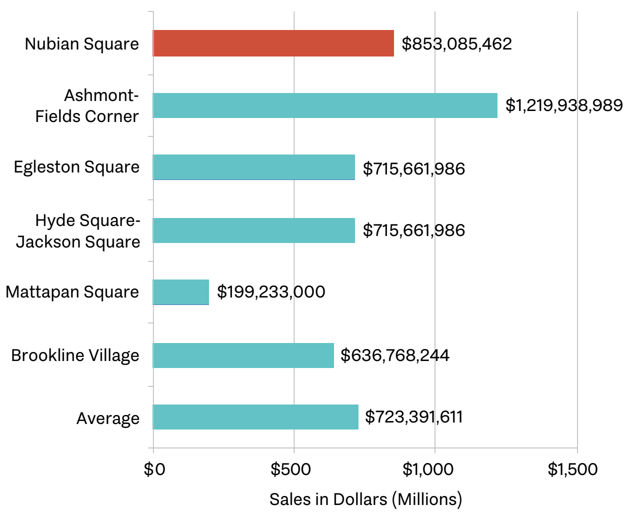
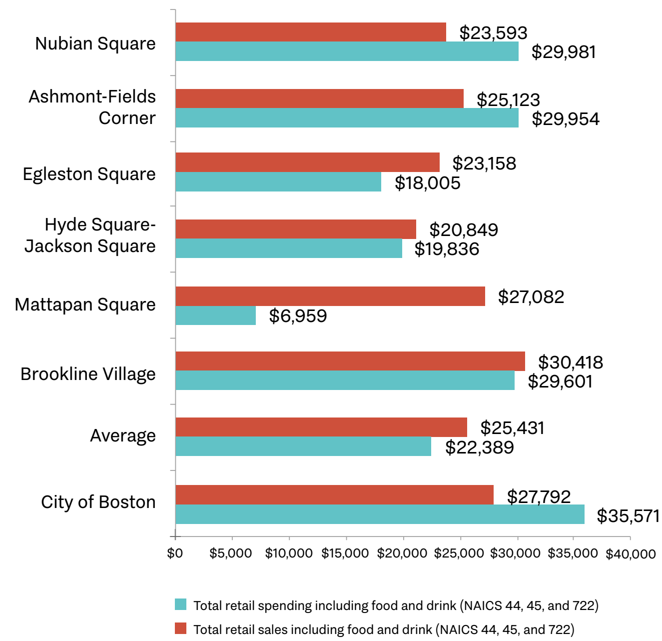


Figure E.37: Total Retail Spending and Sales per Household, Nubian Square and Comparison Areas, 2019



Appendix F: Comparative Analysis: Analogous Submarkets

A. Retail Market Real Estate Market Profiles

Metro Boston Retail Market Overview

According to data compiled and analyzed by the CoStar Group, the Metro Boston retail market supports over 236 million square feet of space with another 5 million square feet of inventory expected for delivery in the next five years.

The most recent fourth quarter report published by the CoStar Group states the following:

"...[D]espite retail's challenges across the country, Boston's retail market has historically enjoyed relatively strong performance. Incomes are approximately 45% higher than the United States overall and continue to grow at an outsized rate as a result of strong job growth in high paying medical and technology fields. Boston is also an under-supplied retail market and has a notably lower retail per square footage per capita than many other metro areas (approximately 49 square feet per capita).

Development has typically been subdued compared to its history, but new projects have opened across Metro Boston and leased well. Projects like WS Development's Seaport Square to Federal Realty Trust's Assembly Row have complemented office and multifamily inventory with attractive retail tenants, pulling demand both locally and from shoppers across the metro. Other bold mixed-use developments are attempting to replicate the successes of these projects. Boston Properties Hub on Causeway and its 200,000 square feet of urban retail recently wrapped up in North Station and the 400,000 square feet Arsenal Yards Redevelopment in Watertown is now fully underway. These mixed-use projects have flipped the dynamics of the retail market, once dominated by a select few areas such as Back Bay's Newbury Street.

Still, the strongest performance may be in the past. Rent growth in the third quarter of 2019 fell into the red for the first time this expansion. Vacancies, while still below the national rate, have flattened and are even slightly up from their trough in 2017. Store closures may play a role. More than a 1.3 million square feet of store closures were announced in Metro Boston in 2018, up from 450,000 square feet in 2017. Already in 2019, another 500,000 square feet of closures have been announced from the likes of Payless Shoe Stores and Shaw's Supermarket.

For well-located shopping centers, this trend will likely only be a blip and may even give landlords a chance to bring in new and innovative retailers. But this phenomenon could pose a challenge for aging urban and suburban centers.

Perhaps indicative of investor views of retail nationwide, sales volume has begun to slow in Boston. Volume in 2018 closed below that of 2017 and was more than 18% below that of its cyclical peak in 2016. The same slowdown in sales volume has been evidenced in multifamily and office as well, so declining sales volume may also be due to reinvestment risk. Selling typically means redeploying capital into another asset, which can be challenging with prices as expensive as they are in Boston."

Roxbury-Dorchester Retail Submarket Overview

According to statistics from the CoStar Group for quarter three 2019, rents in the Roxbury-Dorchester retail market currently hover at just below $25 per square foot with vacancies well below the metro average and other City of Boston neighborhood submarkets.

The general retail format dominates in this market (independents and free-standing retailers), with power centers like South Bay and neighborhood centers like Grove Hall (most anchored by grocery and other regional and national chain tenants) rounding out the mix.

Table F.1: Roxbury-Dorchester Retail Overview

Overview

ROXBURY-DORCHESTER RETAIL

12 Mo Deliveries in SF	12 Mo Net Absorption in SF	Vacancy Rate	12 Mo Rent Growth
47.1K	48.9K	1.4%	-2.4%

KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	0	–	–	–	0	0	0
Power Center	747,148	0%	$27.15	0%	0	0	0
Neighborhood Center	429,225	0.9%	$22.20	0.9%	0	0	0
Strip Center	87,753	0.6%	$27.63	1.9%	0	0	0
General Retail	4,354,302	1.7%	$24.43	2.2%	-5,974	8,000	0
Other	0	–	–	–	0	0	0
Submarket	**5,618,428**	**1.4%**	**$24.67**	**1.8%**	**-5,974**	**8,000**	**0**

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	-0.1%	3.0%	1.9%	6.6%	2006 Q2	0.7%	2017 Q1
Net Absorption SF	49.8K	41,780	8,591	238,144	2007 Q2	-55,624	2006 Q4
Deliveries SF	47.1K	38,340	27,843	178,616	2017 Q4	0	2016 Q4
Rent Growth	-2.4%	1.3%	-0.4%	4.5%	2017 Q3	-3.2%	2009 Q2
Sales Volume	$16.4M	$26.1M	N/A	$65.5M	2017 Q4	$6.7M	2010 Q2

Retail Submarket Market Comparisons

The Roxbury-Dorchester submarket (>5.5 million square feet) supports the largest inventory of retail space among the submarkets examined by this study, followed by Brookline-Newton (<5.5 million square feet), Jamaica Plain-South Suffolk (>3.5 million square feet), the Longwood Medical Area-Mission Hill-Fenway (>1.5 million square feet) and the South End (<1.5 million square feet).

At over 5.5 million square feet, the Roxbury-Dorchester market scale reflects the diffuse nature of the retail inventory throughout the urban markets and much of the existing space must be characterized as older and in need of modernization. Low rents , as will be discussed later, have clearly been a boon to occupancy, however, they also signal low sales volumes and potential weakness in underlying demand.

Retail Submarket Rents and Growth Rates

The analysis shows retail rents in the Roxbury-Dorchester submarket at just under $25 per square foot to be on par with the Metro Boston average, but among the lowest of Analogous Submarkets studied. Only Jamaica Plain and the neighborhoods to the south are lower. The highest performing submarket is Longwood Medical Area-Mission Hill-Fenway, where the demand from entertainment visitation, healthcare and life sciences employees, and tremendous residential density is generating the sales volumes needed to support higher rents.

As the leasing data discussed later will illustrate, retail rents for new spaces are now routinely over $50 per square foot (NNN) in places like the Fenway (some rents here are approaching $100 per square foot). For locations like Nubian Square, low sales volumes, poor space, quality, and the lack of coordinated management and marketing, must be addressed before aspirations for future retail improvements in the district can become a reality.

