



TWO SQUARES, ONE PLACE

A STRATEGY PLAN FOR HYDE/JACKSON SQUARE MAIN STREETS



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Client

Hyde/Jackson Square Main Streets

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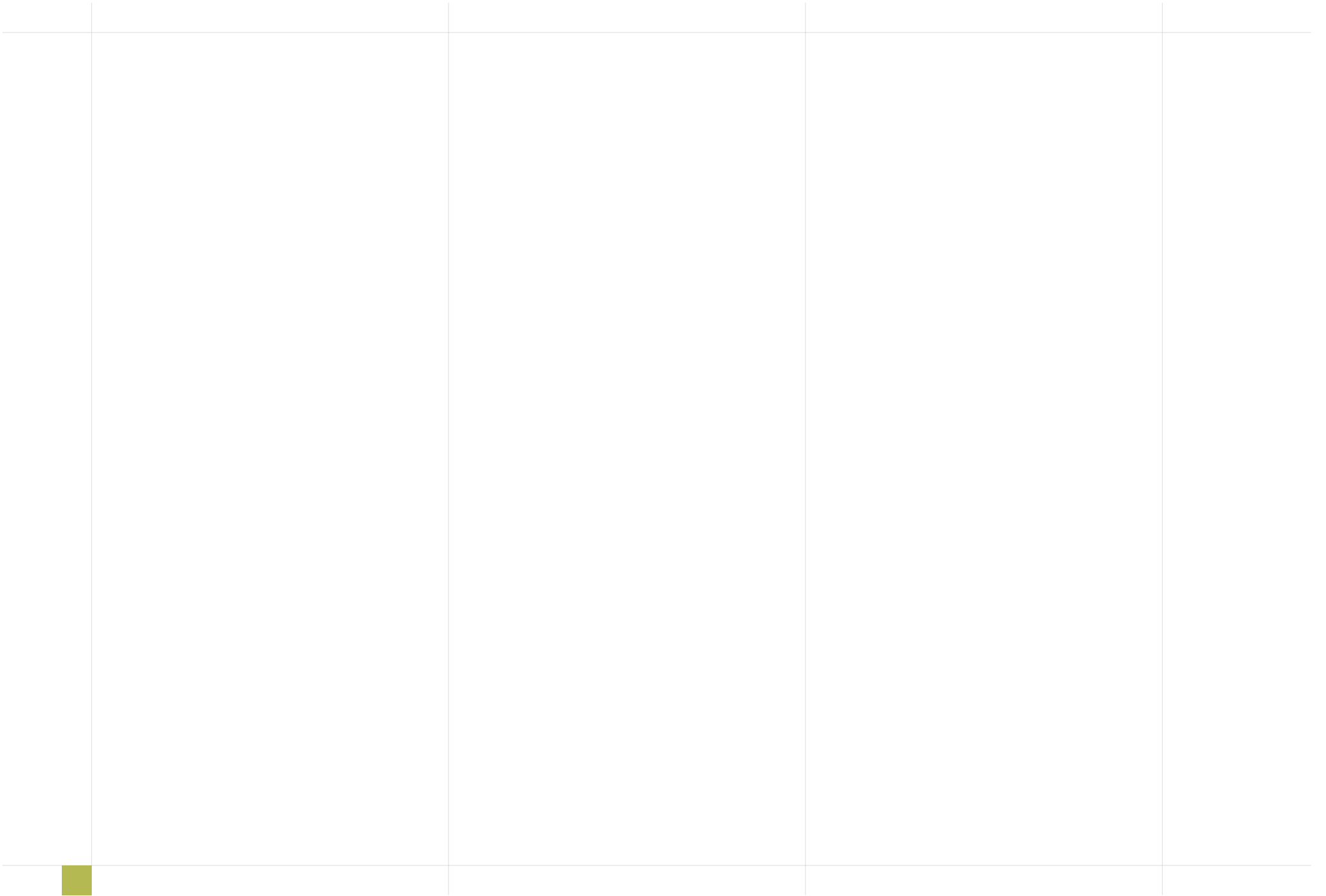



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EXECUTIVE SUMMARY

Executive Summary

Hyde/Jackson Square (HJS) is a vibrant, diverse retail and residential district located in the Jamaica Plain neighborhood of Boston, MA. With the introduction of new developments, changing demographics, and potential for commercial gentrification, HJS now faces a critical moment in its growth. This dynamic has created an environment in which local businesses, developers, residents, and community groups have an opportunity to work together such that HJS emerges as a coherent and unified district.

In addition to these changes, several existing characteristics of HJS challenge this goal of a unified district. First, the physical separation between Hyde and Jackson Squares creates a long corridor with both residential and commercial uses that break the district's continuity. Second, taken together, HJS businesses do not offer as complementary a mix of goods and services as might be provided. There is an overabundance of convenience stores and inadequate entertainment, clothing, and other destination retail. Third, the diverse demographic groups in HJS, which include strong representations of the Latino, non-Latino White, and non-Latino Black populations, often have different needs and visions for the district. Finally, HJS lacks a shared identity, and is struggling to define itself as Latino, multicultural, or some other categorization. This report responds to these challenges by proposing a plan focused on the unifying concept of "Two Squares, One Place" for HJS.

The Hyde/Jackson Square Main Streets organization (HJSMS), part of the Main Streets program operated by the City of Boston and the National

Trust for Historic Preservation, has worked in the district since 1998 to promote and strengthen the area's physical characteristics and economic vitality. With a history of collaboration with business owners, community groups, and local government, HJSMS is well-positioned to take a lead role in supporting the district through its transition period.

This report has been produced by a team of 13 graduate students (the Project Team) from the Department of Urban Studies & Planning at the Massachusetts Institute of Technology. HJSMS retained the Project Team to produce a plan for the organization. The students are all participants in the course, "Revitalizing Urban Main Streets," taught by professors Karl Seidman and Susan Silberberg.

Analysis

Over a three-month period, the Project Team has completed an extensive analysis of HJS. The following includes the components of this process and key findings from each.

Market

The Project Team utilized existing data and conducted demographic and sales gap analyses to understand the HJS market and the changes that have occurred over the past several years. The resident population is extremely diverse, with a growing Latino presence, as well as sizeable non-Latino White and Black populations. Despite this demographic mix, the businesses along Centre Street largely consist of Latino-oriented restaurants and convenience retail. The Project Team's analysis indicates that non-Latinos mostly shop

elsewhere for key goods, and that all groups travel outside the district for entertainment, clothing, and other comparison retail. Meanwhile, several take-out restaurants and a few other destinations do attract diverse customers from outside the district. The two upcoming developments at Jackson Square and the Blessed Sacrament Church, along with the businesses that occupy these new spaces, will largely define the district's image as a marketplace.

Physical

The Project Team collected information on building condition and use, street plantings, open spaces, sidewalk condition, transportation, traffic, and district gateways and signage. The three-quarter mile area of Centre Street that constitutes the HJS district offers a visually stimulating area with impressive public art and brightly colored storefronts, but poses a major challenge to creating a unified district. The long corridor geographically separates Hyde and Jackson Squares into distinct areas. Furthermore, the characters of Hyde and Jackson Squares have subtle differences, such as a greater number of convenience stores at Jackson Square. Centre Street also includes both business and residential properties, as well as several areas that are vacant or recessed from the street, which break the street's continuity. Further, the district is disadvantaged by narrow sidewalks and a lack of prominent gateways. However, its buildings do function on a pedestrian scale and street life is vibrant and an asset upon which to build.

Community

The Project Team conducted nearly thirty interviews with key members of the HJS community to gather qualitative data on the district and better understand diverse perspectives in the community. Interviewees included representatives from city government, local businesses, community groups, real estate companies, and the police department. Stakeholders voiced their concerns about the need to define district identity, develop HJS into a shopping destination, strengthen the physical appearance of Centre Street, improve neighborhood safety, coordinate the work of community groups, and address the potential commercial and residential gentrification.

Comparison Districts

The Project Team conducted a series of site visits to comparable districts in the Boston area to gather contextual information and impressions. District visits included Brighton Center, Centre South, Coolidge Corner, East Boston, and Eggleston Square. The Project Team found that other districts subtly create a unified image through distinct street lamps, consistent signage, and strong district gateways. In addition, several of the districts maintain a broad mix of businesses, and thus attract and keep shoppers in the area.

Two Squares, One Place

Through this extensive analysis, the Project Team has developed a unifying concept to guide its plan for HJS and address the transition occurring in the district. This concept, “Two Squares, One Place,” signifies the district’s opportunity to coalesce the currently disconnected Hyde and Jackson Squares

into one distinct, recognizable place. This opportunity includes creating physical connections between the squares, as well as building linkages among the diverse demographic groups and businesses. The Project Team has also distilled a set of five principles that inform its vision for HJSMS and the district. These are:

- Embrace Diversity
- Enliven Street Life
- Create Destination
- Unify Community
- Manage Change

Building upon the “Two Squares, One Place” concept and guiding principles, the Project Team has developed a set of recommendations with accompanying strategies for HJSMS, grouped under three broad goals for the district.

Create a Continuous Corridor on Centre Street

In response to the challenging configuration and length of Centre Street, the Project Team recommends several ideas for creating a more unified area through both physical and business enhancements. These include improving landscaping and street furniture, buffering pedestrians from certain uses, distributing customer comment cards, and stimulating informal markets and pushcarts.

Develop Hyde/Jackson Square into a Destination

HJS has the opportunity to capitalize on its existing strengths, as well as the upcoming developments, to grow into a strong retail destination for both residents and customers from outside the district. Specific strategies recommended under

this goal include designing new promotional materials, considering renaming the district, developing a business recruitment package, and redesigning district gateways and plazas.

Position Hyde/Jackson Square Main Streets as a Community Building Organization

With resident and business changes occurring in HJS, HJSMS can play a key role in managing the district’s transition and facilitating the efforts of others in the community. Initiatives supporting this goal include implementing new building design criteria, creating a business mentorship program, conducting joint marketing campaigns, and exploring business crime prevention programs.

Implementation

In order to implement the ambitious plan proposed in this report, HJSMS requires increased capacity and financial resources. The Project Team recommends a range of strategies for redefining the organization’s mission and goals, improving its visibility, and strengthening its volunteer committees. In addition, the report outlines numerous funding strategies, including a membership program, merchandising, generating revenue from the new developments, and accessing targeted program grants.

