2013-2014 Survey of Retail Preferences in Spruce Hill

Spruce Hill Community Association Business Attraction Committee – May 2014
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Summary Findings

In Fall 2013, the Spruce Hill Community Association (SHCA) Business Association Committee (BAC) conducted a **survey of retail preferences**. Almost 500 residents responded, demonstrating the importance of retail to a neighborhood's sense of vitality, safety, and identity, and yielding a trove of information that will be useful to residents, community groups, businesses, developers, and policymakers alike. Here are some highlights:

Most-requested retail categories: Clothing Garden center Art supplies	**Most-requested restaurant categories:** Ethnic Brewpub Breakfast/brunch	**Respondents most averse to:** Chain stores Bars Fast food Pharmacies
Most-favorited sites: 1. Honest Tom's 2. Local 44 3. Lil' Pop Shop 4. Tampopo 5. Mariposa 6. Green Line Café	**Most-favorited areas:** **44th St. between Locust & Spruce** **Baltimore Ave. between 45th & 50th** **45th St. between Walnut & Locust** **40th St. between Chestnut & Locust**	**Should we be a regional destination?** 76 percent of respondents were favorable about the neighborhood being a regional destination, especially as it expressed the following characteristics: Locally-owned Walkable Family-friendly

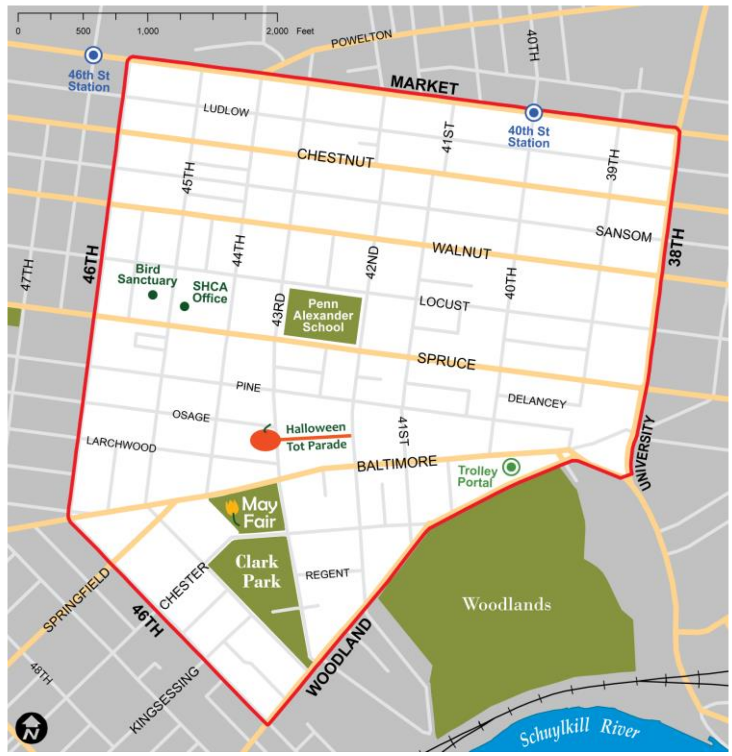
While these survey results reflect a vibrant and improved retail climate, they also indicate that there are still improvements to be made. It is hoped that a wide range of stakeholders – community-serving groups, elected officials, real estate developers, and retail store owners – will utilize this report and the survey results they are based on to initiate those improvements.

SECTION 1 – INTRODUCTION

Retail is an important part of a neighborhood's sense of vitality, safety, and identity. Where people choose to shop is, of course, a personal decision, as is where merchants choose to locate, what they choose to sell, and how they choose to keep up their storefronts. However, people make better choices when they are better informed: about what's out there to buy, about what people want to buy, and about how individual choices can have an impact on others, on neighborhood quality of life, and on the broader world.

The Spruce Hill Community Association (SHCA) Business Association Committee (BAC) was formed in 2013 to keep tabs on neighborhood likes and dislikes as it relates to individual storefronts and retail clusters.[1] In Fall 2013, the BAC conducted **a survey of retail preferences**, which included five open-ended questions that respondents could answer any way they liked:[2]

1. What kind of retail would you like to see in the neighborhood?
2. What kind of retail would you NOT like to see in the neighborhood?
3. What is your favorite retail business or cluster of businesses in the neighborhood?
4. What retail locations in the neighborhood need the most improvement, in terms of filling vacancies, replacing undesirable retail businesses, or sprucing up the facades and streetscapes?
5. Would you like to see the neighborhood become a regional destination, and if so, in what categories?