Figure F.2: Retail Space Inventory, 2019 Quarter Three

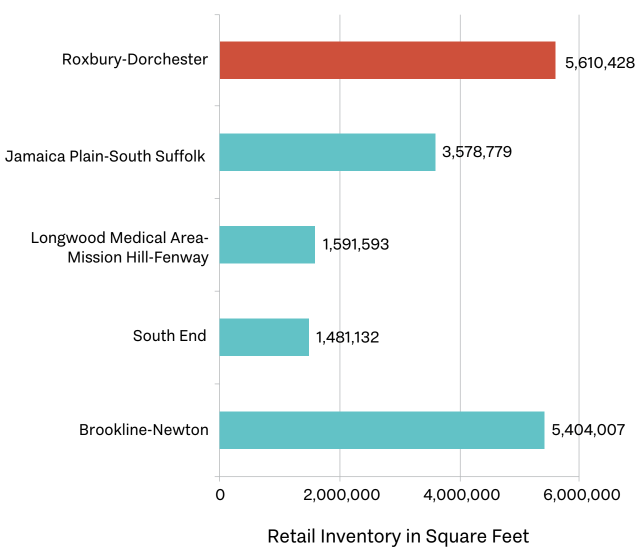
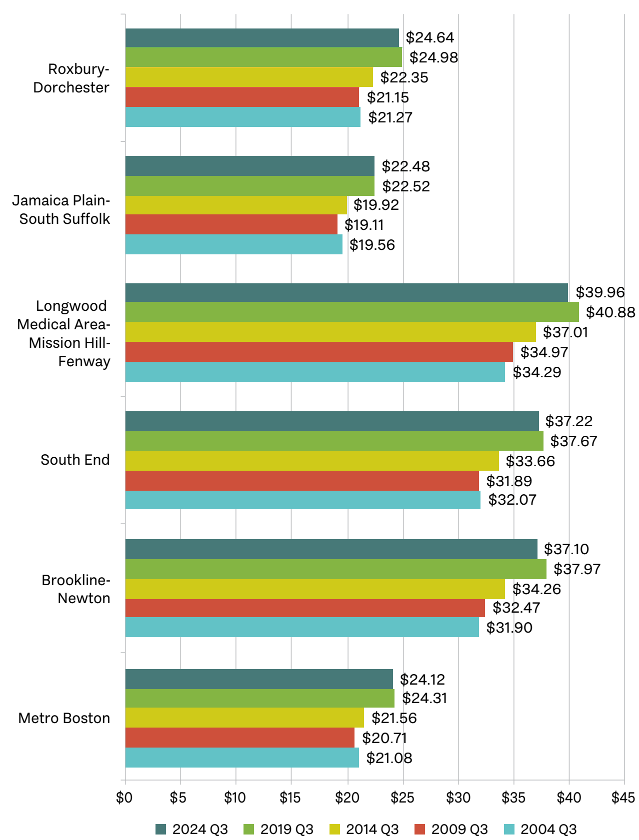


Figure F.3: Retail Rent Trends, 2004-2024



Retail market rents have been stable to declining market-wide since 2014, a function of broad trends in brick and mortar retail outlets. As illustrated in Figure F.4, the retail markets all boomed in 2014 but no district was unscathed during the 2009 Great Recession. Forecasts for the next five years portend small rent increases in the 0.5% per year realm.

Retail Sales Volumes (Imputed)

Retail market rents provide a benchmark for sales performance in the submarkets, as many retailers calibrate supportable rent as a function of gross sales, generally in the 6% to 8% of sales range. Assuming a typical occupancy ratio of 7%, the following sales indications for the submarkets are generated.

Note that Roxbury-Dorchester's imputed sales volumes per square foot, while generally consistent with the Metro Boston market average, are among the lowest of submarkets studied.

Figure F.4: Retail Rental Growth Trends, 2009-2024

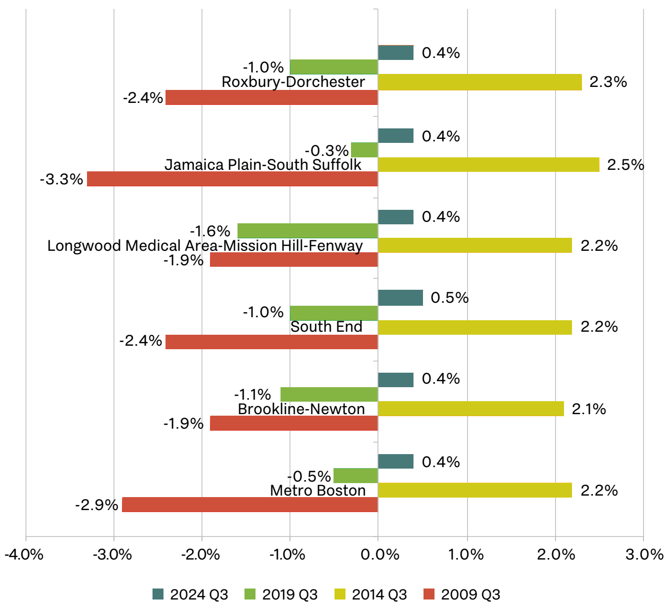
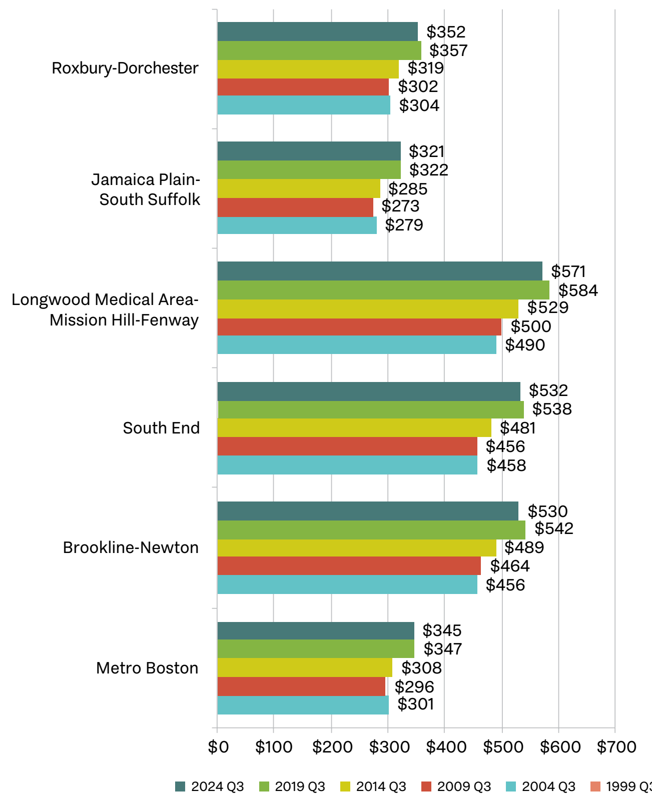


Figure F.5: Imputed Retail Sales Volumes Per Square Foot, 2004-2024



Retail Submarket Vacancy Rates

Retail vacancies in all the submarkets have been generally under 5% since 2010, with rates for Roxbury-Dorchester tracking among the lowest, no doubt rents are low.

Retail Submarket Absorption and Deliveries

As indicated in Figure F.7 and Figure F.8, retail absorption in all the submarkets has generally tracked with supply deliveries and notable tenant or market disruption.

