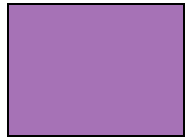


Church Avenue Retail: Current Context and New Opportunities

Prepared for the Church Avenue BID, Spring 2009





Introduction



Context Analysis



Market Analysis



Merchant/Shopper Surveys



Vision



Recommendations



Implementation

Introduction

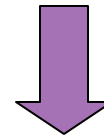


The Team:

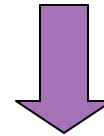
Pratt Center for Community Development and MJB
Consulting

Goals

1 Measure Local Retail Health



2 Identify Shopper Behaviors and Preferences



3 Develop Strategies to Improve Existing Retail and Develop New Retail that Meets the Needs of Customers and the Community

Methodology

Information Gathering

- Field Survey and Mapping
- Retail Inventories
- Demographic Analysis
- Leakage and Competition Analysis
- Consultation with BID Staff and Other Key People
- Merchant Surveys
- Customer Surveys

Context Analysis



Retail Mix, Vacancy, Building Conditions, Streetscape & Roadway, Pedestrian Safety

Retail Mix

AS OF MAY 2009

The map displays a grid of streets in a neighborhood. The streets shown include Caton Av, Church Av, Albemarle Rd, Rugby Rd, Westminister Rd, Stratford Rd, Turner Pl, and Buckley Pl. The buildings are color-coded according to their retail mix. A large green area in the top left corner represents a park or undeveloped land. The map is titled 'Retail Mix AS OF MAY 2009'.

Color	Retail Category
Green	Grocery
Yellow-green	Restaurants
Brown	Bodegas
Pink	Hair and Nails
Orange	Home and General Goods
Purple	Clothing and Apparel
Light blue	Services and Institutions

Vacancies

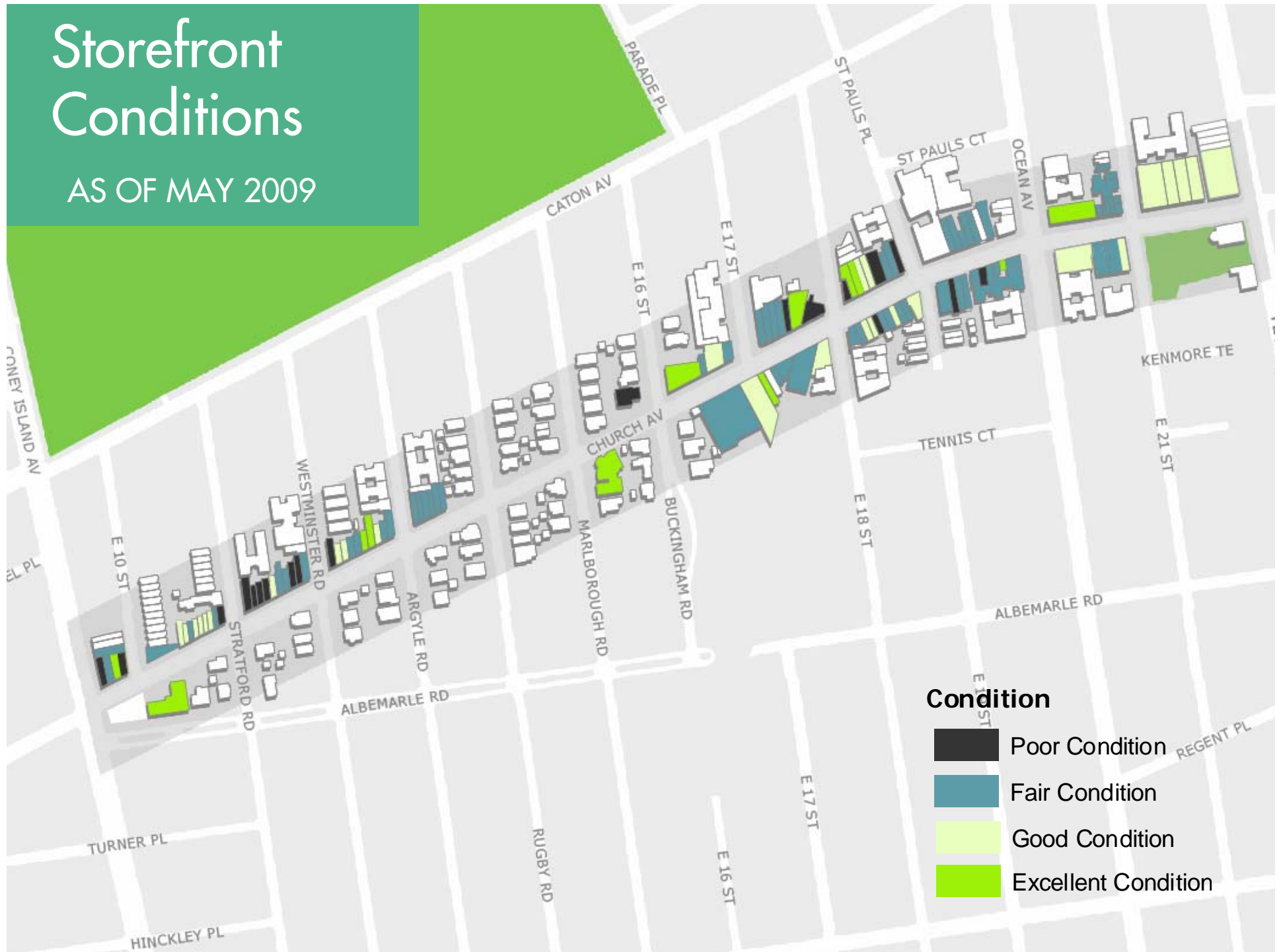
AS OF JUNE 2009

16 Vacancies
11% Vacant



Storefront Conditions

AS OF MAY 2009



Streetscape Conditions

East Church Avenue

Crowded sidewalks with encroachment of sidewalk displays and vendors; sidewalks and roadbed in poor condition