This report represents a summary of the almost 500 survey responses received (see Section 2 for more information on characteristics of the survey respondents). An interactive map of findings has been developed and is viewable at SHCA's website: sprucehillca.org. This information is intended to be useful to residents, community groups, businesses, developers, and policymakers alike.

The bulk of the survey was open-ended questions, so there is a rich amount of information on likes and dislikes (Section 3), areas of strength and areas in need of improvement (Section 4), and the extent to which the neighborhood is or can be a regional destination (Section 5). The purpose of this report is to mine this trove of information for a few summary trends, but clearly there is much more insight to be gleaned, and it is hoped that the BAC and others can delve more deeply into the survey results over time.

[1] See Appendix A for a list of SHCA BAC members as of Spring 2014.

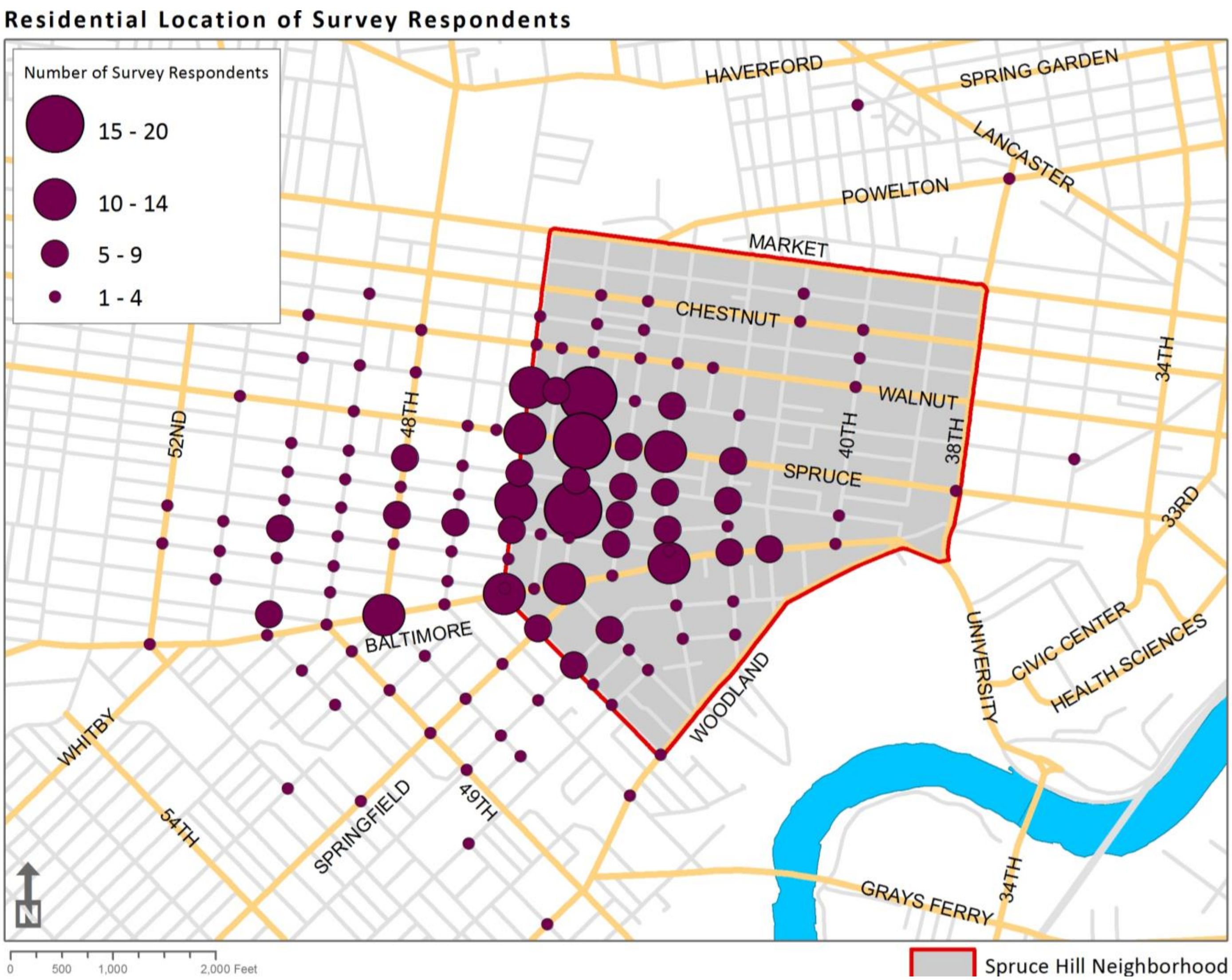
[2] See Appendix B for a copy of the retail survey.

