

# CAMBRIDGE POST-PANDEMIC COMMERCIAL DISTRICT STUDY

## District Profiles

Final Report - Summer 2025



**CITY OF  
CAMBRIDGE**



**Agency**  
Landscape + Planning

# Contents page

1.	Introduction to the District Profiles & Methodology	3
2.	Massachusetts Avenue / Porter Square Corridor	6
3.	Harvard Square	21
4.	Kendall Square	34
5.	Central Square	50
6.	Inman Square	63
7.	East Cambridge	77
8.	Huron Village and Observatory Hill	92
9.	Alewife	103

# 1. Introduction to the District Profiles

## 1.1. Overview of the District Profiles

The focus of the District Profiles is to examine each of Cambridge's commercial districts in terms of their current business environment and market demand. The report also reviews their physical characteristics and infrastructure that support each district's competitiveness and vibrancy.

This analysis has been informed by a robust and consistent data-driven evidence base, and each profile is structured as follows:

- **Business Environment:** draws on the latest business data to assess the density, industry mix, characteristics and performance of the district's commercial businesses with focus on the retail industry.
- **Market Demand:** looks at district visitor demand, and the key patterns, characteristics and attributes of both resident and non-resident visitors, from Cambridge and outside the city.
- **Physical Environment:** describes the spatial identity and branding of the district, accessibility and key flows, and district landmarks and assets, informed by on-the-ground visits and surveys.
- **Adaptive Capacity:** identifies key partners and business associations active in the district, their leadership, engagement and events.
- **Recommendations:** provides summary findings, key takeaways, and recommendations.

## 1.2. Methodology

The research for this report draws on a range of primary and secondary sources for qualitative and quantitative analysis of the city and its eight commercial districts.

Primary research includes in-person visits to each of the eight commercial districts as well as interviews with eight organizations including local business associations and business advocacy groups.

The quantitative analysis in this report draws on a variety of public and private datasets, which are explained in further detail below.

**Cambridge Economic Opportunity and Development Division data:** the City collects and has access to a wide range of district-level data, including primary and third-party research, relating to topics such as district ground floor storefronts, ground floor storefront vacancies, and ground floor storefront closures and openings.

**Data Axle:** a third-party business establishment database which uses a unique approach to data compilation and verification. It offers a 'snapshot' of all active businesses – retail and non-retail. For this report data is from June 2024 and features information covering business location, industry sector, employment, sales, and more. For more information see: [www.data-axle.com/info](http://www.data-axle.com/info)

**Replica:** Replica is a third-party platform that collects various data, like transportation patterns, to create a simulated model of all trips taken by both residents and visitors. Replica publishes results of the model runs in

the spring and fall, with separate results for a typical Thursday and a typical Saturday for each period. For more information see: [www.replicahq.com/platform](http://www.replicahq.com/platform)

Readers should note that Replica compiles various data sources and sometimes uses modelled data and not actual data (for instance, data on visitor characteristics such as age, ethnicity, education, retail spend, and income).

Data for smaller areas like commercial districts can be less reliable and more inconsistent, whether it's based on actual numbers or estimates (models). In this report, we use models to help give a general idea of what might be happening in each area, but they are not the main source of data and shouldn't be treated as exact.

***As of December 2024, Replica discontinued its spending data reporting due to the company's standard of reliability in the original data sources it gathers for its models. For more information about this update: <https://documentation.replicahq.com/docs/economic-model-methodology>***

### How is “retail” defined?

This report uses a consistent definition of the retail industry that includes traditional retail stores and other ground floor businesses such as eating and drinking establishments, hotels, arts and cultural organizations. The definition of retail is based on the following [NAICS codes](#): Retail Trade NAICS 44-45; Arts, Entertainment, and Recreation NAICS 71; and Accommodation and Food Services NAICS 72.

A NAICS-based definition is the most widely reported classification for the available data and provides alignment to government definitions of retail (e.g., see [U.S. Census Bureau here](#)). Where available, more detailed NAICS-based retail categories are cited, such as 'bars, restaurants and cafes', 'grocery and specialty food stores' etc.

## 1.3. This Report

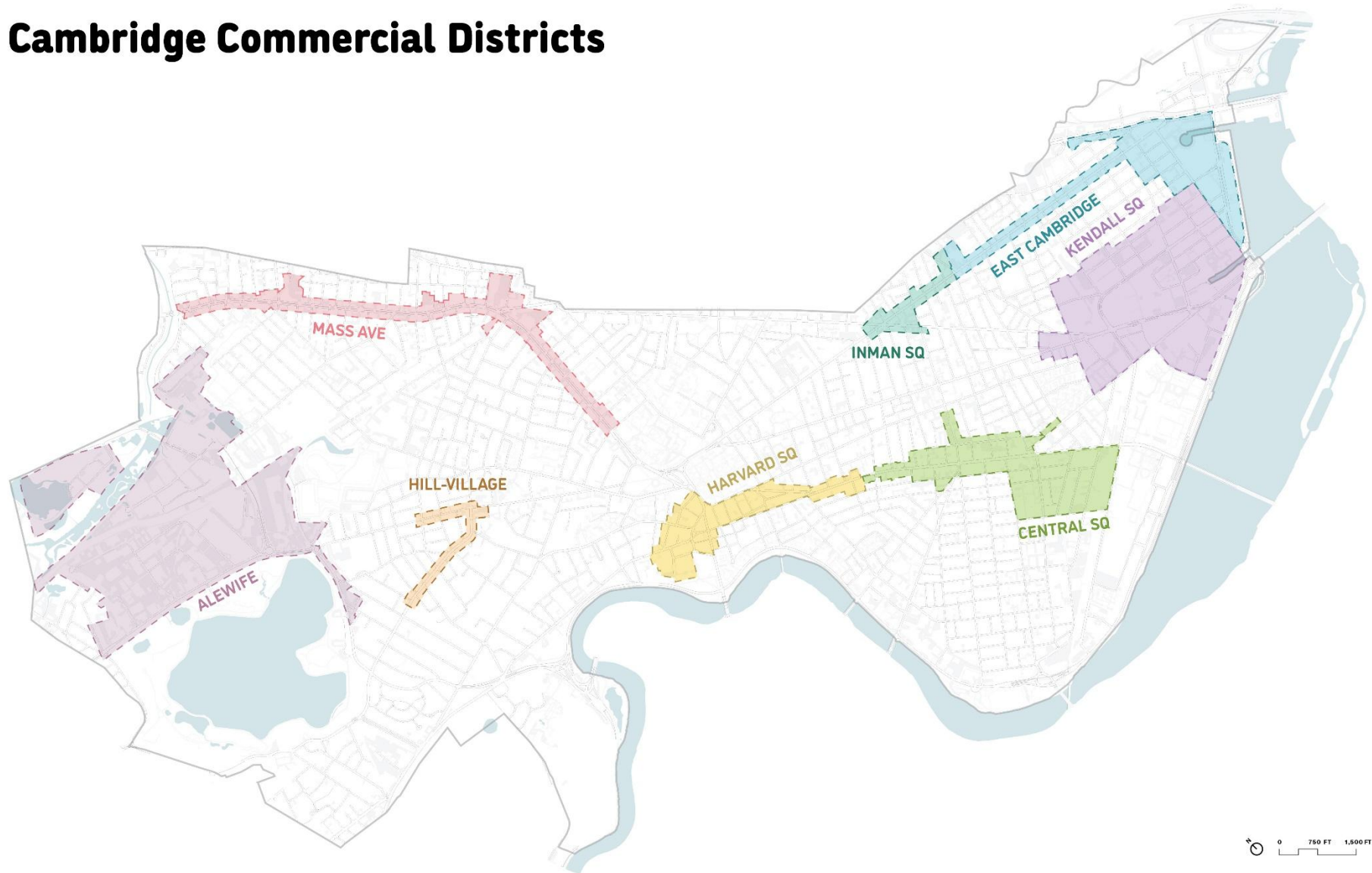
Individual District Profiles were completed for the following eight commercial districts – a map of the districts can be found over the page in **Figure 1.1**. The Profiles for the eight districts can be directly accessed using the following links:

- Massachusetts Avenue & Porter Square Corridor
- Harvard Square
- Kendall Square
- Central Square
- Inman Square
- East Cambridge
- Huron Village and Observatory Hill
- Alewife



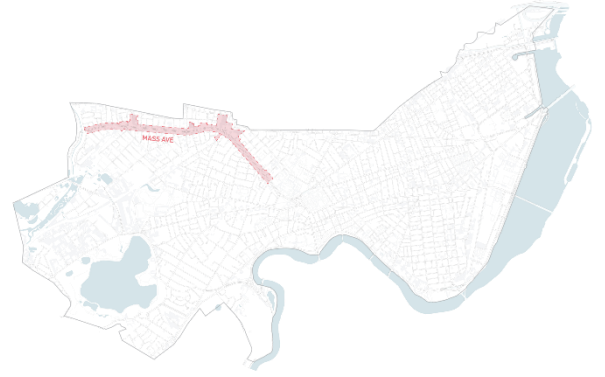
Figure 1.1 Cambridge commercial districts

## Cambridge Commercial Districts



Source: Commercial district boundaries as defined by City of Cambridge ([see here](#)). Map design by Agency.

## 2. Massachusetts Avenue & Porter Square Corridor



### 2.1. Key Takeaways

The Massachusetts Avenue/Porter Square (“Mass. Ave”) commercial corridor contains numerous ground-floor retailers, restaurants, and service providers, and abuts several residential neighborhoods and has major academic presence from staff and students at Lesley University and Harvard University. Our analysis shows:

- Mass. Ave has the highest concentration of retail businesses and employees of all districts, and post-pandemic remains a recognized destination for eating, drinking, and specialty retail.
- According to Replica’s modelling<sup>1</sup>, in-person retail spending in the district is still 32% down from 2019. Only spending on entertainment, recreation, and hospitality has passed pre-pandemic levels.
- Mass. Ave mainly serves local residents and a small number of students, but it still attracts visitors from outside the area. Only Harvard Square and Kendall Square bring in more outside visitors.
- With few daytime workers, visitor numbers have stayed strong. Visitors are now taking more trips than before the pandemic, but they’re spending less money per trip.
- The physical retail environment varies significantly throughout the Mass. Ave corridor, which creates an inconsistent level and pedestrian experience. Cars, and bicycles are prevalent in the corridor.
- With the corridor running along one of Cambridge’s major roads, cars are the prominent mode of transport for visitors, although walking and cycling are becoming more popular.
- Though Mass. Ave. has a unique retail mix, it does not have a distinct brand or visual identity. Current efforts are not consistent or coordinated.



street  
buses,

Outdoor a ‘Capella performance in Porter Square. Photo credit: City of Cambridge.

<sup>1</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4 of this report.

2.2. Business Environment



The density and variety of stores in an area often reflect local economic conditions and market trends, giving insight into the health of local retail businesses.

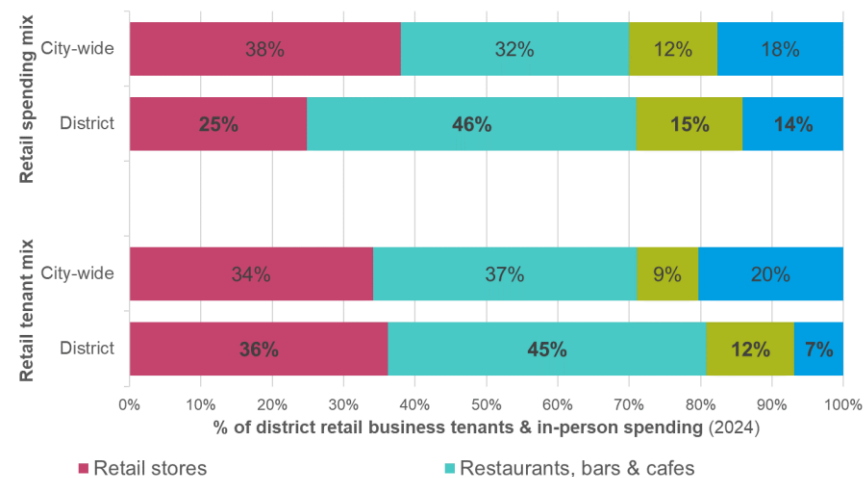
**The Mass. Ave. district is home to 560 businesses with 3,500 employees. Retail is the largest employer with 130 businesses and 1,500 employees**

- Mass. Ave.’s 130 retail businesses account for 42% of all the employees in the district. No other commercial district in Cambridge has a higher share of employees working in the retail sector.
- The next highest-employing industries in the district are professional, scientific, and technical services (17% of district employees), health care and social assistance (12%), and other services (10%).
- Mass. Ave.’s retail business density (per acre) is the highest of all districts, and 9 times the citywide average. On average, Mass. Ave. retail businesses have 11 employees, similar to the citywide average.

**Mass. Ave. is a recognized destination for eating, drinking, and specialty retail**

- **Figure 2.1** shows restaurants, bars and cafes account for 46% of Mass. Ave. retail tenants and 45% of in-person retail spending, above citywide averages.
- Retail stores make up 36% of district tenants but only 25% of spending. Entertainment, recreation, and hospitality are only 7% of the district’s tenants, but make up 14% of the spending. This shows that entertainment and recreation is an important part of Mass. Ave.’s offerings.
- According to Replica’s model, only Alewife brings in more grocery and

Figure 2.1 District retail tenant and spending mix, 2024



Source: Data Axle US Business database (for tenant mix) and Replica model (for in-person spending mix).  
Note: In-person spending data for 2024 is January to July only. Please see pages 3-4 for further information on Replica’s methodology.

specialty food spending in Cambridge.

### District Anchors and Destination Drivers

Mass. Ave's retail hubs have **clusters of restaurants and retail that serve as destination drivers and include district anchors**: long-standing local businesses that are well-known in the community, attract significant local and visitor traffic, and drive local initiatives and programming. **Given its varied retail experience and length, the Mass. Ave district can be divided into five zones.** These five zones are:

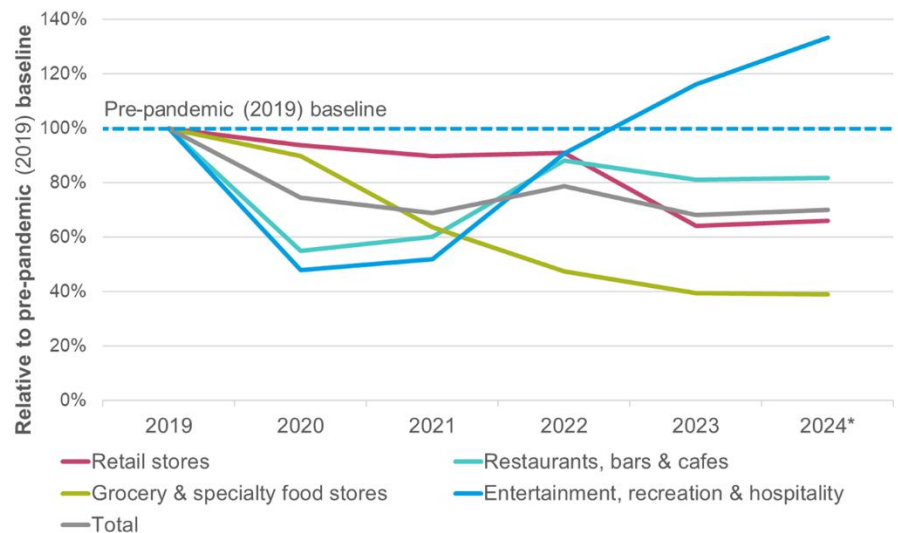
- *Cameron Ave to Dudley St*: Hosts a cluster of neighborhood restaurants.
- *Hollis St and Chester St*: Grouping of specialty grocery stores which are also anchor local businesses.
- *Porter Square Shopping Center, Porter Square Galleria, and Lesley University*: The Porter Square MBTA station is a critical point of entry / exit into the district. National retail chains, neighborhood restaurants and vital community anchor businesses are also located in this zone.
- *Roseland St to Forest St*: Popular neighborhood bakeries, restaurants, clothing, and gift stores distributed evenly on both sides of Mass. Ave.
- *Martin St to Shepard St*: A mix of higher-end restaurants and casual dining. Activity is more concentrated on this hub's south side of Mass. Ave.

Other destination drivers – such as local events and programs, recreational amenities, and open spaces that attract foot traffic to the district, especially from outside the area – are explored in more detail in later sections.

### Some Mass. Ave. retail categories have seen in-person spending recover better than others post-pandemic

- Entertainment, recreation and hospitality has emerged as Mass. Ave's only retail category to exceed pre-pandemic in-person spending (by 33%), according to the Replica model (see **Figure 2.2**).
- Despite recovering through 2021 and 2022, spending at restaurants, bars and cafes - Mass. Ave's largest spending category - is still down 18% from 2019.
- Retail store spending is estimated to be 34% below pre-pandemic levels. Mass. Ave.'s largest spending shortfall is in grocery and specialty food stores (down 61% from 2019).

**Figure 2.2 District in-person retail spending index, 2019-2024**



Source: Replica Model. Note: Data for 2024 is January to July only (indexed to same period – January to July only - in 2019). Please see pages 3-4 for further information on Replica's methodology.

**Almost a quarter of the ground floor businesses active in the Mass. Ave district before the pandemic are now closed, the same rate of closure**



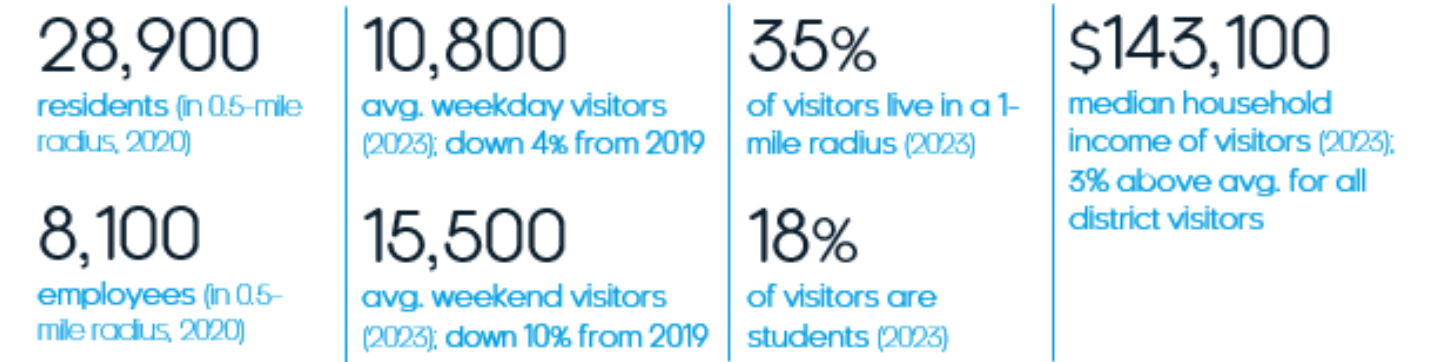
**experienced at the citywide level**

- Most Mass. Ave. ground floor businesses that closed during the pandemic were restaurants, bars and cafes (54%), with a smaller proportion being retail stores (32%). Relative to the citywide average, Mass. Ave had a smaller proportion of restaurants, bars, and cafes close, but more retail stores close.
- As of May 2024, Mass. Ave. had 22 ground floor vacant storefronts (defined as those actively leasing, for sale, leased pending occupancy, or under redevelopment).

**The district’s retail offering is unable to meet local demand**

- Food and drink businesses most likely could capture more local spending. This retail category also accounts for the majority of in-person spending in Mass. Ave.
- Data suggests that business recruitment opportunities in categories like food and drink, grocery, and specialty retail, particularly businesses reliant on in-person spending, or that provide an experiential offer. The district has a small surplus in general merchandise – suggesting demand from non-residents – and is a destination driver for the district.

**2.3. Market Demand**



A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

**Mass. Ave. is a neighborhood/community district with a small student presence**

- With three (3) times as many residents (28,900) living in the district compared to employees (8,100) working in it, Mass. Ave district has a strong residential base. Only Huron Village has a higher ratio of residents than employees. An estimated 62% of residents are “Millennials” or “Gen Z”, while 16% (4,500 total) are of student age, with only Harvard Square and Central Square having a higher share.

**Fewer jobs based on Mass. Ave can be done remotely compared to the citywide average**

- Based on the district's industry mix, it is estimated less than half (46%) of Mass. Ave district workers could do their job from home in 2021, below the citywide average (66%). This comparatively lower share reflects the high share of jobs in retail in the corridor. This trend may have partially protected district retailers from the retail impacts associated with remote work, especially in terms of weekday food and drink trade.

**Post-pandemic weekend visitor numbers have recovered slower than weekdays, but the number of trips these visitors are taking to Mass. Ave has increased**

- The Replica model shows average weekday visitor numbers to Mass. Ave are still down 5% in 2019, and 10% down for weekend visitors. Yet over the same period, there was a small increase (6%) in the total number of individual trips taken by these visitors.
- This suggests people now visiting the district are taking more individual trips to and within Mass. Ave corridor than before the pandemic. This can provide local retailers with opportunities for consistent, repeat customers.

**The demographic characteristics of Mass. Ave visitors are generally similar to other districts, with slightly higher household incomes and education levels**

- Visitors to Mass. Ave were only slightly older and less racially diverse than other districts in 2023. The share that were students (18% of visitors) was comparable to other districts.
- The median household income for Mass. Ave visitors in 2023 was \$143,100, above the average of \$139,200 for visitors to other districts, suggesting stronger buyer power among visitors.

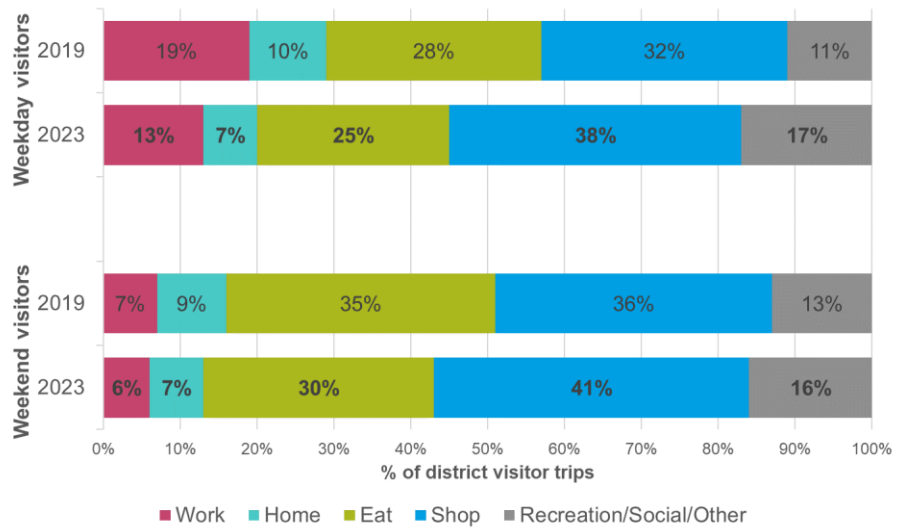
**Mass. Ave attracts local visitors and those from farther away**

- Reflecting its neighborhood status, the Replica model shows 35% of visitors to Mass. Ave live within a 1-mile radius of the district, above the average of 30% for other districts.
- Yet this is down from the 39% share recorded in 2019, making Mass. Ave the only district to see a decline in the share of visitors living within a 1-mile radius.
- Mass. Ave also attracts a good number of visitors from further away; 35% of visitors in 2023 travelled from beyond a 5-mile radius of the district, largely from other communities in Greater Boston. Only Harvard Square and Kendall Square had a higher number of visitors from outside this radius.

**The purpose of visitor trips reinforces Mass. Ave's status as a destination for eating, drinking and specialty retail**

- The share of trips for shopping purposes increased between 2019 and 2023 for both weekdays (to 38%) and weekends (to 41%).
- While eating trips declined, the district still has a higher share of trips for such purposes than any other Cambridge district.
- Only 13% of weekday trips are for work, which is down on 19% in 2019, reflecting the uptake of remote/hybrid working.

Figure 2.3: Purpose of visitor trips to district, 2019 and 2023



Source: Replica Model. Please see pages 3-4 for further information on Replica's methodology.

## 2.4. Physical Environment

The physical environment of a retail district includes the following:

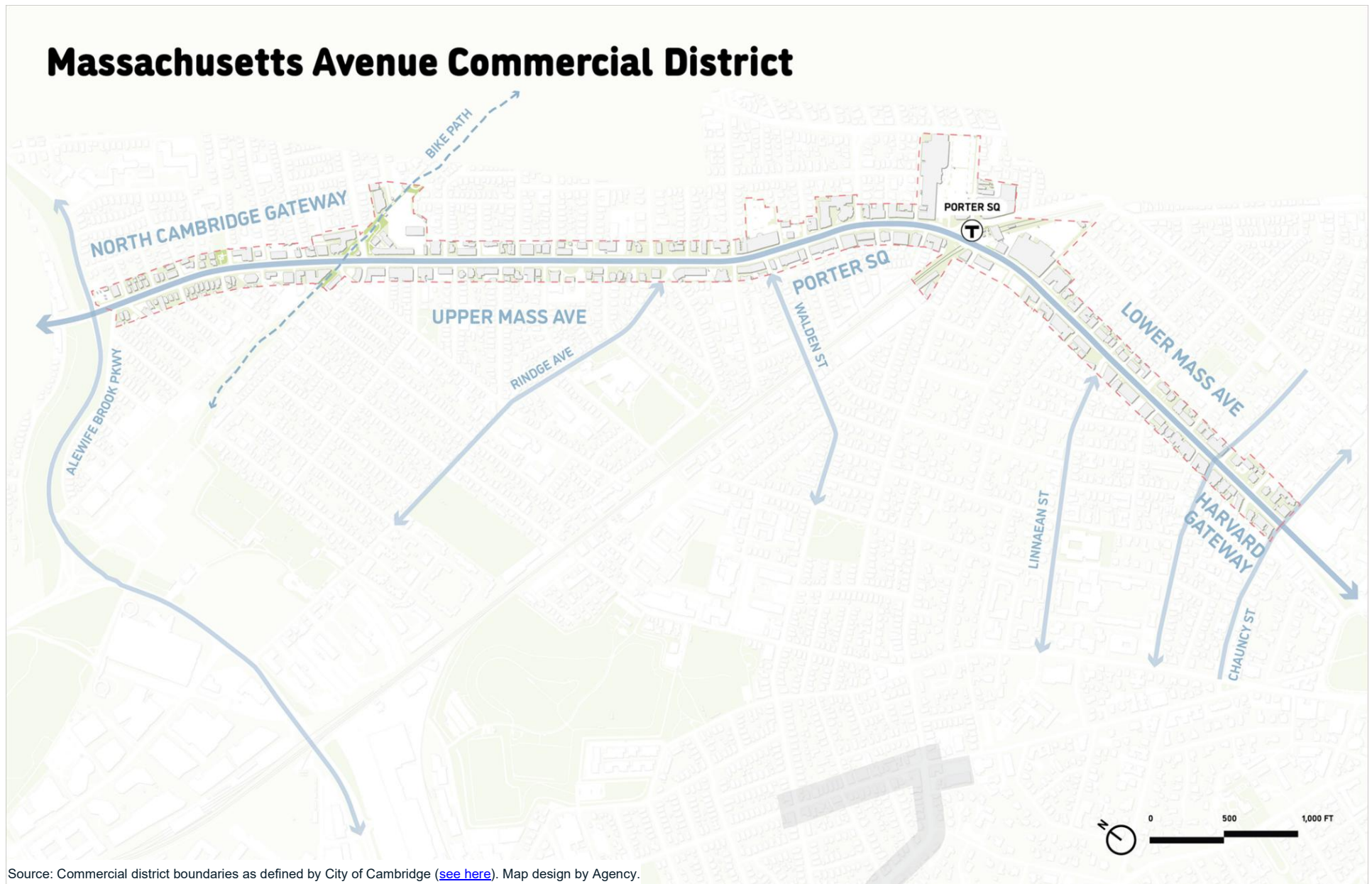
- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.
- **Access:** includes vehicles, pedestrians, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

The physical retail environment varies significantly throughout the Mass. Ave corridor. The district can be considered in five zones, each with distinct retail and physical characteristics. These five zones - visualized in Figure 2.4 - are:

*North Cambridge Gateway (Alewife Brook Parkway to Cameron Ave):*

- Very low concentration of retail within low-rise residential areas.
- Primarily automotive services, salons, and hardware stores.
- Fast-moving car and truck traffic particularly around the Mass. Ave and Alewife Brook Parkway intersection.
- A concentration of bike and pedestrian activity at the intersection with the Alewife Linear Park Bike Path.

Figure 2.4 The Massachusetts Avenue/Porter Square ('Mass. Ave') commercial corridor





*Upper Mass. Ave (Cameron Ave to Russell St):*

- Medium concentration of retail within low-rise residential areas.
- Primarily restaurants or specialty grocery.

*Porter Square (Russell St to Roseland St):*

- High concentration of general retail in and around the Porter Square MBTA stop, with a mix of large-scale national chains, small-scale local stores, and a celebrated Asian food court at Lesley University's University Hall building).
- Famous Asian food court at Lesley University's University Hall building.
- Some vacant storefronts and underutilized plaza spaces around the Porter Square MBTA station detract from the vibrancy of this zone.

*Lower Mass. Ave (Roseland St to Sacramento St):*

- High concentration of restaurants with outdoor seating and neighborhood retail, such as women's fashion, bakeries, and hairdressers.
- More mature tree canopy, wider sidewalks, and street parking in this zone help protect pedestrians from the fast-moving traffic on Mass. Ave

*Harvard Gateway (Sacramento St to Chauncy St):*

- Low concentration of retail, with a small cluster of destination restaurants near Sacramento St.
- Wide sidewalks and shade from taller buildings create a more comfortable pedestrian experience.