Unclean conditions outside some food stores

Lack of amenities like bathrooms, places to sit

Break in retail in central Church area

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Streetscape Conditions

Poor sidewalk and roadbed conditions

Unclean conditions at some locations

Low levels of pedestrian activity and few active retail storefronts

Vacant, underused or unmaintained buildings

Lack of cohesion

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West Church Avenue



Roadway Conditions

Poor parking conditions

Illegal U-turns

Heavy traffic

Double parking and deliveries



Pedestrian Activity

Increased Activity, but Crossings are Unsafe



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Market Analysis

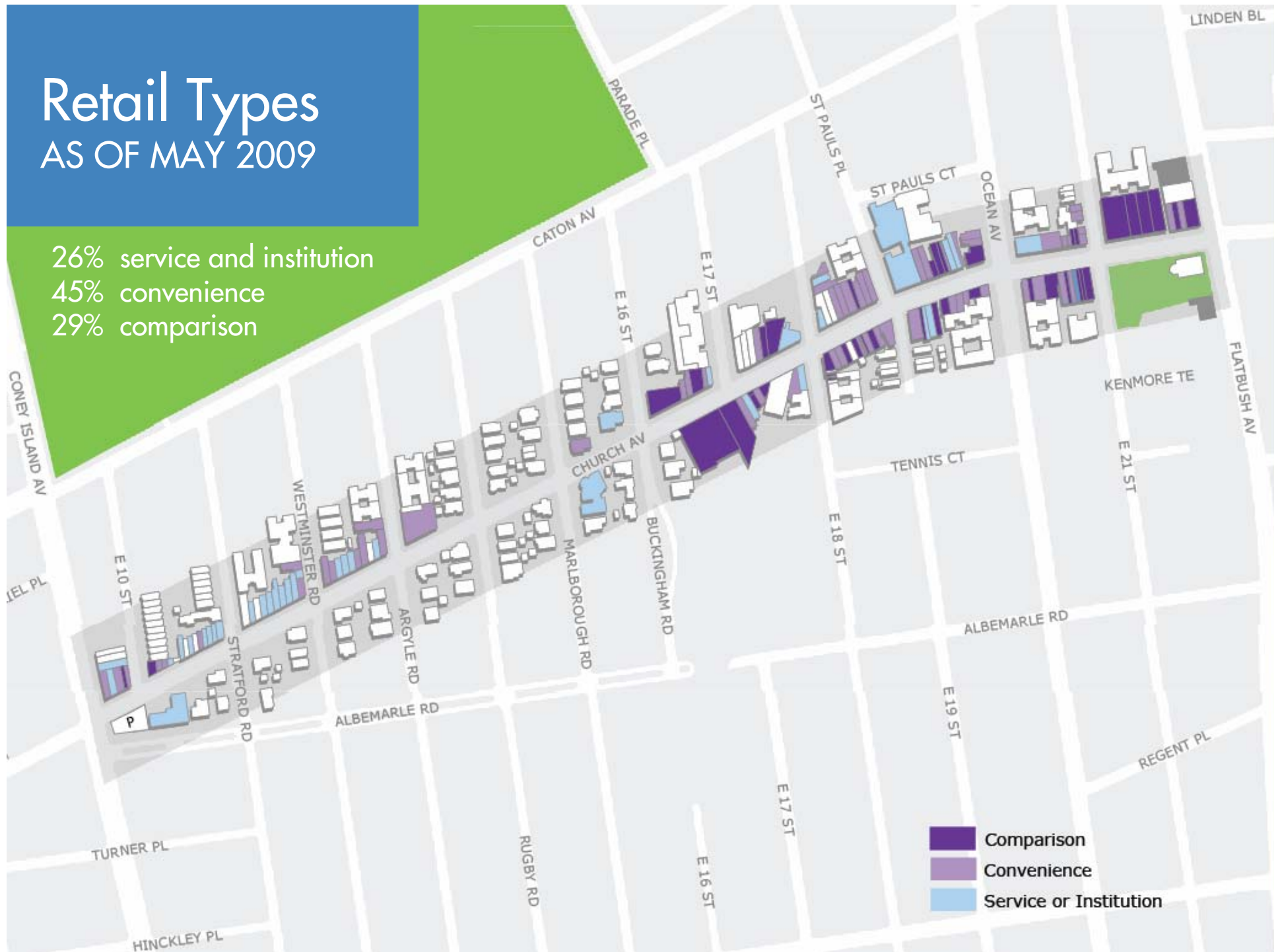


Site Survey, Trade Area, Leakage Analysis, Competition Analysis

Retail Types

AS OF MAY 2009

26% service and institution
45% convenience
29% comparison



Trade Area

Trade Area: geography from which businesses draw a majority of their customers.

Factors in determining Church Avenue Trade Area:

- Dominance of “convenience” stores
- Physical boundaries – the park, major roads
- Home location data from customer survey



Trade Area Demographic Trends

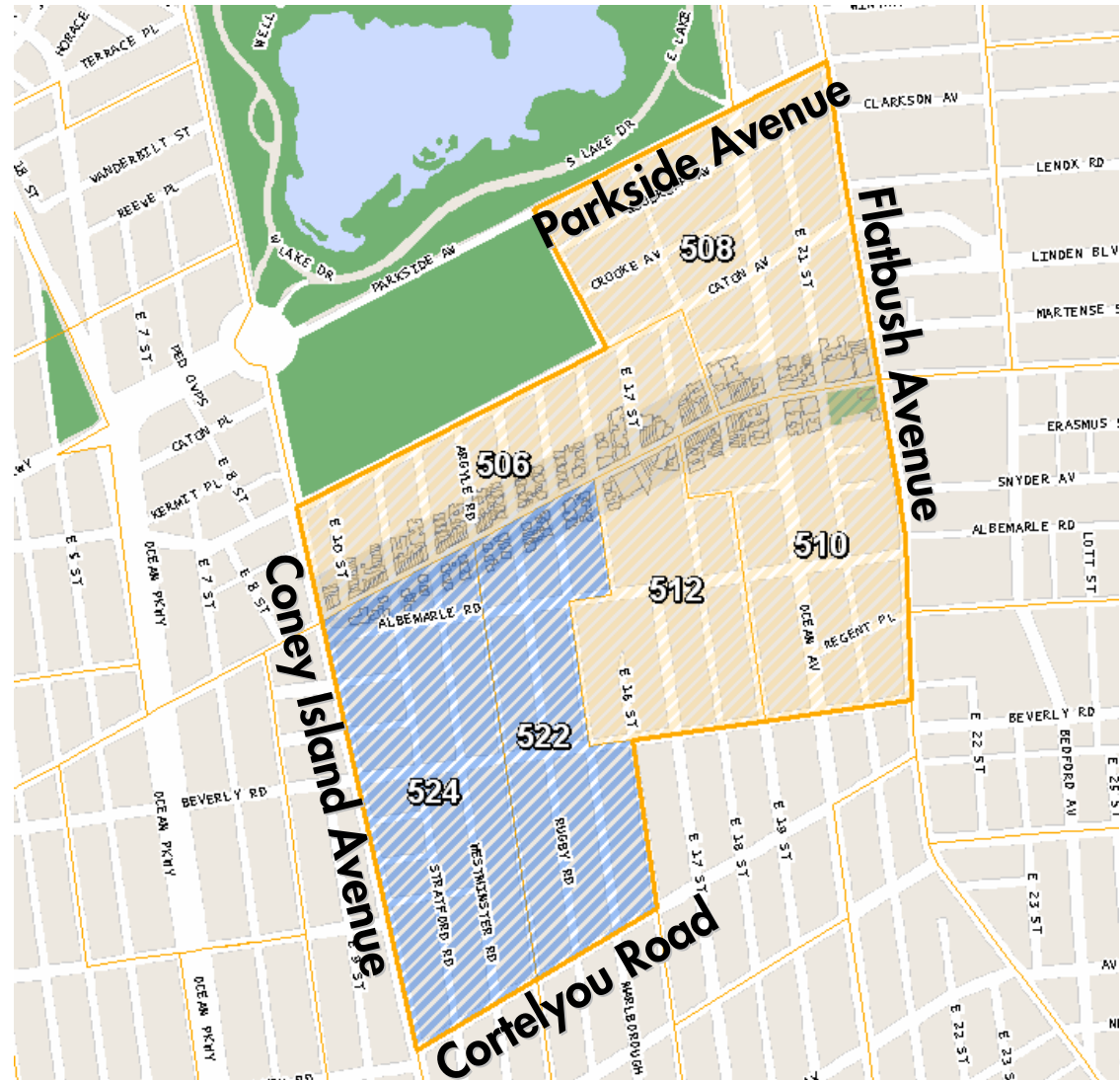
6 Census Tracts

Yellow tracts =
Dense
population,
predominately
low income

Blue tracts =
Less population,
moderate to high
income

Pratt Center for Community Development

Two Distinct Populations



0, 2009

Trade Area Demographic Trends

1990 and 2000 US Census Data

- Total population dropped 4.17%
- Racial demographics are relatively consistent
- Median household earnings increased by 7%, but rose more slowly than inflation, yielding net decline in household purchasing power

Population

Census Tract	1990	2000
506	6,799	6,187
508	14,379	13,884
510	9,954	9,273
512	7,367	6,871
522	1,070	995
524	2,101	2,412
TOTAL	43,660	41,622

Median Household Income

Census Tract	1990	2000
506	22,193	26,369
508	24,326	25,435
510	26,090	24,271
512	26,026	31,393
522	74,629	75,889
524	44,044	50,972

Census Tract	Whites		Blacks		American Indians		Asian		Other Race		Two Race		Hispanic	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
506	1,107	783	4,503	3,697	15	36	315	173	859	1,031	n/a	467	1,791	2,061
508	1,075	1,230	11,061	10,478	51	23	1,266	349	1,266	941	n/a	863	2,412	2,936
510	699	441	8,304	7,588	23	6	266	147	662	734	n/a	357	1,753	1,519
512	831	668	5,769	4,933	0	6	319	205	448	600	n/a	459	1,714	1,494
522	766	457	257	419	0	0	41	32	6	53	n/a	34	110	196
524	997	859	629	678	7	6	272	541	196	175	n/a	153	1,840	266
TOTALS	5,475	4,438	30,523	27,793	96	77	2,479	1,447	3,437	3,534	n/a	2,333	9,620	8,472