SECTION 2 – SURVEY RESPONDENTS

A total of **483 people participated in the survey**. In a very real sense, this is the most important "finding" of the survey effort, which is that interest in retail is extremely high.[3] This speaks to the importance of retail not only in terms of consumer preferences but also in terms of neighborhood-level quality of life.

Together these almost 500 survey responses are a fairly good representation of the entire Spruce Hill neighborhood and surrounding areas (see Figure 2.1).[4] There was a pretty good mix of long-time residents and newcomers – 45 percent had lived in the neighborhood four years or less, while 26 percent had lived in the neighborhood for more than 10 years. Over a third (38 percent) of the respondents had children, and of those respondents about two-thirds (68 percent) had children ages 0 to 5.

Figure 2.1 – Distribution of Survey Respondents by Residential Location



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[3] Not all survey respondents answered all questions. There were an aggregate 1,426 responses to the open-ended questions.

[4] Survey participation was encouraged in the following five ways: (1) a description of and link to the online survey was in a newsletter distributed to all neighborhood residents, (2) a description of and link to the online survey was posted on the SHCA website, (3) a description of and link to the online survey was sent around on various neighborhood email distribution lists, (4) hard copies were distributed at various SHCA functions, and (5) hard copies were available at selected retail stores throughout the neighborhood. Respondents considered the survey overwhelmingly from a resident's point of view: only 2 percent also owned a storefront business in the neighborhood, and only 5 percent also owned commercial property in the neighborhood.

SECTION 3 – LIKES AND DISLIKES

The first two open-ended questions asked respondents to share what kinds of retail offerings they wanted to see and not see in the neighborhood. These responses were analyzed in terms of actual stores or store types that were liked or disliked, and the underlying values that those preferences represented.[5]

Survey respondents advanced about 1,000 preferences, or about 2 per respondent, which were sorted into different types (see Table 3.1).

1. About 46 percent of those preferences were related to some sort of retail offering; among those responses, the three most popular were **clothing** (23 percent), **garden center** (10 percent), and **art supplies** (10 percent).

2. About 24 percent of those preferences were related to some sort of restaurant or cafe; among those responses, 13 percent named some sort of **ethnic cuisine**, and **brewpub**/**bistro** (10 percent) and **breakfast/brunch** (10 percent) were two other popular responses.

3. About 18 percent of those preferences were related to some sort of **grocery store, supermarket, or specialty food store**, with 22 percent of those responses naming a specific chain (Trader Joe's 14 percent, Whole Foods 7 percent, and Wegman's or Superfresh 1 percent) and 19 percent specifying a **bakery or pastry shop**.

4. Preferences that could be characterized as **child-related** or **family-friendly** were frequent across a number of categories. In the retail category, 18 percent were child-related, with requests for children's clothing/consignment stores and toy stores being the most popular. Requests for family-friendly restaurants represented 8 percent of all responses in the restaurant/cafe category.