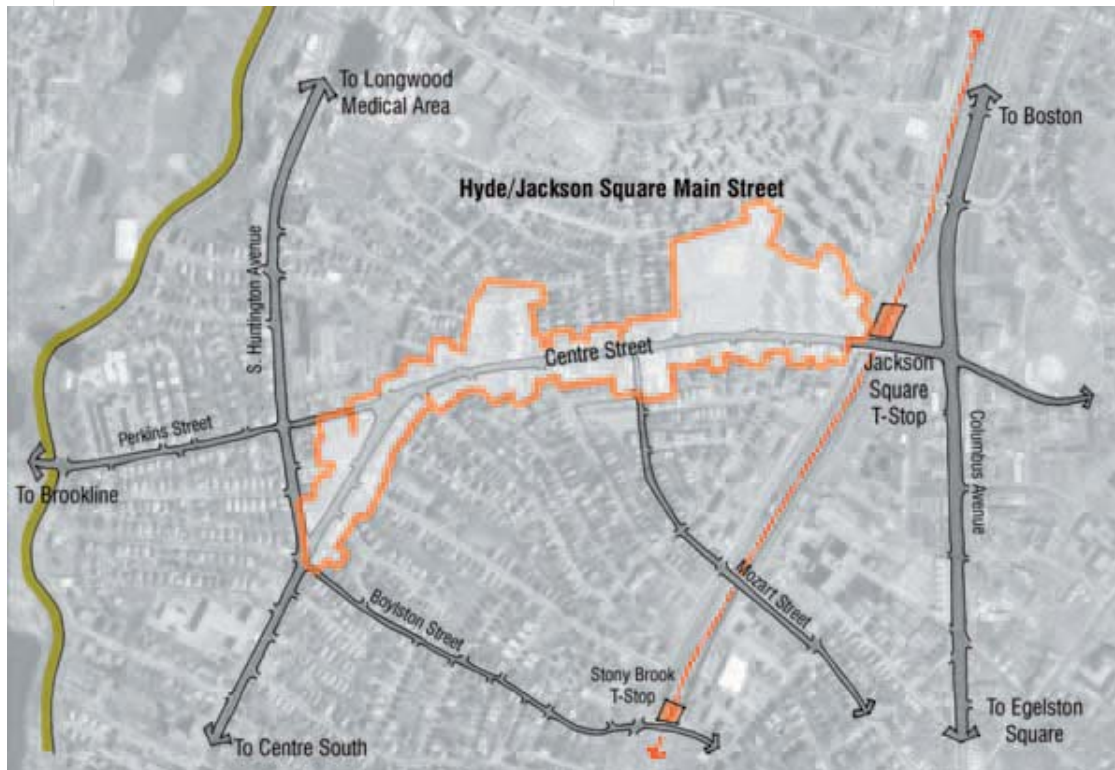
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Hyde/Jackson Square is well-connected to downtown Boston as well as nearby community business districts



Hyde/Jackson Square Main Streets District Boundaries and major connections

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Context

The boundaries of the HJSMS district currently include Centre Street from Lamartine Street to South Huntington Avenue. This report considers a slightly larger district, from Lamartine Street to Columbus Avenue, but emphasizes the existing HJSMS boundaries.

HJS is located 3.77 miles from the heart of Boston. Columbus Avenue, a major street and thoroughway, runs almost the entire length between the two areas. In addition to Columbus Avenue from the east, HJS is approachable by several other major streets: South Huntington Avenue from the north, Centre Street from the south, Mozart Street also from the south, and Perkins Street from the west. HJS is also easily accessed by the Jackson Square MBTA Station on the Orange Line (approximately a 12-minute trip from downtown Boston).

The two commercial districts in closest proximity are Egleston Square and Centre South. Egleston Square has a smaller area than HJS and is dominated by convenience stores, while Centre South is similar in size but offers more comparison goods than HJS. HJS's proximity to these districts presents both the challenge of competition and opportunity for attracting additional customers.

Community

More than 13,000 residents live in the immediate HJS neighborhood. There is no dominant demographic group—Latinos, Whites, and Blacks each represent approximately one-quarter to one-third of the local population.¹ While HJS's total population has slightly declined since 1990, the proportion of Latinos has grown by 50% throughout the decade and now represents a significantly larger percentage than the Latino demographic in either Jamaica Plain or Boston.

HJS is composed of three major sections. In Hyde Square, the Bella Luna Restaurant and Milky Way Lounge & Lanes attract young and middle-aged visitors from across the area, and the Hi-Lo market offers affordable food shopping. The Blessed Sacrament Church, currently slated for redevelopment, is a community icon at the geographic center of the district. Jackson Square, meanwhile, includes the JP Plaza, with destination shopping such as a Stop & Shop, as well as the Bromley Heath residential housing project and Jackson Square MBTA Station.

There are over 20 community-based organizations that are active in HJS. These range from the Hyde Square Task Force (launched in 1991) to Fight the Trash/Mano Dura con la Basura (launched in xx) to Jamaica Plain Neighbors For Neighbors (launched in 2005) to Hyde/Jackson Square Main Streets (launched in 1998). Together, they encompass a wide variety of interests and actors.

Businesses

There are over 120 businesses in HJS, most of which are small and locally-owned by persons of color. Businesses are largely clustered into

three major geographies and types. Hyde Square includes relatively up-scale goods and services, while Latino-oriented convenience stores and restaurants dominate the middle area of Centre Street. Meanwhile, Jackson Square provides convenience and food shopping for mixed income levels. HJS also has a handful of regional and national retailers, mostly located in JP Plaza, such as Bank of America, CVS, Stop & Shop, and Tello's. The district is decidedly diverse with a Latino focus.

New Developments

The two upcoming developments in the district are a major component of the ongoing change in HJS. The Blessed Sacrament Church, one of HJS's most striking and historically significant landmarks, is scheduled for redevelopment, likely into a mixed-use project. Another powerful landmark, more notable now for its absence than presence, is the Jackson Square Development. These six acres of vacant land are projected to become a major mixed-use project emphasizing affordable housing, retail and community space. The project will have a tremendous impact on the gateway to HJS from Columbus Avenue, as well as on the businesses and residents within the district.

Community Concerns

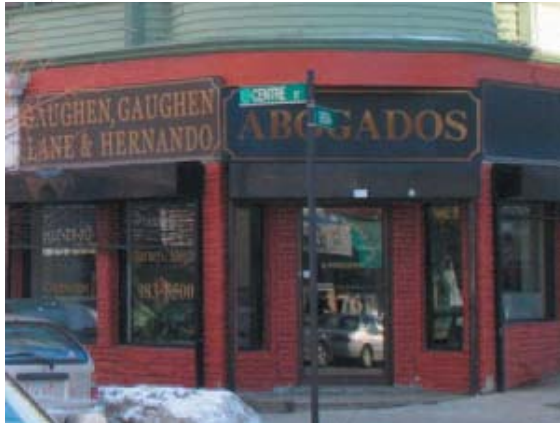
In a dynamic neighborhood, there are always differing perceptions and constituencies. HJS currently has three key dilemmas voiced in community meetings, counter-side chats, in homes, and on the street — the identity of HJS, changing demographics, and the potential for commercial gentrification.

Table 1: Demographic Profile, 2000

	Hyde/ Jackson	Jamaica Plain	Boston
Population	13,457	38,124	589,141
Race/Ethnicity			
% White (non-Hispanic)	35	51	49
% Black (non-Hispanic)	21	15	24
% Other (non-Hispanic)	6	12	13
% Hispanic	38	22	14
Median household income	\$39,107	\$43,113	\$39,629
% Owner-occupied housing units	28	31	32
% Individuals below poverty level	25	22	20

Source: U.S. Census 2000

Renderings of the proposed Jackson Square Development, which would introduce mixed uses and define the Columbus Avenue gateway



“[Hyde/Jackson Square] has a Latino flavor, but I wouldn’t consider it a Latin business district. It should reflect the diversity of the neighborhood.”

- Representative, HJS Community Organization

The first concern to address is the identity of HJS. Over 50% of the businesses have a Latino orientation, but Latino residents are only one of three major demographic groups in the district. Therefore, the question remains whether the business district should market itself as the “Latino Heart of Boston,” appeal more directly to its broad residential base, or do a combination of both.

The second issue focuses on the question of changing demographics. Anecdotal evidence suggests that a relatively high-income, White demographic is entering the neighborhood, while low- to moderate-income Latino and minority groups are gradually leaving. Meanwhile, the 2000 US Census indicates that the fastest growing group is actually middle-aged Latinos (it is worth noting that the US Census typically undercounts communities of color). Clarifying the reality versus the perception is important for HJS, not only because of important choices now being made regarding affordable versus market rate housing, but also because business owners need to have a clear picture of their consumer base.

The third concern addresses the potential for commercial gentrification and its impact on the community. Currently, there is little evidence that commercial rents are rapidly increasing, but housing prices throughout Jamaica Plain are rising (according to the Egleston Square Neighborhood Association, housing costs have doubled in the past ten years). Business owners have expressed concern over the potential for increasing commercial rents and displacement, while property managers and developers often welcome rising values. Clearly, gentrification means different things to different people, and so the community needs

to be prepared to capitalize on the benefits and mitigate detriments of the process.

Endnotes

¹The U.S. Census does not make a distinction between Hispanic and Latino. The U.S. Census defines the groups as “those who classify themselves in one of the specific Hispanic or Latino categories listed on the Census 2000 or ACS questionnaire – ‘Mexican,’ ‘Puerto Rican,’ or ‘Cuban’ – as well as those who indicate that they are ‘Other Spanish, Hispanic, or Latino. Origin can be considered as the heritage, nationality group, lineage, or country of birth of the person or the person’s parents or ancestors before their arrival in the United States. People who identify their origin as Spanish, Hispanic, or Latino may be of any race.” Hence, Hispanic and Latino are used interchangeably in this report.