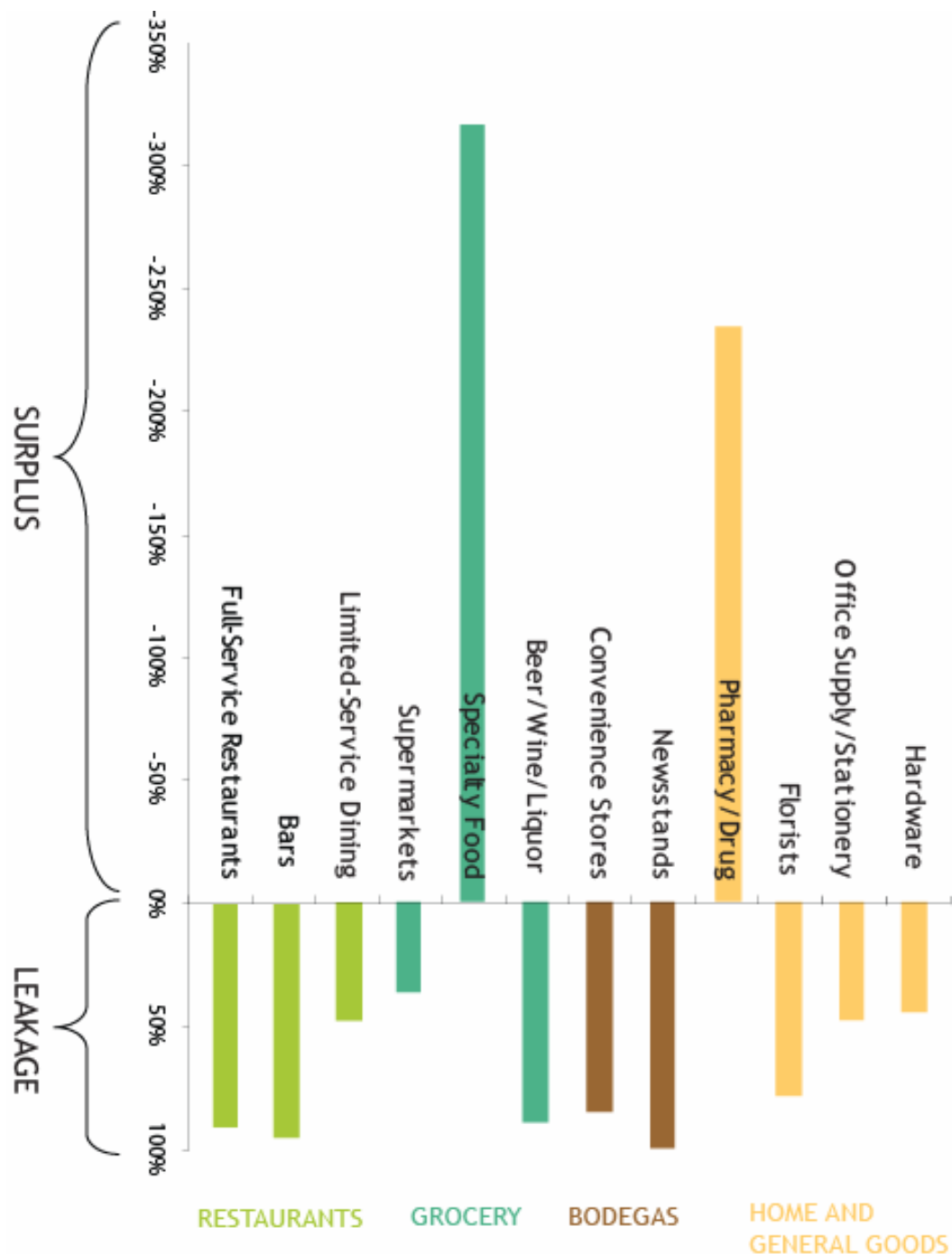
Sales Leakage

Convenience Categories

Surplus = More square footage than local demand can support: eg. pharmacies and specialty foods.

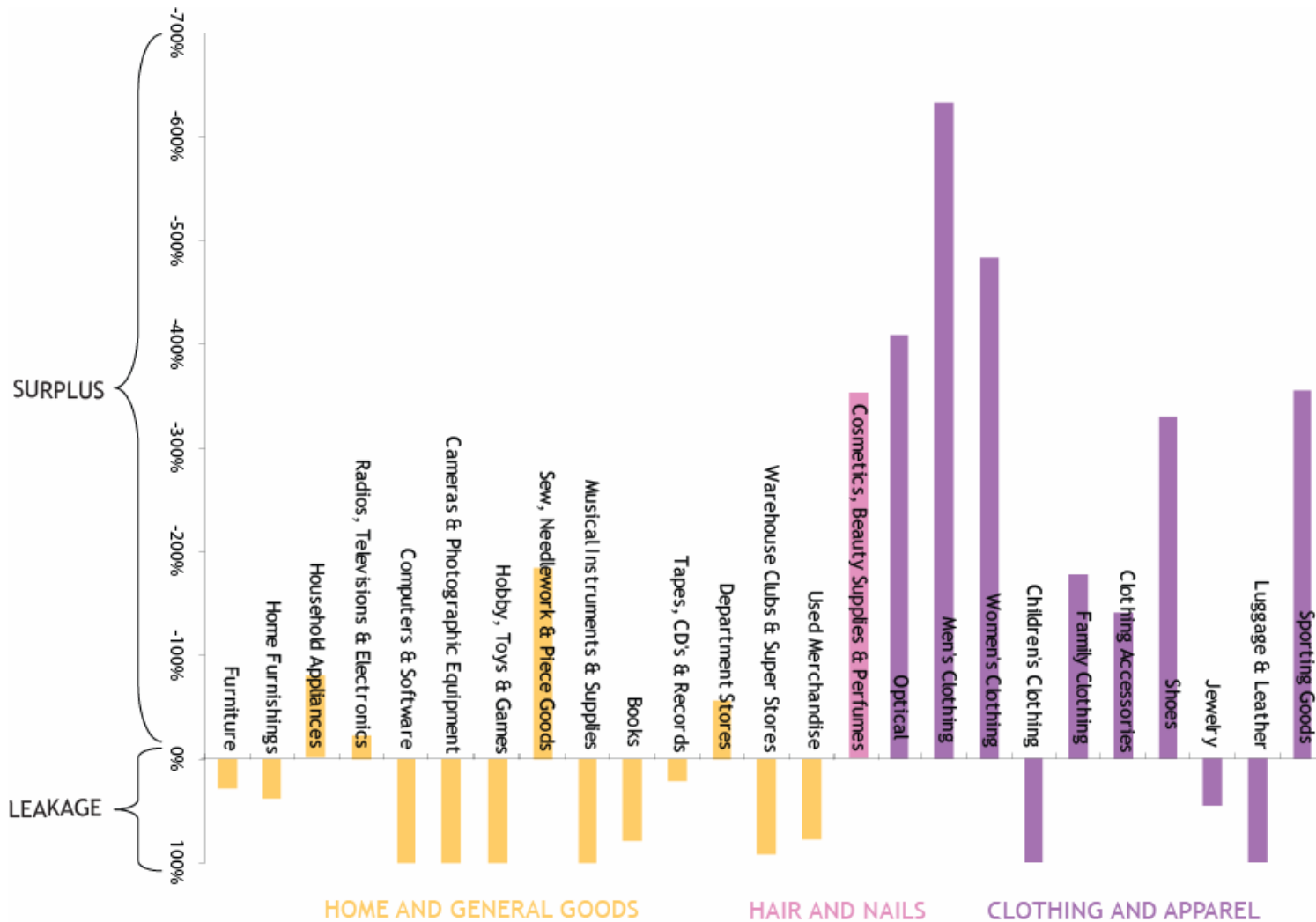
Leakage = Not enough square footage to meet demand: eg. restaurants and liquor

Categories with substantial leakage are in demand: Trade Area can support new stores of this type.