Table 3.1 – Ranking of Edited Responses to "What Kinds of Retail Would You Like to See in the Neighborhood?"[6]

Category	% of Preferences	#1 in Category	#2 in Category	#3 in Category
Retail	46%	Clothing 23%	Garden Center 10%	Art Supplies 10%
Restaurant/Cafe	24%	Ethnic 12%	Brewpub/Bistro 10%	Breakfast/Brunch 10%
Grocery/Food	18%	Bakery/Pastry 19%	Trader Joe's 14%	Whole Foods 7%
Bar/Nightlife/Entertainment	5%	Bar 53%	Entertainment Venue 33%	Movie Theater 8%
Health/Fitness/Personal Care	5%	Adult Gym 40%	Children's Gym 23%	Hair/Nail Salon 11%

[5] As the bulk of the survey consisted of open-ended questions, the BAC had to interpret responses and sort them into different categories. By and large, responses were deconstructed in multiple ways. For example, responses to this question were sorted into categories by name (i.e. if a specific store was mentioned, e.g. "Trader Joe's"), type (i.e. if a type of store was mentioned, e.g. "pizza parlor"), and by value (i.e. if some underlying value was mentioned, e.g. "locally-owned.")

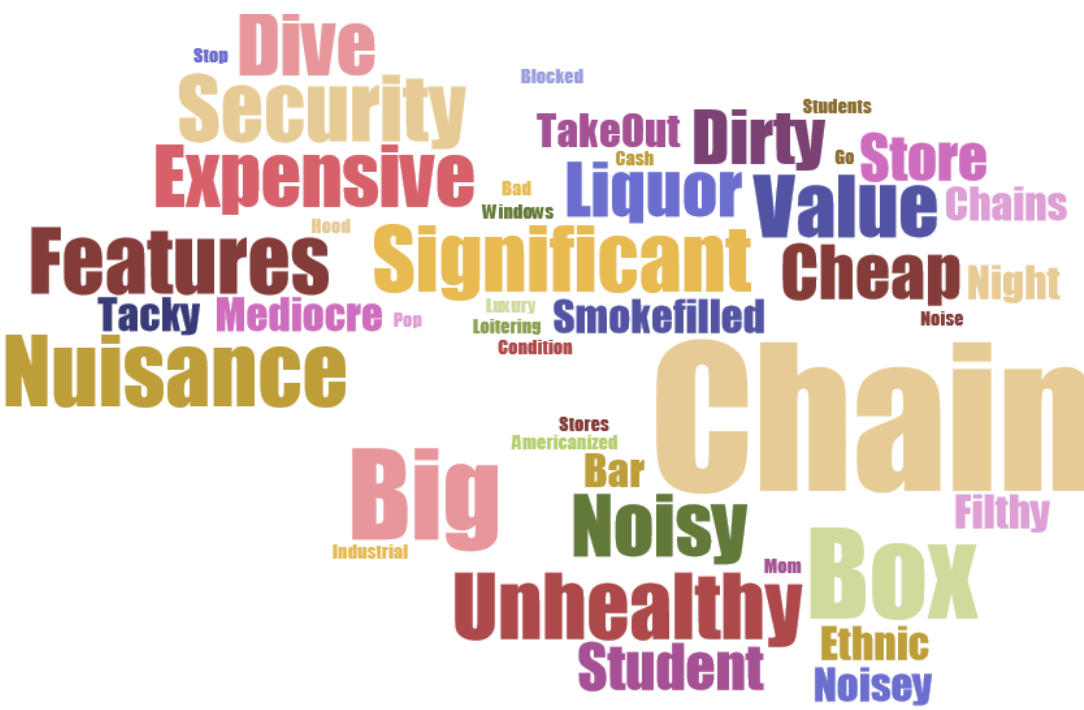
[6] The percentages in the "#1 in Category," "#2 in Category," and "#3 in Category" columns represent the proportion of responses for a particular type of store within the universe of responses in that overall category (e.g. among responses that mentioned something related to groceries or food, bakery/pastry was mentioned 19 percent of the time).

Survey respondents also expressed strong preferences regarding retail they did not want to see more of in the neighborhood (see Figure 3.1). Specifically, they do not want to see more **chain stores** such as McDonald's, Dunkin' Donuts, and Subway (see Figure 3.2), and are averse to more **bars**, **fast food establishments**, and **pharmacies** (see Figure 3.3).

The expression of likes and dislikes in the past has helped shape the current flavor of retail in Spruce Hill (see side bar), and it is hoped that SHCA and other neighborhood groups can point to the results from this survey as an expression of the desires of local residents when discussing storefront possibilities with developers, landlords, and business owners.