Vision

The Project Team has developed a plan for Hyde/Jackson Square Main Streets (HJSMS) to capitalize on the opportunities and mitigate the constraints that result from community change. This plan envisions a Hyde/Jackson Square (HJS) district characterized by:

- Unified Centre Street that offers a continuous, pleasurable pedestrian experience
- Balance of businesses that provide services as well as comparison and convenience goods targeted towards Latinos and other demographic groups
- Consistent and recognizable identity for HJS that is inclusive of diverse groups, incorporates both Hyde and Jackson Squares, and attracts shoppers from beyond the district
- Strong HJSMS organization that takes a leading role in working with businesses, community groups, developers, and local government to coordinate efforts

Methodology

The Project Team set out to gain an understanding of HJS from diverse perspectives, including HJSMS, local businesses, real estate managers and developers, community groups, and local government. This effort began by absorbing numerous existing studies of the district, including a commercial mix analysis and business, restaurant, and customer surveys. The Project Team continued with original research through both quantitative and qualitative analyses. The Project Team's methodology consisted of four key analyses:

Market: demographic studies, retail and service

inventory and a sales gap analysis based on geographic demographic criteria

Physical: surveys of building condition and use, street plantings, open spaces, sidewalk condition, parking, transportation, traffic, district gateways, and signage

Community: nearly 30 interviews with community groups, local businesses, property managers and developers, and local government officials

Comparison Districts: site visits to competing and complementary retail districts, including Brighton Center, Centre South, Coolidge Corner, East Boston, and Egleston Square

In addition, members from the Project Team held weekly meetings with HJSMS and attended numerous events and activities in the district.

Based on this methodology, and in close collaboration with HJSMS, the Project Team has developed its overarching concept of "Two Squares, One Place" and a range of goals, recommendations, and strategies for the organization and HJS as a district.

"We have a goldmine. It could be the next downtown, but we don't know how to administer it."

- HJS Business Owner



Colorful murals in the district reflect the dynamic and diverse surrounding community



Hyde/Jackson youth



The Hyde/Jackson Square (HJS) commercial district is an active retail corridor with established community groups and a distinct mix of multicultural businesses and services. However, these established actors are being buffeted by a series of dramatic changes, including the two new large developments, the possibility of gentrification in and around the community, and changing income and ethnic demographics. Before being able to advise Hyde/Jackson Square Main Streets (HJSMS) on appropriate responses, the Project Team needed to conduct extensive market analysis to understand the existing conditions as well as the expected changes.

The Project Team began by analyzing a variety of previously commissioned studies, including a Business Survey (2001), Commercial Mix Analysis (2003), Restaurant Survey (2003), and Customer Survey (2004) (see Appendix 3 for a summary of the entire surveys prepared by OKM Associates). The historic data in these reports is robust and informative, but also fragmented in terms of the overall picture they provide. To supplement these studies the Project Team initiated a building and business survey, as well as a sales gap and demographic analysis.

From this wealth of information, the Project Team found that the district has a wide base of primarily retail commercial uses, dominated by restaurants and food service stores. However, the district has a strong need for additional comparison shopping stores, drugstores, bookstores, and entertainment options. The Project Team also found that Latino-focused stores compose nearly half of the retail presence and that Latinos represent 60% of shoppers despite comprising only 38% of the district population. This suggests that there are

dramatic returns potentially available in reaching out to non-Latino local residents. Finally, the Project Team has found that the district needs to do a better job of leveraging the vitality of two of its anchors, Hi-Lo and Stop & Shop.

Business Mix Analysis

Overview

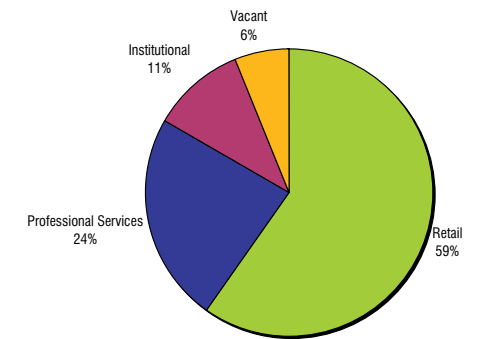
The mix of businesses in HJS has a significant influence on the district's identity, attractiveness, and ability to capture sales. To better understand the current commercial situation in this district, the team produced a district-wide business inventory that breaks down the type, use, and customer focus of all businesses.

General Business Composition

There are over a hundred different stores along Centre Street between Columbus Avenue and South Huntington Avenue. Retail-oriented businesses account for 59% of these stores. There are also a significant number of institutional users of commercial space, reflecting the influence of non-profit organizations, as well as a significant element of professional services such as lawyers (see Appendix 4 for a complete list of businesses by store type).

A more detailed breakdown of the retail businesses has revealed that restaurants account for approximately one-third of stores. Among these twenty-two restaurants are a number of Latino and other ethnic establishments (e.g., El Oriental de Cuba and Miami Restaurant), multiple pizza parlors (e.g., Pizza Oggi, Pizza Azzip), and a scattering of coffee shops (e.g., Crystal Café).

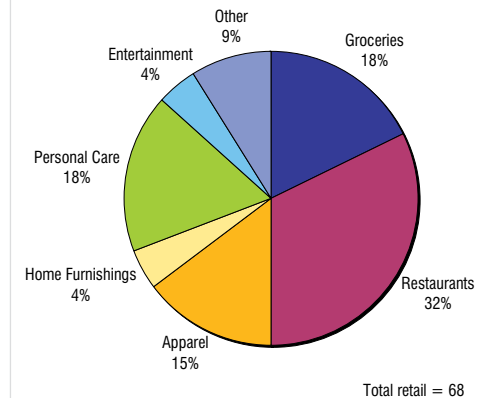
Figure 1: District Business Composition by Storefront



Total storefronts = 114

Source: Project Team Building Survey, 2/26/05

Figure 2: Percentage of Retail Businesses by Sector

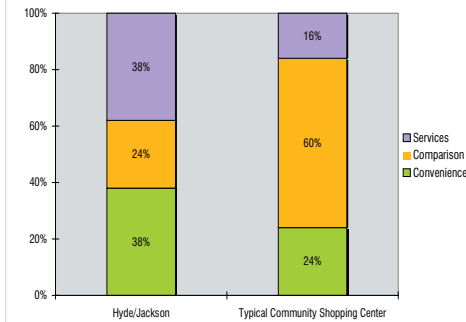


Total retail = 68

Figure 3: Latino focused retail



Figure 4: District Commercial Mix



Source: OKM Associates, 2004

Table 1: Business Mix Compared to Other Main Streets Districts

	% of Commercial Square Footage		
	Hyde/ Jackson	Centre/ South	West Roxbury
Groceries	34	6	18
Home Furnishings	5	1	1
Personal Care	14	11	15
Drugs, Health & Beauty	15	4	5
Apparel/Accessories	10	5	5
Restaurants	15	16	6
Entertainment/Fitness	1	2	16
Gift/Specialty/Florist	2	2	1
Building Materials/ Hardware	0	2	1
Hobby/Sporting Goods	0	4	1

Source: OKM Associates, 2003

In addition to large and small restaurants, grocery stores abound, many with a Latino focus. There are 12 total groceries, including chains such as Stop & Shop and 7-Eleven, as well as a major ethnic grocery store, Hi-Lo. In total, over 50% of the district's retail is in food service. The remaining prominent store types include apparel shops (10) and personal care stores (12), such as beauty salons and barbers.

Latino focused retail accounts for more than half of the businesses in HJS. These businesses provide a range of services, and represent a number of Latino cultural groups. Their dispersion throughout Centre Street emphasizes the multicultural identity of the district, and provides an important opportunity for a single unified business district.

Benchmarking Business Mix

HJS contains a higher percentage of convenience businesses and less comparison shopping locations than the typical shopping district. In a typical commercial district, almost 60% of the businesses are comprised of comparison retail, which tends to draw a broad clientele, whereas in HJS only 24% of the retail sector are comparison businesses.

Several business types commonly found in retail areas and shopping centers, but are visibly under-represented or lacking in the HJS district include:

- Hardware store
- Bookstore
- Drugstore
- Bank
- Fitness center
- Business services (e.g., printing and photo-copying)

Furthermore, in comparison to its immediate neighbors, the Centre South and West Roxbury Main Streets districts, HJS has a higher percentage of grocery stores, restaurants, and apparel stores, as well as a lower percentage of hardware stores, hobby stores, and drugstores.

These missing comparison shopping opportunities and specific business types weaken HJS's overall commercial utility. At the same time, HJS draws great strength from its abundance of restaurants and the unique mix of multicultural businesses with a Latino focus. This gives the district a clear advantage over other districts, and provides important opportunities to promote the district as a regional destination. In addressing the retail holes, HJS should be careful not to lose the uniqueness of its existing businesses.

Rising Land Values

According to data from the Boston Tax Assessor, in 2004 the median property value for commercial or partially commercial structures was \$371,000. Over the last five years, this figure has risen by an average annual rate of 13%. Despite the increase in land prices, the district has not yet had a widespread problem with vacancy. However, if this trend continues, rents will rise and stores will face pressure to shift toward higher value uses and products.

Consumer Analysis

Overview

It is vital to understand a business district's customers both in the abstract and in detail. This section initially examines the relevant findings on

the current consumer composition, including ethnic identity and shopping habits. The section then turns to a more abstract analysis of the district's potential capacity and identifies key areas, such as entertainment, in which it falls short.

Customer Mix

An examination of HJS's current customer mix reveals that 60% of shoppers are Latino. Since Latinos represent only 38% of the neighborhood's total population, and only 21% of Jamaica Plain's population, these figures suggest that HJS is either attracting a large number of regional Latinos or inadequately attracting other demographics from within its boundaries. In either case, this split suggests that HJS's businesses have great potential to increase their customer base by attracting local non-Latino customers.

Anchor Businesses and Retail Linkage

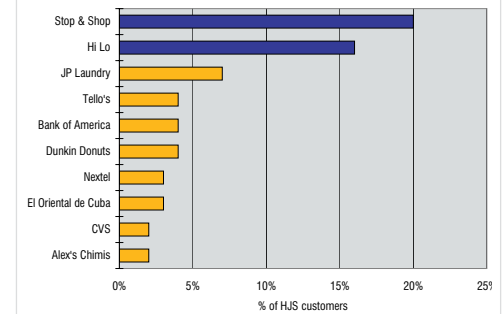
The Consumer Survey results reveal that Stop & Shop and Hi-Lo are the two most commonly visited stores and therefore the key anchor businesses in the district. Taken together, nearly 36% of customers visit one of these two grocery stores on a given trip to the district.