**Public Realm**

**Privately-owned plazas in front of the Lesley University building, Porter Square shopping center, and the Porter Square T station**

**Fast-moving car and bicycle traffic dominates the Mass. Ave district.** There are wide sidewalks, infrequent crosswalks, and busy intersections throughout the district. Conditions vary between retail hubs, which creates an inconsistent pedestrian experience.

- **North of Porter Square has a more under-developed public realm:** low mature tree canopy; low pedestrian activity; few benches and seating areas other than bus stops.

- **South of Porter Square has a more pleasant public realm:** medium concentration of retail; high mature tree canopy; medium pedestrian activity; few benches and seating areas other than bus stops.

There are several public plazas in the district. The Lesley University and Porter Square Shopping Center plazas are privately-owned public spaces. They have amenities like seating, shade, public art, water fountains, and bike repair stations. The plaza spaces around the Porter Square MBTA station have few amenities other than seating.

### Private Realm

#### **The private realm in the Mass. Ave. district varies through the corridor**

Retail hubs north of Porter Square have a less active private realm:

- Low concentration of outdoor dining and seating areas, typically informal and disparate
- Few vibrant storefront displays and sidewalk activity (clothing racks, planters, decorative lighting)

Retail hubs south of Porter Square (and including Porter Square) have a more active private realm:

- High concentration outdoor dining and seating areas, typically formal and well-designed and constructed
- Many vibrant storefront displays and sidewalk activity (clothing racks, planters, decorative lighting)

### Access and Visibility

**The Mass. Ave. district runs along one of Cambridge's major road (Mass. Ave), which has four lanes of traffic, bike lanes, and on-street parking.** Several bus routes run along Mass. Ave and the Porter Square MBTA Station is a major commuter hub with both subway and commuter rail service. The corridor experiences heavy traffic congestion during peak hours. Outside these times, traffic is fast-moving and at times, car and bicycle traffic is interrupted by delivery vehicles.

There are several important gateways to the Mass. Ave district:

#### *Alewife Brook Parkway Intersection*

- Connection between North Cambridge and Arlington, Route 2.

#### *Somerville Ave Intersection and Porter Square MBTA Station*

- Connection between the northern and eastern sides of Cambridge
- The intersection between Mass. Ave, Somerville Ave, and the Porter Square Shopping Center is complex and hazardous for pedestrians and cyclists. Inaccessible plaza space with minimal shade and narrow sidewalks at the MBTA station. Ample bicycle parking.

#### *The Harvard Gateway Zone*

- Martin St to Shepard St retail hub: A cluster of restaurants and casual dining attracts pedestrian traffic from the Harvard Square commercial district.

**Cars are the primary mode of transport for Mass. Ave visitor trips, although walking and cycling are becoming more popular**

- The Replica model estimates on weekends about half of visitor trips to Mass. Ave were by car in 2023, down from 55% in 2019. The share of trips by car on weekdays increased from 49% to 52% during the same period.

- Between 2019 and 2023, walking became more popular, especially on weekdays where it has increased from 27% of all trips to 34%. At the same time, trips by public transportation decreased from 19% in 2019 to 8% in 2023.
- As a result of the increase in shorter, repeat trips (often walking), travel times for trips taken to Mass. Ave has declined since 2019, and the average travel time now stands at just under 20 minutes - the third shortest travel time of Cambridge commercial districts.

### Branding and Placemaking

#### **The Mass. Ave district does not have a distinct brand or visual identity**

The district is known as an important commuter hub and transit thoroughfare. While the corridor has key landmarks such as the Porter Square Shopping Center and Lesley's University Hall. The area has a unique position in Cambridge as a convenient shopping destination. It contains an MBTA transit station and is accessible by bus. It offers a mix of both national chain and local retail.

The red windmill sculpture outside the Porter Square MBTA station ("The Gift of the Wind" by Susumu Shingu) is a unique visual anchor for the district.

Businesses have their own branding within their stores and institutions. However, these efforts are not consistent and not coordinated, resulting in a lack of visual cohesion throughout the Mass. Ave corridor.



The Gift of the Wind sculpture by Susumu Shingu in front of Porter Square MBTA station.

## 2.5. Adaptive Capacity

Local adaptive capacity plays a crucial role in achieving the long-term, community-driven vibrancy of a district. It represents a district's leadership, organizational capacity, resources (both human and financial), and regulatory and policy frameworks.

#### **Porter Square Neighbors Association, or PSNA, is the main neighborhood association in the district.**

PSNA is a voluntary membership organization for residents and businesses that meets monthly. The organization uses its listserv and social media to promote local businesses, events, community meetings, neighborhood clean-ups, and city planning projects (e.g., the Mass. Ave Planning Study).

**Mass. Ave's adaptive capacity is also supported by its proactive network of local anchor businesses.** This includes Porter Square Shopping Center, Porter Square Books, NoCa Block (which is made up of Pemberton Farms and nearby businesses), which host many events and programs, usually promoted using their own digital marketing and in-store advertising.

Individual businesses offer their own weekly and monthly events in the district, which can help draw both resident and non-resident visitors to the district.

Examples include:

- Porter Square Books monthly and weekly book club and author talks.
- Curio Spice Pop-Ups and Classes (weekly) and Marathon Sports Cambridge Run Club (weekly).
- Cambridge Culinary School recreation and professional classes.
- Pemberton Farms Craft Beer Event (annual) and seasonal events (monthly), such as “Pemberfest”. Pemberton Farms also hosts seasonal events with food and live music (e.g., Pride Day and Porchfest).

Many of the local shops and restaurants on Mass. Ave both north of Porter Square participate in the North Cambridge Holiday Stroll (NoCa Block) and south of Porter Square offer holiday strolls. Retailers offer discounts, giveaways, samples, tastings, and mini workshops. Stores decorate their shopfronts for the holidays and Christmas carolers perform.



Music performance along Mass. Ave. Photo credit: City of Cambridge.

## 2.6. Recommendations

### Recommendation 1: Establish a district-wide business association

**Rationale:** Mass. Ave has the highest concentration of retail businesses and employees across all districts and was the only district to see a decline in the number of post-pandemic visits from its local resident population. Despite its concentration of retail businesses, it does not have a business association.

**Objective:** Have a united group of businesses that can develop a strategy and coordinate efforts to: 1) market Mass. Ave’s commercial strengths; and 2) advocate and represent local business needs to community members, city officials, and other organizations.

- Build on the experiences of other business associations in Cambridge to establish a business association for the Mass. Ave corridor. This includes convening businesses present along the corridor, discussing the goals for the association, determining funding options for staff and sustaining the association, volunteer/member business roles, and key priorities to support business retention and growth.



## Recommendation 2: Establish a visual identity through branding, wayfinding, and public art

**Rationale:** The physical retail environment and character varies significantly throughout the Mass. Ave corridor. An eclectic mix of storefronts and lack of coordination between them means the private realm lacks a strong sense of identity. The public realm is challenged by fast-moving car traffic, varying sidewalk widths, and inconsistent public spaces, which makes the pedestrian experience disjointed across the district.

**Objective:** Align with the citywide goal of district placemaking to express the unique character of the Mass. Ave corridor and help visitors navigate the diverse retail offerings. Build on and integrate with the recommendations of the Mass. Ave. Planning Study.

### Wayfinding and Branding

Brisbane, Australia (left); Grandmama Garden, South Korea; and the H Street NE Neighborhood in Washington, DC.

Developing a clear visual brand allows for a cohesive image across a large area that is easily identifiable and memorable.



- In tandem with Recommendation 1, consider convening a working group of relevant stakeholders and conduct a branding exercise in partnership with local designers to create a cohesive vision for the Mass. Ave corridor. This work should build on the colors and shapes of existing and planned public art within the district.
- Develop distinct wayfinding in the form of signage or mapping to highlight key retail destinations along the Mass. Ave. corridor. Given the long, linear nature of the corridor, signage should work at both the vehicular scale - announcing arrival at the threshold to the district and movement through key subdistricts - and at the pedestrian scale - lending more intimate interest and identity to the streets. Signage options include monument signs, pillar signs, street pole signs, or building-mounted signage. Once established, encourage business owners to incorporate this district identity into their storefronts while retaining their own branding.
- Consider partnering with local artists to develop sculptural elements along Mass. Ave that are interactive and provide additional benefits such as shade, play space, or seating. Focus on sculptural works and murals that are reflective of community culture, history, and collective memory. Future pieces can be built on existing moments like the Gift of the Wind sculpture at the Porter Square T Station or the mural on White Street behind Star Market.

- Focus on key sites (identified in the map below) throughout the corridor to identify site-appropriate pieces that also help to define Mass. Ave's subdistricts and break the long, linear corridor down into walkable zones. Following the creation of this public artwork, collaborate with artists and residents to develop a public art and history tour as a celebration of these installations.

### Public Art

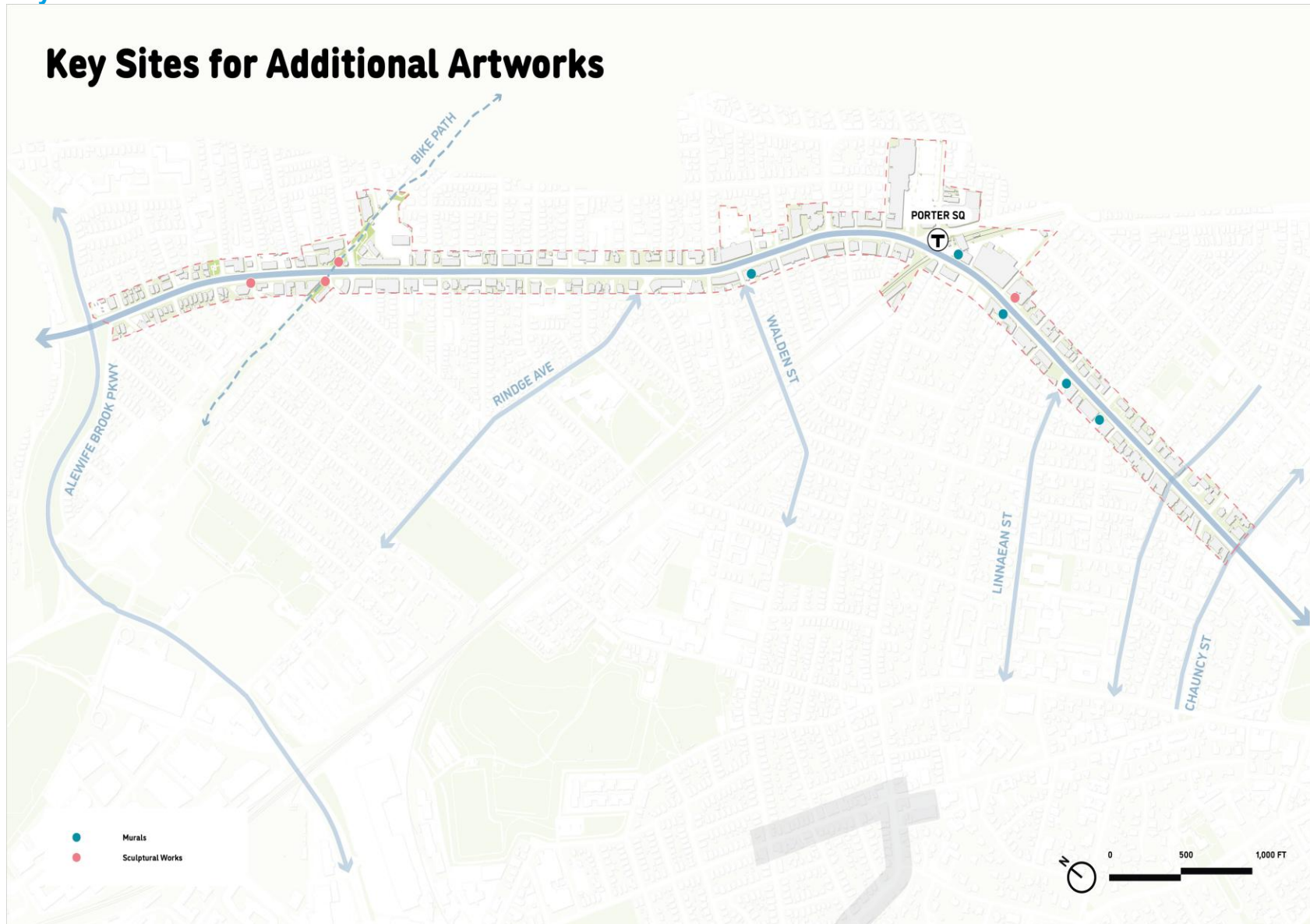
Sayer Street and the Meadow by BJD landscape architects in London, England (bottom left) and the sculpture Air, Sea and Land by Okuda San Miguel in Boston, MA (top right)

Examples of sculptural art works that are interactive or provide additional benefits such as shade or seating

These precedents also showcase how sculptures could be used to create moments along the streetscape and median.



## Key Sites for Additional Art in Mass. Ave



### Recommendation 3: Activate underused areas such as public plazas through increased programming, seasonal events, and other small-scale temporary interventions.

**Rationale:** Among the streetscape and sidewalks sit numerous spaces that hold potential but currently do little to serve the public passing through or adjacent property owners. Rethinking how these areas are used will benefit the residents and business community.

**Objective:** Identify and expand opportunities for businesses to attract new audiences and retain year-round visitor interest. Create renewed engagement and interaction with underappreciated or overlooked spaces.

- Promote events and programming to maintain continuous engagement and interest, building on existing events such as the North Cambridge and South of Porter Holiday Strolls. In doing so, highlight the subdistrict identities across Mass. Ave through thematic events. For example, encourage food-focused activities near the cluster of restaurants towards Cambridge Common, or a craft market to supplement the existing retail closer to Porter Square. Events and programming can also be used to promote the local music scene.
- Where possible, remove or reorganize spatial elements (such as street furniture, planters, and other objects) to make room for temporary activities like commercial pop-ups, outdoor performing arts, recreation, live music, and culturally diverse events. Explore how mobile retail, vending carts, and permanent stalls could be used in high areas with high pedestrian traffic to create opportunities for micro-businesses on non-traditional sites such as plazas, parkettes, and other open spaces.

#### Activation

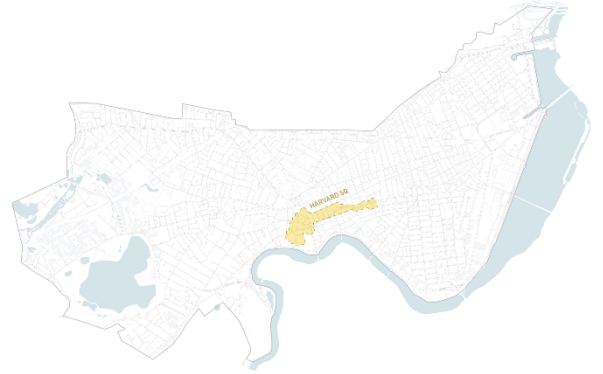
London, England (left and top right) and Silver Lake, CA (bottom right).

Examples of mobile retail and vendor carts that can be established on non-traditional sites such as parking lots or plazas. Implementation of these initiatives can create opportunities for micro-businesses and promote the activation of underused spaces.





## 3. Harvard Square



### 3.1. Key Takeaways

**Home to Harvard University, Harvard Square is an internationally recognizable destination**, and offers a unique blend of restaurants, shops, and cultural offerings which caters to a diverse range of visitors including residents, students, workers and tourists. Our analysis shows:

- Harvard Square has some of the highest density of retail businesses and employees in Cambridge, in addition to high educational and professional services activity. It also has the greatest concentration of spending in restaurants, bars and cafes in the city.
- According to Replica model<sup>2</sup>, in-person retail spending in the district is still 32% down from 2019. Spending on entertainment, recreation and hospitality has passed pre-pandemic levels.
- Harvard Square caters to a diverse range of visitors, including students (a quarter of all visitors), local residents, and visitors from outside the city. Only Kendall Square attracts more visitors from outside a 5-mile radius.
- But with a high dependence on workers (who have high remote work potential), weekday visitor numbers have fallen more than any other district.
- Wide sidewalks, crosswalks with signals, and slower car traffic make walking in Harvard Square enjoyable. Harvard Square is also a major transit hub, with the MBTA station, bus interchange, and bike network.
- As a result, in contrast to other districts, walking and cycling are the dominant mode of transport for visitor trips.
- The district contains large, publicly accessible open spaces, plazas, and streets that provide free public seating and natural spaces for programming. Most storefronts have bright signs and outdoor seating, creating a unified look.
- In addition to its unique retail mix, the Harvard University brand is prominent in the district's visual identity.

---

<sup>2</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4.

### 3.2. Business Environment



The density and variety of stores in an area often reflect local economic conditions and market trends, giving insight into the health of local retail businesses.

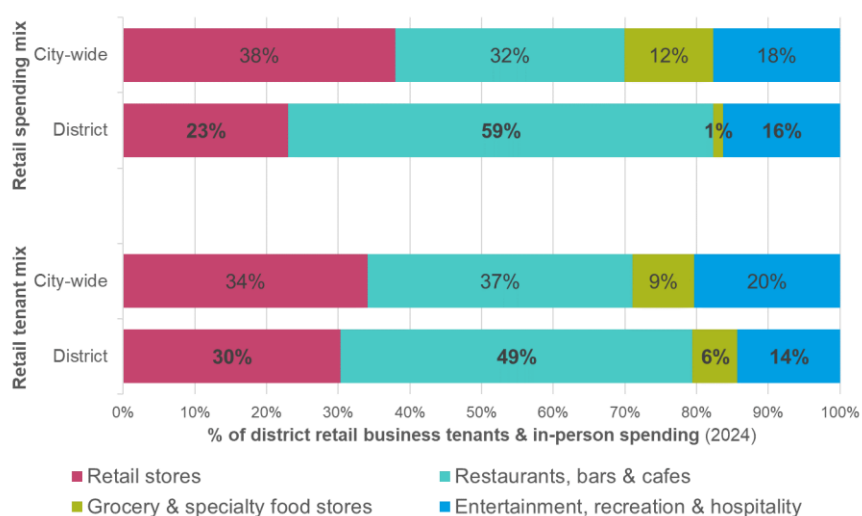
**The Harvard Square district is home to 960 businesses with 8,700 employees. Retail is the largest-employing industry with 180 businesses and 2,000 employees**

- Harvard Square's 180 retail businesses account for 23% of all the employees in the district, above the citywide retail industry average share of 13% of all jobs.
- The next highest-employing industries reflect the presence of Harvard University and related professional services and include educational services (19% of district employees – the highest share of any district), professional, scientific, and technical services (16%), and other services (9%).
- Harvard Square's retail business density (per acre) is the second highest of all districts in Cambridge (behind Mass. Ave). On average retail businesses have 11 employees, similar to the citywide average.

**Harvard Square has the highest concentration of spending in restaurants, bars, and cafes in Cambridge**

- Figure 3.1 shows restaurants, bars and cafes account for 49% of Harvard Square retail tenants and 59% of in-person retail spending - the highest share of all districts.
- Retail stores represent 30% of tenants and 23% of in-person spending, below the citywide averages.
- Representing 14% of tenants and 16% of spending, entertainment, recreation and hospitality is a large

**Figure 3.1 District retail tenant and spending mix, 2024**



Source: Data Axle US Business database (for tenant mix) and Replica 2024 Spending Data (for in-person spending mix).

Note: In-person spending data for 2024 to July only, not full calendar year. Please see pages 3-4 for further information on Replica's methodology.

and growing part of Harvard Square's offer.

### District Anchors and Destination Drivers

Harvard Square's retail hubs have **clusters of restaurants and retail that serve as destination drivers and include district anchors**: long-standing local businesses that are well-known in the community, attract significant local and visitor traffic, and drive local initiatives and programming. These hubs include:

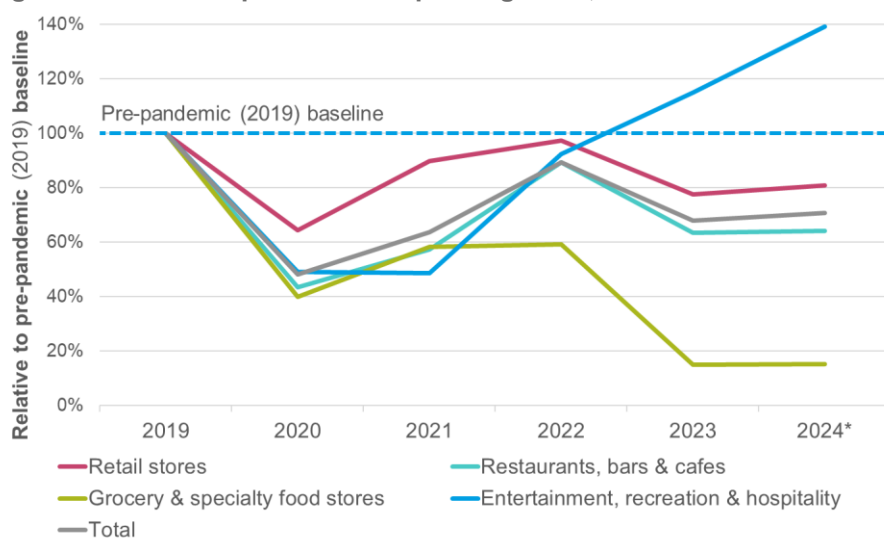
- *JFK and Mass. Ave*: Near the Harvard Square MBTA Station, this hub has restaurants, bars, and fast-casual restaurants. While national chains have large storefronts, the square This hub is a focal point for tourists, with private tours starting in the center of this hub.
- *Mass. Ave and Arrow St*: Smaller hub of local stores, including cafes and dessert shops. These stores are popular with local residents and students. They stay open late, and the area stays busy with locals and students even after nearby shops have closed.
- *Church St and Brattle St*: A cozy, charming corridor. The corridor has a mix of local shops, such as boutiques, wine store, grocery, restaurants, and a watch store. National and international brands are in this hub, as well as Harvard's American Repertory Theater. This is a quieter area, with less foot traffic and tourist activity.

Other destination drivers – such as local events and programs, recreational amenities, and open spaces that attract foot traffic to the district, especially from outside the district – are explored in more detail in later sections.

### Some Harvard Square retail categories have seen in-person spending recover better than others post-pandemic

- Entertainment, recreation and hospitality is the only retail category to exceed pre-pandemic in-person spending (by 39%), according to the Replica model (see Figure 3.2).
- According to Replica's model, spending at restaurants, bars and cafes – the district's largest spending category - is still down 36% compared to 2019.
- Retail stores were initially resilient post-pandemic but now are 19% below pre-pandemic levels. Harvard Square's largest spending shortfall is in grocery and specialty food stores (down 85% from 2019).

Figure 3.2 District in-person retail spending index, 2019-2024



Source: Replica..

Note: Data for 2024 to July only (indexed to same period - to July only - in 2019). Please see pages 3-4 for further information on Replica's methodology

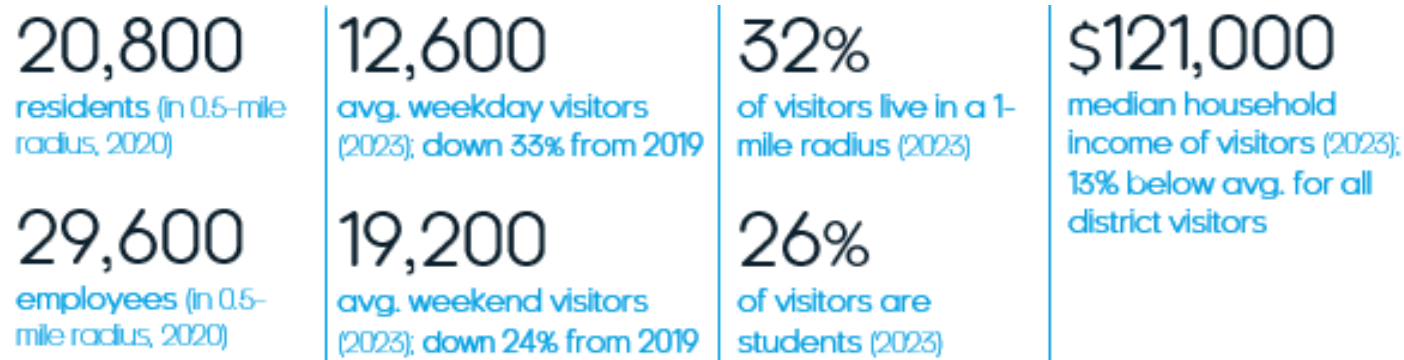
**Almost a quarter of ground floor businesses active in the Harvard Square district before the pandemic are now closed, the same rate of closure experienced citywide**

- Most of the Harvard Square ground floor businesses that closed during the pandemic were restaurants, bars and cafes (55%) and retail stores (42%). Relative to the citywide average, Harvard Square had a smaller proportion of restaurants, bars, and cafes close.
- As of May 2024, Harvard Square had 16 ground floor vacant storefronts (defined as those actively leasing, for sale, leased pending occupancy, or under redevelopment).

**With a surplus in most categories, Harvard Square's retail offer draws in large amounts of non-resident spending**

- Harvard Square's food and drink businesses – its largest retail category – generate a significant retail surplus, reflecting strong non-resident demand, and its status as a destination driver for the district.
- The district also has a large surplus in specialty retail categories such as clothing and accessories, and office, supply and gift stores, reflecting their status as high destination drivers for the district.
- Grocery and general merchandise stores have relatively small footprints in the area, but they make up only a small part of the district's retail stores.

### 3.3. Market Demand



A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

**Harvard Square is a recognized regional/specialty district, with a large worker and student presence**

- With 1.4 times as many employees (29,600) working in the district than residents (20,800) living in it, the Harvard Square district has a strong commercial base. An estimated 75% of residents are “Millennials” or “Gen Z”, while 35% (7,400 total) are of student age – the highest shares of all Cambridge districts, consistent with the large presence of Harvard University.

**Harvard Square had the highest share of jobs that could be done remotely in Cambridge**

- Based on industry mix - and highlighted by the large number of professional services firms in the district – it is estimated three-quarters (74%) of Harvard Square district workers could do their job from home in 2021,



above the citywide average (66%) and the highest of all Cambridge districts. This means Harvard Square retailers have been more likely to encounter the retail impacts associated with remote work, especially in terms of lower weekday food and drink trade.

**Post-pandemic Harvard Square experienced the largest fall in weekday visitor numbers of any Cambridge district**

- The Replica model shows in 2023 average weekday visitor numbers to Harvard Square were still down 33% from 2019, and 24% lower for weekend visitors. No other district has seen a larger drop in weekday visitors, and only Alewife has experienced a bigger fall in weekend visitors.
- Yet over the same period, there was a much smaller drop in the total number of individual trips taken by visitors. This suggests those that still visit the district are taking more individual trips to and within the Harvard Square district than before the pandemic.

**A quarter of Harvard Square visitors are students, while visitors are generally younger, highly educated but with lower incomes**

- Visitors to Harvard Square were younger than other districts in 2023, while 26% of visitors were students – above the 16% average for all districts, and the highest share of all districts.
- The median household income for Harvard Square visitors in 2023 was \$121,000, below the average of \$139,200 for visitors to other districts, though some of this difference can be explained by the high number of student dormitory/housing households in the district.

**Most Harvard Square visitors reside or are staying in Cambridge**

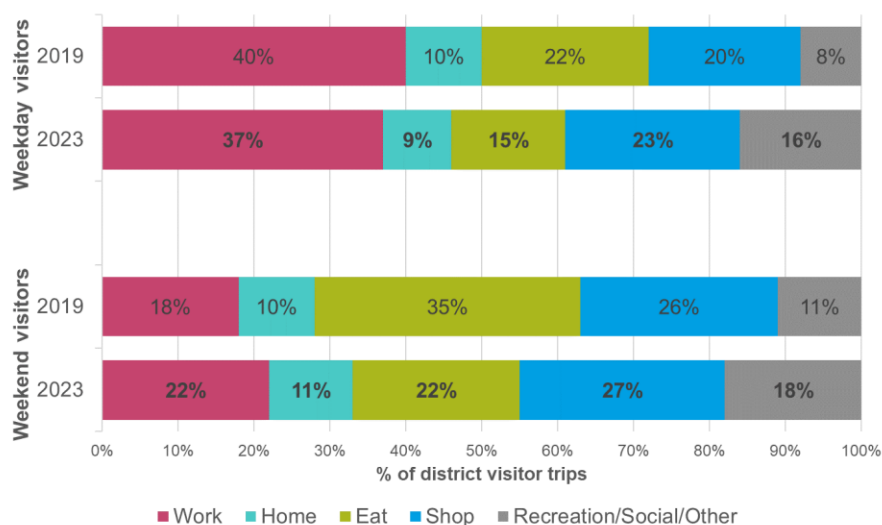
- The Replica model shows 32% of visitors to Harvard Square live or are staying within a 1-mile radius of the district, above the average of 30% for other districts. This is also a small increase on the 30% share recorded in 2019.
- Some 31% of visitors in 2023 travelled from beyond a 5-mile radius of the district, largely from other communities in Greater Boston but also further away. Only Kendall Square had a higher number of visitors from outside such a radius, reflecting Harvard Square's draw as a regional destination.

**The purpose of visitor trips reinforces Harvard Square's status as a regional/specialty destination, and its large worker presence**

- The 37% share of visitor weekday trips for work purposes. This is second only to Kendall Square. (see Figure 3.4).

- This work trip share is only marginally down 40% from 2019, suggesting it is not only workers contributing to the decline in Harvard Square visitor numbers.
- The share of trips for shopping purposes increased between 2019 and 2023 for both weekdays and weekends, although eating trips declined over the same period.

Figure 3.3: Purpose of visitor trips to district, 2019 and 2023



Source: Replica. Please see pages 3-4 for further information on Replica's methodology.