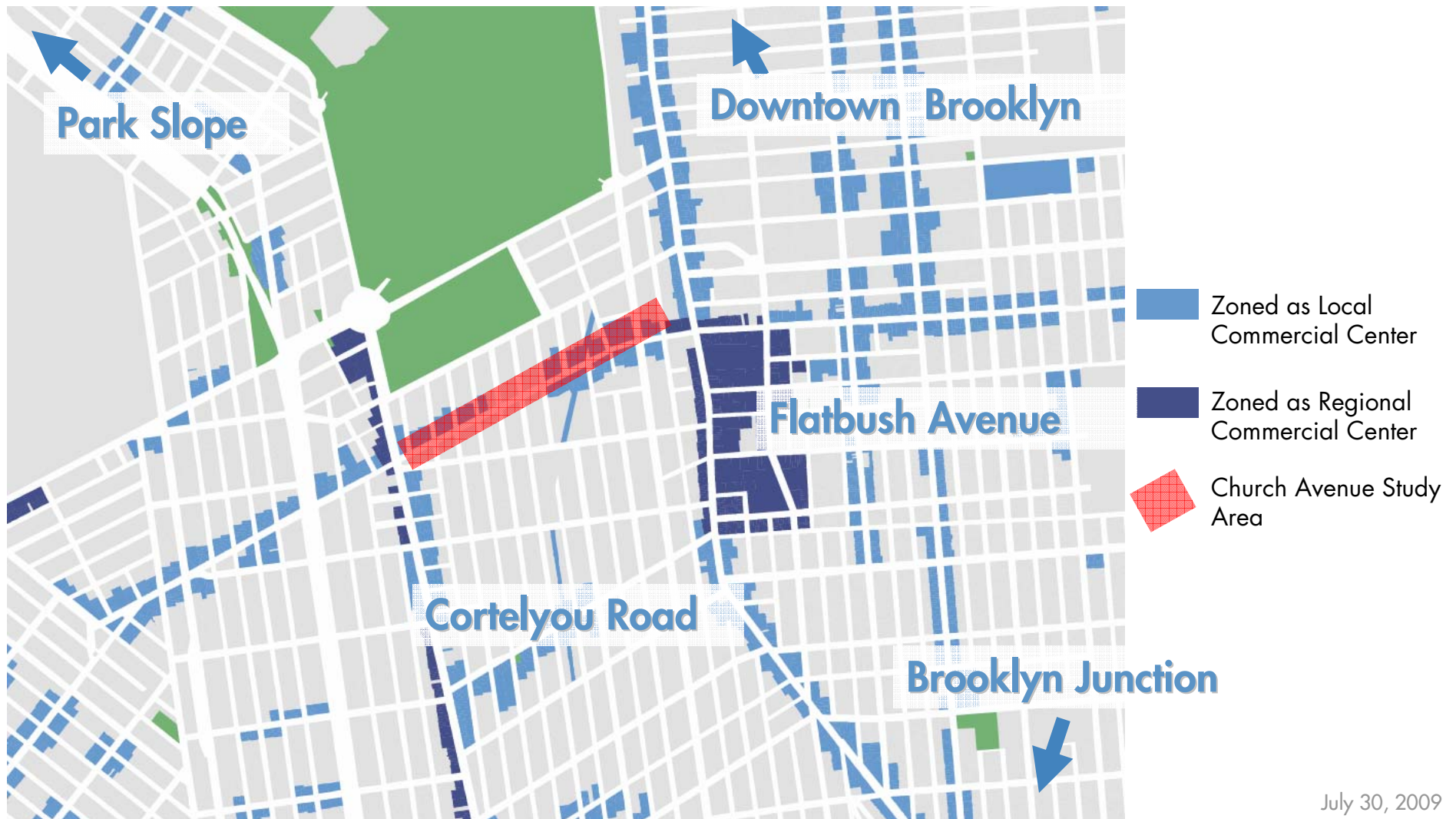
Sales Leakage

Comparison Categories



Competition

Strong Competition Nearby



July 30, 2009

Competition

Flatbush Avenue “The Junction”

- Heavy foot traffic
- High visibility
- Large floorplates
- Superior anchors



Flatbush Avenue

Competition

Cortelyou Road

- Mid-upper end submarket
- Visually appealing, wide sidewalks
- Restaurant niche, boutiques, specialty shops
- Some vacancies



Cortelyou Road

Competition

Downtown Brooklyn

- Fulton Street Mall, Atlantic Center and Atlantic Terminal Mall
- Regional destinations

Park Slope

- Convenience and specialty shopping on Fifth and Seventh avenues



Fulton Mall, Brooklyn



Park Slope

Conclusions

Learnings from Context and Market Analyses

- Three distinct clusters on East Church
- Lack of cohesion, worst storefront conditions and most vacancies on West Church
- Storefront, streetscape and roadway conditions below par
- Poor parking and pedestrian safety
- Demographics not changing drastically
- Robust competition in comparison, moderate competition in restaurant/boutiques, little competition in convenience

Merchant Survey



Merchant Survey

Methodology

- Survey conducted between February and May, 2009
- 76 stores surveyed - 47.5% of Retailers in BID
- Most respondents were business owners; some managers

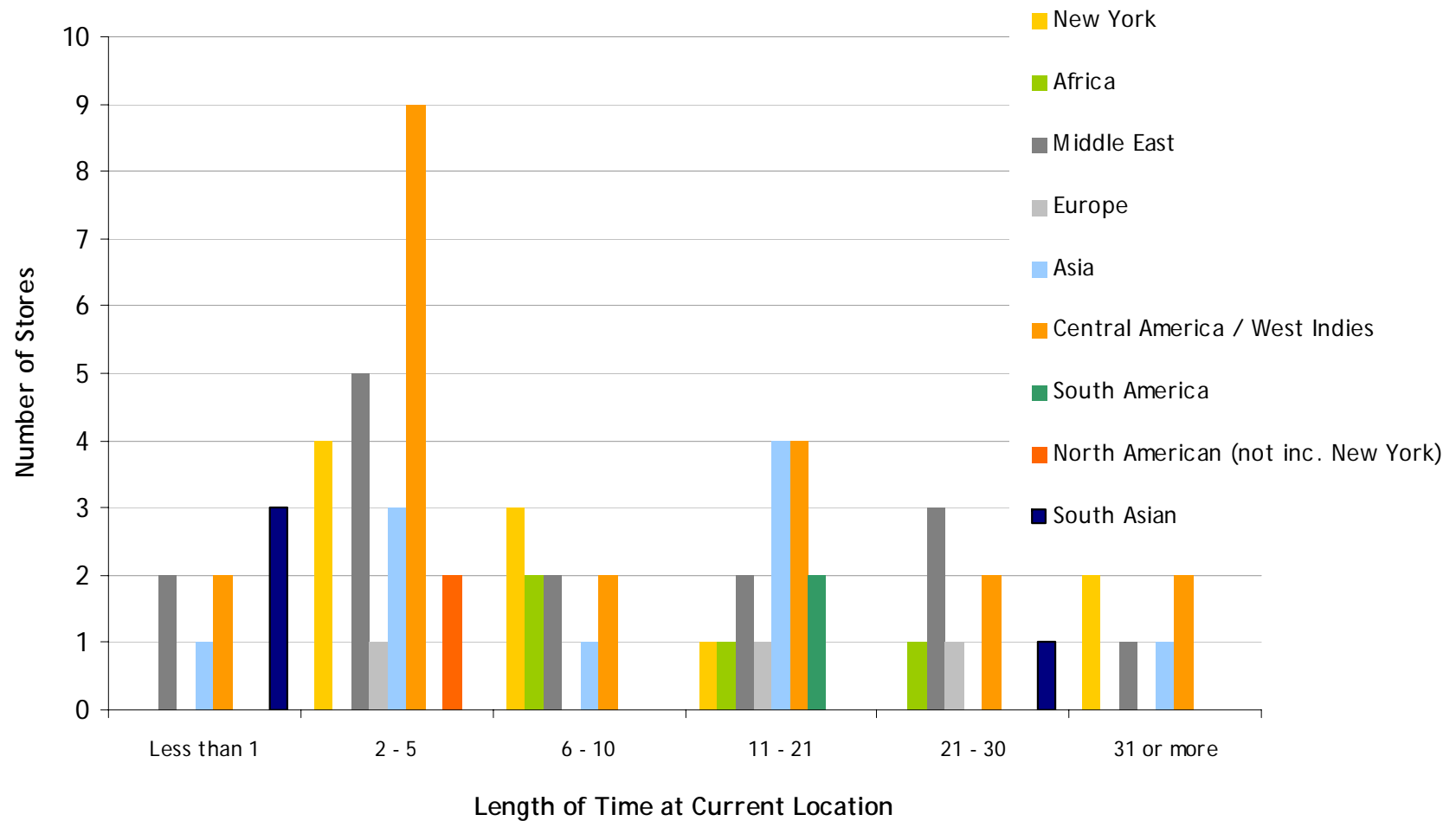


Great Hair Spectations - 1911 Church Avenue
Where all your beauty needs are met

Photo by: Claudie's Photo St
718-941-687E

Merchant Survey Results

Store Tenure and Merchant Ethnicities on Church Avenue



Merchant Survey Results



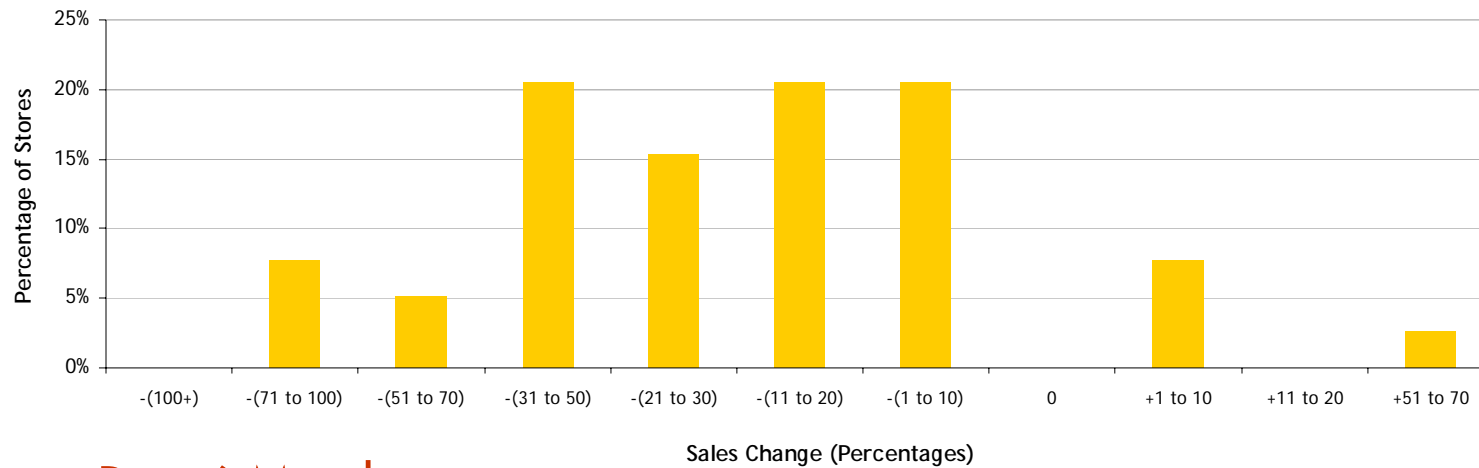
Changing Customer Base

- Merchants report shift from African Americans as historic customer “base”
- West Indian, White & Latino shoppers increasing
 - 53% said the White demographic is increasing in importance
 - 39% said the Latino demographic is increasing in importance
 - 35% of merchants said the West Indian demographic is increasing in importance
 - African American customer base is decreasing or staying the same