Although many customers visit the two anchor stores, less than a third (32% from Hi-Lo and 26% from Stop & Shop) of these customers extend their shopping at other neighborhood stores. This suggests that while the anchors are certainly drawing customers to HJS, the district is not leveraging their presence. In addition, since the two anchors are roughly located at opposite ends of the district, this isolated shopping pattern tends to further fragment Hyde and Jackson Squares.



Hyde/Jackson Square has a mix of locally owned and chain stores

Figure 5: Ten Most Common Customer Destinations



Source: OKM Associates, 2004

Table 2: Sales Surplus/Leakage for the Four Trade Areas

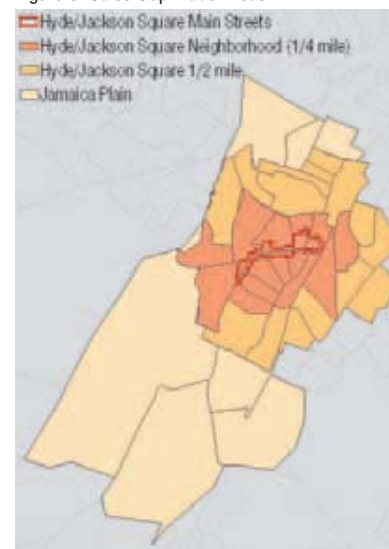
	Estimated Sales Surplus/Leakage (\$millions)			Capture Rate (%)		
	Hyde/Jackson (1/4 mile)	Hyde/Jackson (1/2 Mile)	Jamaica Plain	Hyde/Jackson (1/4 mile)	Hyde/Jackson (1/2 Mile)	Jamaica Plain
	Groceries	6.7	-13.3	-40.9	139	64
Home Furnishings	-3.7	-9.3	-17.1	25	12	7
Personal Care	-0.1	-3.4	-8.0	96	45	26
Drugs, Health & Beauty	-2.6	-5.6	-9.7	0	0	0
Apparel/Accessories	-2.7	-9.2	-18.2	53	25	14
Restaurants	-4.3	-19.9	-41.4	68	32	18
Entertainment	-11.3	-25.2	-44.4	6	3	2
Reading	-0.9	-1.9	-3.3	0	0	0
Other	1.4	1.4	1.4	0	0	0
Total	-53.1	-163.3	-314.9	45	21	12

Sources: U.S. Census 2000, Bureau of Economic Analysis; Project Team Building Survey 02/26/05; Urban Land Institute

Interpreting the Sales Gap Analysis

Store types that exhibit a negative sales gap (i.e., a sales leakage) indicate that district businesses do not meet demand in the trade area. On the other hand, a positive sales gap (i.e., a sales surplus) indicates that the store type attracts customers from outside the trade area.

Figure 6: Sales Gap Trade Areas



Source: U.S. Census 2000

Sales Gap Analysis

The Project Team performed a sales gap analysis and examined customer satisfaction surveys to better gauge the district's opportunities and consumer behavior. A sales gap analysis evaluates the difference between annual consumer spending potential and annual sales potential by different store types in a given trade area. It defines consumer spending potential based on the demographic and income attributes of the population, using standard capture rates based on the physical size of the trade area. To perform this analysis comprehensively, the Project Team defined three different trade areas for HJS, based on geographic criteria, to determine local spending power:

- 1) Quarter-mile radius of the HJSMS boundary
- 2) Half-mile radius of the HJSMS boundary
- 3) Jamaica Plain planning district

Hyde/Jackson Square Neighborhood Findings

Within the immediate HJS area, the Project Team's analysis found the total estimated sales leakage to be \$53.1 million. The largest source of leakage came from entertainment, which suggests a significant opportunity for future businesses. The capture rate for the district's 22 restaurants is 68%, with a total leakage of \$4.3 million, suggesting that although restaurants are numerous, they are not overburdening the market.

Grocery stores are the only category to reveal a surplus, at \$6.7 million, which indicates that many customers come from outside the trade area to shop in the district. Estimated sales for personal care stores are almost equal to estimated spend-

ing, suggesting that these businesses also fare quite well in capturing district visitors.

The remaining categories reveal that the capture rate for home furnishings is relatively low (25%), due to the few furniture stores in this area. Similarly, the lack of bookstores in HJS causes a \$0.9 million dollar sales leakage. Finally, since there are no drugstores in HJS, the capture rate for this store type is equal to zero and the sales leakage exceeds \$2 million.

Comparison of All Three Trade Areas

In the broader trade areas, the Project Team found the total estimated sales leakage is \$163 million for the HJS half-mile radius and \$315 million for Jamaica Plain. Whereas the sales surplus for groceries is as much as \$6.7 million in HJS, there is a sales leakage for the HJS half-mile radius (\$13 million) and Jamaica Plain (\$41 million). These findings imply that although many customers come from outside the HJS neighborhood to visit grocery stores in HJS, these stores do not capture all customers living outside the immediate HJS area. Restaurants and entertainment also show major sales leakage for customers outside of the HJS neighborhood.

Finally, although the capture rates for drugstores and bookstores are equal to zero due to the non-existence of such stores in HJS, the sales leakage for customers outside of the HJS neighborhood is not significant compared to other store types such as groceries, restaurants and entertainment.

Consumer Spending

The sales leakage figures and the following consumer spending patterns indicate a significant

untapped market beyond the immediate HJS area. The magnitude of these consumer spending figures also reveal the importance of even slight improvements in the district's capture rate.

Customer Satisfaction Survey

OKM Associates conducted a survey of consumer satisfaction for a variety of business types in HJS. According to this survey, customers are highly satisfied with restaurants, barbers/hairdressers, beauty supplies, and groceries. On the other hand, furniture stores, book stores, gift/jewelry shops and hardware stores are not well-rated.

These results confirm the findings from the sales gap analysis. That is, grocery stores whose capture rate is very high for HJS (139%) are rated well in the customer satisfaction survey, whereas customers do not think the district has a sufficient number of bookstores and furniture shops, categories for which there are relatively large amounts of sales leakage (capture rates are 0% and 25% for HJS, respectively).



Brendan Behan Pub and Fat Ram's Pumpkin Tatoo cater to both the local and regional consumer markets

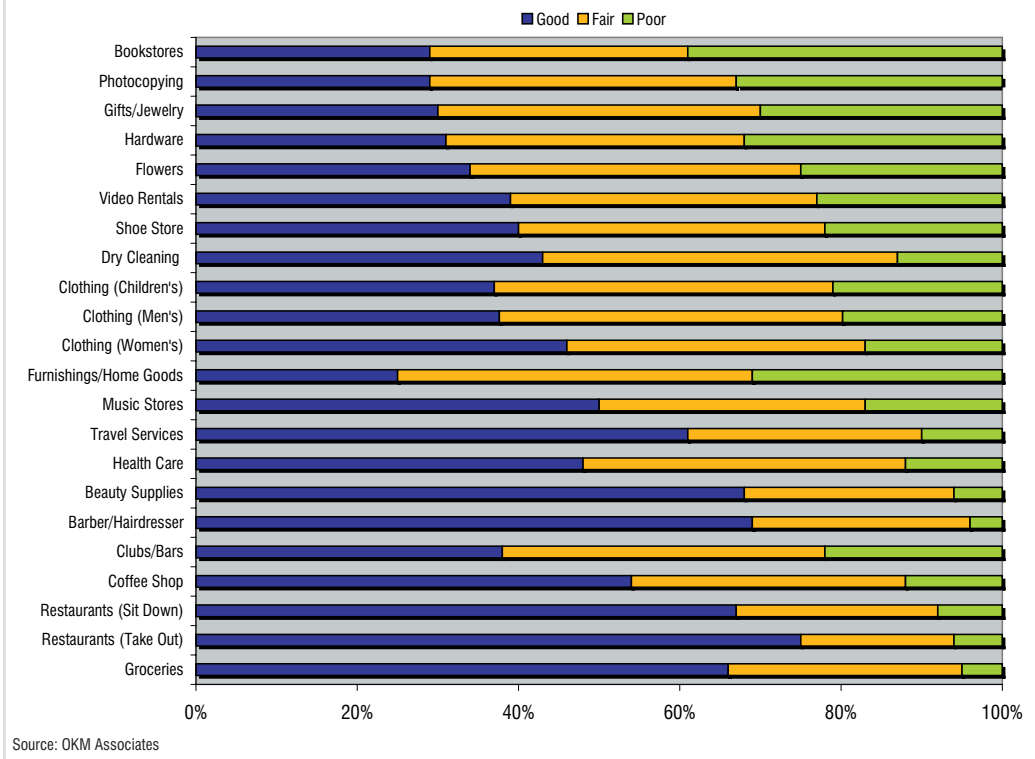
“I don’t do a lot of shopping there. I buy basic retail goods.”
- Representative, HJS Community Organization

Table 3: Consumer Spending for the Four Trade Areas

	Estimated Consumer Spending		
	Hyde/Jackson (1/4 Mile)	Hyde/Jackson (1/2 Mile)	Jamaica Plain
Groceries	\$17,452,660	\$37,527,572	\$65,144,285
Restaurants	\$13,556,463	\$29,149,776	\$50,601,230
Apparel/Accessories	\$5,698,362	\$12,252,899	\$21,269,864
Home Furnishings	\$4,924,804	\$10,589,556	\$18,382,459
Drugs, Health & Beauty	\$2,597,526	\$5,585,328	\$9,695,597
Personal Care	\$2,894,897	\$6,224,750	\$10,805,572
Entertainment	\$12,101,191	\$26,020,577	\$45,169,240
Reading	\$871,077	\$1,873,033	\$3,251,406

Sources: U.S. Census 2000, Bureau of Economic Analysis; National Statistical Agency (Canada)

Figure 7: Consumer Satisfaction by Category



Stop & Shop is a strong regional draw offering a wide array of products

Demographic Analysis

Overview

Residential demographics and patterns around HJS, and in the Jamaica Plain neighborhood in general, are in flux. Boston's urban housing and real estate markets are no longer experiencing disinvestment, but are witnessing renewed interest in home ownership and growing commercial development. As a result, the socio-economic composition of the neighborhood is shifting, impacting HJS. Understanding the demographics and spending power of this community is important to understand the successes and shortfalls of the business district.