Figure F.6: Retail Vacancy Rent Trends, 2004-2024

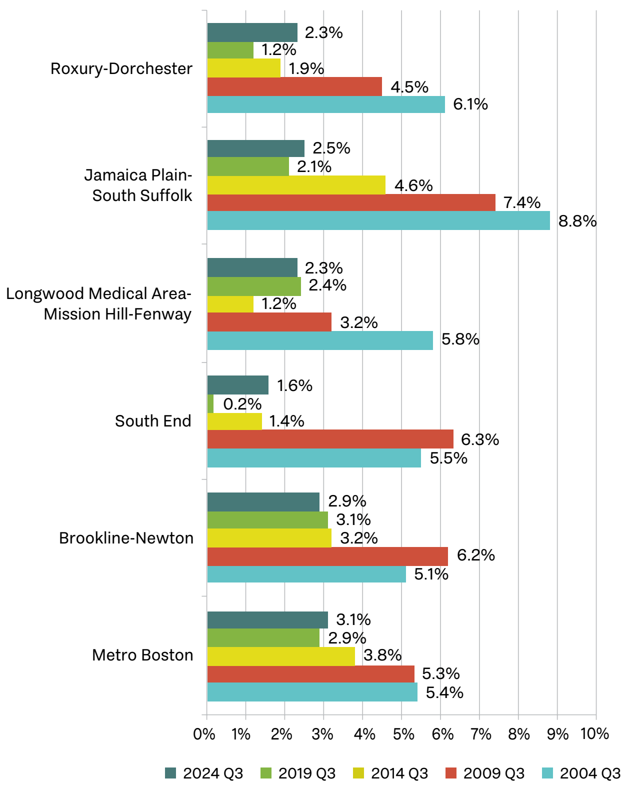


Figure F.7: Retail Absorption Trends, 2009-2024

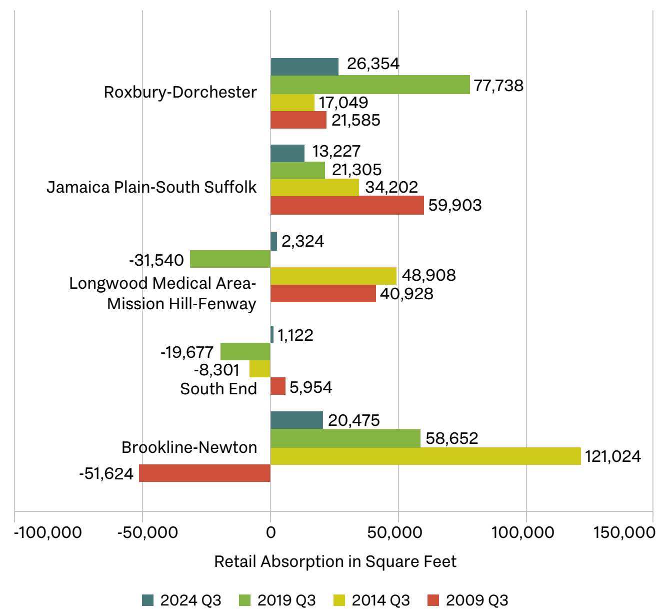
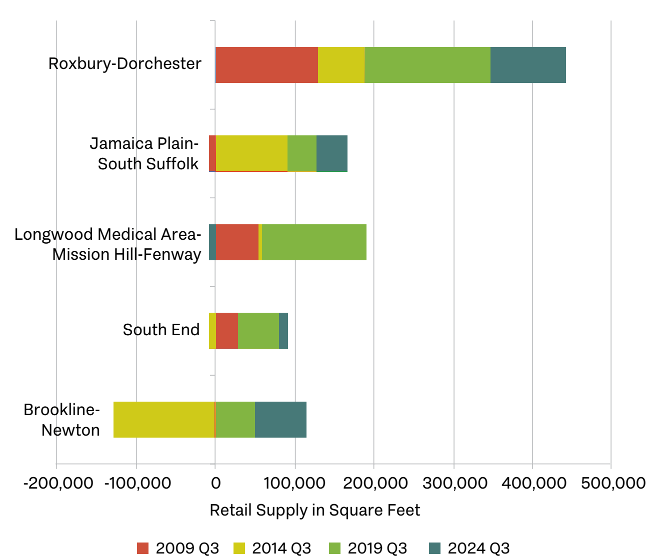


Figure F.8: Retail Supply Additions, 2009-2024



Nubian Square Retail Profile (0.75-Mile Radius)

As indicated by the CoStar Group summary in Table F.9, the Nubian Square walk zone (0.75-mile radius) supports roughly 868,000 square feet of retail space and has not changed appreciably in nearly two decades. Vacancy is now at the lowest point in over 10 years (excludes shadow vacancy not currently on the market) with average rents above $22.50 per square foot (NNN).

Table F.9: Retail Space, Nubian Square Walk Zone, 2006-2019

Year	Inventory SF	Vacant SF	Vacant %	Occupancy SF	Net Absorption SF	Leasing Activity SF	NNN Rent
2019	868,437	1,100	0.1%	867,337	-4,257	0	$22.53
2018	874,594	3,000	0.3%	871,594	2,600	1,419	$21.44
2017	883,126	14,132	1.6%	868,994	-13,988	4,312	$22.88
2016	895,126	12,144	1.4%	882,982	21,173	14,582	$17.28
2015	895,126	33,317	3.7%	861,809	70,671	20,547	$16.11
2014	862,026	70,888	8.2%	791,138	-29,256	18,958	$15.04
2013	869,127	46,233	5.3%	882,894	34,982	9,482	$9.58
2012	890,925	103,013	11.6%	787,912	-13,993	2,314	$13.16
2011	890,925	89,020	10.1%	801,905	-9,922	15,329	$17.42
2010	889,725	77,898	8.8%	811,827	-1,868	5,034	$18.79
2009	889,725	76,030	8.5%	813,695	3,695	2,475	$18.27
2008	889,725	74,225	8.3%	815,500	-14,725	17,000	$17.87
2007	889,725	65,000	7.3%	824,725	-17,475	10,021	$9.17
2006	889,725	50,025	5.6%	839,700	5,620	7,608	$13.19

Nubian Square Retail Leasing Activity

As indicated by the CoStar Group summary in Figure F.10, which reflects 40 leases undertaken in Nubian Square properties in the past 10 years, with a few notable exceptions, rents have generally been in the low- to mid-$20s most with concessions (two to three months free), most deals have been small (under 2,000 square feet), and most have reflected terms of five years in duration.

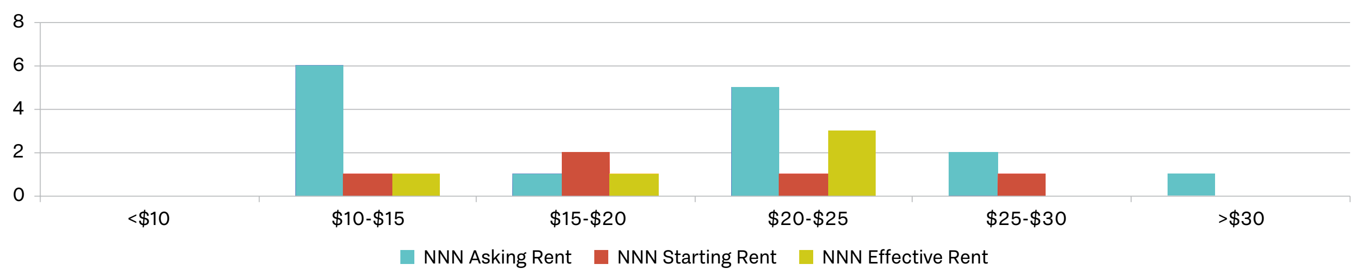
Figure F.10: Nubian Square Leasing Activity

Rents

LEASE COMPS REPORT

NNN Asking Rent Per SF	NNN Starting Rent Per SF	NNN Effective Rent Per SF	Average Months Free Rent
$22.42	**$20.57**	**$20.07**	**2.0**

DEALS BY NNN ASKING, NNN STARTING, AND NNN EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	15	$13.00	$22.42	$22.00	$34.88
NNN Starting Rent, Per Square Foot	5	$15.00	$20.57	$20.00	$28.00
NNN Effective Rent, Per Square Foot	5	$15.00	$20.07	$20.20	$25.00
Asking Rent Discount	5	0.0%	10.3%	9.1%	25.0%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	3	2	2	2	2

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	30	1	18	13	72
Deal Size	40	850	2,994	1,725	10,000
Lease Deal in Months	27	12.0	54.0	60.0	120.0
Floor Number	40	BSMT	1	1	4

Egleston Square (Columbus Avenue and Washington Street) Retail Leasing Activity

As indicated by the CoStar Group summary in Figure F.11, which reflects 20 deals undertaken in Egleston Square properties over the past 10 years, with a few notable exceptions, rents have generally been in the high-$20s to low-$30s, most with concessions (two to three months free), most deals have been small (under 3,000 square feet), and most have reflected terms of five years in duration.

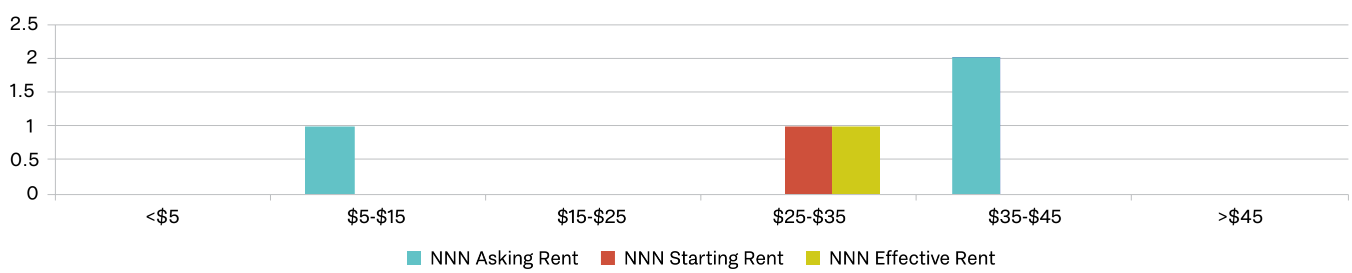
Figure F.11: Egleston Square Leasing Activity

Rents

LEASE COMPS REPORT

NNN Asking Rent Per SF	NNN Starting Rent Per SF	NNN Effective Rent Per SF	Average Months Free Rent
$28.32	$31.30	$31.30	2.0

DEALS BY NNN ASKING, NNN STARTING, AND NNN EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	3	$15.00	$28.32	$36.52	$36.92
NNN Starting Rent, Per Square Foot	1	$31.30	$31.30	$31.30	$31.30
NNN Effective Rent, Per Square Foot	1	$31.30	$31.30	$31.30	$31.30
Asking Rent Discount	1	14.3%	14.3%	14.3%	14.3%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	2	2	2	2	2

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	20	2	13	8	39
Deal Size	20	650	3,616	2,722	14,490
Lease Deal in Months	10	12.0	46.0	60.0	60.0
Floor Number	20	1	1	1	3

Jackson Square to Hyde Square (Centre Street) Retail Leasing Activity

As indicated by the CoStar Group summary in Figure F.12, which reflects 17 deals undertaken in Jackson Square-Hyde Square properties over the past 10 years, with a few notable exceptions, rents have generally been in the mid-$20s, most with concessions (one to two months free), most deals have been very small (under 1,500 square feet), and most have reflected terms of three to five years in duration.