43rd & Baltimore, across from Clark Park, was potentially targeted for take-out fast food before local residents vocalized their preference for a café with outdoor seating. The site became the first of many Green Line Cafés.

Figure 3.1 – Word Cloud[7] of Edited Responses to "What Kinds of Retail Would You NOT Like to See in the Neighborhood?" That Expressed Some Sort of Underlying Value



"Chain stores, though they may draw customers, are not neighborhood builders."

[7] "Word clouds," which display words by size, proportionate to their frequency of appearance, are used throughout this report to visually depict the relative popularity of different types of survey responses. "Edited" word clouds are of categorizations of survey responses by keyword, as sorted by BAC members.

Figure 3.2 – Word Cloud of Edited Responses to "What Kinds of Retail Would You NOT Like to See in the Neighborhood?" That Mentioned a Specific Store Name

Figure 3.3 – Word Cloud of Edited Responses to "What Kinds of Retail Would You NOT Like to See in the Neighborhood?" That Mentioned a Retail Category

SECTION 4 – LOCATIONS OF STRENGTH VS. LOCATIONS IN NEED

The second two open-ended questions asked respondents to identify their **favorite locations** in their neighborhood, as well as, conversely, those locations that could use some **additional attention and investment**. These responses were mapped to better understand the areas of strength and areas of need within the neighborhood.

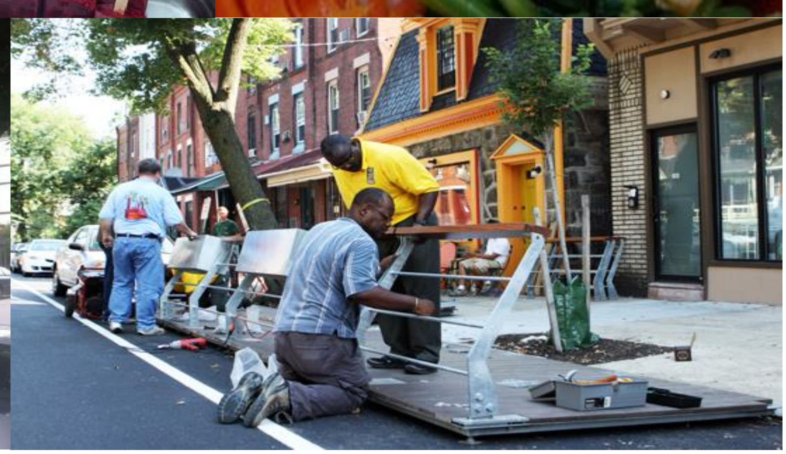
There are some clear favorite spots in the neighborhood (see sidebar and Figure 4.1).[8] It seems there is less consensus about places in need of improvement, as a number of locations, intersections, and corridors were mentioned (see Figure 4.2). Further study is needed to determine how and where to prioritize reinvestment.

Over 100 establishments were mentioned by name. Top sites favorited:

1. Honest Tom's (53 mentions)
2. Local 44 (52)
3. Lil' Pop Shop (48)
4. Tampopo (38)
5. Mariposa (36)
6. Green Line Café (35)