The Project Team's demographic analysis has the following objectives:

- To understand the current socio-economic composition of the neighborhood residents in and around HJS
- To understand the socio-economic changes between 1990 and 2000, as well as more recently
- To recognize the opportunities for local businesses provided by demographic changes

Towards these objectives, the Project Team compiled data from the U.S. Census that includes a range of population, housing, and income indicators, for both 1990 and 2000. Data from HJS, Jamaica Plain and the City of Boston have been included in order to document both local and regional trends. The U.S. Census does not make a distinction between Hispanic and Latino, and although the Project Team gives preference to Latino, the two terms are used interchangeably for the purpose of the demographic analysis.

Unfortunately, no demographic data at the neighborhood level exists beyond the 2000 Census, so it was not possible to analyze population changes within the past five years. The Boston Redevelopment Agency and other agencies have relied on projections based on the current growth rates that can often be highly unreliable, especially when there are shifting housing markets. The Project Team therefore avoided these projections.

However, there is mixed anecdotal information, primarily from stakeholder interviews, about recent demographic changes suggesting that the Latino population is being displaced by rising property values. There is also a general sense that the neighborhood is witnessing an increase in high-income, White residents, but the Project Team has been unable to locate data that would quantify this perception.

Population and Ethnicity

The overall population indicators illustrate that HJS lost population and became more Latino during the 1990s. HJS's total population of 13,457 in 2000 represented a 4% decline in population from 1990, while by comparison the total population in Jamaica Plain fell 9% and Boston grew by 3%. While population loss is often considered a sign of community weakness, it can be a sign of community strength if it represents more single-family and larger units replacing smaller shared accommodations. Anecdotally, this appears to be the case in HJS.

Notably, HJS's Hispanic population grew by 50% throughout the 1990s and now represents 38% of the overall 2000 population. In comparison, the Hispanic population is only 21% of Jamaica

Plain's overall population, and 14% of Boston's. In addition, the 2000 Census figures suggest that while Hispanics are moving out of Jamaica Plain as a whole, HJS's Hispanic population has been thriving and far outpacing overall city-wide growth. These statistics clearly illustrate that the Hispanic population is a unique demographic in HJS relative to the rest of Boston and Jamaica Plain.

However, while the Hispanic population is the only group showing a significant increase in HJS over the past decade, the district is undoubtedly diverse, with a significant presence across all Census defined racial and ethnic groups. This racial heterogeneity is reflected even at more local levels. The majority of block groups that make up the HJS neighborhood (containing 55% of the population) have at least two racial/ethnic groups that each represent over 24% of the population. These diverse block groups are also distributed throughout the district illustrating the broadly distributed diversity within the district.

Age

Census data show that HJS has a relatively young population. The majority of the HJS population, 57%, was under age 35 in 2000. HJS has a greater number of children than Jamaica Plain and Boston as well, with 24% of the population under the age of 18, compared to 17% in Jamaica Plain and 20% in Boston. The Hispanic population accounts for a disproportionate share of the younger age group, representing 54% of the under 18 age group, and 41% of the population under 35. This booming young Latino population suggests HJS's Latino businesses are well-positioned to have continued growth.

Table 4: Population by Race/Ethnicity

	1990	2000
Total population		
Hyde/Jackson	14,056	13,457
Jamaica Plain	41,448	38,124
Boston	574,283	589,141
Hispanic Population		
Hyde/Jackson	3,407	5,109
% of total	24	38
Jamaica Plain	10,477	8,395
% of total	25	21
Boston	61,955	85,089
% of total	11	14
White (non-Hispanic) Population		
Hyde/Jackson	5,499	4,736
% of total	39	35
Jamaica Plain	19,835	19,632
% of total	48	51
Boston	338,734	291,561
% of total	59	49
Black (non-Hispanic) Population		
Hyde/Jackson	4,411	2,759
% of total	31	21
Jamaica Plain	7,192	5,864
% of total	17	15
Boston	136,887	140,305
% of total	24	24

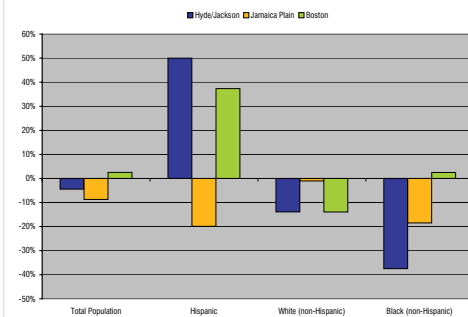
Source: U.S. Census 1990, 2000

Table 5: Families and Households

	Hyde/Jackson		Jamaica Plain		Boston	
	1990	2000	1990	2000	1990	2000
Households	5,000	5,137	16,139	16,140	228,464	239,603
% Hispanic households	19	29	18	17	9	11
Families	2,539	2,668	8,116	6,882	115,927	115,096
% Families with Hispanic householder	37	43	37	27	16	16

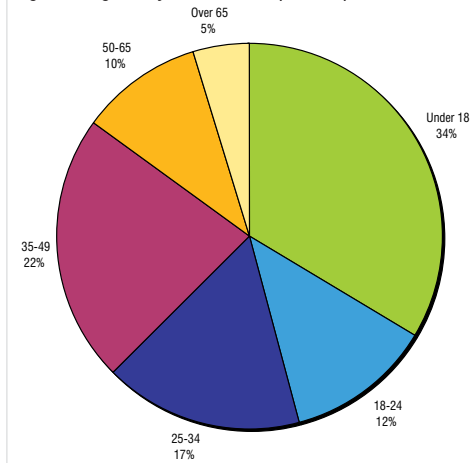
Source: U.S. Census 1990, 2000

Figure 8: Percentage Population Change, 1990-2000



Source: U.S. Census 1990 and 2000.

Figure 9: Age of Hyde/Jackson Square Population, 2000



Source: U.S. Census 2000

Although young people still account for a large share of the HJS population, the age groups that have experienced growth since 1990 are the 35 to 49 cohort (11%) and 50 to 64 cohort (17%). As of 2000, the key 25 to 49 age bracket accounted for 45% of the total HJS population in 2000 up from 39% in 1990. The growth of the 25 to 49 cohort, which has the highest spending levels, suggests that neighborhood fundamentals should help improve sales.

Households

Households are the key unit of consumer demand, and they increased by approximately 3% between 1990 and 2000, despite an aggregate loss in population. Twenty-nine percent of these households are Hispanic, an increase from 19% in 1990. In contrast, Jamaica Plain as a whole remained steady in terms of households, but lost a significant percentage of Hispanic households.

These data, coupled with the strong overall growth in the Latino population, suggest that the district is characterized by an influx of families, not just individuals. The increase in HJS families (both in number and share of households), compared to the drop in Jamaica Plain, suggests that while the population is shifting to non-family households in other areas, families are a stable presence in HJS and represent a key part of the consumer market. In addition, the constant vacancy and homeownership rates in HJS over the previous decade, at 8% and 28%, respectively, suggest historic neighborhood stability. On the other hand, the exodus of families from Jamaica Plain suggests that broader currents may soon be directed at HJS.

Aggregate and Household Income

The HJS median household income in 2000 was \$39,107, which is \$4,000 less than Jamaica Plain, as well as slightly below Boston. This figure represents a 5% increase in real terms since 1990. Average household income rose by 12% in the same period, suggesting that there has been an influx of wealthy households that raise the average. Despite these increases in income, 25% of HJS's population is considered below the poverty line, a slightly higher figure than the other areas.

Looking more broadly, the aggregate income for HJS stands at \$245 million. It is important to note that while 22% of the wealth in HJS is held by the Hispanic population (a greater share than in Jamaica Plain or Boston), 78% of the spending power remains in the hands of the non-Hispanic community. Although many businesses and services cater to the Latino population, the remainder of households, with the vast majority of aggregate income, provide an enormous market opportunity.

Table 6: Aggregate Income and Average Household Income (in 2000 dollars)

	Hyde/Jackson		Jamaica Plain		Boston	
	1990	2000	1990	2000	1990	2000
Aggregate income (millions)	\$212	\$245	\$790	\$914	\$11,457	\$13,758
% Hispanic	15	22	14	17	6	7
Avg. household income	\$42,452	\$47,692	\$48,969	\$56,658	\$50,149	\$57,421
Hispanic avg. household income	\$34,348	\$36,364	\$38,423	\$36,960	\$31,856	\$39,441

Source: U.S. Census 1990, 2000

Table 7: Median Household Income (in 2000 dollars)

	1990	2000	% change
Hyde/Jackson	\$37,392	\$39,107	5
Jamaica Plain	\$38,708	\$43,113	11
Boston	\$38,518	\$39,629	3

Source: U.S. Census 1990, 2000



04 PHYSICAL ANALYSIS

The Hyde/Jackson Square Main Streets (HJSMS) district encompasses the three-quarter mile commercial area along Centre Street from Lamartine Street to South Huntington Street. Among the noticeable elements of the district's character are the length of the corridor, its vibrant murals, colorful store signage, and mix of retail and residential frontages. The district offers a pedestrian-scaled environment, active businesses, a vibrant atmosphere, and diverse building types. The varied physical texture along Centre Street adds to the character of the area and poses challenges for creating a cohesive district.

Overall, the condition of the district's buildings and streetscape is good. Clean and well-repaired sidewalks, appropriately paced vehicular traffic, ample on-street parking, and a large number of crosswalks characterize much of the district. However, numerous challenges were identified by the Project Team and by stakeholders. These include specific clusters with greater incidence of litter, the lack of street trees, and inconsistent signage. One of the most evident issues was the distinct difference in the public realm between the area considered Hyde Square and that of Jackson Square. The physical unification and consistency of the two squares is an important challenge that needs to be addressed in the district. In addition, the Project Team found that while the district has a distinctly varied and vibrant character, it lacks defined gateways that announce entry into Hyde/Jackson Square (HJS) and suffers from multiple breaks in the street fabric.

Pedestrian Feel

The pedestrian experience throughout HJS is highly varied and changes from one block to another. Block surroundings vary from triple-decker residential buildings with setbacks, to single story retail with no setback. In the areas of the district with continuous storefronts on both sides of the street the pedestrian experience is generally stronger, while vacant lots and extended residential spaces lead to a weaker pedestrian experience.