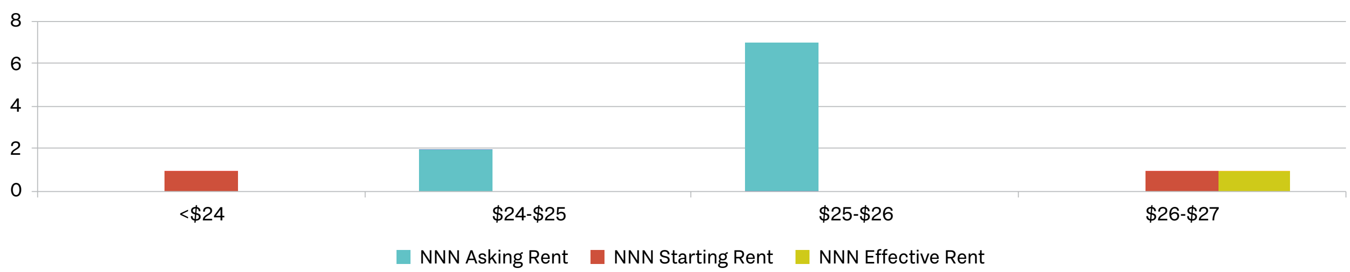
Figure F.12: Jackson Square to Hyde Square Leasing Activity

Rents

LEASE COMPS REPORT

NNN Asking Rent Per SF	NNN Starting Rent Per SF	NNN Effective Rent Per SF	Average Months Free Rent
$25.38	$22.05	$27.00	1.5

DEALS BY NNN ASKING, NNN STARTING, AND NNN EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	9	$25.00	$25.38	$25.50	$25.50
NNN Starting Rent, Per Square Foot	2	$17.00	$22.05	$22.00	$27.00
NNN Effective Rent, Per Square Foot	1	$27.00	$27.00	$27.00	$27.00
Asking Rent Discount	2	-5.9%	12.7%	13.1%	32.0%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	2	1	2	2	2

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	17	3	24	17	46
Deal Size	17	608	1,414	920	3,585
Lease Deal in Months	13	12.0	44.0	36.0	120.0
Floor Number	17	1	1	1	2

Hyde Square to South Street (Centre Street) Retail Leasing Activity

As indicated by the CoStar Group summary in Figure F.13, which reflects 20 deals undertaken on Centre Street between Hyde Square and South Street over the past 10 years, with a few notable exceptions, recent rents have generally been at or above $35 per square foot (asking rents are higher), most with concessions (four months free), most deals have been small (under 2,000 square feet), and most have reflected terms of five years in duration.

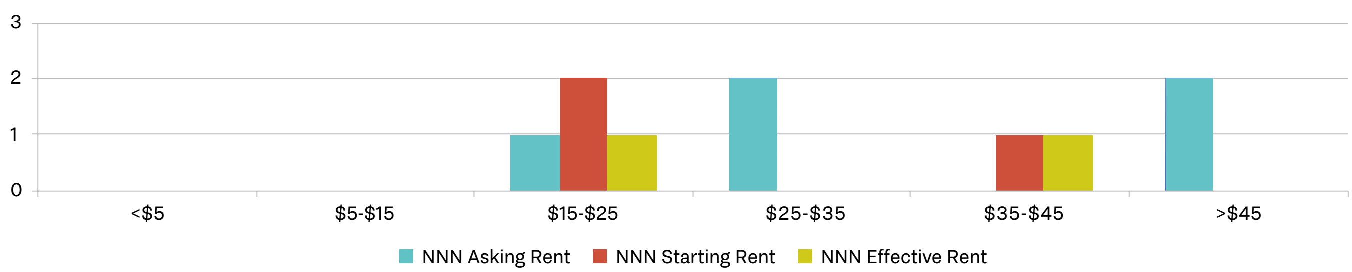
Figure F.13: Hyde Square to South Street Leasing Activity

Rents

LEASE COMPS REPORT

NNN Asking Rent Per SF	NNN Starting Rent Per SF	NNN Effective Rent Per SF	Average Months Free Rent
$35.01	$26.30	$26.63	4.0

DEALS BY NNN ASKING, NNN STARTING, AND NNN EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	5	$20.00	$35.01	$35.00	$53.97
NNN Starting Rent, Per Square Foot	3	$20.00	$26.30	$24.00	$37.50
NNN Effective Rent, Per Square Foot	2	$16.43	$26.63	$26.97	$37.50
Asking Rent Discount	1	31.4%	31.4%	31.4%	31.4%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	1	4	4	4	4

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	15	1	10	9	28
Deal Size	20	500	2,644	1,218	24,260
Lease Deal in Months	10	24.0	51.0	60.0	120.0
Floor Number	19	1	1	1	1

Ashmont to Fields Corner (Dorchester Avenue) Retail Leasing Activity

As indicated by the CoStar Group summary in Figure F.14, which reflects 48 deals undertaken on Dorchester Avenue between Ashmont and Fields Corner over the past 10 years, with a few notable exceptions, recent rents have generally been in the high-$20s to low-$30s per square foot (asking rents are higher), most with concessions (one to two months free), most deals have been small (under 1,500 square feet), and most have reflected terms of three years in duration.

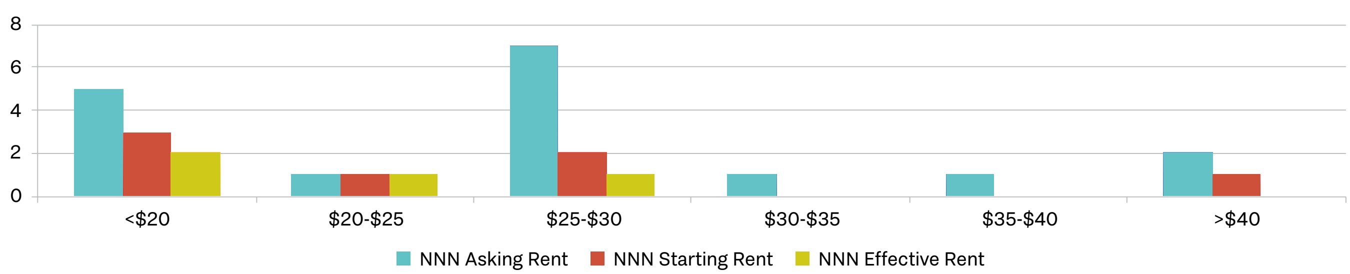
Figure F.14: Ashmont to Fields Corner Leasing Activity

Rents

LEASE COMPS REPORT

NNN Asking Rent Per SF	NNN Starting Rent Per SF	NNN Effective Rent Per SF	Average Months Free Rent
$30.11	$19.76	$20.44	2.0

DEALS BY NNN ASKING, NNN STARTING, AND NNN EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	17	$15.11	$30.11	$27.50	$45.00
NNN Starting Rent, Per Square Foot	7	$4.00	$19.76	$21.00	$45.00
NNN Effective Rent, Per Square Foot	4	$15.00	$20.44	$22.28	$28.00
Asking Rent Discount	5	-5.0%	0.4%	0.0%	5.5%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	2	2	2	2	2

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	45	0	10	8	51
Deal Size	48	300	1,661	1,250	7,458
Lease Deal in Months	30	12.0	36.0	18.0	180.0
Floor Number	48	1	1	1	2

Mattapan Square (Blue Hill Avenue and River Street) Retail Leasing Activity

As indicated by the CoStar Group summary in Figure F.15, which reflects 23 deals undertaken on in Mattapan Square over the past 10 years, with a few notable exceptions, recent rents have generally been between $25 and $30 per square foot, few with concessions, most deals have been small- to mid-sized (under 3,000 square feet), and most have reflected terms of five years in duration.