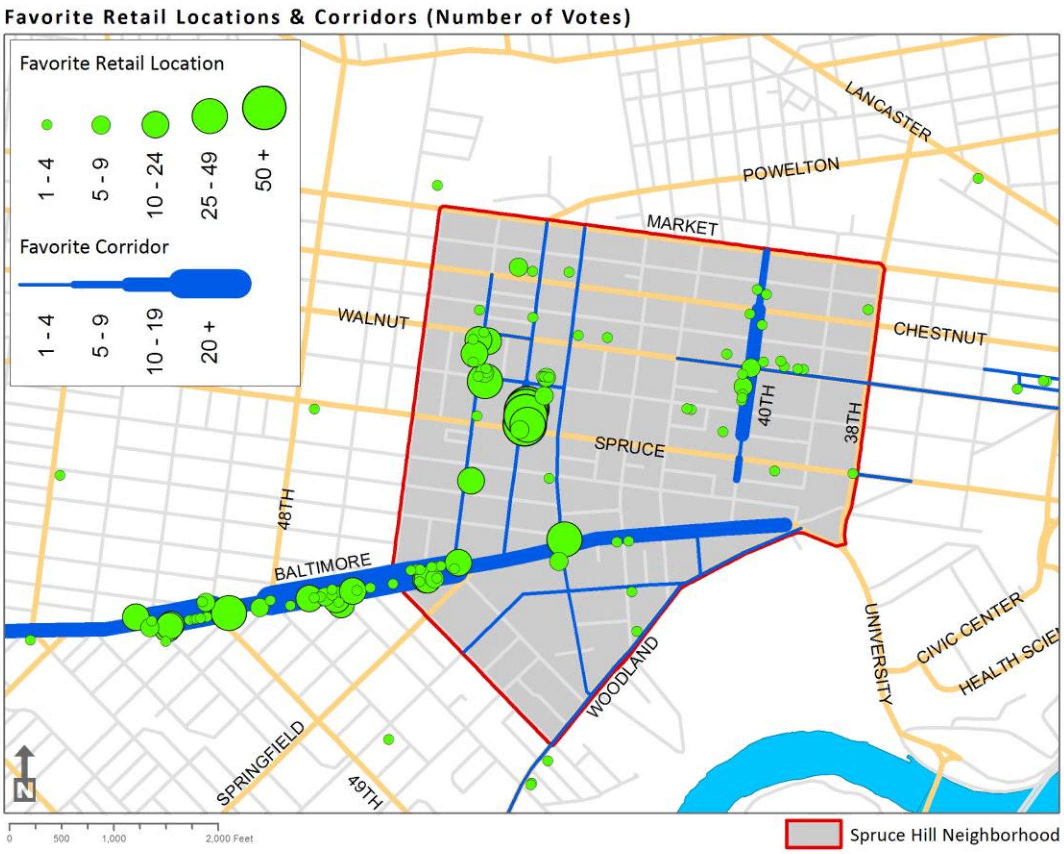
Top areas favorited:

- 44th St. between Locust & Spruce
- Baltimore Ave. between 45th & 50th
- 45th St. between Walnut & Locust
- 40th St. between Chestnut & Locust



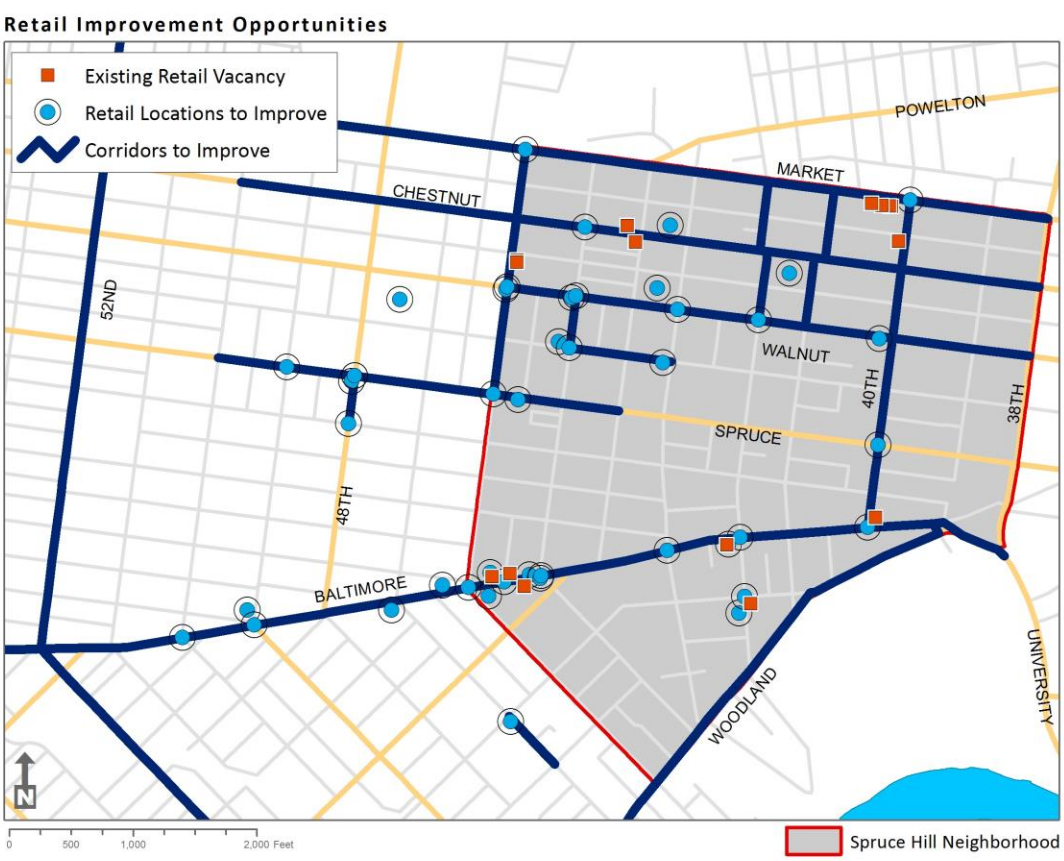
[8] See Appendix C for a list of the top 30 establishments mentioned by name.