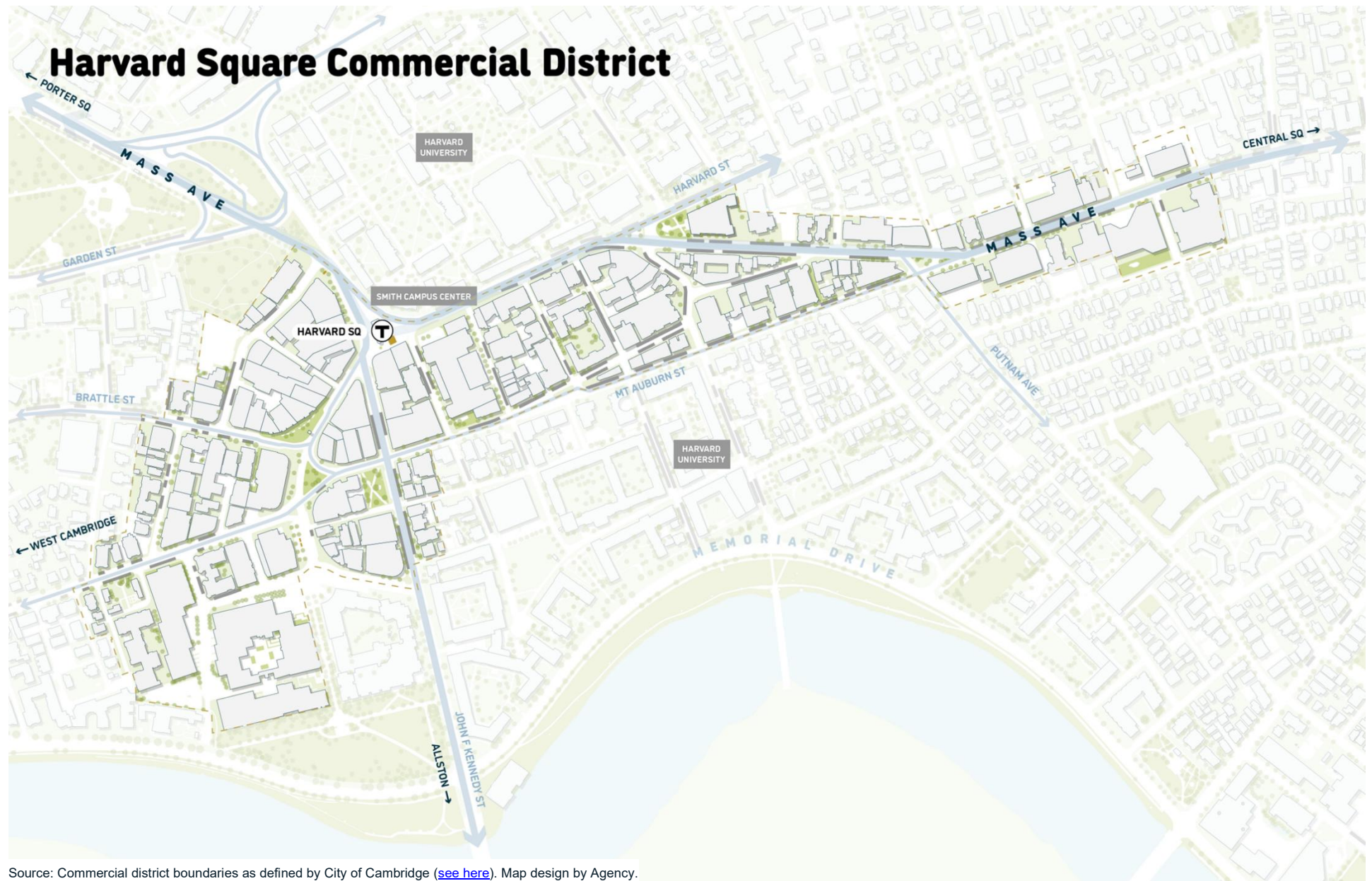
### 3.4. Physical Environment

The physical environment of a retail district includes the following:

- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.
- **Access:** includes vehicles, pedestrians, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

The physical environment of Harvard Square (Figure 3.5) is characterized by its three, vibrant hubs of retail activity.

Figure 3.4 The Harvard Square commercial district



Source: Commercial district boundaries as defined by City of Cambridge ([see here](#)). Map design by Agency.



## Public Realm



Large, open spaces within Harvard Square offering seating, shade, and space for circulation and programming

### **Wide sidewalks, crosswalks with signals, and slower car traffic make walking in the district enjoyable**

- Most of the district has wide sidewalks, protected from cars by on-street parking.
- One-way roads and pedestrian crosswalks significantly slow vehicle traffic in the district
- Even though there aren't many trees, the buildings are close together, which gives shade and a cozier walking experience.

### **The district is characterized by large, publicly accessible open spaces, plazas, and alleys that provide free public seating and natural spaces for programming**

- Accessible plazas are outside the Harvard Square MBTA station, on JFK and Mt Auburn St. (Winthrop Sq.), outside Harvard University's Smith Campus Center, and along Brattle St. (Brattle Sq plaza).
- Open spaces include:
  - colorful outdoor furniture
  - seating options (e.g., large steps, single seats, tables and benches)
  - activities (e.g., chess boards outside the Harvard's Science Plaza)
- Informal programming seen in these public spaces includes musicians and groups playing chess. Some spaces, such as the Palmer St. Alley, also include art installations and murals

## Private Realm

### **Most storefronts have bright signs and outdoor seating, creating a unified look**

- Uniform store signs make it look like there are unique, local shops despite many national and international chains
- Many retailers also use A-frames, planters, and window signage to create storefronts
- Outdoor seating and dining areas are common in every hub, adding to vibrancy

### **Most vacant storefronts also include vibrant signage featuring incoming retailers or pop-up businesses**



- Many vacant storefronts include window displays
- Empty retail spaces are often used for temporary pop-markets. For example, Harvard Square Business Association used a vacant store to display student design projects.



Vibrant signage displaying temporary pop-ups or advertising incoming retailers in vacant retail spaces

### Access and Visibility

**Harvard Square is a major transit hub, with the MBTA station, bus interchange, and bike network**

- Leads to complex and busy traffic flows, especially due to many one-way roads
- Several high-traffic intersections (e.g., JFK and Brattle St) create pedestrian and cyclist hazards
- Accessible by multiple regional buses
- The Harvard Square MBTA station is one of the busiest stations on the Red Line

**Heavy use of car and bike parking in the district**

- Street parking is often full, and signage at some parking lots is unclear about whether public parking is allowed.
- Encourages transit use, biking, and walking
- Bike racks are limited and in high demand, especially due to student traffic.

**In contrast to other districts, walking and cycling are the dominant mode of transport for visitor trips**

- The Replica model shows on weekends 46% of visitor trips to Harvard Square were by walking or cycling in 2023, up from 41% in 2019. The share of trips by walking or cycling on weekdays increased from 37% to 45% during the same period.
- Between 2019 and 2023, car use became less popular, but only on weekends where it decreased from 51% of all trips to 44%. On weekdays, the district's car trip share increased from 42% to 45%. During the same period, trips by public transportation more than halved from 21% in 2019 to 10% in 2023.

**Branding and Placemaking****The Harvard University brand is prominent in the district's visual identity**

- Harvard merchandise stores are throughout the district; tourists and students drive retail demand
- Many other retailers include Harvard colors in storefronts, creating a unified visual identity
- Harvard University branded wayfinding in the district emphasizes this brand

**The district has many murals by local artists, showing a growing focus on arts and culture**

- Art installations include the Gateway Arts Exhibit, 25/8 Artspace on 2 Linden Street, murals (e.g., Black Job, Empowerment, and Everyday Life), and installations on Palmer St, such as a public piano and an artistic canopy
- Art installations complement the music and theatre scene, like The Sinclair, Club Passim, and the Brattle Theatre.



(Top) Signage pointing to parking lots within Harvard Square. (Bottom) Image of crosswalks and narrow roads

### 3.5. Adaptive Capacity

Local adaptive capacity plays a crucial role in achieving the long-term, community-driven vibrancy of a district. It represents a district's leadership, organizational capacity, resources (both human and financial), and regulatory and policy frameworks.

**The Harvard Square Business Association** is a non-profit professional organization actively engaged in shaping the future of Harvard Square and serving the interests of the local business community. Having represented district businesses since 1920, its membership now stands at approximately 300 organizations and individuals.

The Business Association plays an important role in supporting the district's businesses and maintaining the authenticity of the square's historic origins. Its main focus is on highlighting and showcasing Harvard Square as a unique destination, which offers a curated selection of independent businesses, many of which have a long history in the local area. The Business Association provides a significant amount of marketing and promotion

support for businesses in the following ways:

- Promotion via their Social media platforms (Facebook, Tik-Tok, X, Instagram)
- Use of their website to promote businesses and advertise events
- Monthly newsletter that has 22,000 local subscribers and a 50% open rate
- Contract with communications company that supports promotion for members via Tik-Tok and social media influencers
- Organizing annual special events such as the Octoberfest
- Undertaking community relations, surveys and publications for the Square

Key issues affecting Harvard Square businesses as noted by the business association include the length of time the business permitting and inspection process takes for new businesses; the perceived lack of parking and the impact it has on vendors being able to attend markets and events; and select long-term vacancies.

**The district hosts a range of annual events featuring local artists, restaurants, and vendors that attract locals and visitors.** These events capitalize on the district's open spaces and streets. Regular events include:

- Holiday and season events including but not limited to – Salsa Squared and Chilli Cook off.
- Farmers Markets: The Square is home to two markets, the Charles River market, held every two weeks outside the Charles Hotel, and the Harvard University market held once a week in the Science Plaza during the market season.
- Black-Owned Business Pop-up Market: From June to October 2024, there is a weekly pop-up market on Palmer St., a pedestrian street. The market features local gifts, specialty items, clothing, and food.

**Major annual events align with seasonal themes and serve as regional attractions in the greater Boston area.** Roads in the district are typically closed to vehicle traffic during these events. Annual events include:

- Mayfair (May): Spring festival with local food, beer gardens, music, entertainment, and performances
- Octoberfest & Honk Festival (October): Festival with food, arts and crafts, vintage goods, and beer gardens
- Harvard Square Holiday Fair (December): Week-long fair with local and international artists and business owners
- Sparklefest (December): Five-week holiday celebration with festive lights decorating trees and streetlamps across the district
- Winter Carnival and Taste of Chocolate Festival (January): Weekend market with local and regional chocolate vendors, free samples, and live entertainment

**Harvard University is a key part of the district, and its events bring many people to local shops.** Other events include:

- The Head of the Charles Regatta
- Notable collegiate sporting music events (e.g., football, Boston Calling)
- Student Orientation Week and Graduation Weeks

**In addition to the local association and anchors, Harvard Square is represented by an active network of**



**citywide business associations** – such as the Cambridge Chamber of Commerce, Cambridge Local First, and Cambridge and Somerville Black Business Network (CSBBN). CSBBN is particularly active in Harvard Square, hosting weekly pop-ups and with a focus on improving the representation for black-owned businesses in this district, where they are currently least represented.

### 3.6. Recommendations

#### Recommendation 1: Promote local businesses through the Harvard Square Kiosk and surrounding plaza

**Rationale:** Harvard Square is known for its independent businesses and the Kiosk can help to promote these local assets to visitors.

**Objective:** Leverage the reopening of this flexible and dynamic community asset as a platform for small businesses and events.

- In preparation for the reopening of the Harvard Square Kiosk, coordinate with operating partners to identify opportunities to develop programming that centers local businesses.
- Opportunities could include hosting pop-ups of local and small businesses that rotate monthly to promote the range of retail offerings in the area, or to leverage the local and used bookstores in the area. The Kiosk could also be used to distribute informational materials about existing local businesses and the commercial history of the district.

#### Rotating thematic storefront design New York City, NY

Story is a “permanent pop-up shop” designed to host a rotating selection of retailers. Every six weeks, the store changes its design, fixtures, and inventory of merchandise to align with the theme of its current retailer.



#### Recommendation 2: Create markers or signage for legacy businesses in Harvard Square



**Rationale:** While the local Harvard brand is prominent in the district's visual identity, national chains have become increasingly pronounced in the public realm. As Harvard Square continues to evolve, concerns about the decline of the district's historic character and presence of mom-and-pop shops have grown.

**Objective:** Celebrate the rich history of local businesses that helped make the district what it is today.

- Coordinate with the Community Development Department (CDD) team overseeing the pilot project of historic markers in East Cambridge to assess the potential for a similar effort in Harvard Square. Work with the Historical Commission, Harvard Square Business Association and other relevant stakeholders to identify the businesses to be included in the program based on their significance to the neighborhood and to the city.

### Markers and signage

Oakland, CA, USA (left); Brisbane, Australia (center); Lyon, France (right)

These markers could be used to highlight the rich history of local businesses in Harvard Square and denote legacy businesses.

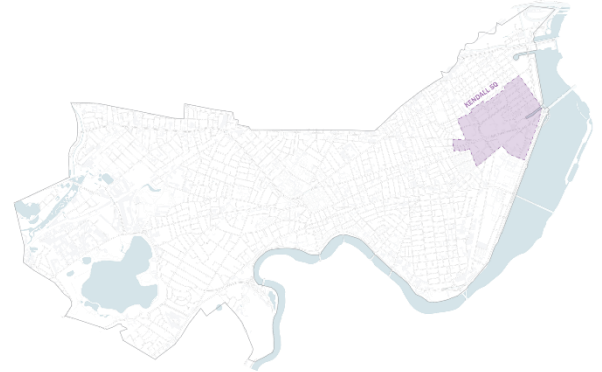


### Recommendation 3: Promote and market the district to a wide audience as a destination for eating, drinking, and shopping

**Rationale:** Harvard Square has a significant retail surplus in food and drink establishments as well as clothing and accessories. This means it draws in a significant amount of in-person spending in these categories from people outside the local area. Harvard Square is a global brand and one of the few districts that has a retail surplus in clothing and accessories, and this is even more surprising given the rise of online shopping. This is a clear strength of Harvard Square which should be promoted.

- The Harvard Square Business Association should continue and expand its marketing strategy leveraging social media and other outlets to promote Harvard Square's restaurant scene as well as its clothing and accessory stores. The City of Cambridge should identify opportunities in its citywide marketing and promotion to highlight Harvard as a destination for people to visit and stay to eat, drink and shop in order to capitalize on its existing strengths in terms of its retail performance.

## 4. Kendall Square



### 4.1. Key Takeaways

**As one of the world's leading centers for biotech research and innovation, Kendall Square** is home to a wide variety of hotels, restaurants, and shops that serve the MIT community, the life science and technology companies, and a growing number of residents in the square. Our analysis shows:

- Kendall Square is the only district where retail does not account for the majority of employees. Knowledge intensive business services is the largest industry with 395 businesses and 9,300 employees.
- Despite its low retail business density, Kendall Square has the third highest in-person retail spending of all the Cambridge districts, the majority of which is at restaurants, bars and cafes.
- Replica model data<sup>3</sup> shows that in-person retail spending in the district is still 58% down from 2019 – the biggest shortfall of any Cambridge district. Only spending on entertainment, recreation, and hospitality passed pre-pandemic levels.
- Analysis shows Kendall Square's retail offer draws in large amounts of non-resident spending in food and drink, and its specialty retail offerings could be boosted.
- Kendall Square has the largest worker presence of all Cambridge districts. Though these workers bring above average incomes (and spending power), almost three-quarters could do their work remotely.

---

<sup>3</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4 of this report.

- Given its high worker-dependency, Kendall Square has experienced a large fall in weekday visitor numbers, although its diverse retail offerings has contributed to weekend visitor numbers increasing. Some 20% of visitors reside within 1-mile of the district.
- With most retail activity in Kendall Square happening on the ground floors of office buildings.
- Wide sidewalks accommodate a heavy flow of pedestrian traffic, even with heavy vehicle traffic, the district offers a comfortable pedestrian experience.
- Kendall Square is also accessible by multiple transit options. Several major bus routes, bike lanes, and pedestrian pathways run along Kendall Square. Yet the car remains the most popular mode of transport for visitors, who on average travel longer than any other Cambridge visitors.
- Kendall Square's physical environment is known for its corporate campuses and employee-focused spaces. A few branding elements help create a cohesive, campus-like feel across the area.



**Paint Night at Urban Park UP Roof Garden. Photo credit: City of Cambridge.**

## 4.2. Business Environment



The density and type of retail offerings in a district is often a reflection of the underlying business conditions and market dynamics and can offer insight into the health of local retail businesses.

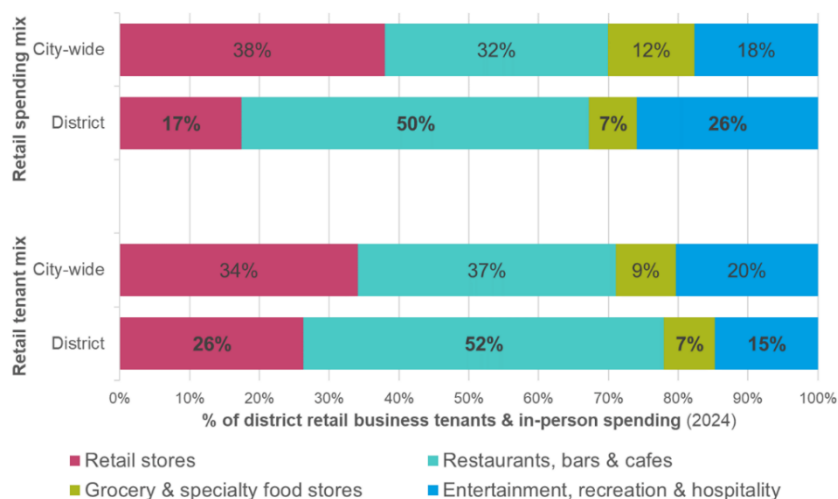
**The Kendall Square district is home to 1,005 businesses with 21,700 employees. Knowledge intensive businesses are the largest industry with 395 businesses and 9,300 employees**

- Kendall Square's 95 retail businesses account for just 6% of all the employees in the district. No other commercial district in Cambridge has a lower share of employees working in retail.
- The district's highest-employing industries are professional, scientific, and technical services (21% of district employees), information (19%), and manufacturing (largely pharmaceutical, at 18%). These industries reflect Kendall Square's reputation as a global hub for life sciences and tech innovation and activity, building on its proximity to MIT.
- Kendall Square's retail business density (per acre) is the third lowest of all districts. On average, Kendall Square retail businesses have 15 employees, the joint-second highest average of all districts.

**Kendall Square has the third highest in-person spending of Cambridge districts, mostly on restaurants, bars and cafes**

- Replica's model shows that restaurants, bars and cafes account for 52% of district retail tenants and 50% of retail spending – no other Cambridge district brings in more spending in this category.
- Retail stores are underrepresented as tenants (17%) and in spending

Figure 4.1 District retail tenant and spending mix, 2024



Source: Data Axle US Business database (for tenant mix) and Replica (for in-person spending mix).

Note: In-person spending data for 2024 to July only, not full calendar year. Please see pages 3-4 for further information on Replica's methodology.



terms (26%).

- The 15% of tenants and 26% of spending attributable to entertainment, recreation, and hospitality is the highest share of Cambridge districts, likely reflecting the presence of large hotels and related activity.

### District Anchors and Destination Drivers

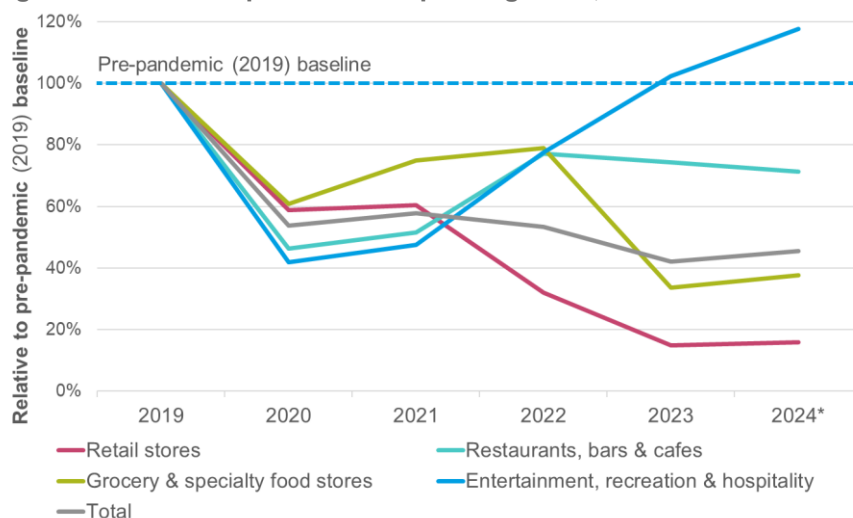
Kendall Square's retail hubs have **clusters of restaurants and retail that serve as destination drivers and include district anchors**: long-standing local businesses that are well-known in the community, attract significant local and visitor traffic, and drive local initiatives and programming. **Kendall Square's retail activity is concentrated in distinct hubs**, while clusters of high-rise office developments separate these hubs, which include restaurants, bars, and national chains, such as Starbucks, serving local employees. Key hubs include:

- *One Kendall Square and Broadway*: Mix of retail with large office blocks. There's a restaurant hub with outdoor seating and a large public plaza. The area includes destination businesses and neighborhood services such as a chiropractor, hair salon, and auto repair shop.
- *Ames St, between Broadway and Main St*: National and regional food chains as well as several banks, serving nearby office areas.
- *Third St, between Athenaeum and Main St*: Concentration of destination bars, restaurants, and cafes, especially along Broad Canal Walk. Includes the primary grocery store in the district.
- *First St, between Bent and Binney St*: Features Neighborhood dining and pocket parks. Other destination drivers – such as local events and programs, recreational amenities, and open spaces that attract foot traffic to the district, especially from outside the district – are explored in more detail in later sections.
- *Carleton St and Hayward St, between Main St and Amherst St*: Location of the Kendall / MIT MBTA station and key destination drivers such as the MIT Museum and MIT Open Space. Also has a concentration of local cafes and healthcare services.

### Some retail categories have seen in-person spending recover better than others

- Entertainment, recreation, and hospitality has emerged as Kendall Square's only retail category to exceed pre-pandemic in-person spending (by 18%), according to the Replica model (see Figure 4.2).
- Despite recovering through 2021 and 2022, spending at restaurants, bars and cafes – Kendall Square's largest spending category - is down 29% from 2019.
- Retail store spending sits a significant 84% below pre-pandemic levels – no other district has seen a

Figure 4.2 District in-person retail spending index, 2019-2024



Source: Replica.

Note: Data for 2024 to July only (indexed to same period - to July only - in 2019). Please see pages 3-4 for further information on Replica's methodology.

larger decrease in retail store spending.

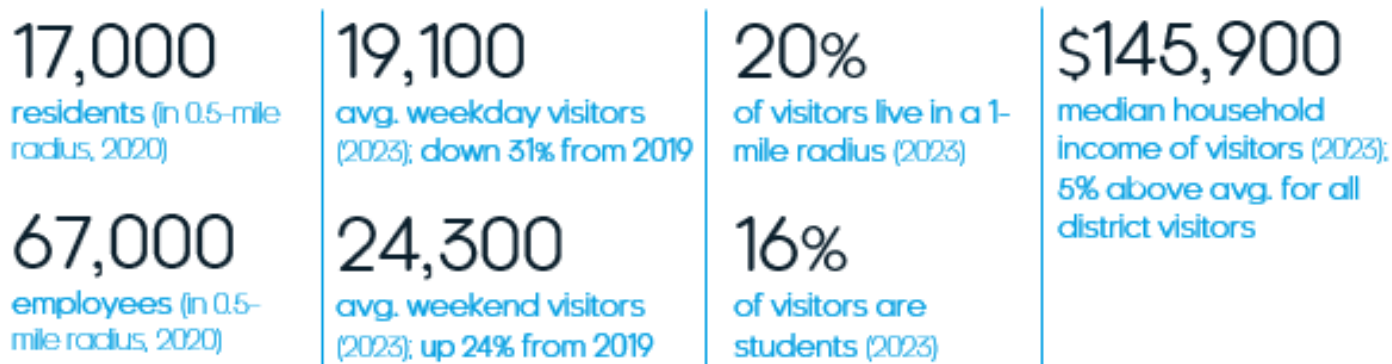
**Almost a quarter (23%) of ground floor businesses active in the Kendall Square district before the pandemic are now closed, a similar rate of closure experienced citywide**

- The vast majority (91%) of Kendall Square ground floor businesses that closed during the pandemic were restaurants, bars and cafes, in comparison to the citywide average of 61%.
- As of May 2024, Kendall Square had 7 ground floor vacant storefronts (defined as those actively leasing, for sale, leased pending occupancy, or under redevelopment).

**Kendall Square's retail offer draws in large amounts of non-resident spending in a few categories, although its specialty retail offerings could be improved**

- Kendall Square's food and drink businesses – its largest retail category – generate a significant retail surplus, reflecting strong non-resident demand, and its status as a destination driver for the district..
- The district has a small representation in soft goods, (notably general merchandise, clothing and accessories, and office, supply and gift stores), which could be areas for business recruitment, particularly businesses reliant on in-person spending, or provide an experiential offer.

### 4.3. Market Demand



A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

**Kendall Square has the largest worker presence of Cambridge districts**

- With almost four times as many employees (67,000) working in the district than residents (17,000), Kendall Square has the highest ratio of employees to residents of any Cambridge district. An estimated 64% of residents are “Millennials” or “Gen Z”, while 15% (2,500 total) are of student age.

**And many of these workers could do their jobs remotely**

- Based on industry mix – notably the high concentration of tech activity – it is estimated almost three-quarters (72%) of Kendall Square district workers could do their job from home in 2021, above the citywide average (66%) and the second highest of all districts (behind only Harvard Square).
- This means Kendall Square retailers have been more likely to encounter the impacts associated with remote

work, especially in terms of lower weekday food and drink trade. Some Kendall Square activity, notably lab-related, does however have a lower rate of remote work.

**Post-pandemic, Kendall Square has experienced a large fall in weekday visitor numbers, although weekend visitor numbers are increasing**

- The Replica model shows in 2023 average weekday visitor numbers to Kendall Square were still down 31% from 2019; only Harvard Square experienced a bigger fall in weekday visitors.
- Yet over the same period, weekend visitors to the district increased by 24%, making Kendall the only district to see an increase in weekend visitors. For both weekday and weekend visitors, there was a notable increase in the total number of individual trips taken by these visitors.
- This suggests people now visiting the district are taking more individual trips to and within Kendall Square than before the pandemic, especially on weekends. This can provide local retailers with opportunities for consistent, repeat customers.

**Kendall Square visitors have higher household incomes and education levels**

- The demographic characteristics of Kendall Square visitors are generally similar to other districts.
- The median household income for Kendall Square visitors in 2023 was \$145,900, above the average of \$139,200 for visitors to other districts, reflecting the presence of the high-paying industries in the district and stronger buyer power among visitors.

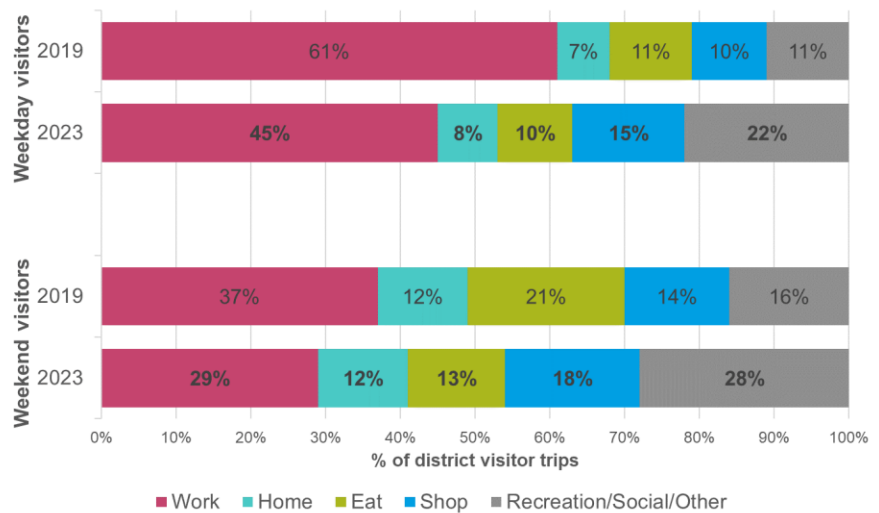
**Kendall Square has the highest share of visitors who live outside the district**

- The Replica model shows only 20% of visitors to Kendall Square live within a 1-mile radius of the district, the lowest share of Cambridge districts. This was a small increase on the 18% share recorded in 2019 and reflects the relatively small (but growing) residential presence in the district.
- Some 45% of visitors in 2023 traveled from beyond a 5-mile radius of the district, largely from other communities in Greater Boston, which was the highest share recorded by any Cambridge district, with twice as many visitors from outside such a radius than the next district (Harvard Square)
- Many of these visitors are commuters travelling to the district for work, with Kendall Square one of Greater Boston's densest employment centers with a commuting network across the city region.

### Kendall Square has the highest share of visitor trips for work purposes

- According to Replica modeling, the 45% share of weekday visitor trips for work is the highest in Cambridge but down compared to 61% in 2019 (see Figure 4.4).
- This drop in work trip share largely reflects the increase of remote/hybrid working.
- The share of trips for recreation/social/other purposes increased between 2019 and 2023 for both weekdays (to 22%) and weekends (to 28%). In fact, Kendall Square has the highest share of trips for such purposes in Cambridge.

Figure 4.3: Purpose of visitor trips to district, 2019 and 2023



Source: Replica. Please see pages 3-4 for further information on Replica's model methodology.