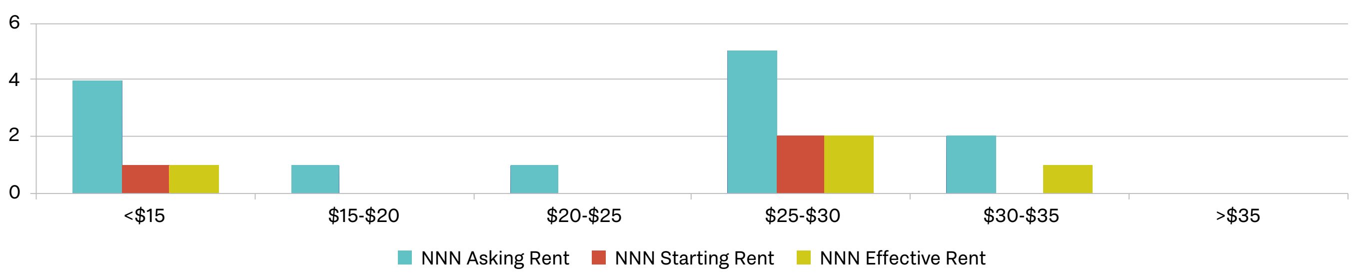
Figure F.15: Mattapan Square Leasing Activity

Rents

LEASE COMPS REPORT

NNN Asking Rent Per SF	NNN Starting Rent Per SF	NNN Effective Rent Per SF	Average Months Free Rent
$18.21	$22.20	$24.14	–

DEALS BY NNN ASKING, NNN STARTING, AND NNN EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	13	$6.00	$18.21	$26.00	$35.00
NNN Starting Rent, Per Square Foot	3	$13.00	$22.20	$26.00	$30.00
NNN Effective Rent, Per Square Foot	4	$13.00	$24.14	$28.00	$35.00
Asking Rent Discount	3	-23.9%	-4.4%	0.0%	0.0%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	–	–	–	–	–

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	19	3	15	10	56
Deal Size	23	582	2,787	2,000	8,668
Lease Deal in Months	13	12.0	50.0	60.0	120.0
Floor Number	23	BSMT	1	1	2

Brookline Village (Harvard Street) Retail Leasing Activity

As indicated by the CoStar Group summary in Figure F.16, which reflects 22 deals undertaken on in Brookline Village over the past 10 years, with a few notable exceptions, recent rents have generally been between $35 and $40 per square foot, most with concessions (one to two months free), most deals have been small (under 1,500 square feet), and most have reflected terms of five years in duration.

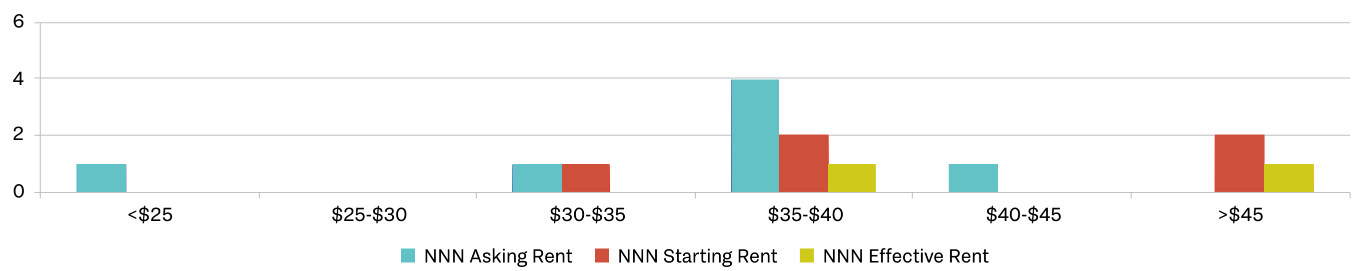
Figure F.16: Brookline Village Leasing Activity

Rents

LEASE COMPS REPORT

NNN Asking Rent Per SF	NNN Starting Rent Per SF	NNN Effective Rent Per SF	Average Months Free Rent
$36.38	**$48.77**	**$56.27**	**3.3**

DEALS BY NNN ASKING, NNN STARTING, AND NNN EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	7	$25.00	$36.38	$36.00	$44.00
NNN Starting Rent, Per Square Foot	5	$34.00	$48.77	$40.00	$60.00
NNN Effective Rent, Per Square Foot	2	$35.11	$56.27	$47.56	$60.00
Asking Rent Discount	1	-4.6%	-4.6%	-4.6%	-4.6%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	3	3	3	3	4

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	19	1	7	5	17
Deal Size	22	650	1,860	1,395	6,606
Lease Deal in Months	13	12.0	53.0	60.0	120.0
Floor Number	22	LL	GRND	1	MEZZ

B. Commercial Office Real Estate Market Profiles

Metro Boston Office Market Overview

According to data compiled and analyzed by the CoStar Group, the Metro Boston office market supports over 346 million square feet of space with another 23 million square feet of inventory expected for delivery in the next five years.

The most recent quarter four report published by the CoStar Group states the following:

"...[O]verall performance is strong, driven by rapidly expanding tech and biotech firms, being drawn to large blocks of space in the Central Business District, the Seaport, Cambridge, North Allston, and suburban markets such as Somerville, Waltham, and Watertown, where the quality of environment needed for employee retention and recruitment can be accommodated.

Despite strong current conditions, warnings signs have begun to emerge. Net absorption has been historically tepid in 2019, even turning negative in the third quarter. This comes after essentially unabated positive absorption this cycle. The forecast calls for strong positive absorption in the next several quarters, meaning slow recent absorption may be a blip but is still a trend worth noting. The struggles of coworking giant WeWork also looms over fundamentals. The firm leases more than 1.5 million square feet in Metro Boston, including 2.6% and 1.6% of the entire inventory of Back Bay and the Financial District respectively. While Boston does not nearly have the same exposure as other major metros like New York or San Francisco, a slowdown in leasing, or even give backs of space, could be a headwind to current conditions.

While rent growth is down from early cycle highs, gains continue at a consistent pace in response to tight vacancies. Due to their particular scarcity, upper floors and large blocks of space in the urban core have reportedly seen the biggest rent increases. Other changes have emerged in the rental landscape in response to low vacancy rates.

In the City of Boston, quoted NNN rents have reportedly become the norm, as have percentage bumps above 2%. While rents are likely to continue their rise in the near term, Boston is a tech-heavy economy, and rent declines during economic slowdowns are typically sharper than in other markets.

On the supply side, deliveries for the next several quarters are expected to be minimal, aiding the near-term vacancy forecast. However, a supply threat looms in 2021 and beyond. Millions of square feet have broken ground in 2019, including three towers in the Central Business District alone, meaning the market's supply peak has likely yet to hit the metro. While much of the space underway is already committed, risks may come from backfill space when the economic outlook may be murkier than it is today."

Roxbury-Dorchester Office Submarket Overview

According to statistics from the CoStar Group for quarter three 2019, rents in the Roxbury-Dorchester office market currently hover just above $30 per square foot with vacancies well below the metro average in this cycle, primarily due to limited supply and a number of owner-occupied buildings.

Several of the largest office buildings here are owned by the City of Boston, including 1010 Massachusetts Avenue (220,000 square feet) and the Bruce C. Bolling Municipal Building (215,000 square feet). The Bruce C. Bolling Municipal Building is the only substantial supply addition this cycle, and little was delivered the previous cycle. Many of the largest lessees of space are typically nonprofits or smaller, local firms that typically do not take large blocks of space. Therefore, vacancies have changed only marginally since 2015.

Table F.17: Roxbury-Dorchester Office Market Overview

Overview

12 Mo Deliveries in SF	12 Mo Net Absorption Per SF	Vacancy Rate	12 Mo Rent Growth
0	51.1K	1.5%	1.4%

KEY INDICATORS

Current Quarter	Rentable Building Area	Vacancy Rate	Market Rent	Availability Rate	Net Absorption, Square Feet	Deliveries, Square Feet	Under Construction
4 Star and 5 Star	0	–	–	–	0	0	0
3 Star	2,271,296	1.3%	$30.71	5.3%	-3,382	0	135,512
1 Star and 2 Star	1,566,526	1.9%	$32.90	2.9%	6,253	0	0
Submarket	3,837,822	1.5%	$31.57	4.3%	2,871	0	135,512

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	-1.4%	4.8%	3.5%	12.7%	2008 Q2	0.6%	2000 Q3
Net Absorption, Square Feet	51,100	20,261	22,313	271,394	2015 Q3	-210,207	2008 Q2
Deliveries, Square Feet	0	23,196	54,396	215,000	2015 Q4	0	2019 Q3
Rent Growth	1.4%	3.0%	-0.2%	16.2%	2000 Q4	-14.0%	2002 Q3
Sales Volume	$118M	$15.8M	N/A	$118.6M	2019 Q3	$0	2011 Q4

Office Submarket Market Comparisons

The Boston neighborhood office submarkets, notably Roxbury-Dorchester (<4.0 million square feet), Jamaica Plain (<1.0 million square feet) and the South End (<4.0 million square feet) markets, are very small by comparison to the prime Central Business District, Seaport, and Back Bay institutional submarkets and have historically been unable to compete for a meaningful share of Metro Boston's growing office demand. Conversely, note in Figure F.18 that the size of the Longwood Medical Area-Mission Hill-Fenway, and Brookline (especially Chestnut Hill) submarkets (both supporting over 8 million square feet), reflect their historic appeal to fast growing healthcare and life sciences sectors.