Figure 4.1 – Survey Respondents' Favorite Retail Locations in the Neighborhood



"Honest Tom's/Lil' Pop Shop/Tampopo is without a doubt one of the best things to happen to the neighborhood in a long time."

Figure 4.2 – Neighborhood Locations That Survey Respondents Said Needed More Attention and Investment



"Keep the local business owners, but support them to spruce up their storefronts."

SECTION 5 – REGIONAL DRAW?

The final open-ended question asked respondents if they wanted the neighborhood to become a regional destination in any categories. Survey responses were sorted by overall favorability to this notion as well as by what categories were referenced most frequently.

Overwhelmingly, survey respondents were favorable towards the notion that the neighborhood is and/or should become a regional destination: 76 percent of responses were positive in nature (see Figure 5.1). Restaurant and food retail categories represented about 40 percent of responses, the largest number by a wide margin. **Ethnic food**, **outdoor recreation**, and **family-friendly offerings** were commonly named types of categories (see Figure 5.2), and respondents frequently expressed such values as **locally-owned**, **walkable**, and **family-friendly** (see Figure 5.3).

Figure 5.1 – Overall Favorability Towards the Notion of the Neighborhood as a Regional Destination

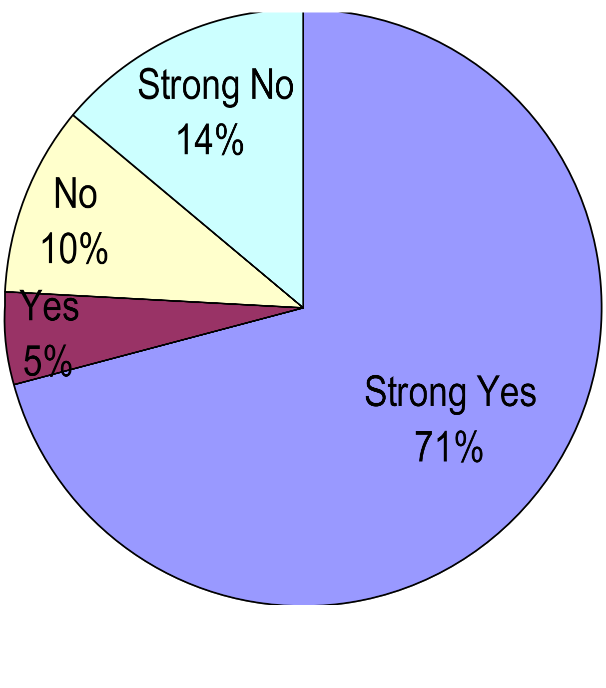


Figure 5.2 – Word Cloud of Edited Responses to “Would You Like to See the Neighborhood Become a Regional Destination?” That Mentioned a Retail Category

Figure 5.3 – Word Cloud of Edited Responses to “Would You Like to See the Neighborhood Become a Regional Destination?” That Expressed Some Sort of Underlying Value

“I love all the little local businesses run by local residents. I feel that these places are really invested in the community.”

SECTION 6 – IMPLICATIONS AND NEXT STEPS

This initial survey effort by the BAC has yielded a rich sense of retail preferences among neighborhood residents. The BAC intends to repeat this effort every other year, to refresh its sense of neighborhood preferences and to identify any shifts in those preferences.