## 4.4. Physical Environment

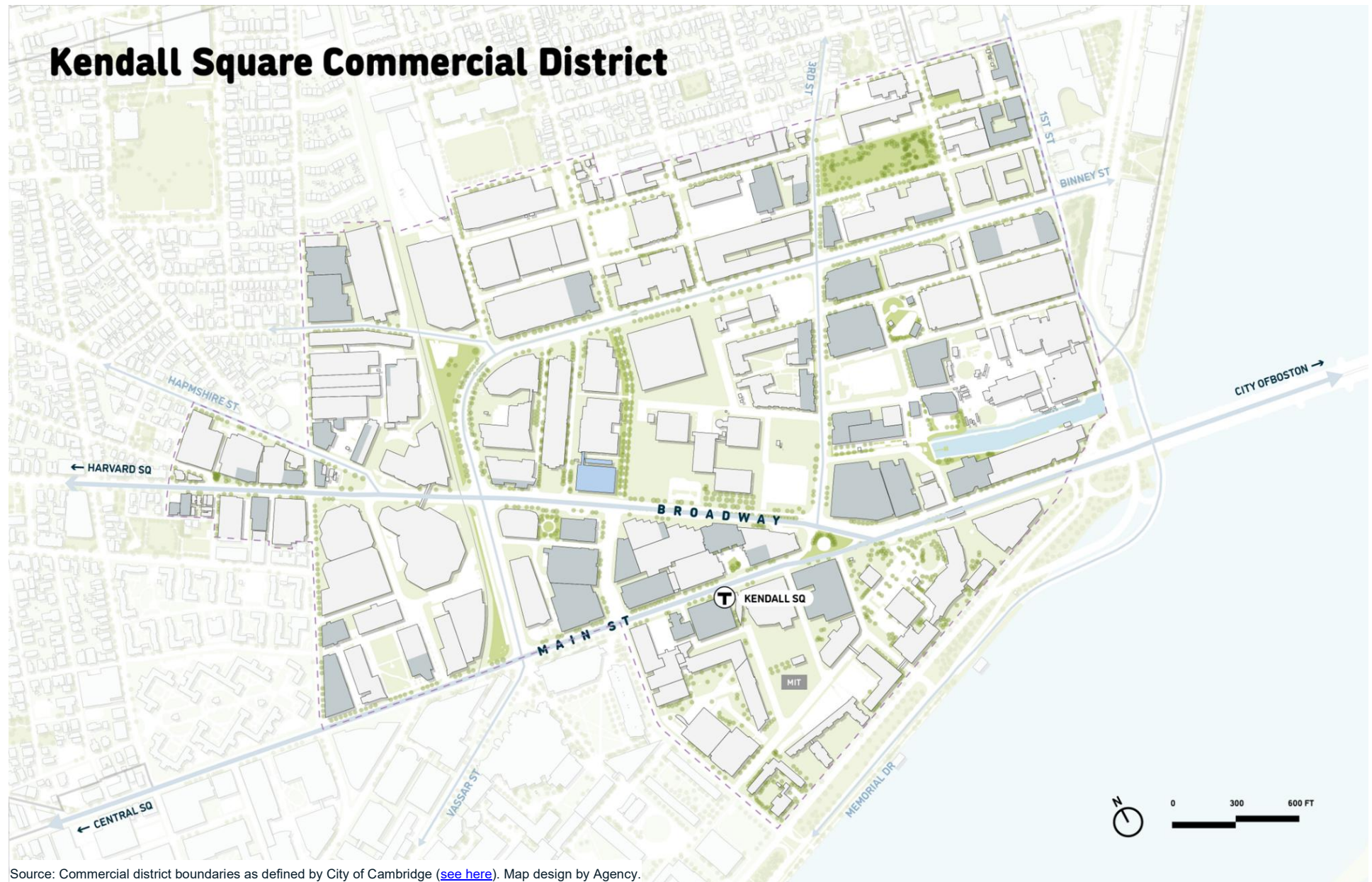
The physical environment of a retail district includes the following:

- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.
- **Access:** includes vehicles, pedestrians, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

**Most retail activity in Kendall Square (Figure 4.5) happens on the ground floors of office buildings,** giving the district's physical environment a corporate feel. The area includes modern, glass facades, new tree canopy, and ground-level planting. Bold, geometric artwork creates a consistent visual identity throughout the district.

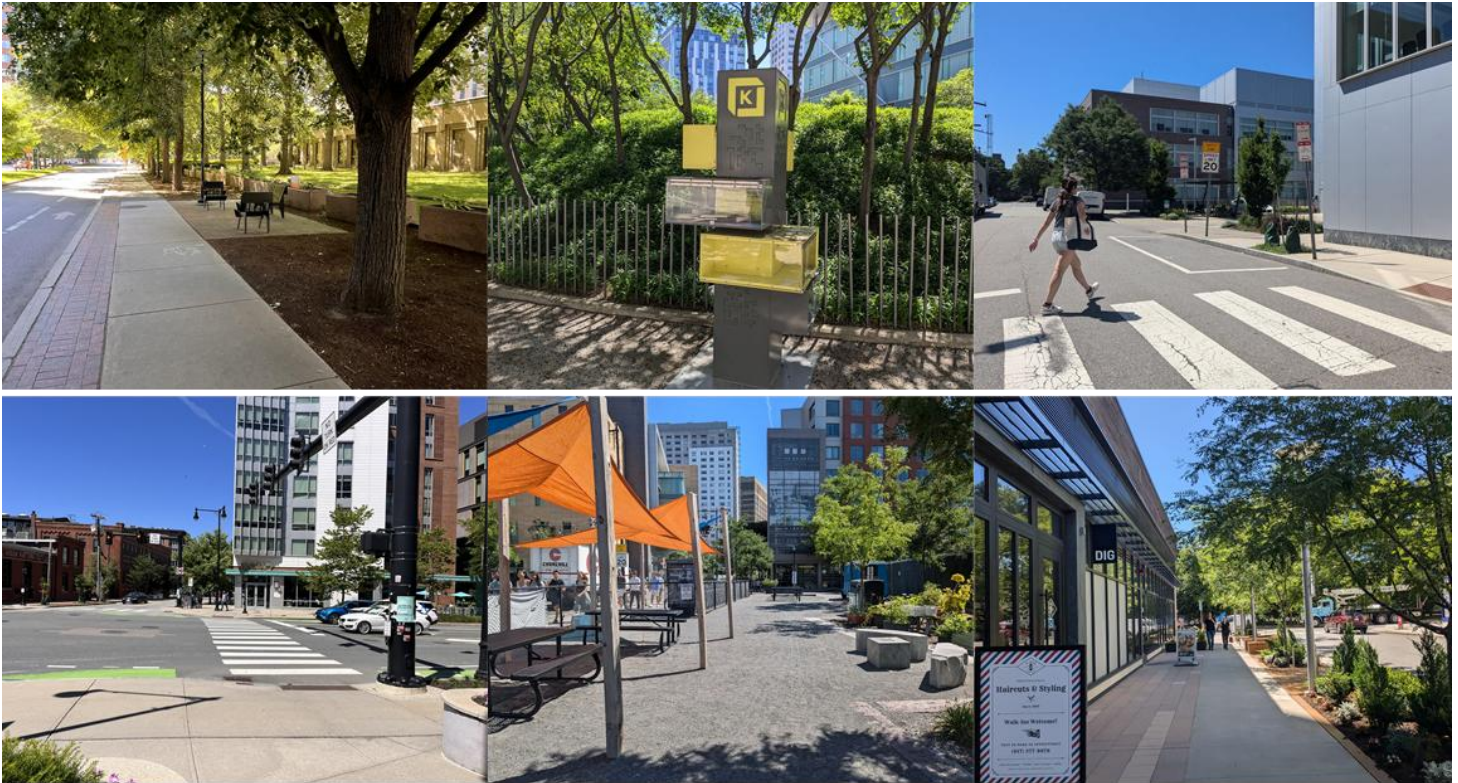


Figure 4.4 The Kendall Square commercial district





## Public Realm



Images of the wide sidewalks, varying sun / shade conditions, and street furniture (such as shade structures and benches) that contribute to a pleasant pedestrian experience

**Wide sidewalks that accommodate the heavy flow of pedestrian traffic dominate Kendall Square.** Even with heavy vehicle traffic, the district offers a comfortable pedestrian experience.

- Large ground floor setbacks accommodate increased pedestrian traffic in the area and allow for placemaking interventions such as sidewalk patios.
- Ground-level planting provides a visual break from hardscaping that is characteristic of the area. Broadway (between Ames and Third St) is pleasant with its mature tree canopy and green median.
- A mix of open spaces and tall developments create variety in sun and shade conditions. The district has frequent crosswalks on major roads, which slow traffic and improve pedestrian movement.

**Several points of interest encourage pedestrians to linger and interact.**

- **The Kendall Square Association** installed several “Little Free Libraries” throughout the district. They provide an opportunity for community members to browse, borrow, and exchange books.
- **The Cambridge Redevelopment Authority** manages a civic space on Third and Binney St. Used for community programming (e.g., community garden) and as a ‘spill-over’ space for nearby retailers. Previous uses of the space include hosting food trucks and a beer garden in the summer.



## Private Realm



Outdoor dining spaces and placemaking interventions (such as signage and greenery) adjacent to food retailers

### Retail activity in Kendall Square is food-oriented

- There is a significant presence of national and regional food chains in ground floor retail spaces across the district.
- Most storefronts share spaces and amenities, including outdoor dining areas, planter boxes, and restaurant signage.
- Within the Ames St. and Third St. retail hubs, recognizable brands and storefronts cater to tourists and nearby workers. Local businesses clusters are largely located outside the heart of the district's retail activity on First St. and Broadway. In these hubs, there is a greater variety in storefront appearance and signage. This contrasts the corporate campus experience of the Ames St. and Third St. retail corridors

### Privately owned public spaces (POPS) like plazas are prevalent throughout the district and complement retail hubs

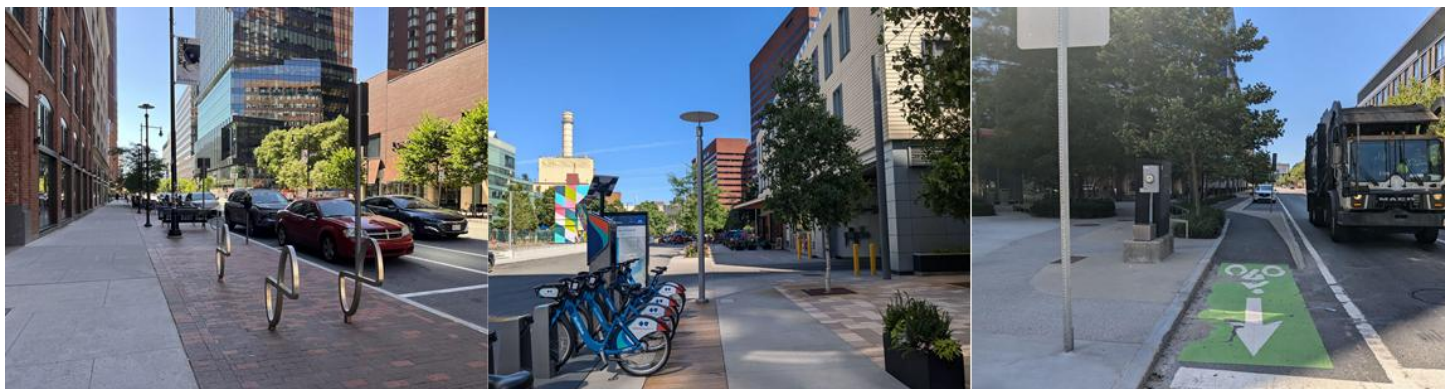
- These POPS provide space for programming, shaded public seating, and serve as pockets of urban green space.
- POPS also feature public art and recreational facilities (e.g., ping pong tables or pickleball courts).
- These open spaces break up dense office development by providing walkways through large blocks (e.g.,

from Binney St. to Broadway)

- POPS within Kendall Square create variety and interest, resulting in a dynamic pedestrian experience.

It is not always obvious that these plazas are publicly accessible. For example, dense planting, fencing, or structural elements hide some spaces. Spaces next to cafes, bars, or office entrances give the appearance that only paying customers or employees can use them. As a result, these spaces seem to serve local employees rather than the general public.

### Access and Visibility



Images of bike infrastructure within the district such as bike racks (left), a blue bike station (center), and bike lanes (right).

**Kendall Square is well connected by transit, and several major bus routes, bike lanes, and pedestrian pathways run along and in the Square.** Kendall/MIT MBTA station serves as a gateway to the district's key retail hubs and MIT. The adjacent sidewalks and plazas are bustling with outdoor seating, retail activity, and public art. This creates a clear focal point for pedestrians and commuters to converge. Bus stations on Broadway and Hampshire St. create another commuter hub. Unlike the MBTA station, this area feels disconnected from the restaurant hub in One Kendall Square. This is due to the lack of a clear pedestrian route or wayfinding between bus stops and the retail centers.

### **Kendall Square has an extensive network of bike infrastructure.**

- Protected bike lanes, side-walk level bike-lanes, bike-share stations, and bike racks.
- High availability of BlueBikes in the district, with at least one Blue Bike station in each retail hub. Blue Bikes encourage bicycle use over car or rideshare.
- Bike racks are available throughout the district. Racks often take artistic forms, adding visual variety to the otherwise homogeneous sidewalks.

**Kendall Square has major arterial roads, including Broadway, Main St, and Binney St.** Roads connect the district to downtown Boston on the East and Central/Harvard Square in the West. As a result, the district experiences heavy car traffic. Trucks provide deliveries to offices and labs, adding to the vehicle traffic in the district. Loading zones and underground parking ensure trucks do not disrupt pedestrian or car traffic flows. Multi-level parking garages and on-street parking provide enough capacity for cars



**Cars are the dominant mode of transport for Kendall Square visitor trips, although walking and cycling are becoming more popular**

- The Replica model shows just over half of visitor trips to Kendall Square were by car in 2023 (for both weekdays and weekends), a similar share to 2019.
- Between 2019 and 2023, walking became more popular, especially weekdays where it has increased from 24% of all trips to 29%. At the same time, trips by public transportation decreased from 25% in 2019 to 14% in 2023.
- With many visitors residing outside the district, the average travel time for trips to Kendall Square now stands at 27 minutes - the longest travel time of Cambridge districts, although this is a decrease from the 2019 average.

**Branding and Placemaking****Kendall Square is known for its corporate campuses and employee-focused spaces. A few branding elements help create a cohesive, campus-like feel across the area such as:**

- The recent proliferation of national cafe chains creates recognizable branding within the area. Pockets of small and local businesses that exist on the edges of the district feature bespoke signage and add visual variety.
- Bold colors, geometric shapes, and abstract designs in art and signage are consistently used within the district and contribute to the district's identity. Outdoor seating, A-frame signs, and planters use similar materials, colors, and patterns which help to reinforce this visual language.
- The Kendall Square Association has a strong presence within the area and their branding appears on signs and street libraries.

**4.5. Adaptive Capacity**

Local adaptive capacity plays a crucial role in achieving the long-term, community-driven vibrancy of a district. It represents a district's leadership, organizational capacity, resources (both human and financial), and regulatory and policy frameworks.

**Kendall Square is represented by the Kendall Square Association**, founded 16 years ago with the mission to build partnerships, host events, advocate for public policy issues that impact its members and local community. It

does so through a calendar of events, distribution of a weekly newsletter, and social media promotion. Many of the issues affecting Kendall Square cited by the association relate to transportation and housing challenges, as well as a reduction in weekday foot traffic. Supporting the local restaurants is also an important area of focus for the association.

Major institutions and developers also host regular seasonal events. These are often in site-specific locations. Locations include MIT Open Space, BXP Urban Park UP Roof Garden, and other private developments. The Kendall Square Association manages and promotes the event calendar. Such events include:

**Massachusetts Institute of Technology (MIT)** - an institutional anchor south of Kendall Square, which generates foot traffic from students and tourists in neighboring retail corridors - hosts public events and programming throughout the district. Programming is hosted at the MIT Open Space. It includes food trucks, weekly movie nights, live music, block parties, public art walking tours, science carnivals.



Urban Park UP Roof Garden. Photo credit: City of Cambridge.



Skate at Kendall seasonal pop-up. Photo credit: City of Cambridge.

**Kendall Center Urban Park UP Roof Garden** is a privately owned public space offering events and programming.

**Canal District Kendall** is a development in the district by BioMed Realty. The developer hosts programming in Termeer Square, next to the new development on 585 Kendall St. This programming is in partnership with local community groups. Programming includes ice skating in the winter, kayak rentals in the spring-fall, weekly community dance events in the summer, weekly beer garden, live music, and community sports events.

Other events include the annual and weekly farmer's market in Spring and Summer hosted by Massachusetts Farmers Market.

**In addition to the local association and anchors, Kendall Square is represented by an active network of citywide business associations** – such as the Cambridge Chamber of Commerce, Cambridge Local First, and Cambridge and Somerville Black Business Network.

Cambridge Local First is particularly focused in Kendall Square on addressing the growing concern about smaller businesses leaving the area and how the larger firms can be engaged to support the small business community. The Chamber of Commerce is working on similar initiatives in Kendall Square, as well as finding ways to fill the gap left by the decrease in office foot traffic since the pandemic.

## 4.6. Recommendations

### **Recommendation 1: Create and strengthen supply chain opportunities between corporate employers, their employees, and small local businesses**

**Rationale:** Kendall Square has seen the largest decrease in in-person spending across all Cambridge districts since the pandemic. The presence of many corporate employers represents an opportunity for independent businesses, but help is needed to connect the two.

**Objective:** Maximize the opportunity to engage with weekday visitors on days when workers come into Kendall Square while also encouraging more local sourcing to meet procurement needs of major employers.

- Work with corporate employers to collect and share information about in-person office days with the local business community.
- Identify supply chain opportunities where demand could exist from corporate employers, in areas including breakfast or lunch catering, coffee service, corporate gifts, and employee incentive gifts (e.g., gift certificates to local coffee shops for performance awards) by building on the Kendall Square Association's [Cater Kendall](#) initiative to highlight local catering options.

## Recommendation 2: Improve the relationship between nearby neighborhoods and Kendall Square to broaden the district's customer base and local business presence

**Rationale:** The existing public realm includes a large number of privately-owned public spaces, and public art that celebrates the district's reputation as an innovation hub. Although Kendall is adjacent to residential areas, businesses and spaces that cater primarily to office workers can leave others feeling excluded.

**Objective:** Align with the citywide goal of strengthening ties between local residents and commercial districts to better serve nearby neighborhoods and expand beyond the singular narrative of Kendall Square as an innovation hub. Encourage and increase community use of privately-owned public spaces (POPS) to activate them during outside-of-work hours.

- Connect Kendall Square to local history, culture, and heritage through public art and programming. Convene a working group of community members and relevant stakeholders in the greater Kendall Square area to define a more inclusive identity for the district. Collaborate with local arts and cultural institutions (such as 585 Arts and the Foundry) to develop projects that reflect a diversity of local stories.
- Identify key POPS and develop relationships or agreements with owners and with surrounding neighborhoods to identify and develop culturally relevant weekend programming, especially programming that caters to families and youth. One possible program to pilot might be "Picnic in the POPS" where nearby local restaurants provide visitors with blankets or take-out baskets and encourage them to enjoy their meal in one of the adjacent POPS in order to activate and enliven these spaces.

### Centering Community Stories

Standing Man Sculpture by Jonathan Borofsky in San Francisco, CA, USA (left) and Rafael Lopez's Community Mural in Fort Collins, CO, USA (top center)

The Standing Man Sculpture was designed to represent all workers, manual laborers, and craftspeople to highlight the importance of working together and unify a community. Similarly, the mural designed by Rafael Lopez was painted together as a community and brought life to a previously underused space.





- Build on existing projects such as the Cambridge Redevelopment Authority (CRA) and Community Development Department (CDD) POPS signage that provide a visual cue noting public access. For example, additional signage providing wayfinding to other public amenities such as restrooms, surrounding open spaces, or key intersections could be established beside existing informational signs.

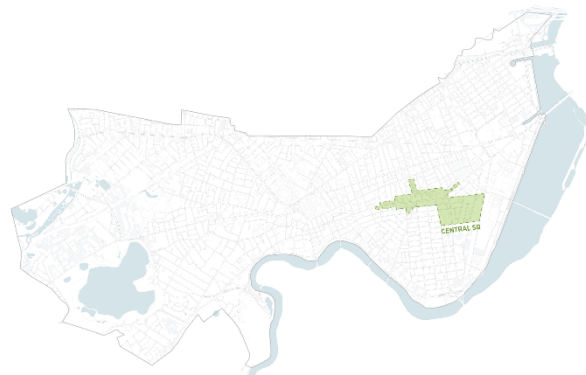
---

### Privately Owned Public Spaces (POPS) Activation Tampa, FL, USA (left); Baltimore, MD, USA (center); and Tokyo, Japan (right)

Precedent images of POPS activation include initiatives such as community movie nights, interactive chess boards, and informative signage. Initiatives like Tokyo's Hibiya Cinema Festival allow community members to gather in the heart of Tokyo and experience movies in a unique way.



## 5. Central Square



### 5.1. Key Takeaways

**Central Square is the traditional downtown for Cambridge, and is a vibrant, mixed-use district which caters to residents, workers, students, and visitors.** It is centrally located in the city, is the seat of the City government, sits mid-way between prestigious Harvard and MIT, and abuts several dense, livable neighborhoods. Our analysis has found:

- Reflecting its mixed-use development, Central Square hosts a range of industries and activities; in addition to its high retail density, health care, professional services and public admin are other large employers.
- Central Square is a recognized destination for eating, drinking, and specialty retail, which generates 70% of the districts in-person retail spending. Yet according to the Replica model<sup>4</sup>, such spending in the district is still 47% down from 2019, with all retail categories underperforming relative to 2019.
- Drinking and dining has a large retail surplus in the district, highlighting its dining destination draw.
- As an active, mixed-use district, Central Square visitors are a diverse representation of residents, workers and students, with many residing within walking distance of the district. Due to its worker presence, and their high remote working potential, weekday visitor numbers have fallen significantly and recovered slowly.
- As a vibrant, active commercial corridor, Central Square's physical characteristics include a high concentration of retail and restaurants with outdoor seating, clear branding across the district, with interesting attractions alongside vacant shop fronts, and unique, colorful bus shelters.

---

<sup>4</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4 of this report.

- As the leading cultural district in Cambridge in addition to hosting many restaurants, bars, clubs, music, and nightlife assets, the district exhibits colorful storefronts, street art, graffiti, and murals which create a gritty, vibrant, and active feel.
- Central Square is a major commuter destination, with heavy pedestrian, bicycle, bus and car traffic. It is largely a comfortable pedestrian experience, resulting in Central Square having the highest share of visitor trips being undertaken by walking and cycling.
- Due to the economic significance of the district, the Central Square Business Improvement District (BID) has established a strong visual identity and brand highlighting the Square's cultural assets.



**Citywide Dance Party.** Photo credit: City of Cambridge.

## 5.2. Business Environment



The density and type of retail offerings in a district is often a reflection of the underlying business conditions and market dynamics and can offer insight into the health of local retail businesses.

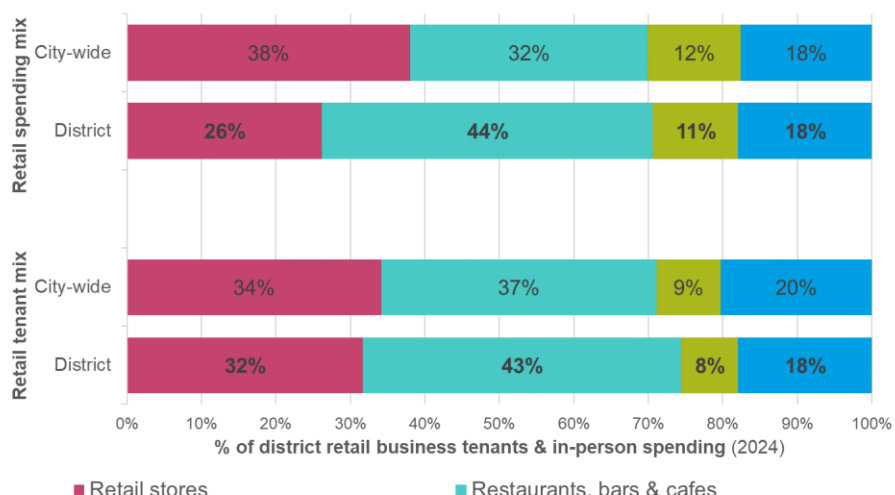
**The Central Square district is home to 740 businesses with 6,300 employees. Healthcare and social assistance is the largest employment industry with 200 businesses and 1,200 employees**

- Central Square's 120 retail businesses account for 19% of all the employees in the district. Only Alewife and Kendall Square had a lower share of employees working in retail, reflecting the districts' mixed-uses.
- The highest-employing industries in the district are health care and social assistance (19% of district employees), professional, scientific, and technical services (17%), and other services (8%).
- Central Square's retail business density (per acre) is the third highest of all districts in Cambridge. On average, Central Square retail businesses have 10 employees, similar to the citywide average.

**Central Square is a recognized destination for eating, drinking, and specialty retail**

- Figure 5.1 shows restaurants, bars and cafes account for 43% of Central Square retail tenants and 44% of in-person retail spending, above citywide averages.
- Actual retail stores represent 32% of tenants, and according to the Replica model, 26% of spending. Only East Cambridge and Alewife generate more retail store spending.
- With 18% of tenants and spending, entertainment, recreation and hospitality is an important part of Central Square's offer; only East Cambridge and Kendall Square generate more spending in this

**Figure 5.1 District retail tenant and spending mix, 2024**



Source: Data Axle US Business database (for tenant mix) and Replica (for in-person spending mix).

Note: In-person spending data for 2024 to July only, not full calendar year. Please see pages 3-4 for further information on Replica's methodology.



category.

- This includes spending in the area around Mass. Ave south of Lafayette where there is a concentration of hospitality and night life options, as well as the Central Square Farmer's Market.

### District Anchors and Destination Drivers

Central Square's retail hubs have **clusters of restaurants and retail that serve as destination drivers and include district anchors**: long-standing local businesses that are well-known in the community, attract significant local and visitor traffic, and drive local initiatives and programming. **There are three distinct hubs in Central Square**, along Mass. Ave, including:

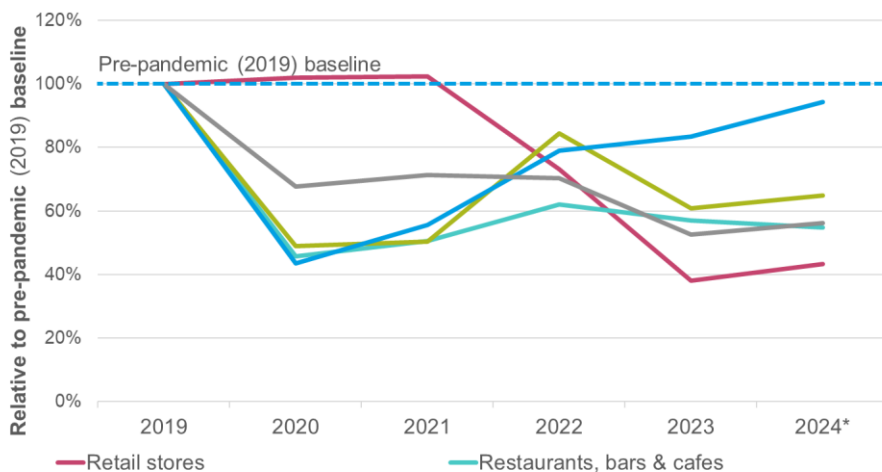
- *Around the intersection of Mass. Ave and Hancock St*: Neighborhood restaurants and bars.
- *Inman St to Prospect St*: Home to casual neighborhood restaurants and cafes, retail stores, and popular bars and nighttime destinations. Civic institutions such as the YMCA, Cambridge City Hall, and the US Post Office are destination drivers.
- *Temple St to Lafayette Square*: Clustered local businesses, culturally significant music venues and bars, restaurants, national retail and restaurant chains. Activity is constant throughout the day and the week. Jill Rhone Brown Park/Lafayette Square is as a gateway into the retail district. National retail chains and grocery stores have foot traffic throughout the day. Neighborhood restaurants with streeteries are important destinations, especially in the evenings. Graffiti Alley, Central Square Theatre, Cambridge Community Television, and the Central Square Branch of the Cambridge Public Library are key destination drivers.

Other destination drivers – such as local events and programs, recreational amenities, and open spaces that attract foot traffic to the district, especially from outside the district – are explored in more detail in later sections.

### No retail category in Central Square has seen in-person spending recover past its pre-pandemic baseline

- Entertainment, recreation and hospitality recovered fastest in Central Square, but remains 6% below its pre-pandemic spending baseline, according to the Replica model (see Figure 5.2).
- Despite proving resilient during 2020 and 2021, spending at retail stores is now 57% down from 2019, representing Central Square's largest decrease in spending.
- Spending at restaurants, bars and cafes sits 45% below pre-pandemic levels, and grocery and specialty food stores are 35% below.

Figure 5.2 District in-person retail spending index, 2019-2024



Source: Replica.

Note: Data for 2024 to July only (indexed to same period - to July only - in 2019). Please see pages 3-4 for further information on Replica's methodology.