Office Submarket Rents and Growth Rates

The analysis in Figure F.19 shows office rents in the Roxbury-Dorchester submarket to be among the lowest of analogous districts studied, with current rents at just over $30 per square foot (only Jamaica Plain and the neighborhoods to the south are lower). The highest performing submarket is Longwood Medical Area-Mission Hill-Fenway, where the competition among healthcare and life sciences users is bidding up prices to well over $50 per square foot. Note that rents above $50 are now necessary to support the cost of new Class A office construction. For locations like Nubian Square, this underscores the importance of economic development policy commitments such as those reflected by the Bolling Building to aspirations for future office growth in the district.

Figure F.18: Office Submarket Market Comparisons, 2019 Quarter Three

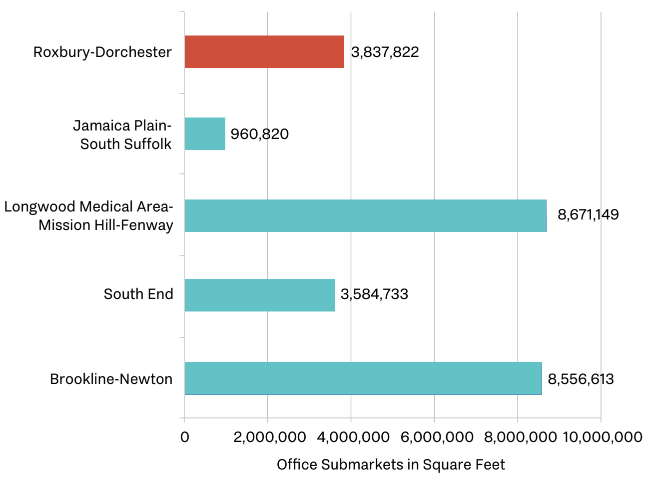
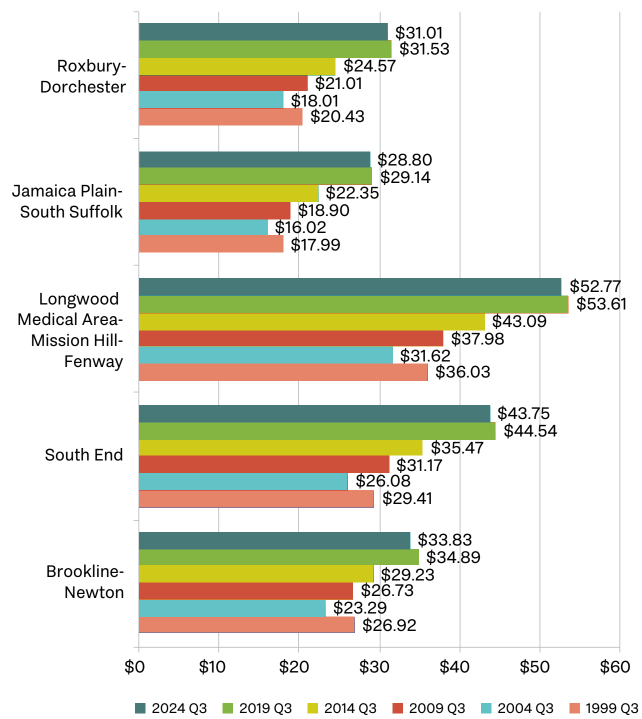


Figure F.19: Office Rent Trends, 1999-2024



The commercial markets are highly cyclical and tend to be especially sensitive to external economic shock. As illustrated in Figure F.20, the office markets all boomed in 1999 and 2014 but no district was unscathed during the 2009 Great Recession. Forecasts for the next five years portend small rent declines--in the 1% per year realm.

Office Submarket Vacancy Rates

Office vacancies in all the submarkets have been generally under 10% since 2010, with rates for Roxbury-Dorchester tracking among the lowest, no doubt because the public occupancies that dominate the tenant mix are highly stable and not prone to market risk or disruption.

Figure F.20: Annual Office Rental Growth Rates, 1999-2024

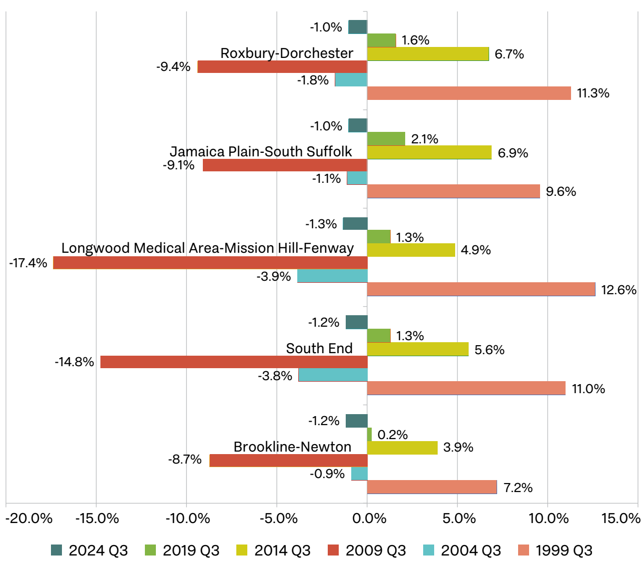
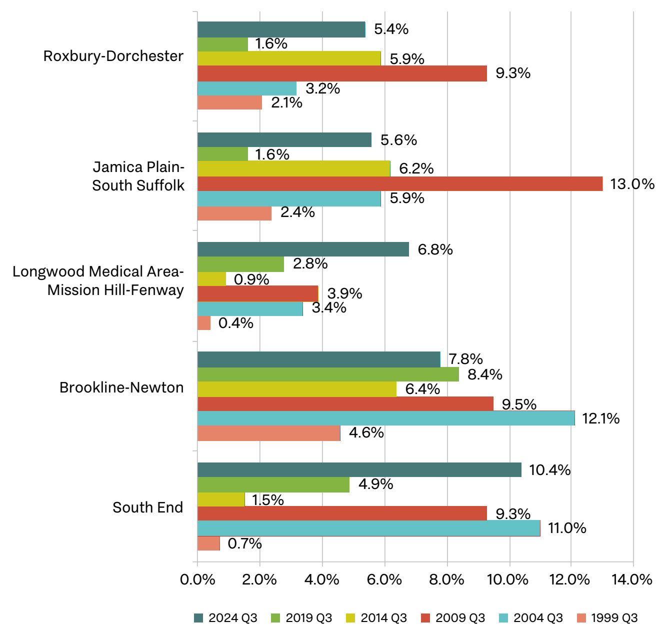


Figure F.21: Office Vacancy Trends, 1999-2024



Office Submarket Absorption and Deliveries

As indicated by Figure F.22 and Figure F.23, office absorption in all the submarkets has generally tracked with supply deliveries and notable tenant or market disruption.