Gateways

The district has two primary gateways. The first is from Columbus Avenue, on the eastern end of Centre Street near the Jackson Square MBTA Station. HJS abruptly begins at this gateway with no signs announcing the district on either the intersection or anywhere along Columbus Avenue. Besides a lack of signage, there are no physical markers or clear sightlines that suggest what lies beyond this immediate intersection. In addition, there are few visual clues to distinguish the district entrance from the fabric that surrounds it.

The second gateway is the entrance from Centre South. At this entry HJS is in the midst of gradually transforming from a residential area to a retail district. This entrance is therefore more conceptual than physical and less dramatic than the Columbus Avenue entrance; nevertheless, it too suffers from a lack of signage and inadequate visual landmarks.

By failing to adequately announce itself either visually or literally, HJS's unity and sense of place is weakened. Instead of having a distinct identity of its own, the HJSMS district feels like two distinct districts defined by Hyde Square on one end



Murals and colorful storefronts enliven the district

Figure 1: District Gateways



Hyde Square



Jackson Square



The Blessed Sacrament Church is a district landmark

and Jackson Square on the other. This lessens the likelihood that someone would naturally choose to walk through the entire district and also weakens the potential for collaboration among businesses. This lessened sense of shared destiny also makes the pedestrian experience less intimate and defined. Taken together, the lack of gateways is an acute problem.

Landmarks

There are several key landmarks that define the HJSMS district, including the Blessed Sacrament Church, the Bromley-Heath residential project, and just beyond the current HJSMS boundary, the Jackson Square MBTA Station. These landmarks serve to orient pedestrians and anchor their visual experience in HJS.

Breaks

The continuity of the district is interrupted by multiple conditions including institutions such as the Blessed Sacrament Church, vacant lots, and residential strips. Each of these breaks occurs in the physical texture between the two nodes of Hyde Square and Jackson Square. They therefore serve to further cleave the district and diminish pedestrian access and continuity between the two nodes. On the other hand, the brightly colored houses and beautiful church are some of the area's most distinct landmarks. It is therefore imperative that these breaks be reconciled with the broader district fabric if the district is to truly become one place.

Land Use

The district is a mix of both commercial and residential uses. Over one-third of the buildings in the district are for residential use only; whereas less than one-fifth are solely for retail uses. The retail-only stores cluster primarily in the Hyde Square area along a strip between Day and Creighton Streets, as well as in the JP Plaza development. Residential-only buildings are scattered in two strips, one just west of Mozart Street and the other at the Hyde Square entrance to the district. Despite the significant presence of single-use buildings, the district is dominated by ground floor retail with residential uses on upper floors. In addition, there is a noteworthy presence of institutional uses in the district; 11 buildings in the HJSMS district house an institutional use. Mixed-use retail and institutional uses are distributed throughout the district. Most of the buildings in the district are occupied. There are only eight buildings with vacancies, or vacant lots, suggesting an overall active district. These vacancies are scattered throughout the district with a slight cluster towards Hyde Square.

Building Type

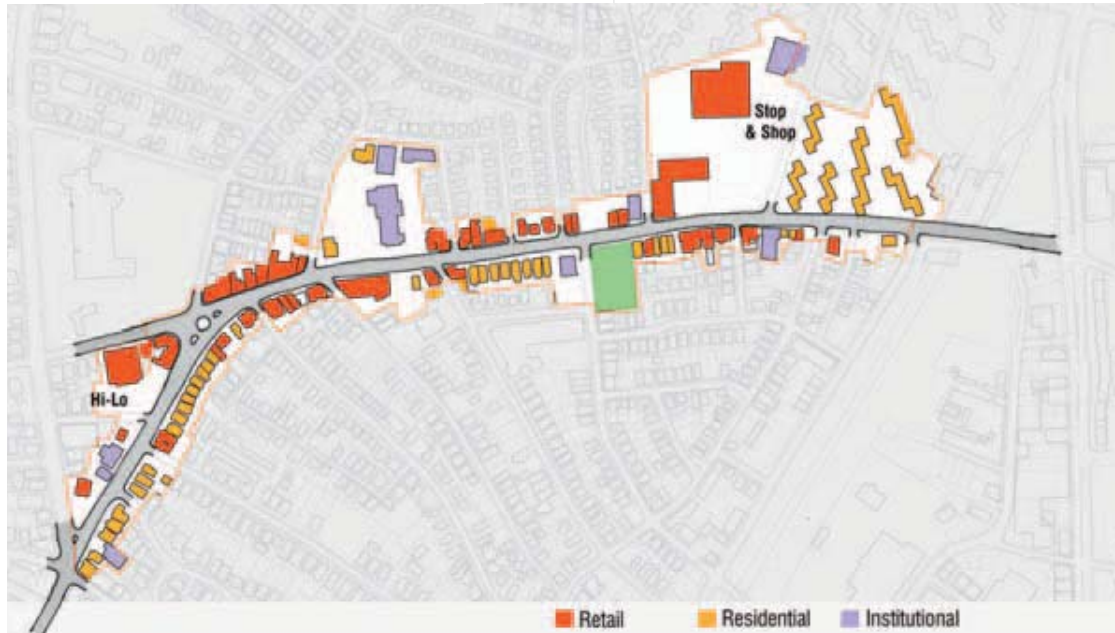
As mentioned above, HJS is made up of a mix of residential and commercial uses. The architectural style of the buildings in the district varies; however, the majority of the structures reflect a traditional triple-decker and Victorian-style that is common in the Boston landscape. Along with the Bromley-Heath residential project, there are also a few larger apartment buildings scattered along Centre Street. The most prominent are located above Casa de Regalos in the Hyde Square vicinity

Figure 2: Breaks in commercial continuity



Vacant lots and residential strips break the commercial continuity on Centre Street

Figure 3: District land uses



and across from the United Baptist Church. The Hyde Square area is also home to what will soon be a high-end condominium development.

Building Condition

A vast majority of buildings, over 85%, are in fair or good shape. The buildings in poor condition are generally scattered throughout the district, although there is a small cluster of disrepair just east of JP Plaza. These buildings would greatly benefit from improvements, such as fresh paint and increased lot maintenance. Fortunately, there are relatively few examples of dramatic neglect, suggesting that the neighborhood is fairly stable. In fact, the majority of buildings in disrepair appear to be under renovation, suggesting gentrification may actually be more of a concern than decline.

Façade Treatments

The majority of buildings in the district incorporate brick into the façade. However, there is great variety among façade materials, even within single buildings. Some of the more distinctive exteriors in the neighborhood include Tacos El Charro with a completely shingled exterior, and the residential cluster of brightly painted houses just west of Mozart Street. These bright residential colors add to the vibrancy of the district.

Signage

There is a great deal of heterogeneity in the signage type and style in the district. In general, bright, dynamic signage, often on the storefronts of Latino-focused businesses, adds to the color and unique character of the district. The presence of large murals, like those at Leaf & Petal, Hi-Lo and Pimentel Market, also adds to the perception of overall building quality and gives the district a distinct flavor. This vibrant flavor is further cemented by the bright colors and tropical motifs of the recently installed HJS street signs. However, these signs are inconsistent in how they identify the district.

Street Condition

Centre Street is a two-way street with a single lane in each direction and parallel parking on both sides. Except for a few larger intersections (i.e., the connection of Lamartine Street to Centre Street and the rotary at Hyde Square), streets intersecting with Centre Street are small side streets emerging from residential blocks. The street itself is in good condition with clear markings.

Sidewalk Condition

Sidewalks in the district are generally in good condition, with few cracks or trip hazards. However, the sidewalks are narrower than ideal for a commercial district. Sidewalks are approximately four to five feet wide and pedestrians often have to pause to get around one another. Such small sidewalks make general congregation as well as sidewalk cafés very difficult.

Although trash has been frequently mentioned as

Figure 4: District building conditions



“The trash problem is big. Stores are still shabby and not as inviting as they could be. But there has been a big improvement.”

- Representative, HJS Community Organization



The commercial and residential buildings in the district are generally in good condition

a district problem, the Project Team found the majority of blocks to be clean and well-maintained. The majority of trash problems are clustered along the stretch from JP Plaza to the Jackson Square MBTA Station and east of Sheridan Street along the corridor passing the Hi-Lo. Although spatially limited, these areas are the two gateways to the district and therefore have a strong visual importance.

Street Greenery

Throughout the district, greenery is intermittently scattered, generally insufficient and not used in a systematic way. There are no bushes on any of the district's blocks and on average there are less than six trees per block and in some blocks only a single tree. Further, trees in the district lack consistent bases - some have dilapidated bollards as ornamentation, and others merely have dirt bases. In general, there are more and better-maintained trees in Hyde Square as opposed to the Jackson Square area.

Transportation

In terms of transportation, the district is fairly homogeneous and well-served. The Jackson Square MBTA Station is located just over the HJSMS border and drives considerable pedestrian traffic to the eastern edge of the commercial district. Just east of the Jackson Square MBTA Station, several acres of open space await development, and beyond that is Columbus Avenue, a major multi-lane thoroughfare. The Orange Line and multiple bus lanes stop at the Jackson Square MBTA Station, though only a single bus line (# 41) traverses the district.

Parking

On-street parking is the only evident public parking in the district. It is not metered, though signs in most places indicate a two-hour limit. Toward the South Huntington Avenue intersection the only restrictions on parking are street cleaning days and snow emergencies. Based on limited observation, there did not appear to be a lack of parking opportunities - there was frequent turnover and each block had one or two open spots during peak Saturday shopping hours. In addition, the large parking lots at Hi-Lo and JP Plaza provide additional off-street parking in the district and seem to alleviate the on-street parking issues.

Traffic

By virtue of its rich connectivity and numerous shopping options, Centre Street is often congested with traffic. From a district perspective this congestion is not necessarily a problem since it slows traffic, enhances the pedestrian experience and stops Centre Street from being used as a bypass route. However, there are two particular nodes, near the rotary and near the JP Plaza, which create particularly acute traffic challenges. The congestion around JP Plaza appears to be the product of difficulties making left turns into and out of the parking lot. The Hyde Square congestion is less acute and is partially due to traffic from Hi-Lo.