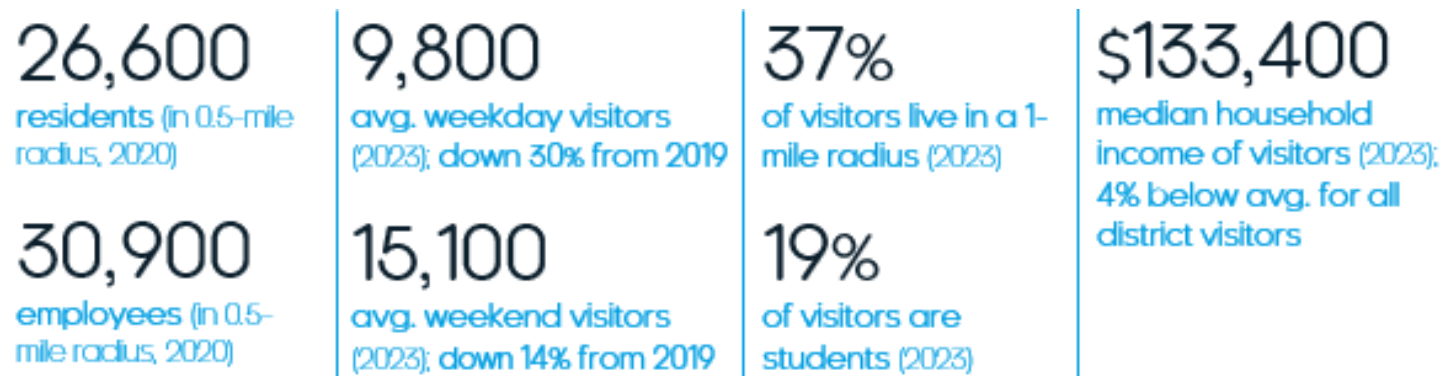
**Almost a third of the Central Square ground floor businesses active before the pandemic are now closed, higher than the rate of closure experienced citywide**

- The majority of Central Square ground floor businesses that closed during the pandemic were restaurants, bars and cafes (69%), with a smaller proportion being retail stores (23%). Relative to the citywide average, Central Square had a smaller proportion of restaurants, bars, and cafes close, but more retail stores close.
- As of May 2024, Central Square had 18 ground floor vacant storefronts (defined as those actively leasing, for sale, leased pending occupancy, or under redevelopment).

**The district's retail offering is not able to meet local demand in most categories**

- Central Square district has the opportunity for recruitment of more specialty retail, ensuring a greater share of spending is retained in the district, particularly businesses that are reliant on in-person spending, or provide an experiential offer.
- The Square weaknesses are most notable in general merchandise, clothing and accessories, and sporting goods, hobby and music.
- The district has a small surplus related to food and drink establishments and grocery stores – suggesting demand from non-residents – reinforcing their status as destination drivers for the district.

### 5.3. Market Demand



A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

**Central Square is a vibrant regional/specialty district, with a diverse representation of residents, workers and students**

- Central Square has slightly more employees (30,900) working in the district than residents (26,600). An estimated 68% of district residents are “Millennials” or “Gen Z”, while 22% (5,800 total) are of student age – the second highest share of Cambridge districts, behind only Harvard Square.

**Most jobs in Central Square could be done remotely**

- Based on industry mix – notably its concentration of professional services – it is estimated 68% of Central

Square district workers could do their job from home in 2021, above the citywide average (66%) and the third highest rate of all districts. This means Central Square retailers have been more likely to encounter the retail impacts associated with remote work, especially in terms of lower weekday food and drink trade.

**Post-pandemic weekday visitor numbers have recovered much more slowly than weekend visitors**

- The Replica model shows in 2023 average weekday visitor numbers to Central Square were still down 30% from 2019, and 14% down for weekend visitors. Only Harvard and Kendall Square have experienced a bigger decrease in weekday visitors.
- Yet over the same period, there was no notable change in the total number of individual trips taken by visitors. This suggests people now visiting the district are taking more individual trips to and within the Central Square district than before the pandemic.

**Central Square visitors are slightly younger and more racially diverse than other districts.**

- Visitors to Central Square are slightly younger and more racially diverse than other districts in 2023, while the shares that were students (19% of visitors) was second only to Harvard Square.
- The median household income for Central Square visitors in 2023 was \$133,400, slightly below the average of \$139,200 for visitors to other districts, partly reflecting the high number of student dormitory/housing households.

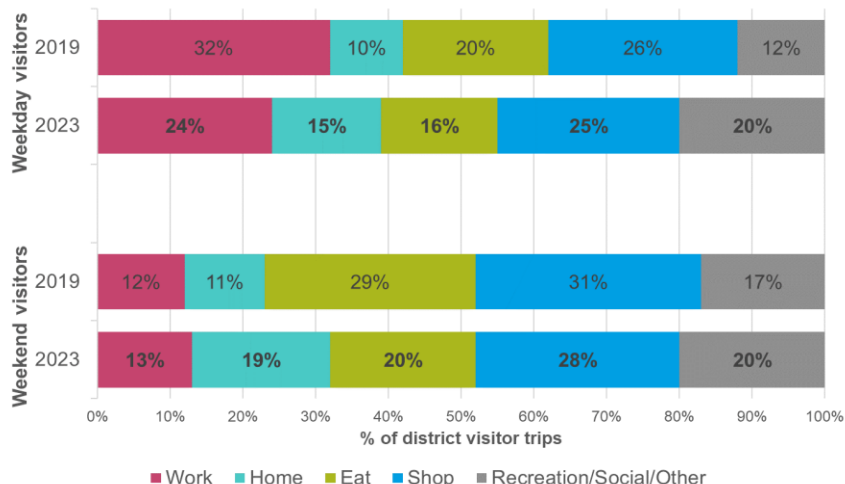
**Most Central Square visitors reside within close proximity to the district**

- The Replica model shows 37% of visitors to Central Square live within a 1-mile radius of the district, above the average of 30% for other districts, reflecting the significant presence of housing units in the district. This is also a notable increase on the 30% share recorded in 2019.
- Only 30% of visitors in 2023 travelled from beyond a 5-mile radius of the district, below the district average of 36% and the lowest share recorded by any Cambridge district, while in absolute visitor number terms only Inman Square and Huron Village attracted less.
- This suggests Central Square has a lower reliance on out of district and out of city visitors compared with other districts.

## The purpose of visitor trips reinforces Central Square's status as a destination for living, work and leisure

- **Figure 5.4** shows the share of trips for shopping purposes decreased between 2019 and 2023 for both weekdays (to 25%) and weekends (to 28%).
- While eating trips also declined, the district still has the third highest share of trips for dining out of all Cambridge's districts.
- According to the Replica model, the district has the highest share of all districts for trips where the destination is a person's home.
- 24% of weekday trips are for work, down from 32% in 2019. This reflects the uptake of remote/hybrid working.

**Figure 5.3: Purpose of visitor trips to district, 2019 and 2023**



Source: Replica. Please see pages 3-4 for further information on Replica's methodology.

## 5.4. Physical Environment

### The physical environment of a retail district includes the following:

- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.
- **Access:** includes vehicles, pedestrians, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

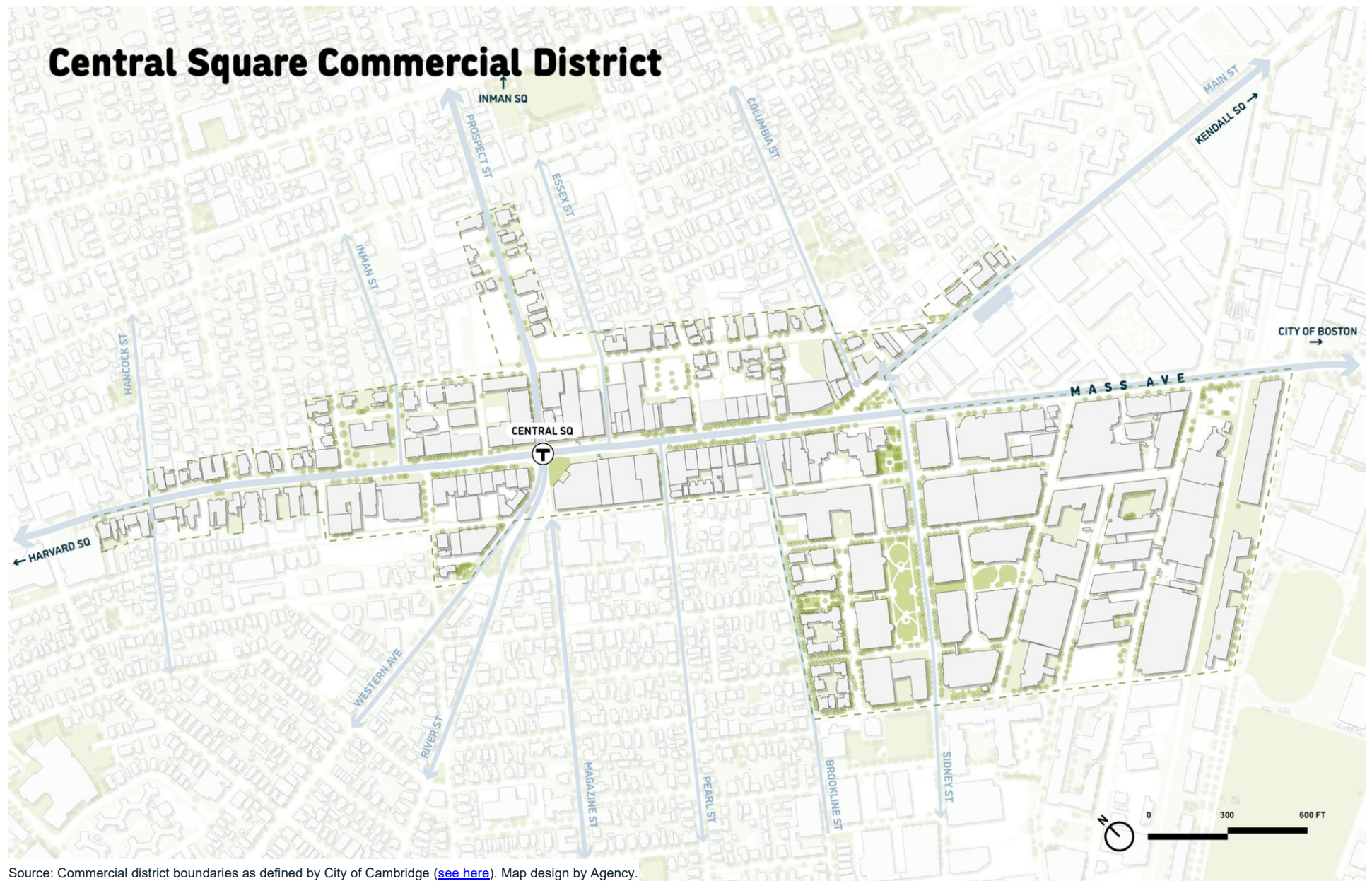
**Central Square (Figure 5.5) is a vibrant, active commercial corridor through the central spine of Cambridge and along Mass. Ave** Characterized by three distinct hubs, its key retail and physical characteristics include:

- High concentration of retail and restaurants with outdoor seating
- Cultural destination in Cambridge with restaurants, bars, clubs, music, and nightlife
- Colorful storefronts, street art, graffiti, and murals create a gritty, vibrant, and active feel
- Clear branding across the district that creates interesting attractions with vacant shop fronts



- Unique, colorful bus shelter canopies that match the Graffiti Alley canopy

Figure 5.4 The Central Square commercial district



Source: Commercial district boundaries as defined by City of Cambridge ([see here](#)). Map design by Agency.

- Wide sidewalks support high pedestrian traffic
- High volume of bike traffic and many bike racks
- High volume of vehicular traffic along Mass. Ave.

### Public Realm

**Mass. Ave. in Central Square is a major commuter destination, with heavy pedestrian, bicycle, bus and car traffic along the busy corridor.** A comfortable pedestrian experience, protected from fast-moving traffic, is supported by wide sidewalks, shade structures, tree canopy, street parking, and streeteries.

**This comfortable pedestrian experience is not consistent along the corridor.** The busiest areas around the MBTA and bus station have less tree canopy. Large bus stops interrupt the pedestrian and cyclist experience. Crossing Mass. Ave is also a challenge because there are few signalized crosswalks and a high volume of vehicle traffic. The corridor is well served by bike racks and seating which are often painted to match the districts' visual identity.

### There are several public plazas in Central Square

- Jill Rhone Brown Park/Lafayette Square A popular gathering space, supported by local ice cream shops which draw extensive foot traffic to the plaza in the warmer months. Amenities include seating, public art, trees and planting beds, water fountains, and shade.
- Carl F. Barron Plaza Temporarily closed for upgrades. It will include amenities such as trees, public art, and fixed and moveable seating. It will also serve as an important transit hub, with bus shelters and a bike lane running through.
- City Hall Lawn – home to Citywide dance party, small public events, and a public gathering space

### Private Realm

**Central Square's private realm is very active, and carries over to the street with outdoor dining and streeteries across the district**

Streeteries are on-street parking or sidewalk space converted to seasonal outdoor dining. They are located both in and outside of the major hubs.

### Outside of the hubs, there is outdoor dining at:

- The northwest corner of Main St. and Windsor St.
- The south side of Mass Ave between Blanche St. and Lansdowne St.
- The southwest and southeast corners of Mass. Ave and Hancock St intersection.
- Both sides of Mass. Ave between Inman St. and Prospect St.
- Both sides of Mass. Ave between Temple St to Lafayette square.
- Seats and tables within University Park provide additional areas for outdoor dining within the district.

### Access and Visibility

**Central Square runs along a major arterial road (Mass. Ave), which has two to three lanes of traffic, bike lanes, and on-street parking.** Several bus routes run through this district (along Mass. Ave, Prospect St,

Western Ave, River St, Pearl St, Brookline St, and Green St). The Central Square MBTA Station is a major commuter hub and has entrances on both sides of Mass. Ave. During peak hours, the corridor experiences heavy traffic congestion. Outside of these times, traffic is medium-speed and at times, car and bicycle traffic is interrupted by delivery vehicles. There are many crosswalks that allow pedestrians to cross Mass. Ave., both at intersections and in the middle of blocks.

The important gateways to Central Square include:

*Carl F. Barron plaza*

- Connection between Central Square and northern and western sides of Cambridge, including Harvard
- The ongoing plaza renovation project is an opportunity for a clearer gateway into the cultural district
- The intersection of Western Ave, River St, and Mass. Ave is highly trafficked and hazardous for pedestrians and cyclists

*Jill Rhone Brown Park/Lafayette Square near University Park and Mass. Ave intersection*

- Connection between Central Square and eastern sides of Cambridge, MIT, and Boston
- Gateway into The Port and North Cambridge through Columbia St.
- A cluster of ice cream shops and other restaurants attracts pedestrian traffic
- Highly activated area, with controlled traffic and separated bike lanes

*Brookline St. and Mass. Ave. intersection*

- Connection between Cambridgeport (and parts of Boston and Boston University) to Central Square

**Central Square has the highest share of visitor trips being undertaken by walking and cycling of all Cambridge districts**

- The Replica model shows on weekends 47% of visitor trips to Central Square were by walking or cycling in 2023, up from 41% in 2019. On weekdays the share increased from 32% to 45% during the same time period. These are the highest walking and cycling trip shares of all Cambridge districts.
- Between 2019 and 2023, car use became less popular, especially for weekends where it declined from 51% of all trips to 42%. On weekdays, its trip share saw a smaller decrease from 45% to 43%. At the same time, trips by public transportation almost halved from 23% in 2019 to 12% in 2023.

**Branding and placemaking**

**The Central Square BID has established a strong visual identity and brand for the area.** This district identity is apparent through signage on bins and vacant storefronts, wayfinding, and banners. The district also has a vibrant network of street art, with murals by local artists on most street-facing walls. The Central Square BID's branding campaign is clear and vibrant, especially with their vinyl activation of vacant storefronts.

An iconic visual anchor for the district is Graffiti Alley, which celebrates street art and serves as a tourist attraction. Murals by Adam O'Day, Felipe Ortiz, Daniel Gavez, and Sneha Shrestha along Mass. Ave are also key visual anchors.

Recent campaigns by the Central Square BID include:



- **“In Central I Can”** launched in 2023, the new campaign, “In Central I Can” celebrates Central Square’s can-do, entrepreneurial spirit. This is a place of action and self-actualization, where people from all stations of life, across generations, go to make their dreams come true.
- **Central Square Mural Project** public art campaign, including a series of murals by local artists.

## 5.5. Adaptive Capacity

Local adaptive capacity plays a crucial role in achieving the long-term, community-driven vibrancy of a district. It represents a district’s leadership, organizational capacity, resources (both human and financial), and regulatory and policy frameworks.

Business Associations and Community Organizations play an important role in Central Square, including:

- **The Central Square BID** focuses on place-keeping, programming, and pop-ups. They manage a team of Block-by-Block ambassadors and outreach workers, assist shop-owners and at-risk residents, and maintain shared public spaces.
- **Central Square Theater** is the oldest female-led theater organization in Greater Boston. They uphold the values and theatrical excellence of its origin companies, Underground Railway Theater and The Nora.
- **The Middle East** is a complete entertainment complex made up of discrete sections, including the Upstairs in The Middle East, a 194-capacity concert venue hosting local and touring acts.
- **The Dance Complex** is a 25+ year old central hub of dance in the New England region, with connections to the national and international dance field.

The work of the Central Square BID is very much embedded in maintaining, enhancing, and supporting the local authenticity of Central Square and its rich cultural offering. With projects that range from outdoor community events, public art, and initiatives around public safety and cleanliness, this organization is a big support to the district’s adaptive capacity. The BID has developed an action plan that focuses on five key areas for its work going forward – place-keeping, unique businesses, sense of place, storytelling, and community building.

The presence of City Hall also makes the City an organization that plays an important and active role in Central Square. The City of Cambridge, the Central Square Business Improvement District (BID), and other businesses and organizations host many events throughout the year. Many occur in the summer months:

- **Citywide Dance Party (annual)** The City of Cambridge and Cambridge Arts host a dance extravaganza with a DJ outside of City Hall each June.
- **Central Square Farmers Market (weekly)** This weekly market features over two dozen Massachusetts farmers and food producers. Mass Farmers Markets, with support from the Central Square BID, hosts this market on the entire block of Norfolk St. between Mass. Ave and Bishop Allen Dr. right near H-Mart and Graffiti Alley.
- Other frequent events include FOUND Block Party, World’s Fair, Rush Hour Jam Session, and Popportunity.

**In addition to the local association and anchors, Central Square is represented by an active network of citywide business associations** – such as Cambridge and Somerville Black Business Network (CSBBN). CSBBN has partnered with the Central Square BID to host the Popportunity program.

## 5.6. Recommendations

### Recommendation 1: Create district signage, streetscape, and storefront design guidance to reinforce and preserve Central Square's unique identity

**Rationale:** Central Square is home to a well-equipped and well-programmed public and public realm. Weekly events, a variety of business types, outdoor dining, wide sidewalks, and colorful public art keep the area lively.

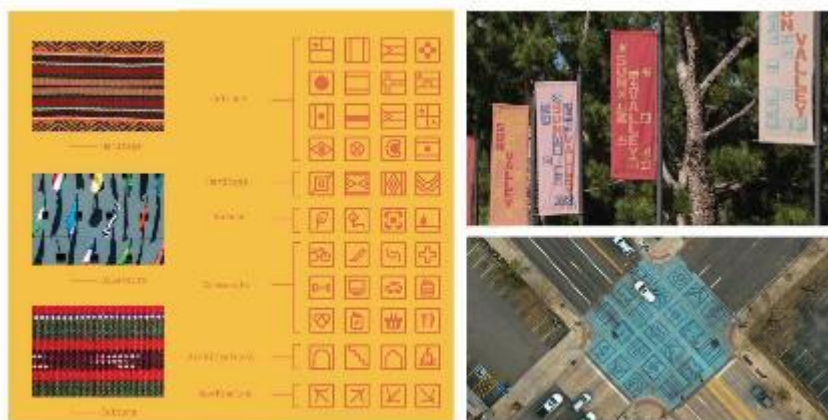
**Objective:** Ensure that future development and retail tenanting reinforces rather than undermines the commercial character of Central Square.

- Work with the Central Square Business Improvement District and CDD's Urban Designers to define a cohesive, colorful, and spirited aesthetic approach to signage, streetscape, and storefronts in the district. As future development occurs in the area, this guidance could become an aid to developers hoping to better integrate their projects into the surrounding area or could be used as part of the city's design review processes for projects in Central Square requiring special zoning permissions or permits.

#### District Branding

##### Sun Valley Neighborhood (Denver, CO, USA)

Designed by Wunder Werkz, this brand package features a series of custom fonts, iconography, and a color palette that was applied to wayfinding, signage, and streetscape.



### Recommendation 2: Promote Central Square as Cambridge's downtown, leveraging its transit connections as an entertainment and dining destination

**Rationale:** Central Square has the 3<sup>rd</sup> highest proportion of visitors who live within a 1-mile radius of the district (37%); however, it has experienced the second highest decrease in in-person retail spending across all districts. This is an interesting finding because we know that post-pandemic people tend to do more in-person retail shopping in their local area and Central Square draws a significant number of visitors from nearby. One possible explanation for this finding is that visitors from further away, who are no longer passing through this district, tend to spend a much greater amount per person than local residents.

**Objective:** Attract additional residents and visitors from further away to consider Central Square as an entertainment and leisure destination area.

- Work with Central Square BID to promote existing events and attract new events to Central Square.

## 6. Inman Square



### 6.1. Key Takeaways

**Inman Square is a compact, vibrant district with a diverse mix of residential and retail uses** that contributes to a strong sense of neighborhood and community. The district hosts a variety of restaurants, personal services, and specialty retail stores. Our analysis has found:

- As the district with the second highest concentration of retail employees, Inman Square is recognized for its eating and drinking establishments – which account for two-thirds of tenants – and a growing specialty retail offering.
- According to the Replica model<sup>5</sup>, in contrast to other districts, in-person retail spending in the district has recovered past pre-pandemic levels, led by spending in retail stores.
- Given its smaller, largely residential mix of uses, Inman Square experiences an overall retail leakage in categories such as clothing and accessories, grocery stores, and even eating and drinking.
- As a compact and densely populated neighborhood/community district, Inman Square caters mostly to a local, older resident base, with 41% of visitors residing in a 1-mile radius.
- With few workers and low remote work potential, visitor numbers recovered much stronger than other districts, especially on weekends, with only Kendall Square seeing stronger growth in weekend visitors.

---

<sup>5</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4.

- Narrow sidewalks are a challenge to physical accessibility in this district. But they also contribute to an intimate pedestrian experience. Tree canopy cover, street parking, good lighting and public seating contribute to a strong pedestrian experience and a charming neighborhood feel.
- Storefronts stand out with colorful and distinct architectural styles, memorable signs, and window displays. But large parking lots disrupt concentrated neighborhood retail and stepped entryways impede physical accessibility.
- Cambridge Street is a major bicycle, car, and bus corridor. The street connects Cambridge and Somerville to downtown Boston. It is also a popular road for cyclists, with continuous stretches of bike lanes. But there is limited access to bike racks.
- Formal and informal placemaking reflect the neighborhood's identity as a hub for crafts and community arts. Despite lacking a formal district brand, the area maintains a cohesive visual identity through consistent street furniture and harmonious architectural styles and building facades.



**Cambridge Plays Program in Vellucci Plaza. Photo credit: City of**



## 6.2. Business Environment

135

total business tenants  
(2024)

0.14

retail businesses per  
acre (2024)

\$72 million

in-person retail  
spending (2023)

6

vacant ground floor  
store-fronts (Spring 2024)

45

retail business  
tenants (2024)

9 employees

average per retail  
business (2024)

3%

above pre-pandemic  
baseline spending

83%

vacant storefronts  
'long-term' (2+ years)

The density and type of retail offerings in a district is often a reflection of the underlying business conditions and market dynamics and can offer insight into the health of local retail businesses.

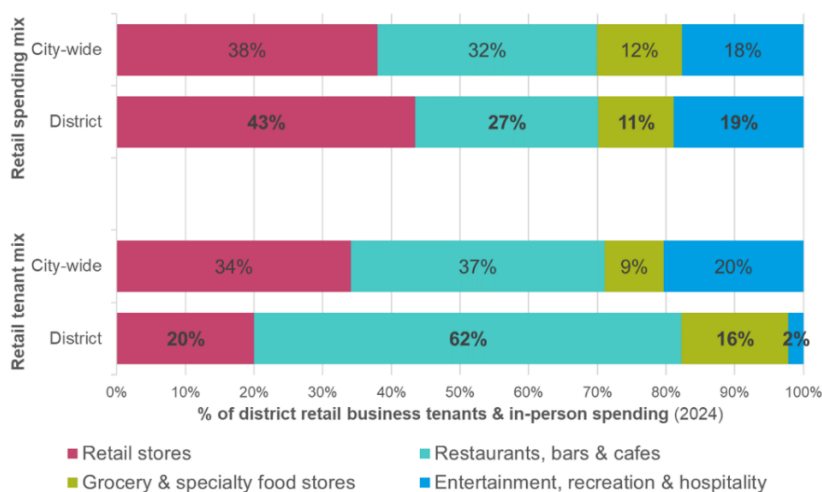
**The Inman Square district is home to 135 businesses with 1,000 employees. Retail is the largest-employing industry with 45 businesses and 400 employees**

- Inman Square's 45 retail businesses account for 41% of all the employees in the district. Only the Mass. Ave district has a higher share of employees working in retail.
- The next highest-employing industries in the district are health care and social assistance (21% of district employees), finance and insurance (15%), and professional, scientific, and technical services (7%).
- Inman Square's retail business density (per acre) is broadly in line with the citywide average. On average, Inman Square retail businesses have 9 employees, the second lowest of all Cambridge districts.

**Inman Square is a recognized destination for eating and drinking, with a growing specialty retail offer**

- Figure 6.1 shows restaurants, bars and cafes represent 62% of Inman Square retail tenants, the highest share of any Cambridge district.
- According to the Replica model, restaurants generate 27% of in-person retail spending. This small share is likely due to higher revenue from retail stores in the district, which represent 20% of tenants, yet 43% of spending.
- Spending on grocery and specialty food, and entertainment, recreation

Figure 6.1 District retail tenant and spending mix, 2024



Source: Data Axle US Business database (for tenant mix) and Replica (for in-person spending mix).

Note: In-person spending data for 2024 to July only, not full calendar year. Please see pages 3-4 for further information on Replica's methodology.

and hospitality is similar to the citywide average.

### District Anchors and Destination Drivers

Inman Square's retail hubs have **clusters of restaurants and retail that serve as destination drivers and include district anchors**: long-standing local businesses that are well-known in the community, attract significant local and visitor traffic, and drive local initiatives and programming. **There are two key hubs of retail activity**:

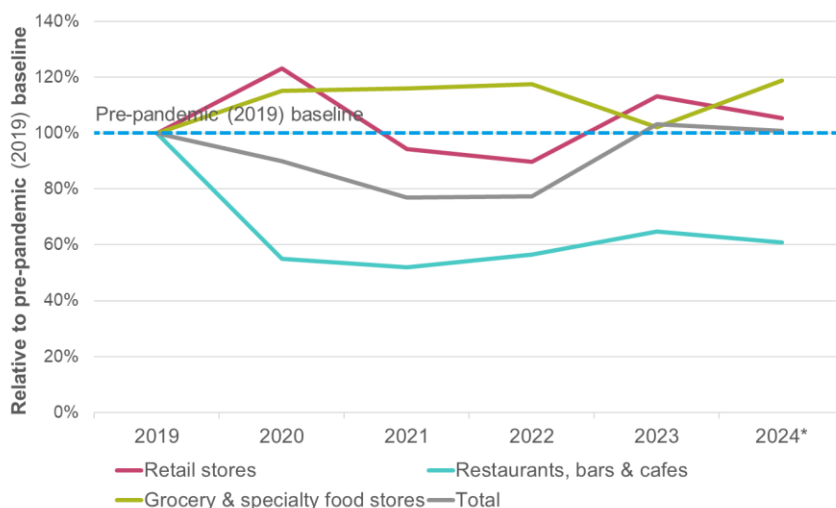
- *Cambridge St., from Springfield to Prospect St.*: Longstanding cafes and bars public and private outdoor seating spaces, large open spaces (e.g., Vellucci Community Plaza), specialty craft and food stores, and casual dining. Many of the cafes and bars are key destination businesses in the community, attracting regular local and visiting customers.
- *Cambridge St., from Tremont to Elm St.*: High-end dining, and neighborhood services, including salons and hardware stores.

Other destination drivers – such as local events and programs, recreational amenities, and open spaces that attract foot traffic to the district, especially from outside the district – are explored in more detail in later sections.

### In contrast to other commercial districts, almost all retail categories have seen in-person spending recover past pre-pandemic baselines

- In-person spending at both grocery and specialty food, and retail stores was resilient through the pandemic and has since recovered past their 2019 baseline (see **Figure 6.2**).
- Replica modeling shows that spending at restaurant, bars and cafes – which represent two-thirds of Inman Square retail tenants – is down on 2019 levels, by some 39%.
- This makes Inman Square the only commercial district in Cambridge to have seen total in-person retail spending recover past pre-pandemic levels.

**Figure 6.2 District in-person retail spending index, 2019-2024**



Source: Replica.

Note: Data for 2024 to July only (indexed to same period - to July only - in 2019). Values for entertainment, recreation and hospitality excluded due to low values in baseline year. Please see pages 3-4 for further information on Replica's methodology.

### With only 18% of ground floor businesses active in the district before the pandemic now closed, Inman Square has the lowest rate of closure of all districts

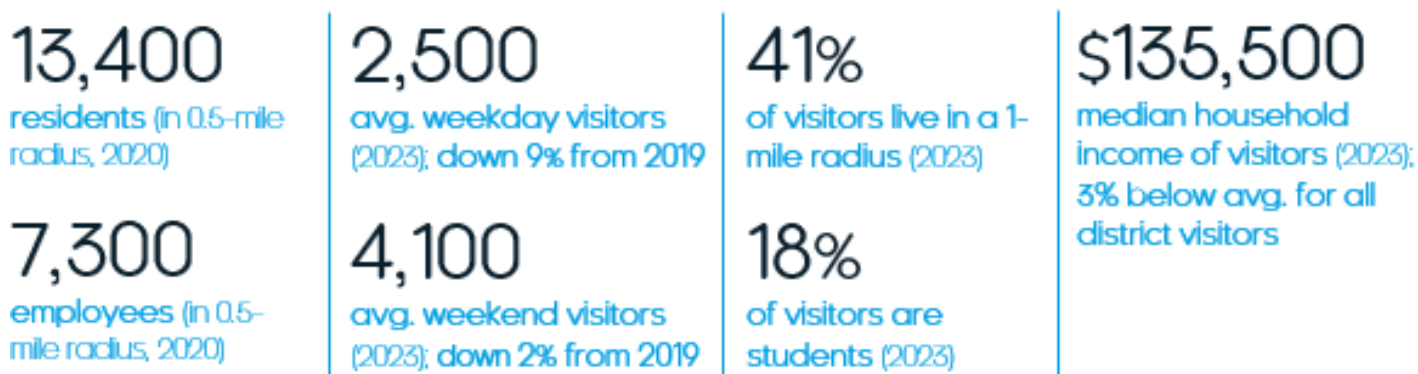
- The majority of Inman Square ground floor businesses that closed during the pandemic were restaurants, bars and cafes (75% - above the citywide average of 61%), with a small proportion being retail stores (8%).
- As of May 2024, Inman Square had 6 ground floor vacant storefronts (defined as those actively leasing, for

sale, leased pending occupancy, or under redevelopment).