Figure F.22: Office Net Absorption, 1999-2024

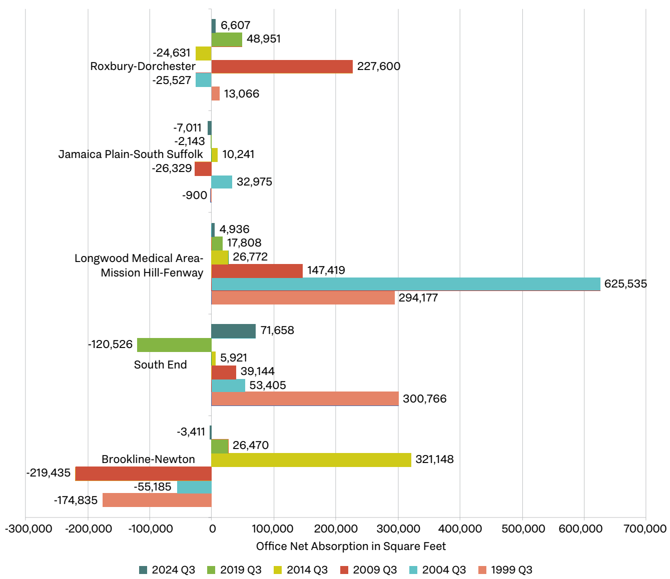
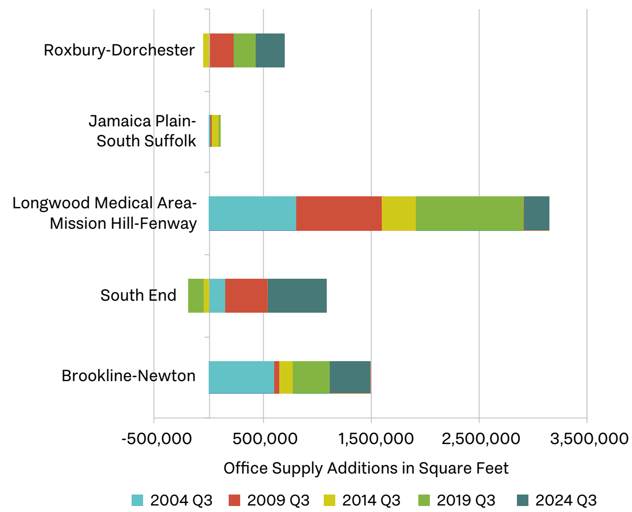


Figure F.23: Office Supply Additions, 1999-2024



Nubian Square Office Leasing Activity

As indicated by the CoStar Group summary in Figure F.24, which reflects 50 deals undertaken in Nubian Square properties over the past 10 years, with a few notable exceptions, rents have generally been in the high-$20s to low-$30s per square foot, most with concessions (one to two months free), most deals have been small (under 5,000 square feet), and most have reflected terms under five years in duration.

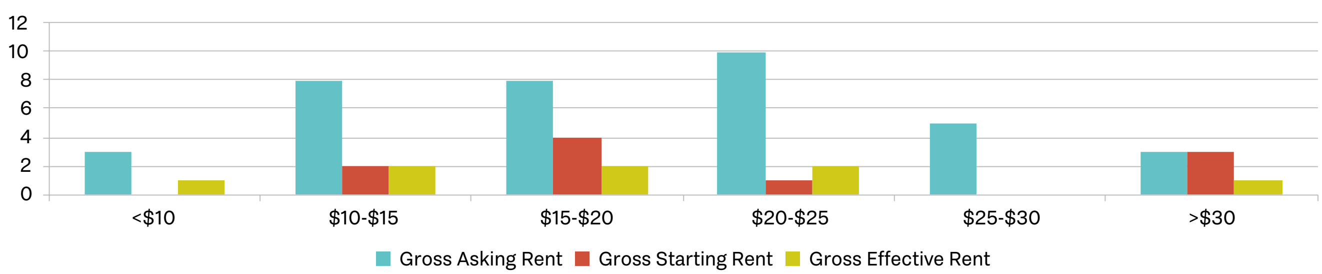
Figure F.24: Nubian Square Office Leasing Activity

Rents

LEASE COMPS REPORT

Gross Asking Rent Per SF	Gross Starting Rent Per SF	Gross Effective Rent Per SF	Average Months Free Rent
$20.02	$29.00	$19.20	1.2

DEALS BY GROSS ASKING, GROSS STARTING, AND GROSS EFFECTIVE RENT



SUMMARY STATISTICS

Rent	Deals	Low	Average	Median	High
NNN Asking Rent, Per Square Foot	37	$8.00	$20.02	$20.00	$46.27
NNN Starting Rent, Per Square Foot	10	$12.48	$29.00	$19.44	$38.00
NNN Effective Rent, Per Square Foot	8	$8.01	$19.20	$17.00	$31.51
Asking Rent Discount	7	-26.0%	-10.2%	0.0%	-61.7%
Tenant Improvement Allowance	–	–	–	–	–
Months Free Rent	5	0	1	1	2

Lease Attributions	Deals	Low	Average	Median	High
Months on Market	44	1	21	14	79
Deal Size	50	200	6,123	2,233	43,031
Lease Deal in Months	34	12.0	48.0	36.0	120.0
Floor Number	50	LL	1	1	4

Appendix G: Retail Opportunity Gap Analysis

The retail spending opportunity/gap analysis is a tool used by major retailers and chain restaurants to gauge market demand and competition within a specified geographic area. It presents a snapshot of the current consumer spending on various retail categories within a specified geographic area alongside actual retail store sales in those same categories within the same geographic area. Where expenditures by households in the market area exceed sales in that market area, a gap or opportunity exists for new or existing stores within the market area to "capture" more of those household expenditures. (This loss of potential sales is also called "leakage.") Conversely, where market area household expenditures are less than actual sales for a category, it indicates that stores in that category already attract consumer dollars from outside the market area and the opportunity to draw more retail activity may be more limited, or may require greater effort.

The analysis is predicated on the idea that people will typically purchase goods and services within the shortest available walking or drive time from where they live. The principle applies to comparable and competitive goods, services, and pricing: there is no guarantee of success based strictly on location advantage, which simply presents the opportunity.

Retailers typically define market areas in terms of drive times, with a 15-minute drive time considered the maximum time consumers would be willing to drive for all but the largest stores and store types. In the case of Nubian Square, however, the study team concluded that a much smaller market area was appropriate, given the nature of the (mostly small) businesses in Nubian Square, the density of population in the area, and the proximity of other comparable market areas. An area described by circles with 0.75-mile and 1.5-mile radii capture the Nubian Square's business activities. The 0.75-mile radius is also the well-recognized customer walk zone, while 1.5 miles represents a secondary, but still important local market area for residents traveling for goods and services by car or transit.

To provide a context for the potential of this sector, Table G.1 shows the total population, number of employees, retail expenditures for both residents and employees (demand), retail sales (supply), and the total gap within 0.75 miles and 1.5 miles of the center of Nubian Square, for which the team used the Bruce C. Bolling Building Municipal Building at 2300 Washington Street.

As indicated, aggregate retail demand exceeds aggregate business sales by a relatively small amount within the 0.75-mile radius, suggesting some opportunity for new or expanded business activity but at 1.5 miles, residents are clearly buying less than local businesses are selling, indicating that businesses are attracting customers from outside the area.

Table G.1: Overview of Nubian Square Retail Market Areas

	0.75-Mile Radius	1.5-Mile Radius
Population	41,255	184,236
Total Employees	28,590	197,607
Median Income	$39,659	$51,318
Total Retail Expenditures	$627,950,785	$3,404,213,305
Total Retail Sales	$579,412,096	$4,455,470,188
Total Opportunity Gap	**$48,538,689**	**($1,051,256,883)**

However, the totals mask variations at the sector level. Indeed, there are several sectors in which the resident population is spending some of their retail dollars outside the market areas, signaling opportunities for several business categories to draw more spending back into the area.

Data in Table G.2 summarize the analysis of those sectors in which current consumer expenditures (demand) exceed actual store sales (supply) within the local retail market areas in 2019 and projected to 2024. The analysis shows where the gaps between supply and demand are sufficiently large to indicate an opportunity to capture sales leakages, either through better sales performance in existing stores, location of new stores, or expansion of existing businesses. The market areas for these sectors are most likely to be within a 1.5-mile radius of Nubian Square. The final column in Table G.2 shows estimated annual growth rates for the retail categories over the next five years.

If about a quarter of the total leaked expenditure potential or “opportunity gap” were deployed to support new square footage, between 78,560 square feet and 148,520 square feet of additional business activity could potentially be borne by 2019 resident and employee spending within a 1.5-mile radius of Nubian Square.

The number of stores would be between 17 and 31. By 2024, the additional square footage would range from 87,000 square feet to 163,000 square feet or from 20 to 34 stores. It is important to emphasize that these estimates are based on broad industry averages of sales, store sizes, and estimates of spending and are only indicative of potential. Actual business success depends on many other factors besides demand. The numbers suggest sectors in which Nubian Square businesses might find opportunities to do better and advocates for new additions to Nubian Square might search for interest.

Those sectors include: furniture and floor coverings, hardware, garden centers, small grocery and meat markets, health and personal care, hobbies and toys, gifts and novelties, and limited service restaurants and buffets.

Understand that the gap analyses do not mean there is no opportunity for growth or improvement outside of these sectors, simply that these offer an evidence-based understanding of what is missing from the area from a consumer perspective. Also understand that the presence of a “gap” is no guarantee. The analysis provides a picture of current business opportunity for existing retailers to do better by capturing a greater share of customer purchases in existing stores and for new retailers to locate or expand facilities to take advantage of unmet customer demand.

A successful revitalization plan for Nubian Square must include strategies for business retention and improved profitability for those that have already made a bet on Nubian Square as well as signaling that Nubian Square is a place to do business for new enterprises that may be seeking opportunities to innovate, expand, or relocate.