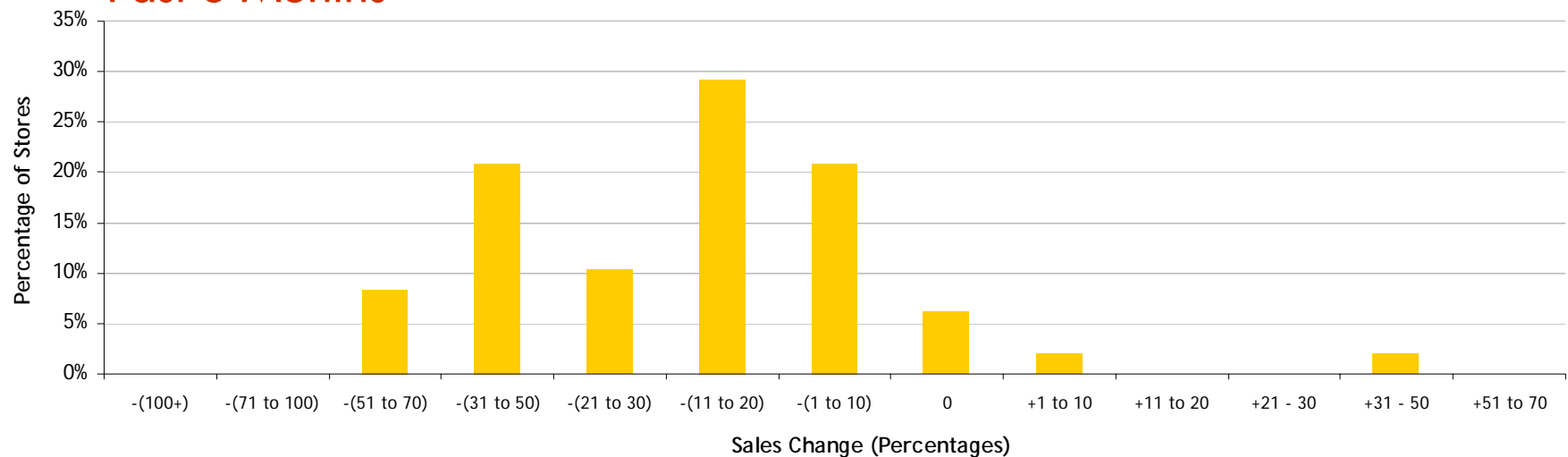
Merchant Survey Results

Sales Declines

Past 3 Years



Past 6 Months



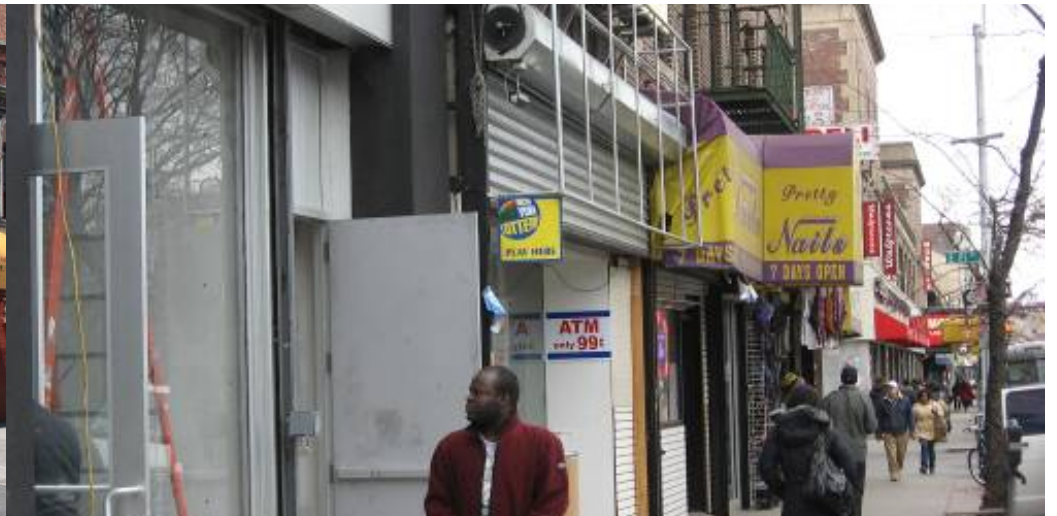
Merchant Survey Results



Merchant Awareness

- Merchants lack understanding of customer income levels and preferences
- They don't appear to have clear reasons for locating on Church Avenue
- They attribute sales declines to general economic issues
- They acknowledge store aesthetics are important for financial success, but lack knowledge and resources to make necessary improvements
- They perceive the customer base to be changing, but don't appear to be adapting to a new market

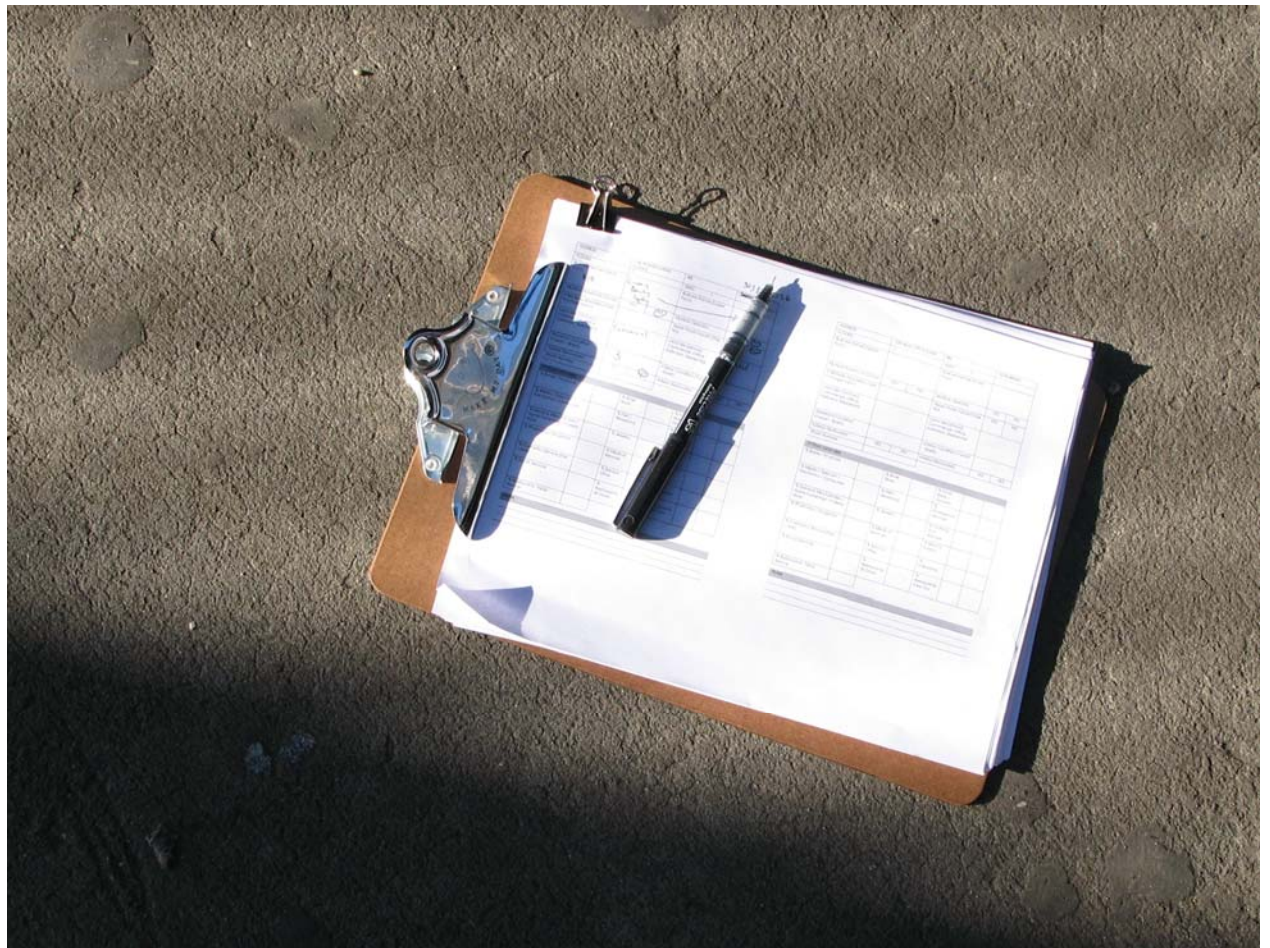
Shoppers Survey



Shoppers Survey

Methodology

- Survey conducted between March and May 2009
- Three methods of collection:
 - "On the street"
 - Internet
 - Self-administered, paper
- Total of 674 surveys collected



Shoppers Survey Results

Respondents

	CENSUS FIGURES FOR TRADE AREA	ALL SURVEY RESPONDENTS	INTERCEPT	SELF- ADMINISTERED (INTERNET)	SELF- ADMINISTERED (PAPER)
Number of Respondents	N/A	674	297	255	122
GENDER					
Men	46%	30%	30%	27%	36%
Women	54%	70%	70%	73%	64%
ETHNICITY					
Black or African American	33%	21%	32%	10%	15%
West Indian	37%	22%	37%	6%	17%
Latinos	23%	12%	11%	9%	19%
White	8%	32%	11%	57%	28%
INCOME					
Median Household Income	\$32,282	± \$50,000	± \$25,000 - \$50,000	~\$50,001 - \$100,000	~\$50,000
AGE					
Median Age	32.0	±45	± 41 - 50	± 35	± 40

Shoppers Survey Results

Who shops on Church Avenue?