Figure 5: Concentrations of trash and traffic





Concurrent to its market and physical analyses, the Project Team conducted nearly 30 interviews with Hyde/Jackson Square (HJS) stakeholders to understand the numerous initiatives happening in the area, as well as identify potential partners and resources for Hyde/Jackson Square Main Streets (HJSMS). Interviewees included representatives from community groups, local businesses, real estate management and development companies, and local government.

The interviews highlight the numerous strengths of HJS, including its cultural diversity and the commitment of individuals and community groups to support and improve the district. Several interviewees expressed that with appropriate support HJS could capitalize on its strengths and develop into a strong commercial destination — both locally and regionally. However, in order to improve the district, many stakeholders indicated that several weaknesses must be addressed, including overall district identity, mix of convenience and comparison goods, maintenance and litter, and neighborhood safety. The interviewees also noted the significant changes underway in HJS, including residential gentrification and the new developments at Jackson Square and Blessed Sacrament Church.

All of the stakeholders generously offered invaluable perspectives on HJS that have been instrumental in guiding the Project Team's concept, goals, and recommendations presented in this report. The anecdotes and information gathered from the interviews have been grouped into the prevailing issues that emerged.

District Identity

HJSMS has been conflicted regarding the manner in which to market HJS, an issue that is closely tied to the products and services offered by the district's businesses. The strong presence of Latino-oriented businesses are a unique characteristic upon which to build a local and regional destination, but at the same time, HJSMS does not want to exclude other businesses and customers from coming to the district. Stakeholder opinions varied greatly when asked to describe the image of the district. Some stated that the district is strongly Latino, while others described HJS as a multicultural community. Generally, many said that although a Latino element certainly exists in HJS, businesses must market and merchandise in a manner that appeals to Latinos as well as to the changing demographics of the district and Jamaica Plain as a whole. In this way, HJS can simultaneously attract a broader Latino clientele and residents in the immediate area and adjacent communities.

Destination Shopping

Opinions on HJS's market composition focused on the district's balance between convenience and comparison goods. Residents and community groups expressed concern about the diversity of services available in the district, while few business owners identified services and products as an obstacle to creating a strong shopping destination. Many respondents described HJS as a convenience shopping area, noting that shoppers need to leave the district to meet most other needs, such as clothing and entertainment. Some respondents stated that they would shop in the



Community groups, such as Hyde Square Task Force and Fight the Trash/Mano Dura con la Basura, work to improve the district



The Blessed Sacrament Church closure represents a major institutional loss to the surrounding community and signals the potential of increasing gentrification of the residential neighborhood

district more if HJS created an outdoor mall along Center Street where shoppers could find both convenience and comparison goods. Others commented that local businesses fail to be flexible and meet the needs of current and incoming residents, forcing them to shop elsewhere.

Physical Appearance

Many of the stakeholders agreed that the physical appearance of the neighborhood has improved over the past several years. However, despite the work of local groups, such as Fight the Trash/Mano Dura con la Basura and HJSMS, problems with litter, landscaping, and storefronts persist. Further, almost all stakeholders identified the district's physical appearance, including litter and store façades, as characteristics of the district that deter shoppers from visiting the area.

Safety

Neighborhood safety and crime prevention continue to be major concerns in the district, particularly for business owners. Several owners regarded the perceived and actual crime in the district as major deterrents to potential customers. Those stakeholders actively involved in implementing innovative prevention programs suggested several opportunities for HJSMS to participate in improving safety for business owners, residents, and shoppers.

Financial and Technical Support

Although all stakeholders voiced concerns about HJS's appearance and retail mix, many recognized that business owners often lack the financial

resources to invest in storefront improvements and extensive marketing. Numerous interviewees noted that the district does not possess all the skills necessary to improve businesses and manage the district in order to attract more shoppers. HJSMS can take a lead in building such capacity among business owners.

Community Organizations

One of HJS's greatest strengths as a district comes from the large number and high quality of local organizations working to improve the community. Despite their quantity and strong commitment, many interviewees stated that these organizations lack a common vision and voice. One stakeholder commented that developing consensus around a unified voice is the most effective tool for initiating change. At the same time, this collaboration and coordination must be guided by leadership that is in touch with the needs of the community. A number of interviewees acknowledged that the neighborhood and organizations should pursue goals in a more coordinated manner, but also felt that certain groups should spearhead leadership in this regard. Therefore, successful projects in the district demand a combination of collaboration, compromise, and leadership.

Gentrification

The topic of gentrification emerged in the majority of interviews. This term was consistently ambiguous, so the opinions and description of gentrification in the district often refer to residential and commercial gentrification as one process. For the purposes of the Project Team and the

mandate of HJSMS, these are two distinct but related processes. HJSMS and local business owners can do little to mitigate rising residential rents and housing prices. However, gentrification can also severely impact businesses; during the interviews, the businesses expressed concern over rising commercial rents and expiring leases with subsequent rent hikes.

Many interviewees characterized commercial gentrification and rising overhead costs as a challenge to existing businesses, and noted the need for businesses to adapt to these rising costs by improving the services and products offered. However, they felt many businesses are either unable to understand the need for this flexibility or incapable of adapting their businesses to accommodate these changes. Some interviewees expressed concern over alienating some of their client base through actions such as increasing prices. In addition, business owners and representatives from community groups noted the potential for the local customer base to be priced out of the neighborhood. Clearly, a tension exists as the potential for rising commercial rents has forced businesses to consider offering new products and services to attract different demographics and income levels.

The chart on the following pages provides a map of organizations that can serve as resources and partners to HJSMS.

“Probably the high housing costs have driven the poor residents out, and a lot of richer people are moving in.”

- Representative, HJS Community Organization

Table 1: Community Partners and Resources

Organization	Unify Landscaping & Public Art	Improve Sidewalks & Streets	Strengthen Nodes, Gateways & Plazas	Implement Design Initiatives	Refine District Image	Diversify Business Mix	Promote Informal Markets	Deliver Business Technical Assistance	Host Events	Improve Safety & Sanitation
Hyde/Jackson Square										
Bromley-Heath Management Company	×	×							×	×
Bromley-Heath Tenants Association	×	×							×	×
Chesnut/Mozart Crime Watch										×
Day Street Crime Watch										×
Women for Crime Watch										×
Fight the Trash/Mano Dura con la Basura	×	×	×	×						×
Forbes Street Neighborhood Association	×	×	×	×					×	×
Hyde/Jackson Business Association	×				×	×	×	×	×	
Hyde/Jackson Square Task Force	×			×	×	×	×		×	
Jamaica Plain/Roxbury										
City Life/Vida Urbana								×	×	
Jamaica Plain Tree of Life/Arbol de Vida	×									×
Jamaica Plain Area Planning Action Council								×	×	
SCORE Boston - Jamaica Plain Branch						×		×		
District E-13 Police									×	×
Jamaica Plain Arts Council	×				×				×	
Jamaica Plain Neighborhood Council	×	×	×	×	×				×	×
Jamaica Plain Neighborhood Development Corp.			×		×	×	×	×	×	
Jamaica Plain Neighbors for Neighbors	×	×						×	×	×
Spontaneous Celebrations	×				×				×	
Urban Edge			×		×	×	×	×	×	
Key										
Partner										
Resource										
Partner & Resource										

Table 1 (continued)

Organization	Unify Landscaping & Public Art	Improve Sidewalks & Streets	Strengthen Nodes, Gateways & Plazas	Implement Design Initiatives	Refine District Image	Diversify Business Mix	Promote Informal Markets	Deliver Business Technical Assistance	Host Events	Improve Safety & Sanitation
Boston										
Boston Business Assistance Center						×	×	×		
Boston Department of Neighborhood Development						×	×	×		
Boston Empowerment Center								×		
Boston Main Streets Program								×		
Boston Private Bank & Trust	×	×						×		
Community Business Network						×	×	×		
Nuestra Comunidad Development Corporation						×	×	×		
Regional										
Bank of America Loan Center						×				
Circle Lending						×		×		
Hale and Dorr Legal Services Center, Harvard Law School								×		
Gravistar						×				



The Project Team conducted a series of site visits to comparable districts in the Boston area in order to gather contextual information and impressions. District visits included Brighton Center, Centre South, Coolidge Corner, East Boston, and Eggleston Square. While all five pose different types of competition to Hyde/Jackson Square (HJS), the visits confirmed HJS's uniqueness and the opportunity for Hyde/Jackson Square Main Streets (HJSMS) to further develop the district into a strong destination. The Project Team explored districts with several criteria in mind, including identity, gateways, streetscape, and business mix.

Brighton Center

Brighton Center is a Main Streets district located in the Boston neighborhood of Brighton. The district is somewhat different than HJS in configuration, with a long corridor augmented by a few side streets that extend the shopping area. The business mix includes a number of local pubs and restaurants, floral shops, and small national chains (e.g., Dunkin' Donuts). Several businesses open their doors and effectively set up their merchandise to spill onto the sidewalk. Also of note, businesses have Main Streets membership decals prominently displayed on their storefronts. The district is well unified through consistent signage, wide sidewalks, distinct street lamps, and one very strong gateway (a distinguished clock tower). Finally, the Main Streets office is situated in the center of the district, with a visible and professional sign that announces its presence. The Project Team believes that Brighton Center offers an excellent model from which HJS can learn, but due to its proximity to several universities, the district largely attracts a different clientele than HJS.

Centre South

Farther south on Centre Street from HJS in Jamaica Plain is the Centre South Main Streets district. With a comparable size and range of ethnic restaurants, Centre South presents potential competition to HJS. One of its anchor tenants, the JP Licks ice cream shop, attracts families from across the area, while Centre South's restaurants appeal to the Boston area young adult population. With retail stores such as Footlocker and Boomerangs, Centre South has both national and local chains. Furthermore, Centre South is an appealing and walkable district despite its narrow sidewalks, with a vibrancy created by the numerous pedestrians on the street. Centre South's strong identity in the region offers a model for HJS, while its restaurant cluster and appeal to the young adult population present real competition to HJS.

Coolidge Corner

The Coolidge Corner commercial district is located in Brookline, a town adjacent to Boston and sharing a border with Jamaica Plain. The district is significantly larger than HJS and includes several wide streets. The retail offerings in the district are largely upscale national and regional chains (e.g., the Gap, CVS, Pier 1, and Finagle-A-Bagel), with relatively few local businesses or services. The high volume of pedestrians on the streets creates a real vibrancy, but the district's plain buildings do not enhance the experience. Furthermore, a lack of signage does not help shoppers find their way to the numerous businesses. With a more upscale mix of businesses and clientele, as well as a very different identity, the Project Team believes that Coolidge Corner represents more of a complementary than competitive shopping district to HJS.