Table G.2: Retail Opportunities in Nubian Square Retail Market Area, 1.5-Mile Radius: 2019 and 2024 Projected

Retail Stores	Market Area Gap 2019	Supportable Square Feet 2019	Supportable Square Feet 2024	Range of Potential Square Feet of New or Expanded Business Activity 2019		Range of Potential Number of Stores 2019		Range of Potential Square Feet of New or Expanded Business Activity 2024		Range of Potential Number of Stores 2024		Projected Annual Demand Growth from 2019
Furniture Stores (NAICS 4421)	$14,061,379	39,721	47,666	5,000	10,000	1	2	5,000	10,000	1	2	3.72%
Floor Covering Stores (NAICS 44221)	$10,423,068	27,286	32,470	4,100	8,200	1	2	4,100	8,200	1	2	3.47%
Hardware Stores (NAICS 44413)	$4,234,178	16,540	19,517	–	5,000	0	1	–	5,000	0	1	3.45%
Nursery, Garden Center, and Farm Supply Stores (NAICS 44422)	$18,838,654	73,588	87,570	6,400	9,600	2	3	6,400	9,600	2	3	3.46%
Grocery Stores (NAICS 4451)	$62,291,628	96,877	111,408	20,000	40,000	1	2	20,000	40,000	1	2	2.81%
Meat Markets (NAICS 44521) Specialty Foods SPSF	$4,098,482	10,645	12,241	–	3,500	0	1	–	3,500	0	1	2.87%
Other Health and Personal Care Stores (NAICS 44619)	$11,584,805	36,090	42,947	4,100	12,300	1	3	8,200	12,300	2	3	3.57%
Hobby, Toy, and Game Stores (NAICS 45112)	$8,336,270	15,240	17,831	2,287	4,574	1	2	4,574	6,861	2	3	3.24%
All Other General Merchandise Stores (NAICS 452319)	$23,737,043	104,767	121,530	20,000	30,000	2	3	20,000	40,000	2	4	2.99%
Gift, Novelty, and Souvenir Stores (NAICS 45322)	$5,718,714	17,488	19,762	2,673	5,345	1	2	2,673	5,346	1	2	2.50%
Limited-Service Restaurants (NAICS 722513)	$44,492,739	135,649	157,352	12,000	16,000	6	8	14,000	18,000	7	9	3.00%
Cafeteria, Grill Buffets, and Buffets (NAICS 722514)	$3,669,241	11,187	12,977	2,000	4,000	1	2	2,000	4,000	1	2	3.00%
Total Gap	**$211,486,200**	**585,077**	**683,270**	**78,560**	**148,520**	**17**	**31**	**86,947**	**162,807**	**20**	**34**	

Endnotes

1, 2 Source: ICIC analysis of Environics/InfoGroup USA Business Data (2019) and U.S. Census Bureau ZIP Business Patterns (2016).

3 Most prestigious buildings competing for premier office users with rents above average for the area. Buildings have high-quality standard finishes, state of the art systems, exceptional accessibility, and a definite market presence.

4 Clusters are groups of closely related and interconnected businesses that operate within a specific geography and benefit from their geographic proximity.

5 MBTA. (2018). MBTA Ridership by Season, Route/Line, Stop, and Time Period [Data File]. Retrieved from: https://mbta-massdot.opendata.arcgis.com/search?tags=mbta%2Cridership.

6 For this analysis, people of Hispanic or Latinx origin are counted as a separate group regardless of race.

7 Delgado, M., Porter, M., & Stern, S. (2010). Clusters and Entrepreneurship. Journal of Economic Geography. (10) 4, 495-518.

8 Kuah, A. (2002). Cluster Theory and Practice. Journal of Research in Marketing and Entrepreneurship. (4)3, 206-228.

9 Chatterji, A., Glaeser, E., Kerr, W. (2013). National Bureau of Economic Research. Working Paper No. 19013.

10 Muro, M., & Fikri, K. (2011). Job Creation on a Budget. Brookings-Rockefeller Project on State and Metropolitan Innovation.

11 Source: ICIC analysis of Environics/InfoGroup USA Business Data (2019) and U.S. Census Bureau ZIP Business Patterns (2016).

12 Source: CoStar Group (2019). http://www.costar.com/about/submarket-maps.

13 The Building Owners and Managers Association (BOMA) defines three classes of office space: A, B, and C: Class A: Most prestigious buildings competing for premier office users with rents above average for the area. Buildings have high quality standard finishes, state of the art systems, exceptional accessibility and a definite market presence. Class B: Buildings competing for a wide range of users with rents in the average range for the area. Building finishes are fair to good for the area. Building finishes are fair to good for the area and systems are adequate, but the building does not compete with Class A at the same price. Class C: Buildings competing for tenants requiring functional space at rents below the average for the area.

14 Sztabinski, F. (2018). Bike Lanes, On-Street Parking & Business. Report: Clean Air Partnership & Toronto Centre for Active Transportation.

15 Hopper, T. (2020). Massachusetts Housing Partnership's Center for Housing Data's Transit Oriented Development Explorer (TODEX) Retrieved from: https://mhpcenterforhousingdata.shinyapps.io/todex/.

16 Hahm, Y., Yoon H., & Choi Y. (2019). The effect of built environments on the walking and shopping behaviors of pedestrians. Cities. (89) pp. 7.

17 Lawlor, E. & Tasker, M. (2018). The Pedestrian Pound: The business case for better streets and places. Living Streets. Retrieved from: https://www.livingstreets.org.uk/media/3890/pedestrian-pound-2018.pdf.

18 Hahm, Y., Yoon H., & Choi Y. (2019). The effect of built environments on the walking and shopping behaviors of pedestrians. Cities. (89), pp. 9.

19 Utile. (2013). Boston Complete Streets Design Guidelines.

20 Steuteville, R. (2017, July 21). Great Idea: The Public Realm. Retrieved from: https://www.cnu.org/publicsquare/2017/07/20/great-idea-public-realm 124 Nubian Square Market Analysis February 2020.

21 Lopez, N. & Lukinbeal, C. (2010). Comparing Police and Residents' Perceptions of Crime in a Phoenix Neighborhood Using Mental Maps in GIS. Yearbook of the Association of Pacific Coast Geographers. 72(1), pp. 35.

22, 23 Source: ICIC analysis of Environics/InfoGroup USA Business Data (2019) and U.S. Census Bureau ZIP Business Patterns (2016).

24 Most prestigious buildings competing for premier office users with rents above average for the area. Buildings have high-quality standard finishes, state of the art systems, exceptional accessibility, and a definite market presence.

25 Clusters are groups of closely related and interconnected businesses that operate within a specific geography and benefit from their geographic proximity.

26 Delgado, M., Porter, M., & Stern, S. (2010). Clusters and Entrepreneurship. Journal of Economic Geography. (10) 4, 495-518.

27 Kuah, A. (2002). Cluster Theory and Practice. Journal of Research in Marketing and Entrepreneurship. (4)3, 206-228.

28 Chatterji, A., Glaeser, E., Kerr, W. (2013). National Bureau of Economic Research. Working Paper No. 19013.

29 Muro, M., & Fikri, K. (2011). Job Creation on a Budget. Brookings-Rockefeller Project on State and Metropolitan Innovation.

30 Source: ICIC analysis of Environics/InfoGroup USA Business Data (2019) and U.S. Census Bureau ZIP Business Patterns (2016).

31 The white, Black, Asian and Other race/ethnicity categories do not exclude people of Hispanic or Latino origin. All people of Hispanic or Latino origin are included in the Hispanic or Latino category. "Other" includes American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, some other race alone, or two or more races. "Less than high school diploma" is the share of the population 25 years and over with less than a high school diploma (or equivalent) as the highest level of education attained. "High school diploma only" is the share of the population 25 years and over with a high school diploma as the highest level of education attained. ESRI income data for 2019 are in 2019 dollars. ESRI income projections are in 2024 dollars and, therefore, include projected inflation between 2019 and 2024. Average household disposable income is net income available after income taxes. Average household discretionary income is the average disposable household income minus income spent on essential purchases. Sources: Boston Housing Authority; ICIC analysis of Claritas Pop-Facts Premier – 2019 Current Year Estimates, Nubian Square Residential Projects, ESRI Community Profile (Nubian Square), ESRI Detailed Age Profile (Nubian Square), ESRI Disposable Income Profile (Nubian Square), and ESRI Retail Demand Outlook (Nubian Square) data.

32 Source: Environics Analytics Spotlight Reports, industry sources, and FXM Associates.

33 Source: Environics Analytics Spotlight Reports, industry sources, and FXM Associates.

34 Source: Environics Analytics Spotlight Reports, industry sources, and FXM Associates.

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