Core Shoppers

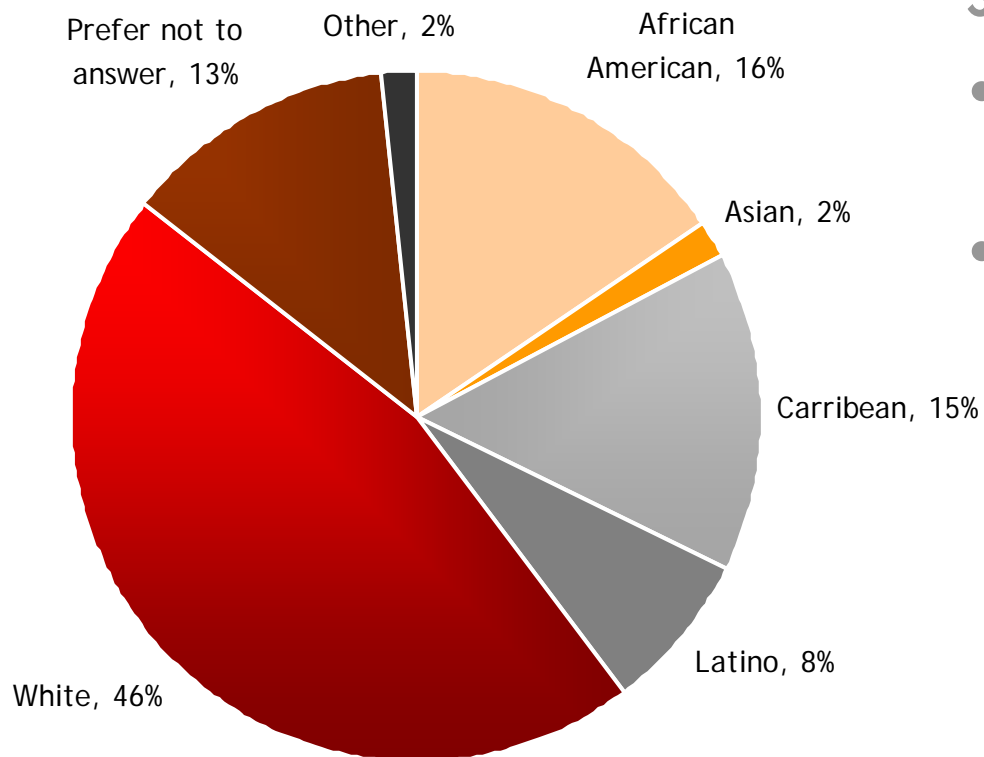
- **Shop at least weekly**
- Lower household incomes
- 28% West Indian
- Church Avenue workers
- Matches most closely to intercept respondents
- 68% walk to Church Avenue

- **Shop monthly, seldom or never**
 - More affluent
- Come to Church Ave to transfer to subway or bus
 - Matches most closely to Internet respondents

Infrequent Shoppers

Shoppers Survey Results

Infrequent Shoppers



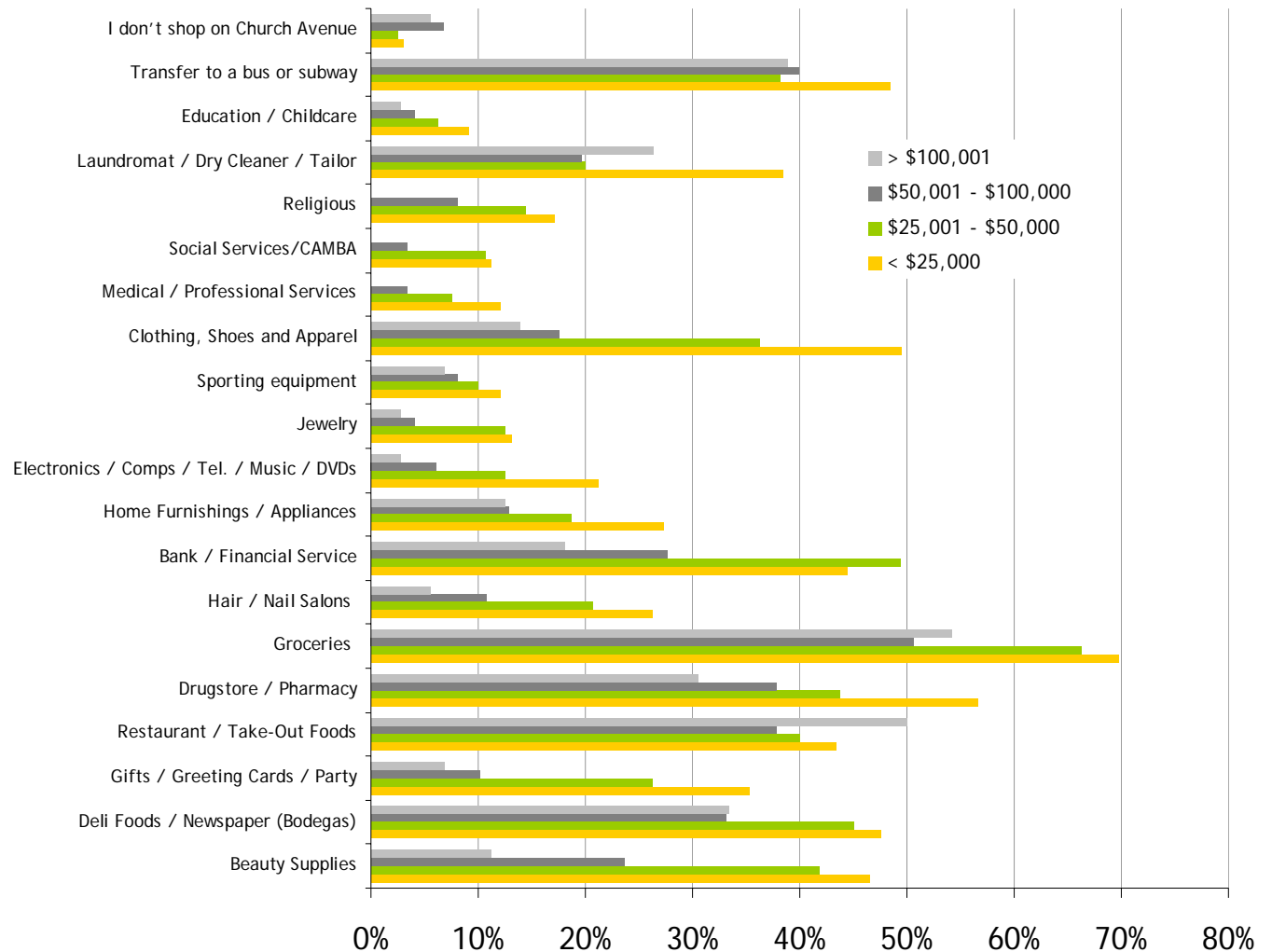
Shop monthly, seldom or never

- More affluent: 71% have household incomes over \$50,000
- White respondents were more likely to be infrequent shoppers

Shoppers Survey Results

Shopping patterns differ according to income

- Most respondents engaged in convenience shopping
- Two most popular niches: discount apparel and food & grocery
- Food & grocery a common denominator across incomes



Shoppers Survey Results

Shopper satisfaction is low
across all categories...



Shoppers Survey Results

Infrequent shoppers are less satisfied

All respondents gave parking, cleanliness and availability of amenities low ratings.

Infrequent Shoppers (Shop monthly, seldom or never)

- Infrequent shoppers were much more likely to give Church Avenue a poor rating
- Quality of food and merchandise was an issue for these shoppers

Frequent Shoppers (Shop at least weekly)

- More likely than average to be satisfied with quality and types of merchandise and food items

Shoppers Survey Results

How do shopper views compare to data from the merchants survey?