The findings from this effort support what many already believe about the neighborhood, which is that: (1) its residents care deeply about the **storefront environment** around them, (2) they have **strong opinions** about the kinds of stores they want to see more or less of, and (3) there are some **clear favorite spots** in the neighborhood.

> *"A lot more stores! I find that I have to leave the neighborhood to purchase most things."*

While these survey results reflect a vibrant and improved retail climate, they also indicate that there are still improvements to be made. It is hoped that a wide range of stakeholders – community-serving groups, elected officials, real estate developers, and retail store owners – will utilize this report and the survey results it is based on to initiate those improvements.

This is the purpose of this survey effort and of the BAC as a whole: to provide a forum for residents to express their opinions, and to aggregate those expressions to better inform decisions about locations to prioritize, stores to open, and investments to undertake.

APPENDIX A – SHCA BAC MEMBERS

Business Attraction Committee Members:

- Ariel Ben-Amos
- Monica Ferguson
- Matthew Goodro
- Lee Huang (Chair)
- Andy Lochrie
- Mary Ellen McCarty
- Mary McGettigan
- Khalil Meggett
- Samir Thaker

Spruce Hill Community Association Board Members:

- Monica Calkins, President
- Andy Cole, Executive VP
- Mark Wagenveld, VP for Operations
- Marie McCullough, Secretary
- Judy Powers, Treasurer
- Pauline Borkon
- Brett Feldman
- Monica Ferguson
- Lee Gayle
- Barry Grossbach
- Rich Guffanti
- Ed Halligan
- Sylvia Hamerman-Brown
- Haven Henderson
- Lee Huang
- Susan MacQueen
- Brennan Maier
- Mary Ellen McCarty
- Marie McCullough
- Justin McDaniel
- Elaine Nelson
- Eric Santoro
- Michael Shashaty
- Jackie Waiters
- Pamala Williams

APPENDIX B – SHCA BAC RETAIL SURVEY QUESTIONS

(1) What is the closest intersection to your home? (Example: 45th/Locust)

(2) If you have kids, what are their ages? *No kids* *0-5* *6-12* *13-18*
(circle all that apply)

(3) Do you own a storefront business in the neighborhood? *Y* *N*
(circle all that apply)

Food *Other Retail*

Personal Services *Professional Services*

(4) Do you own commercial property in the neighborhood? *Y* *N*
(circle all that apply)

Food *Other Retail*

Office *Residential*

(5) How long have you lived this neighborhood? *0-1 years* *2-4 years* *5-10 years* *11-20 years* *20+ years*

(6) What kind of retail would you like to see in the neighborhood? This could be a specific business or type of business, and it could be something that does not exist in the neighborhood yet or something that does exist that you want more of.

(7) What kind of retail would you NOT like to see in the neighborhood? This could be a specific business or type of business, and it could be something that already exists in the neighborhood or something that doesn't exist that you don't want to see.

(8) What is your favorite retail business or cluster of businesses in the neighborhood?

(9) What retail locations in the neighborhood need the most improvement, in terms of filling vacancies, replacing undesirable retail businesses, or sprucing up the facades and streetscapes?

(10) Would you like to see the neighborhood become a regional destination (i.e. a place that people come to from all over the city and region)? If so, in what categories? Y N

APPENDIX C – TOP 30 ESTABLISHMENTS MENTIONED BY NAME

1	Honest Tom's	53
2	Local 44	52
3	Lil' Pop Shop	48
4	Tampopo	38
5	Mariposa	36
6	Green Line Café	35
7	VIX Emporium	18
T8	Baltimore Pet Shop	16
T8	Bottle Shop	16
T10	Milk and Honey	15
T10	Vietnam Café	15
T12	Bindlestiff Books	14
T12	Dock Street	14
14	Manakeesh	13
15	Fu Wah	11
16	Earth Cup	10
T17	Second Mile	9
T17	Vientanne	9
19	Aksum	8
T20	Café Renata	7
T20	Gold Standard	7
T20	Saad's	7
T20	Satellite	7
24	Firehouse Bicycles	6
T25	Dahlak	5
T25	Farmer's Market	5
T25	Hip City Veg	5
T25	Studio 34	5
T29	Abyssinia	4
T29	Kaffa Crossing	4