**Given its smaller, largely residential development, Inman Square experiences an overall retail leakage**

- Inman Square’s leakages largely relate to specialty retail - notably clothing and accessories— which may be areas for recruitment, particularly for businesses reliant on in-person spending, or those providing an experiential offer.
- The district has a very small surplus related to general merchandise and grocery stores.

### 6.3. Market Demand



A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

**Inman Square is a compact and densely populated neighborhood/community district**

- With 1.8 times as many residents (13,400) living in the district compared to employees (7,300) working in it, the Inman Square district has a strong residential base (only Mass. Ave. and Observatory and Huron have a higher ratio of residents than employees). An estimated 63% of residents are “Millennials” or “Gen Z”, while 11% (1,400 total) are of student age.

**Inman Square has the lowest proportion of jobs that can be done remotely of all Cambridge districts**

- Based on industry mix, it is estimated only 41% of Inman Square district workers could do their job from home in 2021, below the citywide average (66%). This comparatively lower share reflects the high share of jobs in retail in the corridor (and fewer commuters coming into the district for professional services jobs). This trend may have partially protected district retailers from the retail impacts associated with remote work, especially in terms of weekday food and drink trade.

**Post-pandemic visitor numbers to Inman Square have recovered strongly, especially for weekend visitors**

- The Replica model shows average weekend visitor numbers to Inman Square were only 2% down from 2019, and 9% down for weekday visitors. Only Kendall Square experienced a stronger recovery in weekend visitors.
- This compares favorably to the average for all Cambridge districts, which shows district weekday visitors

being 19% down from 2019 and 11% down in weekend visitors.

### Inman Square visitors are typically older than other districts, and with slightly lower household incomes

- According to the Replica model, in 2023 14% of Inman Square visitors were over 75, double the 7% average for all districts, though this may be influenced by the above-average healthcare/medical activity in the district. The share that were students (18% of visitors) was comparable to other districts.
- The median household income for Inman Square visitors in 2023 was \$135,500, below the average of \$139,200 for visitors to other districts.

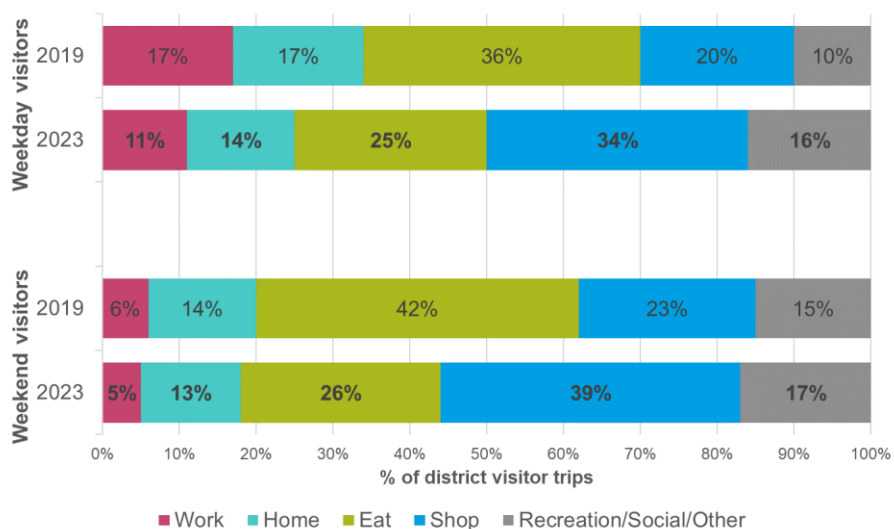
### Most Inman Square visitors live close to the district

- Reflecting its neighborhood/community status, the Replica model shows 41% of visitors to Inman Square live in a 1-mile radius of the district, above the average of 30% for other districts and the second highest share of all districts. This is also a small increase on the 38% share recorded in 2019.
- Inman Square also attracts a good number of visitors from farther away. 32% of visitors in 2023 travelled from beyond a 5-mile radius of the district, largely from other communities in Greater Boston.

### The purpose of visitor trips reinforces Inman Square's status as a destination for eating/drinking and specialty retail

- **Figure 6.4** shows the share of trips for shopping purposes notably increased between 2019 and 2023 for both weekdays (to 34%) and weekends (to 39%).
- While eating trips declined, the district still has the second highest share of trips for such purposes of all Cambridge districts. Only 11% of weekday trips are for work, down from 17% in 2019, reflecting the uptake of remote/hybrid working.

**Figure 6.3: Purpose of visitor trips to district, 2019 and 2023**



Source: Replica. Please see pages 3-4 for further information on Replica's methodology.

## 6.4. Physical Environment

### The physical environment of a retail district includes the following:

- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.



- **Access:** includes vehicles, pedestrians, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

**There are two hubs of retail activity** which characterize the physical environment of Inman Square (Figure 6.5).

#### Public Realm



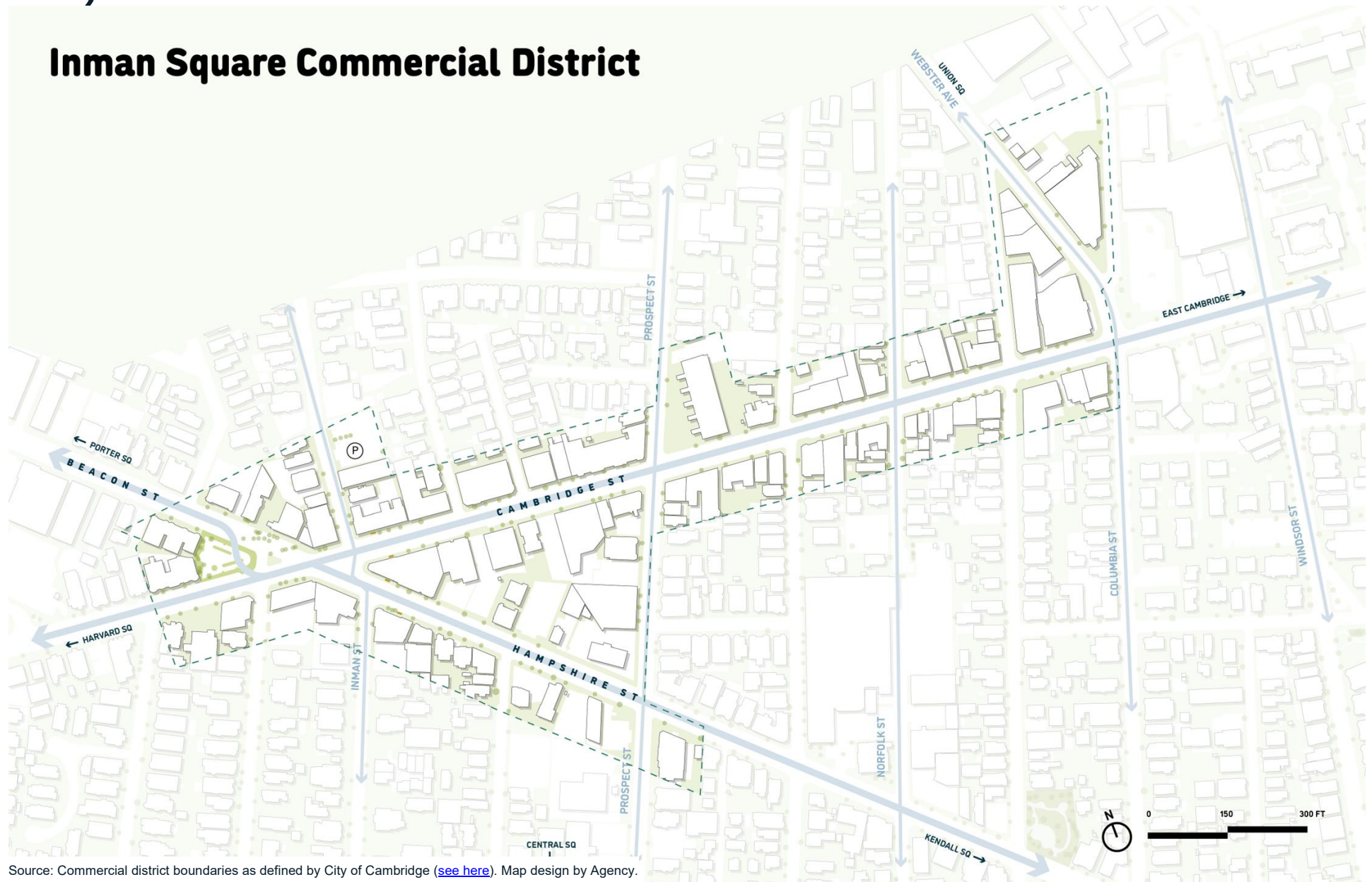
Images of Vellucci Plaza, patio dining, and streetscape greenery that demonstrate the emerging vibrant identity of Inman Square. These images highlight the use of bright colors in placemaking interventions within the district, reflective of its association as an arts and crafts hub

**Narrow sidewalks are a challenge to physical accessibility in this district. But they also contribute to an intimate pedestrian experience**

Additional accessibility challenges include:

- Outdoor seating
- Bike paths at grade with sidewalks

Figure 6.4 The Inman Square commercial district



- Retail signage (e.g., A-frames)

**Several factors contribute to a strong pedestrian experience and create charming neighborhood feel. Those factors include:**

- Abundant tree canopy
- Available street parking throughout district
- Good lighting
- Public seating

**The Vellucci Community Plaza is a stand-alone attraction. The plaza complements this retail hub by providing ‘spill-over’ space for customer seating**

- Vellucci Plaza is an important center for the district. The plaza provides a space for residents and customers to enjoy greenery and a place to gather outdoors
- Dense tree planting provides ample shade
- String lights and lighting make this space vibrant at all hours of the day

#### Private Realm



Images of existing facades and storefront signage that reflect the saturated color palette of the district

**Inman Square storefronts stand out with colorful and distinct architectural styles, memorable signs, and window displays**

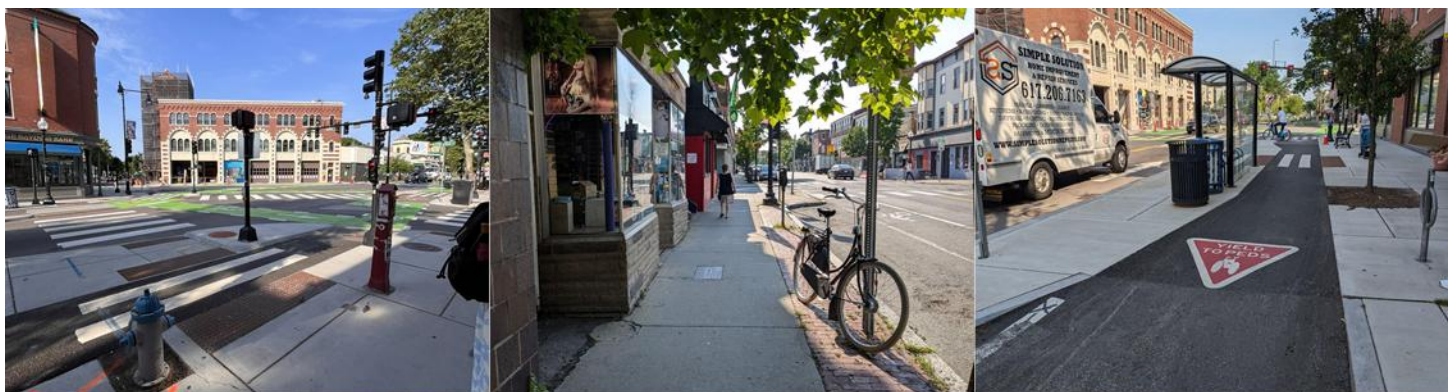
- Painted facades provide bright pops of color at the street-level
- Large window displays featuring retailers’ products (e.g., craft supplies, spices). These displays emphasize the identity of the district as a hub for arts and crafts
- Many retailers include outdoor seating, adding to the visual diversity of the district
- The Incubator Space is one of the few storefronts with limited signage. This makes it a key opportunity for further placemaking during transition periods between tenants within the space.

**Large parking lots disrupt concentrated neighborhood retail and stepped entryways into many**



**storefronts impede physical accessibility**

- Several large private parking lots along Hampshire St. e.g., outside S&S, East Cambridge Savings Bank, on Amory St., and behind 7/11
- Parking lots disrupt the intimate, charming character of the Cambridge St. retail corridor
- Many storefronts have narrow, single-entry doorways and 1-2 steps to enter
- Strollers and Wheelchairs are on sidewalks where retail entries are not accessible

**Access and Visibility**

Images of Cambridge St. and Hampshire St. pedestrian crossings (left), narrow sidewalks along Cambridge St (center), and newly developed, separated bike paths (right)

**Cambridge St. is a major bicycle, car, and bus corridor. The street connects mid-Cambridge and Somerville to East Cambridge and downtown Boston**

- There are high volumes of car and bus traffic, especially in peak hours. This high traffic tends to be slower moving due to pedestrian crossings and traffic lights
- Recent redesign of the Hampshire St. intersection aimed to improve safety for pedestrians, cyclists, and vehicles
- Street parking, tree canopy, and the construction of separated bike lanes protect pedestrians from traffic noise and movement. This contributes to the intimate pedestrian experience

**Cambridge St. is a popular road for cyclists, with continuous stretches of bike path. But there is limited access to bike racks**

- Some bike racks are available throughout the corridor, but these are limited. Bikes are locked to fences or utility poles throughout the district
- Bike path is at sidewalk level around the Cambridge St. and Hampshire St. intersection. This could create a risk of pedestrian-cyclist collisions; however, people have picked up on the patterns around the district.

**Cars are the dominant mode of transport for Inman Square visitor trips, although walking and cycling are becoming more popular**



- The Replica model shows on both weekdays and weekends, about half (48%) of visitor trips to Inman Square were by car in 2023, only slightly down from the share recorded in 2019.
- Between 2019 and 2023, walking became more popular, especially on weekdays where it has increased from 30% of all trips to 39%. At the same time, trips by public transportation decreased from 15% in 2019 to 6% in 2023. This was common around Cambridge and the region as the MBTA continues a series of subway service improvement projects over 2022-24.
- As a result of its dense neighborhood status, the average travel time for trips to Inman Square stood at just under 20 minutes in 2023 - the second shortest trip travel time among Cambridge's commercial districts.

### Branding and Placemaking

#### **Formal and informal placemaking reflect the neighborhood's identity as a hub for crafts and community arts**

A few elements contribute to a vibrant and charming visual identity.

- Posters on storefronts advertising community events, banners on lamp posts, painted utility boxes
- The City's public patios are consistent with the district's key industry. The patios offer Free Craft Supply Libraries, "craftivities" hosted with local businesses, and a public piano.

#### **Despite lacking a formal district brand, the area maintains a cohesive visual identity through consistent street furniture and harmonious architectural styles and building facades**

The use of similar street furniture in Vellucci Plaza and Public Patios on Cambridge St creates a continuous visual identity throughout the length of the district.

## 6.5. Adaptive Capacity

Local adaptive capacity plays a crucial role in achieving the long-term, community-driven vibrancy of a district. It represents the district's leadership, organizational capacity, resources (both human and financial), and regulatory and policy frameworks.

**The East Cambridge Business Association plays an important role in supporting adaptive capacity through its work with the local business community.** With 150 members, this business association merged with the Inman Square Business Association seven years ago and has members that range from small entrepreneurs to large developers located in Kendall Square. The Business Association's focus for Inman Square specifically is on branding and extending the area that people perceive as Inman Square.

**The association works on Inman Incubator as well as Inman Eats and Crafts**, whose branding comes into this area. Inman Incubator is based out of a 190-square retail storefront near the Vellucci Plaza, and hosts artists and makers for 4-6 weeks for retail pop-ups and exhibits, with free participation. Given the strong local restaurant scene draws a more regional clientele, the business association hopes to continue supporting this local strength through promotion, marketing and branding.

Finally, the association also advocates for business interests, delivers both large and small events to drive foot traffic and highlight local businesses. The Association has also focused on the issue of commercial gentrification in East Cambridge, supporting efforts to modernize while still maintaining the traditional Main Street offer and local

town feel.

Events and programs include large-scale annual events focused on food and craft industries:

- **Inman Eats and Crafts Market:** Annual street fair featuring local retailers, makers, and restaurants
- **Inman Square Holiday Market:** Annual market with local vendors selling jewelry, housewares, accessories, and textiles
- **Inmanween:** Annual Halloween celebration with food, crafts, and movies
- **Inman Square Movie Night:** This summer movie series happens in open spaces, such as the East Cambridge Savings Bank parking lot. East Cambridge Business Association and Cambridge Arts Council organize this series.

**In addition to the local association and anchors, Inman Square is represented by an active network of citywide business associations** – such as the Cambridge Chamber of Commerce, Cambridge Local First, and Cambridge and Somerville Black Business Network. Many of these organizations run marketing for businesses within the district, such as Cambridge Local First’s promotion of local businesses in Inman Square on their website or advocacy around commercial displacement, an issue that Inman Square businesses are concerned about.

## 6.6. Recommendations

### Recommendation 1: Formalize the district’s identity as an arts, crafts, and innovation hub through placemaking interventions

**Rationale:** As Inman Square has evolved over time, a distinct identity has emerged through formal and informal placemaking efforts. Community-led initiatives such as the Free Craft Supply Libraries, “craftivities” hosted by local businesses, and public performances contribute to the neighborhood’s budding identity as a hub for crafts and community arts.

**Objective:** Align with the citywide goal of district placemaking and support the unique identity that has evolved over many years through local businesses and community efforts, such as painted storefronts and unique businesses.

### Art and Culture Activations

LIBERTY ALIVE in Perth, Australia (left) and the Backyard Cinema in London, England (right)

Images show alleyway activation through programming such as local artist showcases or community movie nights. LIBERTY ALIVE was an initiative designed to breathe life into the abandoned Liberty Theatre and reprogram the area with live music, art, local foods, craft beer, and laneway festivities.



- Collaborate with local artists and business owners to identify opportunities for art and color to enliven the area, such as painted crosswalks or sculptural lighting installations at key intersections like Cambridge St and Prospect St. With narrow sidewalks, they continue to blend the private and public realm by partnering with local businesses to increase spaces available for temporary events that are true to Inman’s character such as craft workshops, parking lot / open space movie nights, markets, art displays, performances and more.

### Recommendation 2: Continue to support successful existing initiatives within the district

**Rationale:** Inman Square’s existing initiatives are successfully driving foot traffic in the district and meeting the demand of the local resident population. The success of the current activities is evidenced by the fact that in-person spending in the district has recovered past pre-pandemic levels.

**Objective:** Celebrate the success of existing community efforts and foster the expansion of growth and improvement projects.

- Support the expansion of existing festivals such as the Inman Eats and Crafts Market, Inman Square Holiday Market, and Inmanween. Collaborate with the East Cambridge Business Association and local vendors to develop new, seasonal festivals for year-round programming.

### Recommendation 3: Address gaps in physical accessibility within the district and improve the experience of getting to and through Inman Square by bike, bus, and on foot

**Rationale:** Inman Square is characterized by an intimate pedestrian experience with distinct architectural styles and a variety of transportation options along the Cambridge St corridor – including a well built out network of bike lanes. While the narrow sidewalks contribute to this character, they also present a challenge to physical accessibility for pedestrians, wheelchair users, and cyclists within the district.

**Objective:** Ensure that businesses and public spaces are physically accessible to everyone.

- Conduct an Americans with Disabilities Act (ADA) compliance audit of streets, walkways, and

#### Accessibility Interventions

From manufacturers such as StopGap (left) and custom builds (top right and top left).

Examples of simple ramp designs, these modular components are easy to implement, improve accessibility within the district, and require minimal changes to the existing streetscape.



public spaces<sup>6</sup>. Partner with businesses and property owners to create alternate entrances and ramps in areas with stepped entryways or narrow sidewalks. Coordinate with the Department of Public Works to remove unnecessary obstacles along the street to better accommodate people using wheelchairs, walkers, and strollers.

- Promote the City's existing initiative that allows businesses to request a bicycle rack be placed on public property to provide additional parking for people cycling to their stores. A coordinated program could be developed in partnership with local artists to design bike racks that reflect the district's identity as an arts hub.

---

### Pedestrian Experience

#### Salt Lake City, UT and an example of a prefabricated sculptural bike rack by Kor Kat

These precedents demonstrate how Inman Square can turn infrastructure such as crosswalks or sculptural bike rack furniture into an asset that reflects the district's unique character as an arts and crafts hub.

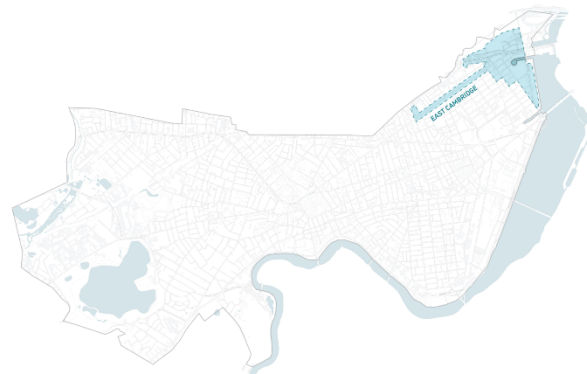


---

<sup>6</sup> Precedent examples of streetscape studies and toolkits include Curado et al.'s methodology for studying street accessibility in Avila, Spain; and the Microscale Audit of Pedestrian Streetscapes (MAPS) developed by the Active Living Research lab at the University of California, San Diego. While these methods do not focus on accessibility and ADA compliance, a similar audit format could be developed. Curado et al.'s study of street accessibility can be accessed [here](#). More information about MAPS can be found [here](#).



## 7. East Cambridge



### 7.1. Key Takeaways

**East Cambridge features a longstanding neighborhood retail corridor, with a strong restaurant and specialty retail offerings.** This is complemented by the East Cambridge riverfront which features hotels, residential and commercial development, the CambridgeSide regional shopping mall, and the Museum of Science. Our analysis has found:

- Retail is the largest employment industry in East Cambridge. The presence of the CambridgeSide mall drives significant retail store spending – at a higher proportion than any other district. Meanwhile, no other district generates more entertainment, recreation and hospitality spending.
- According to the Replica data<sup>7</sup>, Retail stores and entertainment, recreation and hospitality have driven the post-pandemic in-person spending recovery in East Cambridge, ahead of the averages for other districts in Cambridge, although spending at restaurants, bars, and cafes has been slower to recover.
- Specialty retail shows a large retail surplus, reflecting strong non-resident demand, and its status as a destination driver for the district. As a large regional/specialty district with a significant worker presence (there are almost twice as many workers as residents), East Cambridge caters to a diverse customer base, with many visitors living outside the district.
- With a high number of workers (two-thirds of whom could work remotely), visitor numbers to East Cambridge have recovered slowly. Although these visitors are now making more individual trips than before the pandemic, and spending more (in-person) per trip.
- East Cambridge's physical environment is generally characterized by two zones:
  - *First Street / North Point Zone*: newer mid to high-rise, mixed-use development (similar in character to Kendall Square); concentration of offices and national chains; anchored by CambridgeSide mall; includes the Cambridge Crossing development to the north.
  - *Cambridge Street Zone*: low-rise neighborhood retail and personal services; several hubs of restaurants and bars interspersed with less active retail; some green/open spaces; narrower sidewalks and limited tree canopy; ground floor office/residence entries.
- The large Route 28 multi-lane highway disrupts pedestrian flows between Lechmere MBTA station and the core of the district. The district is well-served by bike lanes, but access to bike racks and Blue Bike is limited.

---

<sup>7</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4 of this report.

Cars are the dominant mode of transportation for East Cambridge visitor trips.

- The district's identity feels fragmented due to a mix of office, lab, and retail spaces. Its large, spread-out layout also lacks a clear focal point or main attraction. Although iconic local businesses and cultural heritage help create a unique identity in East Cambridge.

## 7.2. Business Environment



The density and type of retail offerings in a district is often a reflection of the underlying business conditions and market dynamics and can offer insight into the health of local retail businesses.

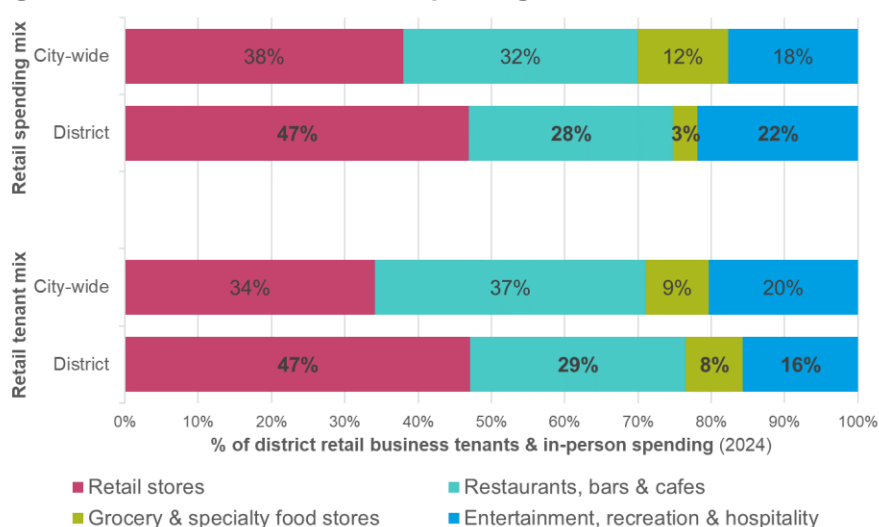
**The East Cambridge district is home to 525 businesses with 5,500 employees. Retail is the largest-employing industry with 100 businesses and 1,800 employees**

- East Cambridge's 100 retail businesses account for 33% of all the employees in the district. Only Mass. Ave. and Inman Square had a higher share of employees working in retail.
- Reflecting its proximity to Kendall Square and MIT, the next highest-employing industries in the district are professional, scientific, and technical services (22% of district employees), information (8%), and manufacturing (largely life sciences, at 8%).
- On average, East Cambridge retail businesses have 18 employees, which is the highest of all Cambridge districts, indicating larger retail stores and retail operations in the district.

**East Cambridge is one of Cambridge's largest retail centers, and also has a strong entertainment and hospitality offering**

- Figure 7.1 shows retail stores account for 47% of East Cambridge's retail tenants and spending, above citywide averages and the highest shares of any district.
- According Replica model, restaurants, bars and cafes represent just under a third of spending and tenants.
- With 16% of tenants and 22% of the district's spending, entertainment,

Figure 7.1 District retail tenant and spending mix, 2024



Source: Data Axle US Business database (for tenant mix) and Replica (for in-person spending mix).

Note: In-person spending data for 2024 to July only, not full calendar year. Please see pages 3-4 for further information on Replica's methodology.

recreation and hospitality is an important part of East Cambridge's offer. No other district generates more spending in this category.

### District Anchors and Destination Drivers

East Cambridge's retail hubs have **clusters of restaurants and retail that serve as destination drivers and include district anchors**: long-standing local businesses that are well-known in the community, attract significant local and visitor traffic, and drive local initiatives and programming. **There are three established retail hubs in East Cambridge** and an additional hub is transitioning from a retail mall to mixed use. These are:

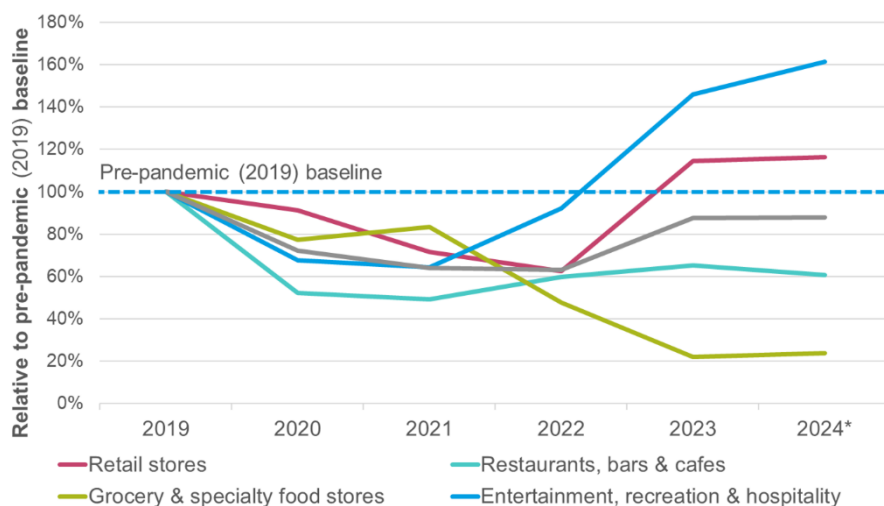
- *Cambridge St, between 7th and Warren St*: Destination restaurants and cafes specialty grocers (e.g., fish market), and long-standing local businesses (e.g., long term bakeries). Public open space and a greenway along the unused train tracks encourage pedestrians to linger.
- *Cambridge St, between 5th and 6th St*: Neighborhood restaurants, coffee shop, and resident services (e.g., childcare, salons, and convenience stores)
- *Cambridge St and 3rd St intersection*: Neighborhood retail and services, including a bank, post office, and a pharmacy. This hub is a convenient stop for workers in nearby offices and commuters from the Lechmere MBTA station.
- *First St and CambridgeSide Place*: A fourth retail hub is evolving at the CambridgeSide mall development. The mall is being renovated into a mixed-use space with offices, labs, housing, and retail. While construction is ongoing, some stores remain open. But most aren't visible from the outside, and many street-level storefronts appear vacant. Lechmere Canal Park also acts as a destination driver and anchor within this area.