Sales Declines:

- Merchants cited poor economy as reason for declining sales
- Shoppers ranked their shopping experience as Poor to Fair, and majority are buying food items but little else on Church Avenue

Competition:

- Merchants didn't feel competition was a primary reason for declining sales
- Shoppers report frequenting a wide range of NYC shopping areas

Appearance:

- Merchants report they are working to improve aesthetics
- Shoppers rate aesthetics in the Poor to Fair range

Shopper Survey Results

Most Desired Improvements

Survey respondents said they would shop on Church more often if it met their needs and expectations.

Top three desired changes:

- Improve physical appearance
- Improve cleanliness
- Improve parking

Top three desired new business types:

- Café
- Bookstore
- Sit-down restaurants



Market Position / Vision



Market Position

Good News/Bad News

Strengths:

- Very dense trade area (40,000+ potential customers)
- Tremendous pedestrian traffic to and from subway
- Good variety of food products and merchandise
- Strength of food shopping, discount apparel (Bobby's)
- Mix of store sizes

Weaknesses:

- Physical conditions of streets, sidewalks and buildings
- Lack of parking, amenities, sit-down restaurants
- Many residents in Trade Area are not shopping on Church; many shoppers are only shopping for groceries
- Brand recognition of the stores is low

Market Opportunities

- Unmet demand for restaurants
- Explore park users as untapped market
- Store vacancies/development sites in key locations

Potential niche strategy:

- 1) Leverage strength of Flatbush Avenue
- 2) Expand/build upon “breadbasket” on East Church
- 3) Develop discount merchandise near Bobby’s
- 4) Provide sit-down restaurant experience in West

Recommendations



Overview

Recommendations Table of Contents

- Circulation
- Streetscape
- Building Exteriors & Interiors
- Retail Improvement & Recruitment
- Promotion
- Site Development

Circulation



Circulation

PARTNERS AND FUNDING:

NYCDOT

Transportation Alternatives

Governors Traffic Safety Committee

NYSDOT Transportation Enhancements Program

NYSDOT Hazards Elimination Program

State Transportation Improvement Program

Alleviate Traffic Congestion

Goal

Address the congestion of the Church Avenue roadway.

Recommendations

- Support NYCDOT recommendations, including:
 - Using pedestrian bulges
 - Changes to signalization to improve safety
 - Expanded bus stops
 - Improve roadbed conditions
 - Changes to parking rules to reduce double parking
- Do not support the idea of converting Church to a one-way street
- Support measures that address illegal cabs & dollar vans, and other traffic violations
- Provide written and verbal feedback on other ongoing DOT studies including Truck Route Management Study

Circulation

PARTNERS AND FUNDING

Transportation Alternatives

DOT Park Smart Program

Parking

Goal

Alleviate lack of parking and long wait-times for customer parking spaces.

Recommendations

- Create metered parking lot on E 18th Street and add directional signage
- Muni-meters to increase turnover and vacant space
- Designate employee parking areas and provide information on lots and parking rules to merchants
- Promote cycling and public transit for employees and merchants, with bike parking on side streets
- Request side street bicycle racks through NYCDOT Cityracks program

July 30, 2009

Streetscape



Streetscape

FUNDING AND PARTNERS:

University Design Studios

DOT

Projects for Public Spaces

Elected officials

Sidewalks: Church Avenue East

Goal

Make pedestrian circulation more comfortable and less crowded between Flatbush and E16th.

Recommendations

- Map encroachments on sidewalk and share images of cramped sidewalk space with merchants
- Support the NYCDOT's proposal to adjust traffic signals, expand bus stops
- Create and monitor delivery hours for trucks and merchandise loading/unloading
- Implement commercial loading zone program

July 30, 2009

Streetscape

FUNDING AND PARTNERS:

University Design Studios

DOT

Projects for Public Spaces

Elected officials

Sidewalks: Church Avenue West

Goal

Establish a unique look and feel for Church and Coney Island Avenues area; foster the creation of a restaurant row.

Recommendations

- Design to encourage night visits: intimate lighting, planter boxes, etc. to facilitate restaurants
- Plant heavily on the southern side to bring the street to scale and reduce the feeling of there being retail on one side only
- Create space for sidewalk seating by widening sidewalks
- Lobby for regulatory changes to accommodate new vision of West End

July 30, 2009

Streetscape

PARTNERS AND FUNDING:

Street Vendor Project

NYC Greencarts Program

Prospect Park Alliance

Vendors

Goal

Create a vendor location strategy that improves pedestrian traffic flow, enhances the streetscape and is fair to vendors.

Recommendations

- Designate parking spaces for vendors' use during specific hours
- Engage translators to facilitate dialogue with vendors
- Combine location incentives with enforcement of illegal vendors
- Encourage vendor carts at Parade Grounds, including Church Avenue restaurant vendors ("Church Avenue featured restaurant")

July 30, 2009

Streetscape

FUNDING:

Community Development Block
Grant Program

Keep America Beautiful



Providence, RI Art Can
(designed by Steelyard)

Cleanliness

Goals

Cleaner sidewalks with less litter; change perception of cleanliness on Church Avenue.

Recommendations

- Install recycling bins
- Increase number of trash cans on key intersections
- Replace some cans with “art cans” designed by art students and artists
- Encourage food purveyors to improve sidewalk cleanliness in front of their stores

Restroom Access

Goal

Increase the number of publicly accessible restrooms.

Recommendations

- Distribute survey results to merchants showing customer dissatisfaction with the availability of restrooms
- Create a list of publicly accessible restrooms on Church Avenue and make print copies available in stores (combine with parking, ATM and other useful information)
- Encourage restaurants to consider providing publicly accessible restroom

Buildings

29
**BEST CORNER
LAUNDROMAT**
DROP OFF SERVICE & SELF - SERVICE

CLOSED ONEVERY WED

Buildings



Buildings

PARTNERS AND FUNDING:

University Design Studios
Norman Mintz

Keep America Beautiful

SBS Façade Improvement
Program

National Trust for Historic
Preservation

New York State Main Street
Program

SBS Four Point Program

Façade Improvement

Goal

Assist property owners to improve building exteriors.

Recommendations

- Create voluntary design guidelines for upgrading facades (or use existing SBS guidelines)
- Provide grants to owners/merchants for wire mesh gates, and exterior finishes (Four Point Program)
- Work with suppliers of gates and awnings to negotiate group purchase price for merchants
- Work with building owners to lessen the visual impact of vacant storefronts
- Host workshop on principles of façade design

Buildings

PARTNERS:

University Design
Studios

Design and Display

Goal

Improve interior aesthetics to be more appealing to existing and new customers.

Recommendations

- Create voluntary design guidelines as a resource for merchants update their interiors
- Work with Bobby's during their façade renovation to revamp interior and hold Grand Reopening
- Host lecture/workshop on inexpensive interior design and merchandising
- Offer prizes for best window display
- Engage university students to provide free consultations and design suggestions

July 30, 2009

Buildings

Subway Station

Goal

Create an attractive and clean gateway to Church Avenue.

Recommendations

- Lobby MTA to improve cleanliness and condition of Church Avenue Subway station, including garbage collection and interior and exterior maintenance



Retail Improvement



Retail Improvement

PARTNERS AND FUNDING:

CAMBA Small Business Service Program

Healthy Bodegas Initiative

The Bodega Association of the United States

Community Development Block Grant

NYC Small Business Services
(Business Planning and Training courses and employee training)

ACCION USA

Other NGOs

Training and Development

Goal

Connect merchants to services and training that help them be better business leaders

Recommendations

- Work with local organizations to deliver business improvement workshops
- Interface with CAMBA and SBS to bring business planning and marketing assistance to merchants
- Provide translation services
- Compile a resource manual listing free or inexpensive training courses for merchants and staff
- Assist businesses with grant applications for SBS and other capacity boosting programs

Retail Improvement

PARTNERS:

Pratt Center for Community Development

FUNDING:

NYSERDA

ConEdison

Energy Audits and Incentives

Goal

Small commercial energy audits and incentives to help reduce utility costs.

Recommendation

- NYSERDA audits, free if recommended efficiency measures are implemented, \$100 otherwise

- Con Edison audits are free

Energy Audit



Recommendation Report



Install Measures



Receive Incentives

Retail Improvement

PARTNERS:

Healthy Bodegas Initiative
Brooklyn CSAs

FUNDING:

Robert Wood Johnson
Foundation Active Living by
Design

CAMBA Small Business Service
Program

NYPD Operation Safe Store

Bodegas

Goal

Improve the quality and variety of goods offered at bodegas, assist bodega owners to run successful businesses.