Brighton Main Streets prominently displays logo on its office window



Products sold at this Brighton Center store spill onto the sidewalk



Storefronts in Egleston Square promote district identity by displaying its name



Garbage cans in East Boston promote a Main Streets clean-up project with local business sponsorship

East Boston

The East Boston Main Streets district lies within the borders of the city of Boston, but is separated by the Charles River. East Boston is an extremely large and complex district, with numerous store-lined streets connecting several distinct squares. Although the district lacks sufficient signage to direct shoppers through the district, it is unified by distinctive street lamps that lead pedestrians through the various streets. In addition, storefronts display relatively uniform signage, and the streets are notably free of excessive litter. The business mix includes a large number of restaurants, many of which appear to be locally-owned, as well as numerous convenience stores and services. The district also has a strip mall with chain stores. The Project Team believes that East Boston, despite its distance from HJS, poses strong regional competition to HJS because of its identity as a Latino district and extensive mix of retail options. However, the Project Team believes that HJS can utilize East Boston as a model for integrating disconnected squares into one continuous place.

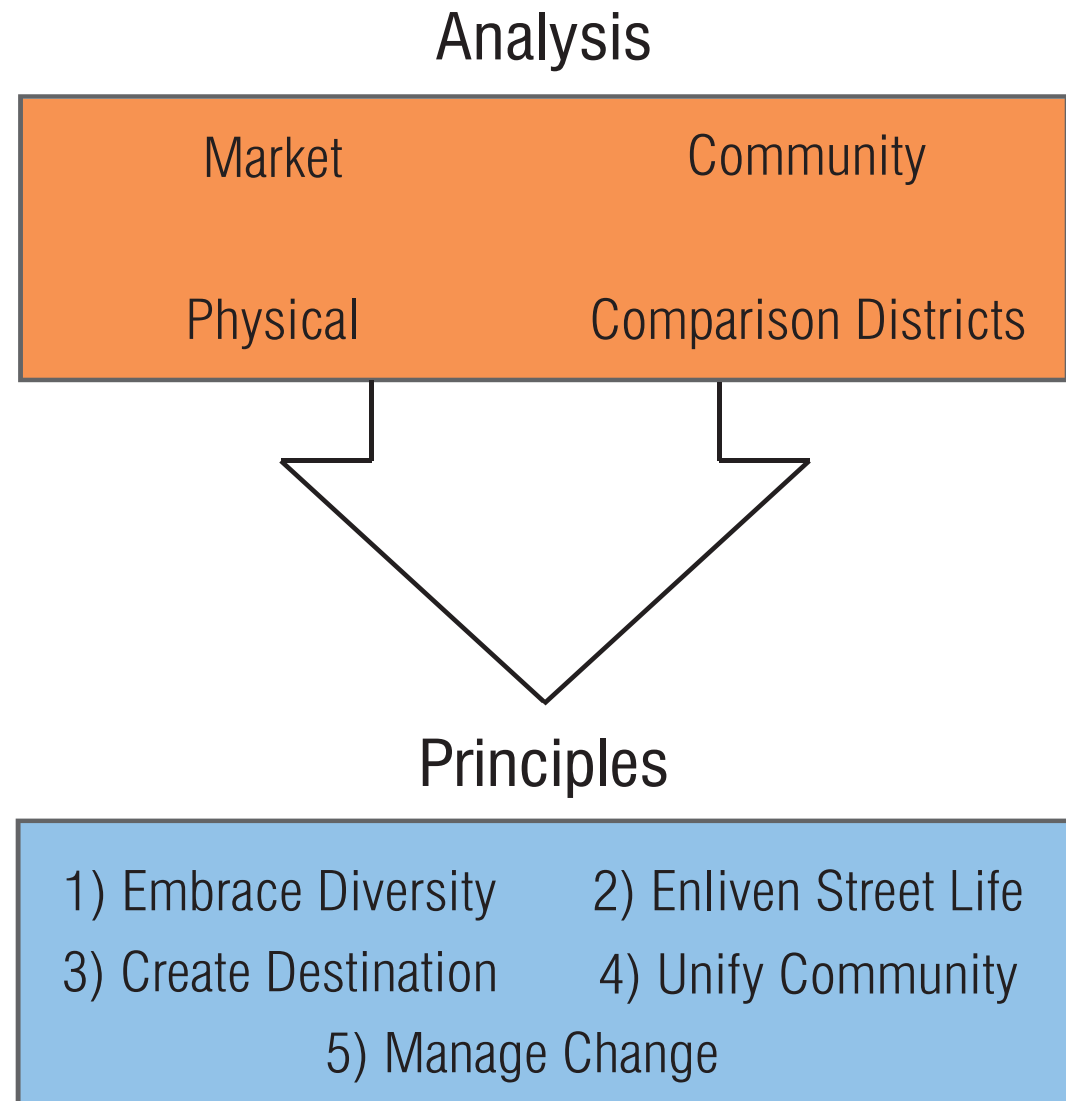
Egleston Square

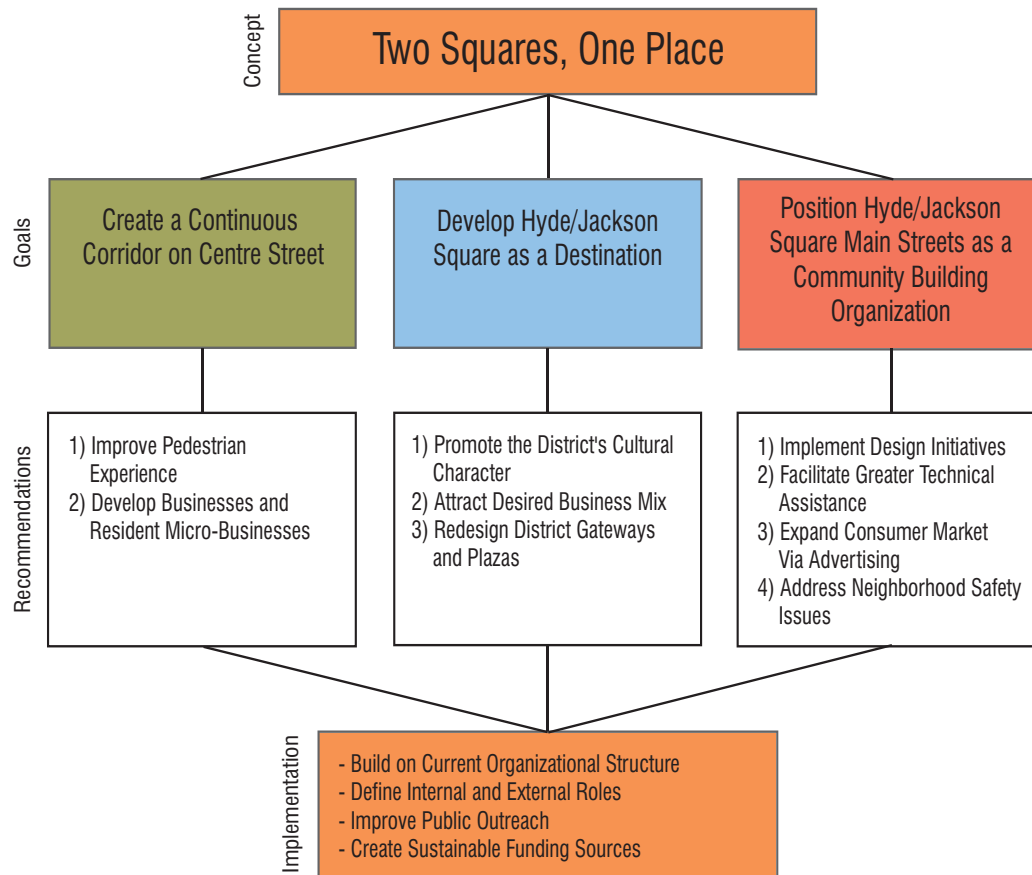
Egleston Square is a Main Streets district in Roxbury, a neighborhood in Boston adjacent to Jamaica Plain. The district appears slightly smaller than HJS and largely includes convenience oriented businesses. There is a Latino focus to the businesses, but this is not as emphasized as in HJS. Similar to HJS, the district has numerous residential properties that break the commercial continuity. The pedestrian experience in Egleston Square is not especially pleasant, and the district lacks HJS's color and vibrancy. With less diversity than HJS, the Project Team believes that Egleston Square does not pose significant competition.



Through the preceding market, physical, community, and comparison district analyses, which confirmed the potential to unify Hyde and Jackson Squares, the Project Team has developed its concept for Hyde/Jackson Square (HJS) as “Two Squares, One Place.” This concept focuses on the district’s opportunity to unify, both in the physical and economic sense, in order to emerge in a stronger position from the ongoing period of transition. The Project Team envisions Hyde/Jackson Square Main Streets (HJSMS) playing a lead role in this transformative process by acting as a coordinator of others’ efforts.

The Project Team has also distilled a set of principles to guide and inform its recommendations and strategies to HJSMS.





Building upon these key principles, the Project Team has developed a series of recommendations with accompanying strategies, categorized under three broad goals for HJSMS and the district as a whole. These are:

- 1) Create a Continuous Corridor on Centre Street: creating a more unified district through both physical and business improvements, including improving landscaping and street furniture, buffering pedestrians from certain uses, distributing customer comment cards, and stimulating informal markets and pushcarts
- 2) Develop Hyde/Jackson Square into a Destination: improving HJS as a shopping destination for both residents and customers from beyond the district by designing new promotional materials, renaming the district, developing a business recruitment package, and redesigning district gateways and plazas
- 3) Position Hyde/Jackson Square Main Streets as a Community Building Organization: strengthening HJSMS's role in the community through initiatives such as new building design criteria, creating a business mentorship program, conducting joint marketing campaigns, and exploring business crime prevention programs

The remainder of this report will focus on articulating the Project Team's strategies for achieving the proposed recommendations under each of the above goals.

"Change is good."

- Representative, HJS Community Organization