Other destination drivers – such as local events and programs, recreational amenities, and open spaces that attract foot traffic to the district, especially from outside the district – are explored in more detail in later sections.

### Retail stores and entertainment, recreation and hospitality have driven the post-pandemic in-person spending recovery in the district

- East Cambridge has experienced the strongest in-person retail store spending recovery of all Cambridge districts (see **Figure 7.2**), according to the Replica model.
- Entertainment, recreation and hospitality spending has been the strongest performing category, up 61% from 2019.
- For other categories, performance has been mixed. Spending at restaurants, bars and cafes is down 39% from pre-pandemic levels.
- Grocery and specialty food stores

Figure 7.2 District in-person retail spending index, 2019-2024



Source: Replica.

Note: Data for 2024 to July only (indexed to same period - to July only - in 2019). Please see pages 3-4 for further information on Replica's model methodology.



spending is down 76% from 2019.

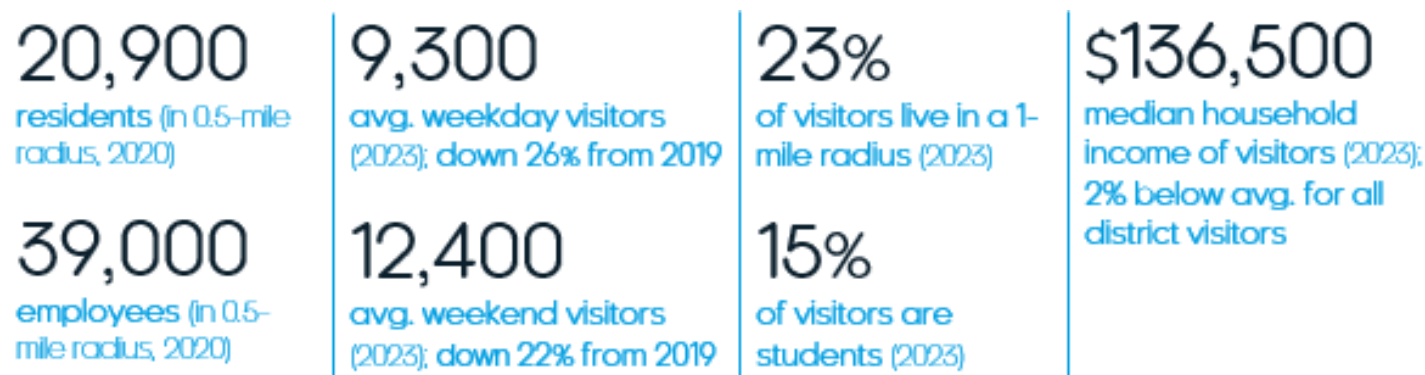
**Twenty percent of ground floor businesses active in the East Cambridge district before the pandemic are now closed, a similar rate of closure experienced at the citywide level**

- The majority of East Cambridge ground floor businesses that closed during the pandemic were restaurants, bars and cafes (60% - similar to the citywide average), with a smaller proportion being retail stores (20%).
- As of May 2024, East Cambridge had 19 ground floor vacant storefronts (defined as those actively leasing, for sale, leased pending occupancy, or under redevelopment). This higher number may be due to the new, available ground floor development along First Street and Cambridge Crossing.

**The strength of East Cambridge's specialty retail offer is shown by its large retail surplus**

- Clothing and accessories generate a large retail surplus for East Cambridge, reflecting strong non-resident demand, and CambridgeSide's status as a destination driver for the district.
- The district also has a surplus in other specialty retail such as general merchandise, as well as in food and drink establishments, reflecting its strong dining offering.

### 7.3. Market Demand



A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

**East Cambridge is a large regional/specialty district with a significant worker presence**

- With 1.9 times as many employees (39,000) working in the district compared to residents (20,900) living in it, the East Cambridge district has a strong commercial base (only Kendall Square has a higher ratio of employees than residents). An estimated 65% of residents are “Millennials” or “Gen Z”, while 14% (2,800 total) are of student age.

**The proportion of jobs that can be done remotely in East Cambridge is similar to the citywide average**

- Based on the industry mix, it is estimated 61% of East Cambridge district workers could do their job from home in 2021, which is below the citywide average (65%).
- Largely due to the mall and retail presence, this is lower than other districts with similarly high employee to

resident ratios, such as Kendall Square, Harvard Square, and Central Square.

### **Post-pandemic visitor numbers to East Cambridge have been slow to recover**

- The Replica model shows average weekday visitor numbers to East Cambridge are still down 26% from 2019, and 22% down for weekend visitors. Yet over the same period, there was a small increase in the total number of individual trips taken by these visitors.
- This suggests people now visiting the district are taking more individual trips to and within the East Cambridge district than before the pandemic. This can provide local retailers with opportunities for consistent, repeat customers.

### **East Cambridge visitors are typically younger than other districts, and with slightly lower household incomes**

- Visitors to East Cambridge were slightly younger and less racially diverse than other districts in 2023. Only Alewife had a smaller share of visitors that were students, who made up 15% of total district visitors.
- Despite a smaller proportion of student visitors, the median household income for East Cambridge visitors in 2023 was \$136,500, slightly below the average of \$139,200 for visitors to other districts.

### **The majority of East Cambridge visitors live away from the district**

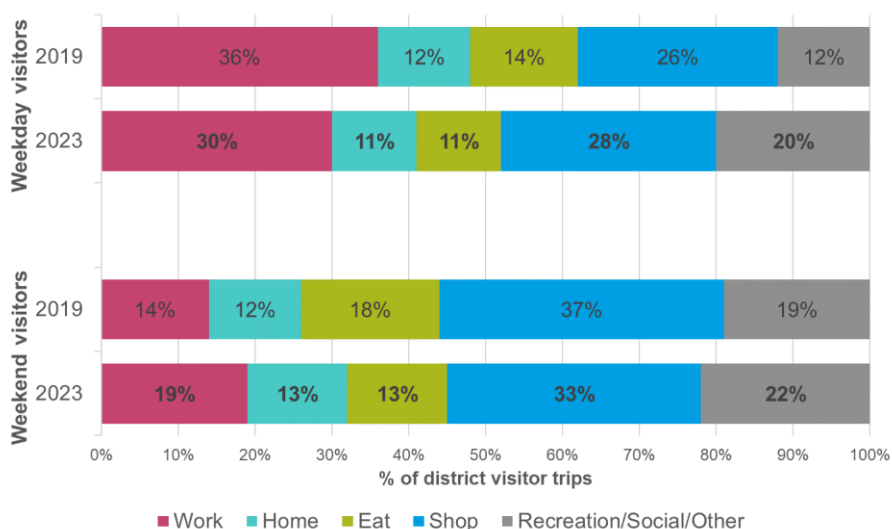
- Consistent with the relatively smaller residential market in this district, the Replica model shows only 23% of visitors to East Cambridge live in a 1-mile radius of the district. Only Kendall Square had a lower share. This was a small increase on the 19% share recorded in 2019.
- Some 37% of visitors in 2023 traveled from beyond a 5-mile radius of the district, largely from other communities in Greater Boston. Only Kendall Square and Alewife attract a higher share of such visitors.

### **The purpose of visitor trips reinforces East Cambridge's status as a destination for leisure and specialty retail**

- **Figure 7.4** shows the share of trips for recreation/social/other purposes increased between 2019 and 2023 for weekdays (to 20%) and weekends (to 22%). Only Kendall Square has a higher share of recreation/social/other trips.

- Shopping trips are still one of the major purposes for trips to East Cambridge, especially on weekends (33% of total trips).
- On weekdays, work purposes dominate, with 30% of weekday trips, but down from 36% in 2019.

Figure 7.3: Purpose of visitor trips to district, 2019 and 2023



Source: Replica. Please see pages 3-4 for further information on Replica's model methodology.

## 7.4. Physical Environment

The physical environment of a retail district includes the following:

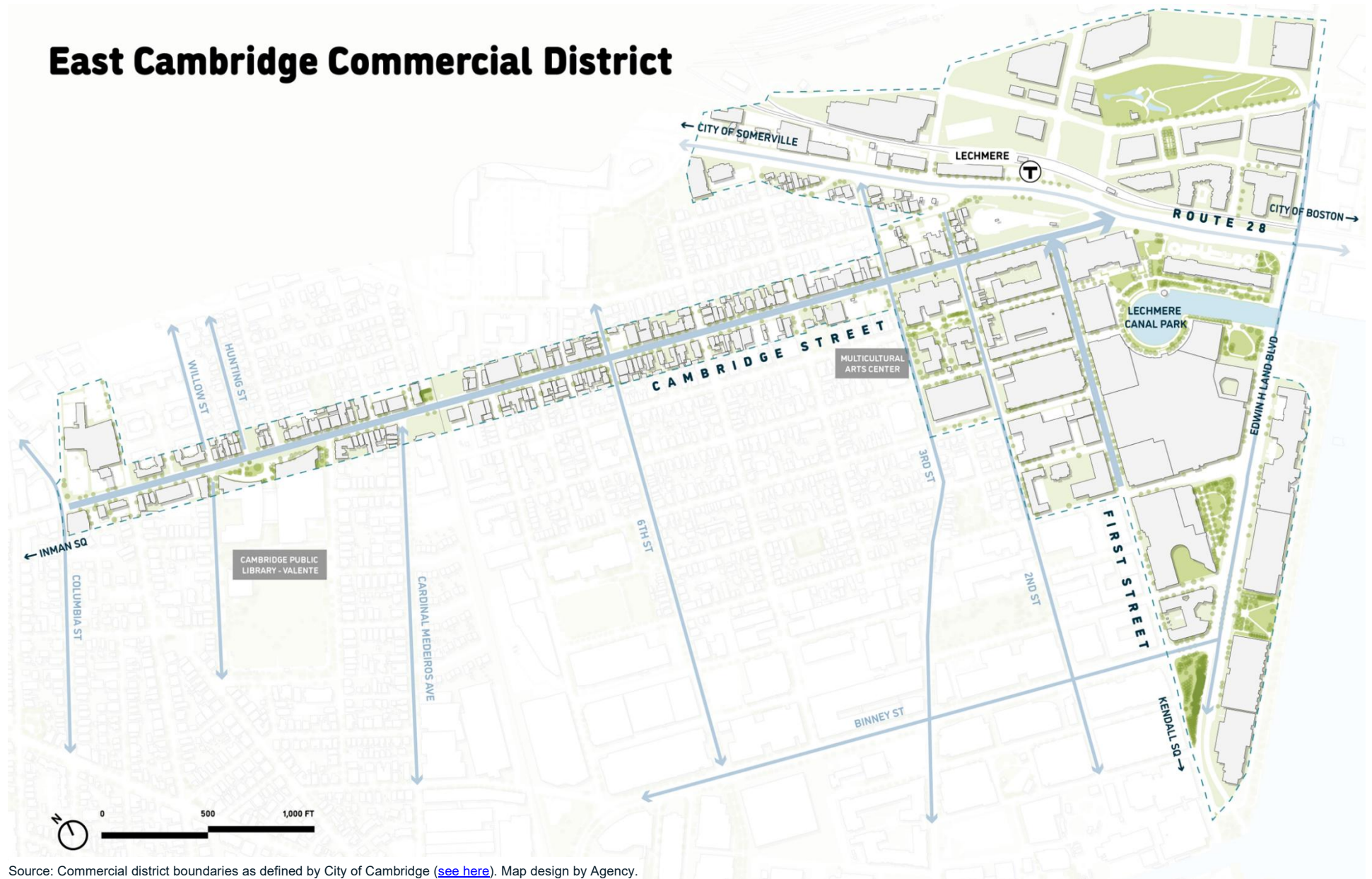
- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.
- **Access:** includes vehicles, pedestrians, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

**There are three distinct retail hubs in East Cambridge.** An additional hub is up and coming, but not yet fully formed. **In terms of physical environment, East Cambridge (Figure 7.5) is characterized by two zones:**

### First Street / North Point Zone

- Newer mid-rise, mixed-use development reflecting a similar character of Kendall Square
- Concentration of offices and national chains
- Anchored by CambridgeSide mall (currently under redevelopment)
- Borders Cambridge Crossing (north) with new development, destination restaurants, and national retail

Figure 7.4 The East Cambridge commercial district



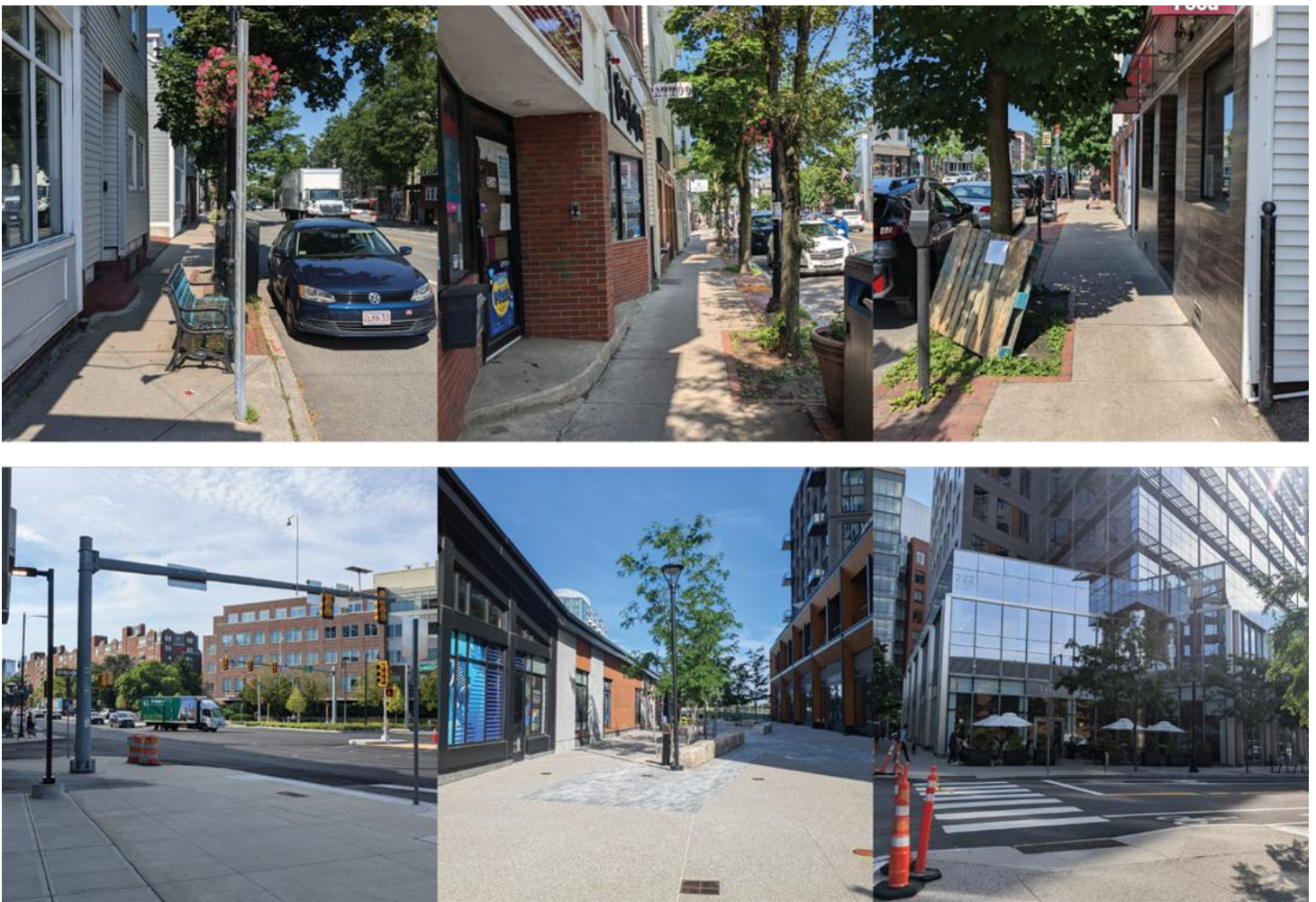


brands

### Cambridge Street Zone

- Includes large parking lots, ground floor entries to residences and offices
- Low-rise neighborhood retail and services
- Several hubs of restaurants and bars interspersed with less active retail (e.g., salons, convenience stores)
- Some green and open spaces; narrower sidewalks and limited tree canopy

### Public Realm



Images depicting the intimate, historic character of the Cambridge St Zone (top row) in contrast with the contemporary style of the First Street / North Point Zone (bottom row)

### Pedestrian experiences vary between the two sides of the district.

First Street Zone has a 'downtown' feel and comfortable pedestrian experience. Examples of this experience include wider sidewalks, slow-moving traffic, abundant crosswalks, on-street parking that buffers street traffic, and

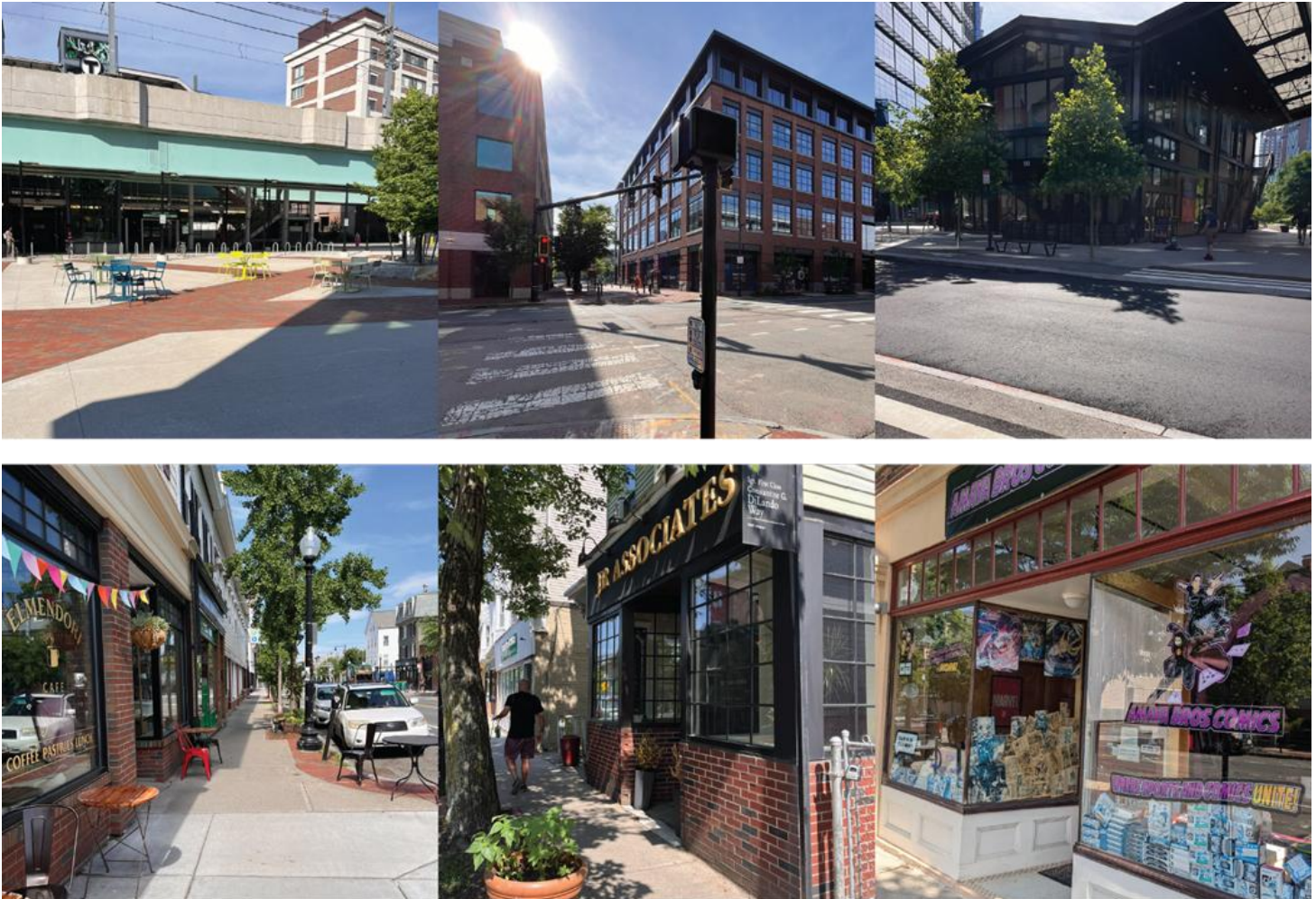


tree canopy for shading. However, narrow sidewalks along Cambridge St create challenges for pedestrian accessibility.

**Open spaces give pedestrians places to stop and relax along the otherwise monotonous Cambridge St. corridor. For example:**

- **Lechmere Canal Park**, starting with the plaza on Thorndike St. and First St. and areas surrounding the Vellucci Fountain, provides waterfront views and access to retail.
- **Centanni Park and Otis St.** is a scenic green space with distinct architecture.
- **Cambridge St. Courtyard** and the green space by the railroad crossing offer places for the community to gather.
- **Cambridge Public Library Valente Branch plaza** provides seating and shade.

#### Private Realm



Images show the private realm of First Street / North Point Zone (top row) is characterized by wide sidewalks and a plethora of glass facades. In contrast, the Cambridge St Zone (bottom row) has narrower sidewalks and smaller window displays

- Mid-rise office and lab developments
- Fast casual dining and national chains catering to local employees
- Inactive ground floors (e.g., entries to office buildings, vacancies)

**Western zone is a typical commercial street with ground-floor stores and storefront signs.**

- Signs are generally more functional than decorative, especially for local services, like laundromats and salons.
- Restaurants and cafes at popular spots have more eye-catching signs and decorative storefronts.
- There are few places in this zone with outdoor dining. One business uses a side street for a streetery (where parking or sidewalk space is converted for outdoor dining).

**Access and Visibility**



Images show the First Street/North Point Zone (left and center) reflects conditions of a typical downtown area— wider sidewalks, roads, and bike lanes. The Cambridge Street Zone (right) features narrower sidewalks, fewer vehicular lanes, and slimmer bike lanes

**The Monsignor O’Brien Highway (Route 28) is a large multi-lane state highway that disrupts pedestrian flows between Lechmere MBTA station and the core of the Cambridge St. district**

- Multiple crosswalks and a wide highway create a confusing pedestrian experience
- Foot traffic from Lechmere is channeled to retail in Cambridge Crossing, next to the station
- Easier connection for bikes, with marked and separated bike lanes

**The district is well served by bike lanes. But access to bike racks and BlueBikes is limited**

- The eastern side of the district near First Street, Lechmere, and CambridgeSide are well served with multiple BlueBikes stations. There is only one BlueBikes station and bike repair station near Cambridge Public Library Valente Branch.
- Clusters of bike racks are available throughout the corridor, but they are limited. Bikes are often seen locked to fences or utility poles

**Cars are the dominant mode of transport for East Cambridge visitor trips, although walking is becoming more popular**

- The Replica model shows on weekends over half (54%) of visitor trips to East Cambridge were by car in 2023, down from 57% in 2019. The share of trips by car on weekdays increased from 50% to 52% during the same time.
- Between 2019 and 2023, walking became more popular, especially on weekdays where it has increased from 25% of all trips to 32%. At the same time, trips by public transportation decreased from 22% in 2019 to 10% in 2023.

**Branding and Placemaking****The district's identity feels fragmented due to a mix of office, lab, and retail spaces. Its large, spread-out layout also lacks a clear focal point or main attraction**

- Eastern side of the district: lack of ground-floor retail activity, signage, or wayfinding.
- Western side: Patchwork of streeteries, planting, and signage on popular cafes and restaurants.
- Eastern side: Some branding is present. The CambridgeSide name is on building facades storefront windows along First St.

**Iconic local businesses and cultural heritage help create a unique identity in East Cambridge**

- Cambridge is well known for Portuguese cuisine and fish markets. This reflects the history of Portuguese immigration to the neighborhood.
- Valente Branch of Cambridge Public Library holds the city's Portuguese language collection.
- Iconic, original signage for the now-closed Mayflower Poultry shop read, "Live Poultry, Freshly Killed." Since the business closed, the local business association adopted the slogan, It is now used for merchandise and event branding.

## 7.5. Adaptive Capacity

Local adaptive capacity plays a crucial role in achieving the long-term, community-driven vibrancy of a district. It represents a district's leadership, organizational capacity, resources (both human and financial), and regulatory and policy frameworks.

**The East Cambridge Business Association plays an important role in supporting adaptive capacity through its work with the local business community.** With 150 members, this business association merged with Inman Square Business Association seven years ago and has members that range from small grocers to large developers located in Kendall Square. The Business Association's focus is on advocacy for business interests, events to drive foot traffic, and delivering smaller activations to highlight local businesses. The Association has also had a focus on the issue of commercial gentrification in East Cambridge, supporting efforts to modernize while still maintaining the traditional Main Street offer and local town feel.

Community anchors, such as Cambridge Public Library Valente branch and Cambridge Multicultural Arts Center, host many events and programs. Examples of programming include:



- **Cambridge Public Library Valente branch** monthly book group, Summer Art Walks, regular story times, and sing-alongs.
- **Multicultural Arts Center** concerts by local and visiting artists, summer series including dance and music events.

Annual events attract high volumes of visitors and are important destination drivers. Local events focus on the district's diverse food scene. The East Cambridge Business Association facilitates these in partnership with local restaurants. Flagship events in the district include:

- **Smoke This Rib Fest** live music, a beer garden, and over 20 restaurants competing for the "Best Ribs" and "People's Choice" awards.
- **Le Grand Prix Elmendorf du Pain** a new Paris-inspired street festival. The East Cambridge Business Association and Elmendorf Baking Supplies host this festival. The festival includes local bakeries and cafes. There's a competition for the best baguette in Boston.
- **Chicken Run Fresh 1 Mile** annual race from Lechmere Station to Inman Square. The event is a fundraiser for the local business association. It honors the iconic "Live Poultry Fresh Kill" sign associated with Mayflower Poultry, once located on Cambridge St.
- **CX Summer Nights** provides regular, free neighborhood events through the summer with live music, food trucks, lawn games, and more.

Other annual events include annual runs, and East Cambridge Community Cleanup.

**In addition to the local association and anchors, East Cambridge is represented by an active network of citywide business associations** – such as the Cambridge Chamber of Commerce, Cambridge Local First, and Cambridge and Somerville Black Business Network.

## 7.6. Recommendations

### **Recommendation 1: Establish a consistent district brand and pedestrian experience that works across the different zones of the district**

**Rationale:** The western zone along Cambridge St. features low-rise residential buildings; narrow sidewalks; and small clusters of neighborhood commercial, retail, and service hubs. By contrast, the eastern zone along First St. reflects modern development trends, featuring wider sidewalks, mid-rise buildings, and national chains within CambridgeSide. These contrasting characteristics of the Cambridge St. Zone and First St. Zone create the feel of two separate areas within the district.

**Objective:** Align with the citywide goal of district placemaking by defining a unique and flexible visual identity to help visitors connect and navigate the Cambridge St. and First St. zones as a cohesive district.

- Collaborate with the East Cambridge Business Association to conduct a brand development exercise for the area. Based on this identity, work with the business association to roll the branding out by developing wayfinding in the form of banners, signage, or mapping that highlights key destinations in both zones and creates visual continuity throughout the district. Consider how the brand will integrate with other ongoing signage initiatives such as the City's "East Cambridge Businesses: Past and Present" historical markers
- Animate open spaces through programming such as pop-up markets, temporary installations, cultural activities, and workshops. Example sites of opportunity include the area in front of the Valente Branch of the Cambridge Public Library or Centanni Park. Increase safety along the Cambridge St. Railroad Crossing through strategic planting between the railroad tracks and the emerging foot paths between Cambridge St. and Millers River Apartments. Where possible, remove obstacles to expand the narrow sidewalks along Cambridge St. and improve accessibility. Seek to improve wayfinding from Lechmere Station to promote pedestrian movement throughout the district.

### Consistent Branding

Waterloo Greenway Park, Austin, TX brand strategy designed by Bruce Mau Design

These images showcase how a distinct district identity can unify a large area.



### Pedestrian Experience

Impulse in Chicago, IL, USA (top right) and Off-Ground in Copenhagen, Denmark.

Precedent images of different public space animation strategies such as seasonal programming and temporary, interactive installations.



---

**Recommendation 2: Continue to support and promote East Cambridge's entertainment, recreation, and hospitality businesses**

**Rationale:** East Cambridge generates the highest spending of all districts in entertainment, recreation, and hospitality, which is largely due in part to the hotels based within this district. Although East Cambridge has the second lowest proportion of resident visitors who come from within a 1-mile radius (23%), it has not experienced as great of a decline in in-person retail spending compared to other districts that rely on a large proportion of visitors from afar.

**Objective:** Promote hospitality, entertainment and recreation offerings in East Cambridge since they are helping the district against greater decline in in-person spending despite fewer visitors post-pandemic.

- Work with the East Cambridge Business Association to identify key businesses in this sector and understand what additional support they need, especially as CambridgeSide transitions to a mixed-use development with a more diverse residential and business mix.
- Work with citywide marketing initiatives to further promote East Cambridge's hospitality, entertainment and recreation offer to wider audiences.

## 8. Huron Village and Observatory Hill



### 8.1. Key Takeaways

**The Huron Village and Observatory Hill (“Observatory and Huron”) district supports small, vibrant and complementary neighborhood retail, which largely serve the surrounding community.** Our analysis has found:

- Retail is the largest-employing industry in the district, but on average Observatory and Huron retail businesses are much smaller than other districts, with the lowest number of average employees per retail businesses.
- The district’s offer is largely focused on specialty retail and food and drink. Replica model<sup>8</sup> shows that in-person retail spending in the district is 19% down from 2019. This shortfall is largely accounted for by lower retail store spending.
- Given its smaller, mostly residential uses, The Observatory and Huron district primarily caters to a local, older, higher-income resident base. In fact, visitors have the highest average incomes of Cambridge visitors). 42% of visitors reside in a 1-mile radius, the second highest share of all districts.
- With few workers and low remote work potential, post-pandemic Observatory and Huron area has experienced the strongest recovery in weekday visitors of all Cambridge districts, although weekend visitors are still at lower levels than in 2019.