Recommendations

- Partner with Brooklyn based Community Supported Agriculture organization to distribute organic produce out of bodegas and greenmarkets
- Contact health department to participate in Healthy Bodegas Initiative
- Encourage bodegas to stock healthy food items
- Work with NYPD to install cameras in bodegas with violent crime and loss issues (Operation Safe Store)

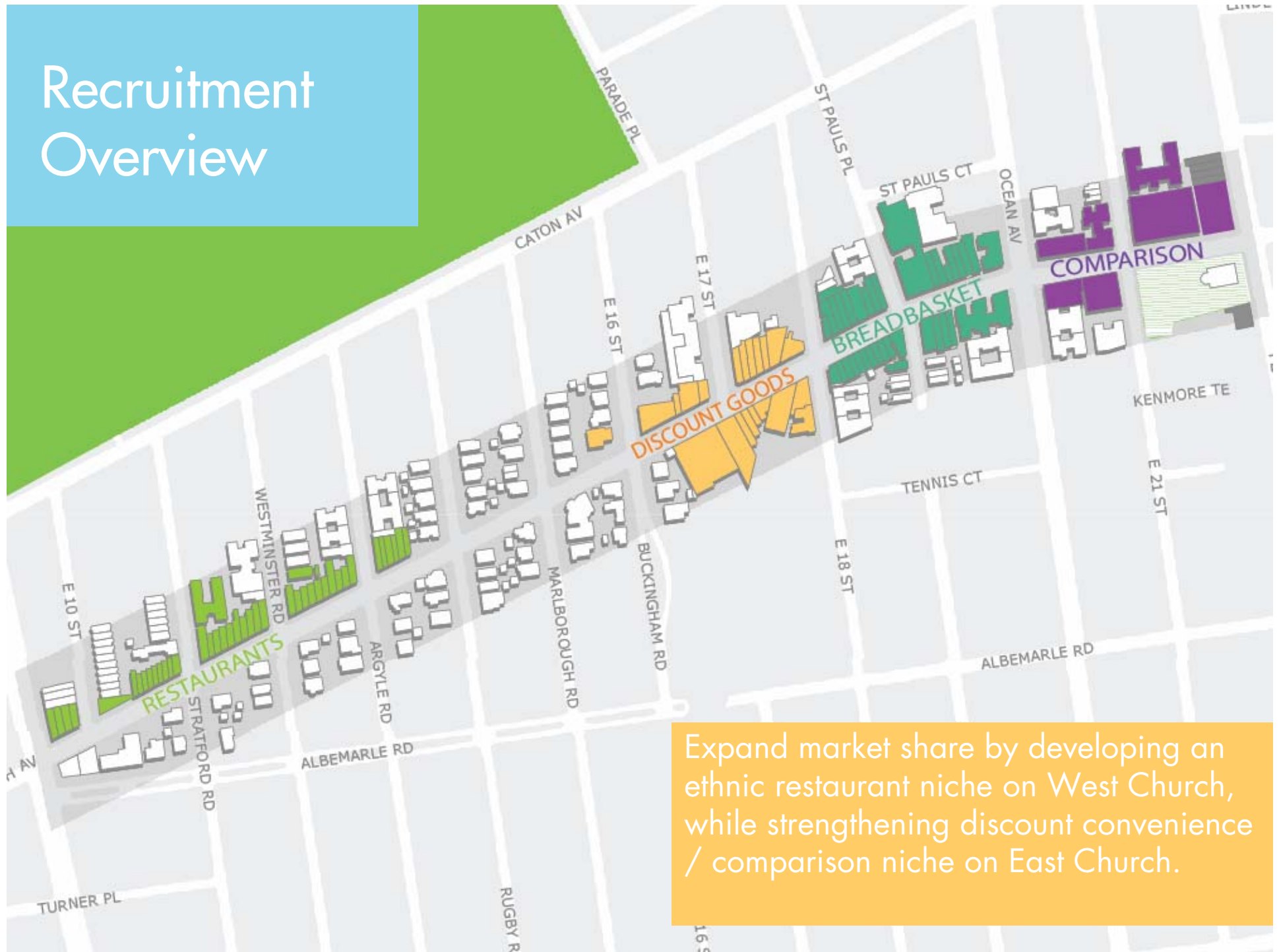
July 30, 2009

Retail Improvement

Promotion

- Produce an area wide marketing strategy in partnership with other retail corridors (see Mosholu Preservation Corporation in the Bronx)
- Blog monthly business profiles on BID website (see Bedstuy Gateway BID)
- Scan and post menus of restaurants and takeout foods online to help businesses increase web-presence
- Offer small grants for merchants to develop a website or other web-based marketing (see Lower Eastside BID)
- Explore signage and wayfinding strategies

Recruitment Overview



Expand market share by developing an ethnic restaurant niche on West Church, while strengthening discount convenience / comparison niche on East Church.

Recruitment

Comparison Area

Comparison goods retailers on the blocks just west of Flatbush Avenue

Still has visibility from primary shopping street

- Comparison goods and boutiques between Flatbush Avenue and subway will enjoy visibility to Flatbush Ave shopper but at lower rent levels
- Targeting independent merchants who place an emphasis on “visual merchandising” and store feel
- Targeting concepts “from the homeland”



Recruitment



Recruitment

Breadbasket Area

- Church from E 21st to E 18th streets has strong existing anchors selling meats, fish, produce
- Encourage other food markets and convenience-oriented businesses to cluster nearby
- Bakery, ethnic food purveyor, cheese, etc.



Recruitment

Discount Apparel/General Merchandise Niche

RETAILERS:

Courts (furniture and appliance)

Rainbow

Childrens Clothing



- Discount-oriented comparison goods brands immediately west of subway (E 18th to E 16th)
- Anchoring presence of Bobby's
- Study locating a family restaurant, clothing store like Rainbow, general merchandise store like Courts, etc.
- Vacancy: Church Bargain Center building

Recruitment



Recruitment

Food Concept Area

- Church Avenue near Coney Island Avenue, between Westminster and E. 10th, abutting Ditmas Park to the south
- Weak market for retail space
- “Cross-over” ethnic restaurants appealing to the Ditmas Park consumer and Church Avenue East shoppers
- Less street traffic than on East End, but less hectic atmosphere could be asset for a restaurant district



Recruitment



Recruitment

Increased Foot Traffic in Food Concept Area



- AYSO thrift shop, office / recruitment center, or 'showroom' would draw AYSO members to Church Avenue
- Writers Workshop space or outlet of Superhero store from Park Slope
- Explore partnership with Bonnie's Youth Club
- Bolsters restaurant prospects
 - Brings foot traffic to western section of Church
 - Synergies with NYC Icy
- Many vacancies between East 10th and Westminster



Site Development



Site Development



2022 Church Avenue

- Underdeveloped one story commercial building– built at 0.75 FAR, 3.0 FAR allowable.
- Potential site for mixed use development in prime location.
- Redeveloped, it could accommodate comparison retail with a larger floorplate.

Site Development



MTA Lot (at E 18th and Church)

- Currently vacant; lot size and shape make it unsuitable as a development site.
- Potential uses which would enhance Church Avenue East:
 - Metered parking
 - Outdoor market/vendors
 - Location for public restrooms

Site Development



1703 Church Avenue

- Formerly Church Bargain Center, one of the largest available spaces on Church Avenue.
- Attractive site to focus on for retail recruitment.
- Possibilities: Sit-down family restaurant, Rainbow, Gymboree, Café, etc.

Site Development



1515 Church Avenue

- Key “transitional site” between retail/residential areas; suggests “mixed-use” development
- Located directly across from Bobby’s, currently for sale.
- Suitable location for a destination family restaurant, diner or pancake house.
- Could draw Bobby’s shoppers, local residents, families using nearby Parade Grounds.

Site Development



Church at Coney Island Ave

- Parking lot in use on weekdays, empty on weekends; visible location with high drive-by traffic.
- Potential weekend uses: outdoor flea market, farmers market, local gathering space for events, etc.
- Outdoor restaurant incubator for food businesses destined to occupy spaces on Church Avenue West

Implementation



Implementation

Phased Approach

Near Term

Can be done by BID “alone” or with current partners and minimal investment

Recruitment strategy and package

Promotional materials

Lectures and workshops

Design assistance from Pratt Institute

Recruitment for Church Bargain Center vacant site

Medium Term

Requires partnerships and approvals, plus special funding

Study sidewalk encroachment and share information with merchants

Energy audits

Parking improvements

Bodega improvement

Vendor location strategies

Weekend uses of Church/Coney parking lot

Long Term

Requires substantial cooperation of other entities, large capital investment

Streetscape redesign/sidewalk widening

Traffic Improvements

Façade Improvements

Development of 2022 Church, 1515 Church, the MTA lot

Implementation

Modest Investments, Substantial Returns

- ① Merchandising improvements
- ② Ramp up garbage collection and cleaning services
- ③ Vacant lot marketplace
- ④ Recruit “activity generators”
- ⑤ Merchant capacity building

THANK YOU!

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