---

<sup>8</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4 of this report.



- Observatory and Huron’s physical environment is characterized by a low concentration of retail within a low-rise residential area, with single-story development, neighborhood restaurants, grocery stores, specialty retail, and small offices.
- A mix of small-scale local retail creates an intimate and charming character for the neighborhood. Specialty retail includes restaurants, specialty food, galleries, and boutiques. Retail hubs are separated by residences, creating a less connected retail experience.
- Ornamental planting, flowers, and vibrant storefronts are found throughout the corridor, with narrow sidewalks lead to smaller, distributed placemaking elements. As a residential neighborhood, the Observatory Hill and Huron Village district is one of the most car-dependent districts in Cambridge.



**Observatory Hill Holiday Stroll. Photo Credit: City of Cambridge.**

## 8.2. Business Environment



The density and type of retail offerings in a district is often a reflection of the underlying business conditions and market dynamics and can offer insight into the health of local retail businesses.

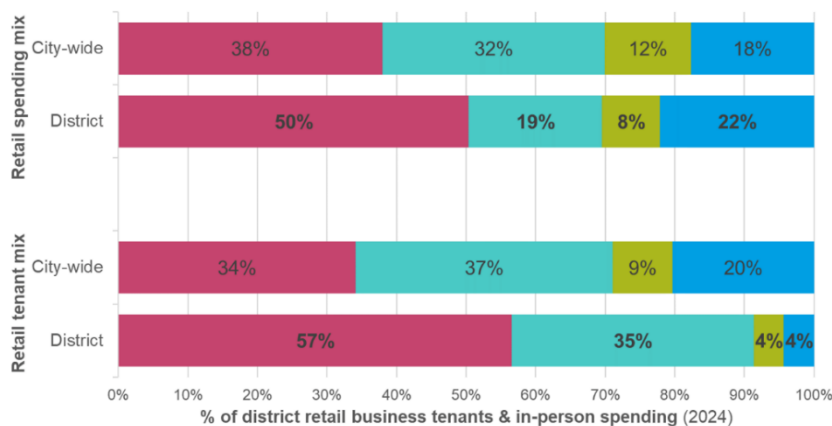
**The Observatory and Huron district is home to 80 businesses with 400 employees. Retail is the largest-employing industry with 25 businesses and 100 employees**

- The Observatory and Huron's 25 retail businesses account for approximately a third of all the employees in the district.
- Other industries in the district are professional, scientific, and technical services (26% of district employees), other services (17%), and healthcare and social assistance (6%).
- Alongside the joint-lowest retail business density, on average the Observatory and Huron retail businesses only have 4 employees, the lowest of all Cambridge districts, highlighting the comparatively smaller size of district retail businesses and retail operations.

**Hill- Village's offer is largely focused on specialty retail and food and drink**

- **Figure 8.1** shows retail stores account for 62% of retail tenants and 50% of retail spending in The Observatory and Huron; no other district has a higher share of retail store tenants.
- Replica model shows that restaurants, bars and cafes represent 35% of tenants, yet only 19% of spending (below the citywide average), suggesting smaller per-establishment revenues.
- Entertainment, recreation and hospitality now has a higher share

**Figure 8.1 District retail tenant and spending mix, 2024**



Source: Data Axle US Business database (for tenant mix) and Replica (for in-person spending mix).

Note: In-person spending data for 2024 to July only, not full calendar year. Please see pages 3-4 for further information on Replica's methodology.

of spending than restaurants, bars, and cafes, at 22%.

### District Anchors and Destination Drivers

**There are four small retail hubs in Hill-Village.** These hubs have **clusters of restaurants and retail that serve as destination drivers and include district anchors**: long-standing local businesses that are well-known in the community, attract significant local and visitor traffic, and drive local initiatives and programming. These hubs are:

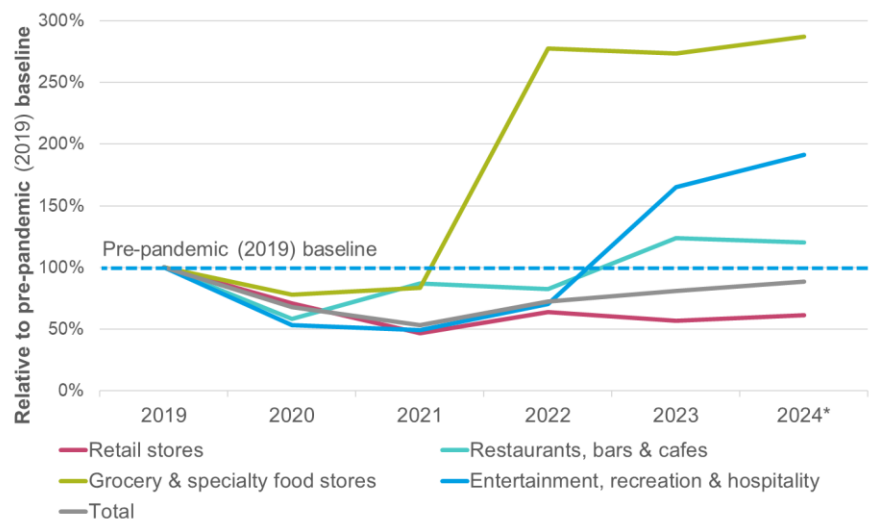
- *Huron Ave. around the Gurney/Chilton St. intersection*: collection of neighborhood restaurants and legacy businesses that act as community anchors.
- *Concord Ave. and Huron Ave.*: Neighborhood restaurants, cafes, and legacy businesses.
- *Concord Ave. and Walden St.*: Neighborhood restaurants and stores. The Cambridge Public Library's Boudreau Branch is also located on this stretch of Concord Ave.
- *Huron Ave. and Appleton St.*: Was previously a small retail hub but there is now a major retail vacancy across from a small plaza.

Other destination drivers – such as local events and programs, recreational amenities, and open spaces that attract foot traffic to the district, especially from outside the district – are explored in more detail in later sections.

### Besides retail stores, all other categories have seen in-person spending recover from the pandemic

- In **Figure 8.2** the Replica model shows in-person spending in retail stores, the district's largest spending category, remains 39% down from 2019.
- In contrast, all other retail categories have recovered strongly, led by grocery and specialty food store spending, which is almost three times 2019 levels.
- Observatory and Huron district has also seen the strongest recovery in restaurant, bars and cafe spending of all Cambridge districts, which is up 21% compared to 2019.

**Figure 8.2 District in-person retail spending index, 2019-2024**



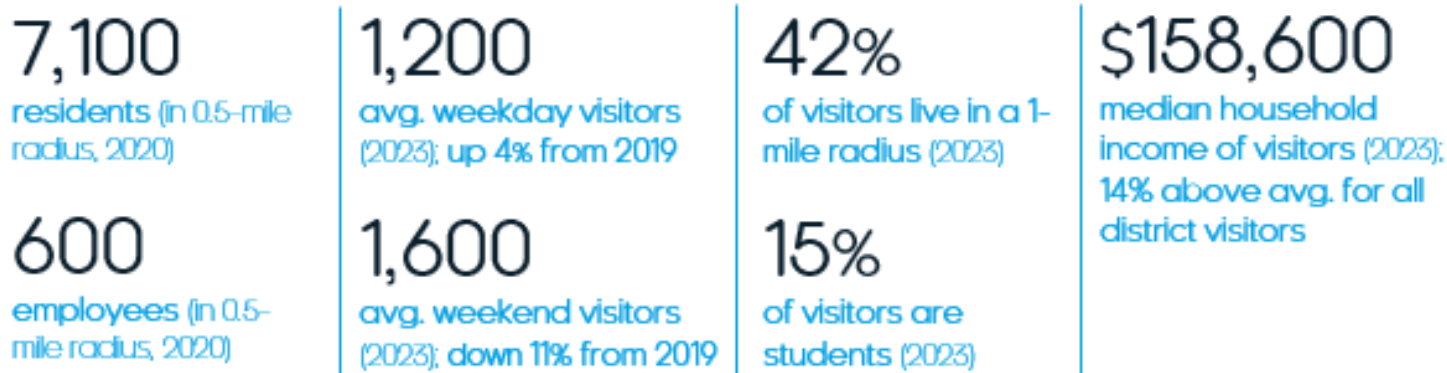
Source: Replica.

Note: Data for 2024 to July only (indexed to same period - to July only - in 2019). Please see pages 3-4 for further information on Replica's methodology.

### Twenty percent of the ground floor businesses active in the Observatory and Huron district before the pandemic are now closed, a similar rate of closure experienced citywide

- All of the Observatory Hill and Huron Village ground floor businesses that closed during the pandemic were retail stores.

- As of May 2024, The Observatory and Huron had 3 ground floor vacant storefronts (defined as those actively leasing, for sale, leased pending occupancy, or under redevelopment).



### 8.3. Market Demand

A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

#### **The Observatory and Huron is a compact, family-oriented neighborhood/community district**

- Of all Cambridge districts, the Observatory and Huron district has the highest ratio of residents (7,100) living in the district compared to employees (600) working in it. Less than half of residents are “Millennials” or “Gen Z”, while 11% (800 total) are of student age.

#### **Less than half of employees in the district could do their remotely**

- Based on industry mix, it is estimated only 45% of the Observatory and Huron district workers could do their job from home in 2021, below the citywide average (65%). Given the very small number of workers in the district, however, it is unlikely this trend has had a significant impact on district retail.

#### **Post-pandemic Observatory Hill and Huron Village have experienced the strongest recovery in weekday visitors of Cambridge districts**

- The Replica model shows average weekend visitor numbers to the Observatory and Huron were 11% lower than 2019, identical to the average shortfall for all Cambridge districts.
- But for weekdays, visitor numbers were 4% above their 2019 baseline; no other Cambridge district has experienced a stronger recovery in weekday visitors. This performance has likely been assisted by the low number of workers present in the district, in addition to residents who are able to work from home and visit the district during the week.

#### **The Observatory and Huron visitors are typically older than other districts and have very high household incomes**



- In 2023, 40% of the Observatory and Huron visitors were aged over 50, above the 32% average for all districts. The share that were students (15% of visitors) was slightly below the average of other districts.
- The median household income for Observatory and Huron visitors in 2023 was \$158,600, the highest of all districts in Cambridge, and above the average of \$139,200 for visitors to other districts. This suggests stronger purchasing power among visitors than elsewhere in Cambridge.

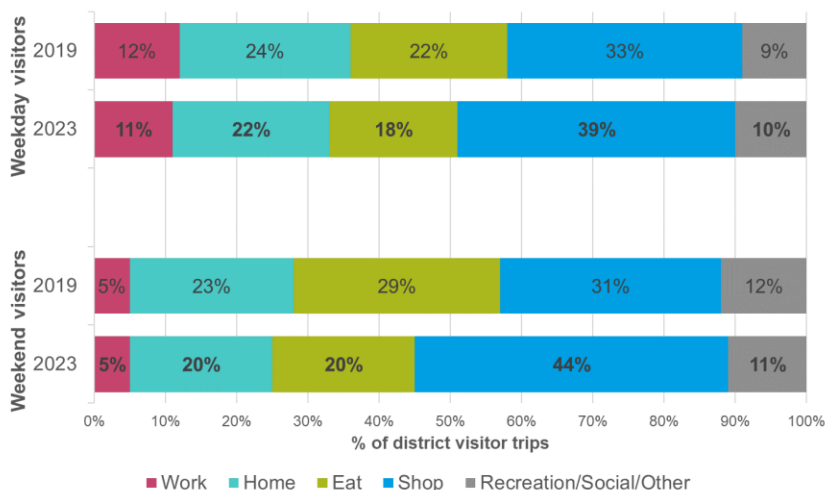
### The majority of the Observatory and Huron visitors live close to the district

- Reflecting its compact neighborhood/community status, the Replica model shows 42% of visitors to the Observatory and Huron live within a 1-mile radius of the district, above the average of 30% for other districts and the second highest share of all districts.
- The Observatory and Huron district attracts comparatively few visitors from farther away; only 26% of visitors in 2023 travelled from beyond a 5-mile radius of the district, the lowest rate of Cambridge districts.

### The purpose of visitor trips reinforces the Observatory Hill and Huron Village's status as a neighborhood for living, shopping and leisure

- On both weekdays (39% of total trips) and weekends (44%) most visitor trips are for shopping purposes, and both up on their 2019 (Figure 8.3).
- No other Cambridge district has a higher share of trips for shopping purposes.
- The district also has the highest share of trips for home purposes of all districts in Cambridge, reflecting its neighborhood status.
- Given its limited number of workers, only 11% of weekday trips are for work, and largely unchanged from 2019.

Figure 8.3: Purpose of visitor trips to district, 2019 and 2023



Source: Replica. Please see pages 3-4 for further information on Replica's model methodology.

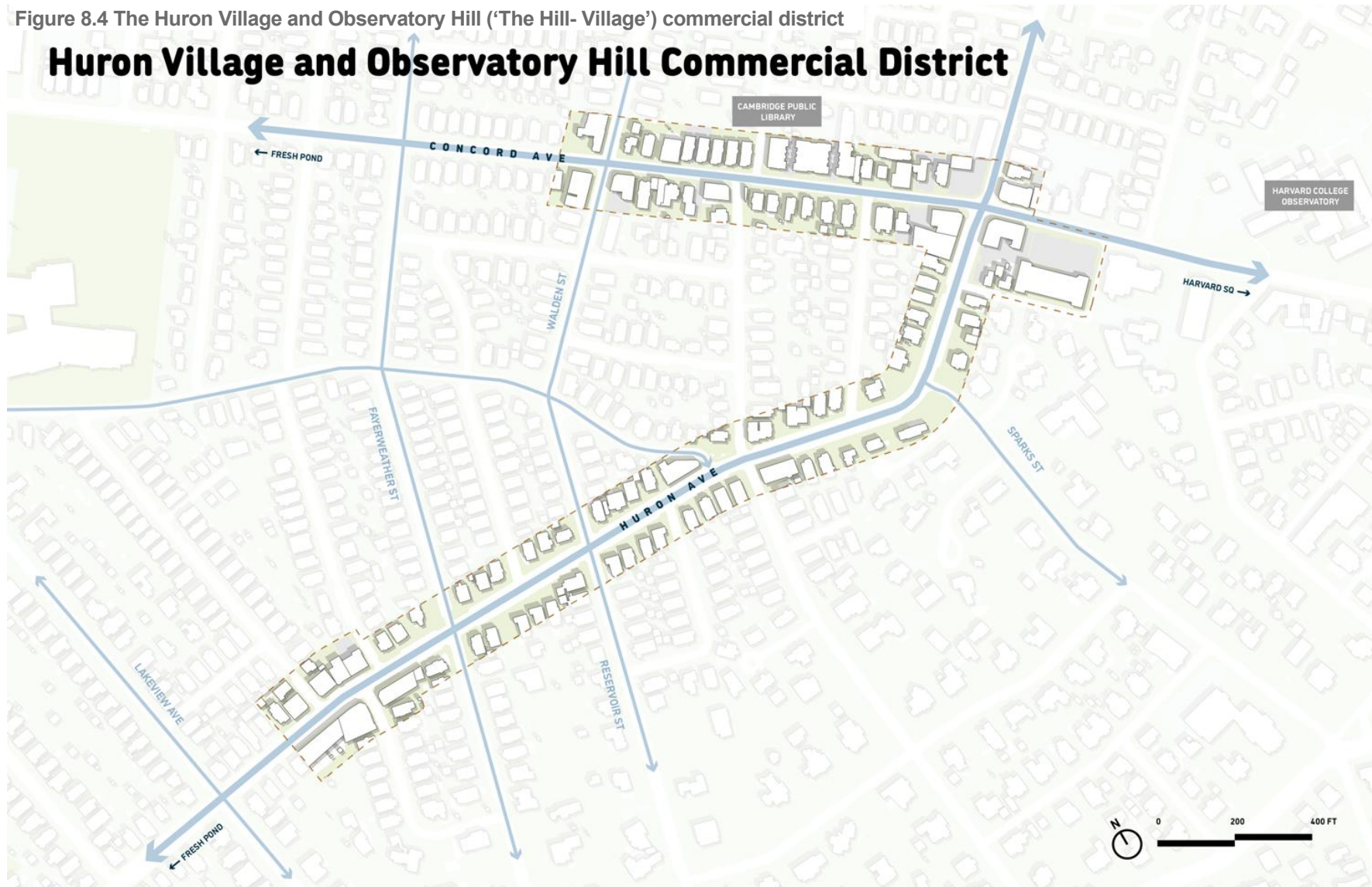
## 8.4. Physical Environment

### The physical environment of a retail district includes the following:

- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.

- **Access:** includes vehicles, pedestrians, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

Figure 8.4 The Huron Village and Observatory Hill ('The Hill- Village') commercial district



Source: Commercial district boundaries as defined by City of Cambridge ([see here](#)). Map design by Agency.

**There are three to four small retail hubs in the Observatory Hill and Huron Village neighborhood (Figure 8.4), and their physical environment is characterized by:**

- Low concentration of retail within low-rise residential area
- Primarily single-story development and neighborhood restaurants, grocery stores, specialty retail, and small offices.
- A mix of small-scale local retail creates an intimate and charming character for the neighborhood. Specialty retail includes restaurants, specialty food, galleries, and boutiques.
- Three to four hubs of retail activity at the intersection of Huron and Concord Aves., and branching west from there. Each hub is separated by residences, creating a disconnected retail experience.
- Ornamental planting, flowers, and vibrant storefronts throughout the corridor
- Narrow sidewalks lead to smaller, distributed placemaking elements

### Public Realm

**The Observatory and Huron's character is defined by its intimate, enclosed pedestrian experience.** It is embedded in a residential area, which comes through in the smaller scale spaces, garden-like plantings, and more intimate gathering moments.

Across the district, there is generally a pleasant public realm:

- Low to medium concentration of retail
- High mature tree canopy and vibrant, floral plantings
- Low pedestrian activity along narrow sidewalks
- Distributed benches and seating areas

There are several small public plazas. The plaza at the corner of Huron Ave. and Appleton St. has amenities like benches, trees, plantings, and a BlueBikes station. A few bump outs or sidewalk widenings have created places to put gathering elements or other infrastructure.

However, compared to the rest of the district, Concord Ave. is more car-oriented and lacks shade.

### Private Realm

**The private realm in Observatory and Huron is disconnected between hubs by residences, but the character is similar throughout.** It is defined by boutiques, specialty retailers and beloved neighborhood restaurants. Storefronts are often painted bright colors. There are occasional moments of fun throughout the district. The district has a medium active private realm.

- Low concentration of outdoor dining and seating areas, typically formal and well-designed and constructed
  - Vibrant storefront displays and sidewalk activity (colorful signage, seating)

### Access and Visibility

**The Observatory and Huron district runs along Concord Ave. and Huron Ave., each of which have two**



**lanes of traffic.** Huron Ave. also has bike lanes and on-street parking on both sides. Concord Ave. has on-street parking on one side and bikes share the road with vehicle traffic.

- Given it is predominantly residential neighborhood, the district has heavy car traffic, especially along Concord Ave. A lack of shade on this corridor creates a challenging pedestrian experience. Sidewalks are generally narrower, and bike racks are well distributed throughout the district.
- The Huron and Concord Ave. intersection serves as a major gateway to the district. However, the retail across the four corners feels disconnected because of the topography and heavy traffic.
- There is one Bluebikes station located at the intersection of Huron Ave. and Appleton St. It is across from the vacant retail building where Formaggio Kitchen was formerly located.

### **As a residential neighborhood, Observatory and Huron is one of the most car-dependent districts in Cambridge**

- The Replica model shows on both weekdays and weekends, just under two-thirds of visitor trips to the district was by car in 2023 – only Alewife had a higher share of trips by car.
- Between 2019 and 2023, walking became more popular, especially on weekends where it has increased from 31% of all trips to 37%. The district has the lowest share of trips by public transportation in Cambridge, at only 3% of trips on weekdays.
- Given its compact size and residential nature, trips to the Observatory and Huron have the shortest travel time among Cambridge commercial districts, standing at just under 20 minutes in 2023.

### **Branding and Placemaking**

There is no formal branding for the Observatory and Huron district. It is defined by its whimsical nature, flowers, art, and food. Boutique, small-scale retail and vibrant planting define the district's character. It feels like a neighborhood retail corridor, with resident-centric services and small offices. Individual stores have taken on an artful look, with brightly painted storefronts and benches.

## **8.5. Adaptive Capacity**

Local adaptive capacity plays a crucial role in achieving the long-term, community-driven vibrancy of a district. It represents a district's leadership, organizational capacity, resources (both human and financial), and regulatory and policy frameworks.

**There are no business associations in Observatory Hill and Huron Village, so organizing falls onto small businesses to do amongst themselves.** Harvard College Observatory is the research hub of Harvard University's Department of Astronomy. They host community events and are an institution partner for the commercial district.

**Some anchor businesses and institutions host events and programs.** These events include:

- **Formaggio Kitchen's Summertime Weekend BBQ (weekly) and Superbowl BBQ (annual)** each weekend over the summer, Formaggio hosts BBQ pick-up outside of their store. As a special event, they also bring back their Weekend BBQ for the Superbowl in February.

- **Observatory Hill Holiday Stroll (annual)** happening in December, this event is a chance for local businesses to connect with their customers. The event was started by Observatory Hill businesses over ten years ago. The event invites people to shop, stroll, and meet local retailers, who offer refreshments and holiday activities. Stores decorate their shopfronts for the holidays. In 2023, Huron Village participated and expanded the stroll.
- **Harvard Observatory Nights (monthly or occasionally)** the Harvard College Observatory hosts these public events, usually on the last Thursday of selected months. These popular events feature guest speakers and astronomers who guide visitors through the night sky.

**Without a business association of their own, the Observatory and Huron is represented by an active network of citywide business associations**— such as the Cambridge Chamber of Commerce, Cambridge Local First, and Cambridge and Somerville Black Business Network. Many of these organizations run marketing campaigns that also cover the district. For example, Cambridge Local First has been active in supporting the local businesses of Observatory Hill and Huron Village through their community events and advocacy work, most of which is done virtually.

## 8.6. Recommendations

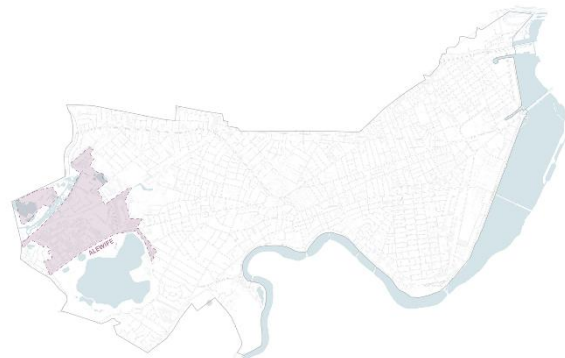
### **Recommendation 1: Highlight the attractions of Huron Village and Observatory Hill in citywide marketing materials to draw visitors from farther away**

**Rationale:** Huron Village and Observatory Hill's unique specialty retail offerings and its proximity to a higher-income resident base have resulted in a small but successful commercial district that captures local resident spending, with 42% of its visitors from within a 1-mile radius of the district. It attracts fewer external visitors, highlighting an opportunity to capture a broader audience.

**Objective:** Express the artisanal identity of the district and promote a welcoming community image to draw visitors.

- Work with local business leaders and stakeholders to define the district's character and express its appeal in a coordinated marketing campaign. In addition to outward communications the campaign could feature benefits for visitors such as discounted prices or rewards at participating restaurants or stores.
- Continue to support local businesses to promote and grow signature events in the district such as the Huron Village and Observatory Hill Holiday Stroll. In addition to existing events, gauge interest in new programming such as thematic markets that highlight both local businesses and pop-ups from complementary businesses outside of the district.

## 9. Alewife



### 9.1. Key Takeaways

**Alewife is the largest commercial district in Cambridge. It is made up of distinct, mixed-use areas** including old and new residential, light manufacturing, modern offices, and retail. The district has significant development potential estimated to be about and additional 3 million square feet. **Alewife is well-served by regional road and public transit assets, which are partly responsible for creating the distinct areas within the district.** Our analysis shows:

- Alewife is one of two districts (alongside Kendall Square) where retail isn't the largest-employing industry. Just over half of district employees work in professional services or healthcare, largely concentrated in areas north of its rail/transit corridor.
- According to the Replica's model<sup>9</sup>, Alewife generates more in-person retail spending than any other district, with a focus on specialty retail and groceries. Nevertheless, as of 2023, in-person retail spending in Alewife is still down 22% from 2019 levels.
- Alewife's retail offer draws in large amounts of non-resident spending on groceries, with national grocery store chains leveraging their location near Arlington and Belmont. Retail leakages elsewhere however suggest the district could capture more local spending in categories such as clothing and accessories, general merchandise, and eating and drinking.
- Alewife primarily caters to an older, higher-income customer base (only Kendall Square visitors have higher average incomes). Reinforcing this finding, 38% of visitors reside outside a 5-mile radius, which is higher compared to the other districts.
- Post-pandemic, visitor numbers to Alewife have recovered slowly, especially for weekend visitors. Alewife's decline in visitor numbers has not been accompanied by an increase in visitor trips, as witnessed in other districts.
- The physical environment of Alewife is generally characterized by large city blocks with big building footprints occupied by low- to mid-rise office, retail, and multi-family residential uses. Wide, high-traffic avenues, parkways and several parking lots promote driving over walking in the district – in fact, visitors have the highest car-dependency of all districts in Cambridge.
- There is minimal signage, wayfinding, or sense of visual identity throughout the district, and regional railways

---

<sup>9</sup> Replica compiles various data sources to create modelled data. These models are used in the report to give a sense of what may be going on in each area only. For more information on Replica, please check out the methodology section on pages 3-4 of this report.

and parkways bisect the district to physically separate the triangle to the north from the quadrangle below. Pedestrian connections often include navigating overpasses and underpasses to cross major infrastructure barriers.

- Reflecting its mixed use, the visual landscape of Alewife is eclectic and defined by branded signage from storefronts and malls. There are some small-scale instances of place-making scattered throughout the district.



## 9.2. Business Environment

580 total business tenants (2024)	0.06 retail businesses per acre (2024)	\$296 million in-person retail spending (2023)	2 vacant ground floor store-fronts (Spring 2024)
70 retail business tenants (2024)	15 employees average per retail business (2024)	22% below pre-pandemic baseline spending	50% vacant storefronts 'long-term' (2+ years)

The density and type of retail offerings in a district is often a reflection of the underlying business conditions and market dynamics and can offer insight into the health of local retail businesses.

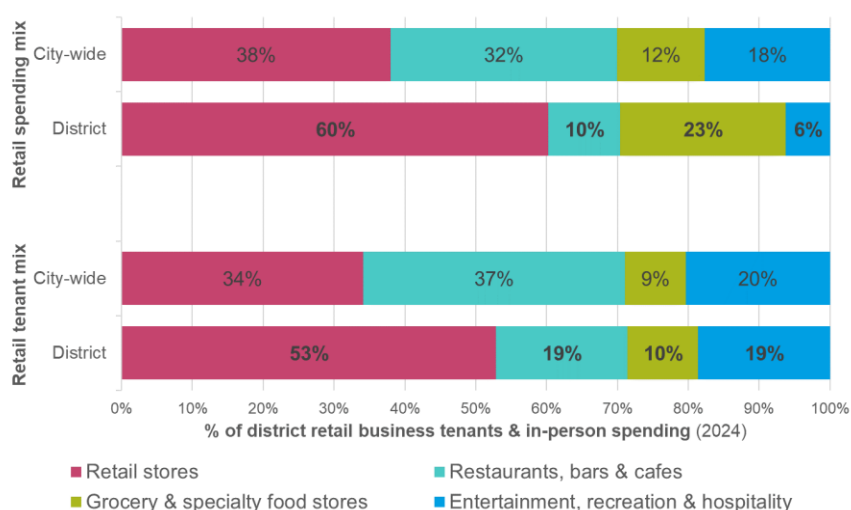
**The Alewife district is home to 580 businesses with 7,900 employees. Professional, scientific, and technical services is the largest-employing industry with 25 businesses and 2,700 employees**

- Alewife's 70 retail businesses account for 13% of all the employees in the district. Only Kendall Square has a smaller proportion of employees working in retail, reflecting Alewife's larger geography and non-retail development – in fact the largest-employing industries in the district are professional, scientific, and technical services (34% of district employees) and health care and social assistance (17%).
- Given its large geography, Alewife has the lowest retail business density (per acre) of all districts. However, Alewife retail businesses tend to employ a higher number of people (15 on average), which reflects the larger retail businesses (notably grocery stores) in the area.

**Alewife is an established destination for specialty retail and groceries, and has the highest in-person spending of all districts in Cambridge**

- Retail stores account for 53% of retail tenants and 60% of retail spending (Figure 9.1); no other district has a higher share or value of spending in retail stores.
- According to the Replica model, Alewife has the highest share and value of spending in grocery and specialty food stores (23%).
- Alewife accounts for 31% of total retail spending and 36% of total grocery and specialty food spending in Cambridge.

Figure 9.1 District retail tenant and spending mix, 2024



Source: Data Axle US Business database (for tenant mix) and Replica (for in-person spending mix). P  
Note: In-person spending data for 2024 to July only, not full calendar year. Please see pages 3-4 for further information on Replica's methodology.

- Restaurants, bars and cafes represent 19% of tenants, yet only 10% of spending, a similar pattern seen in entertainment, recreation and hospitality.

### District Anchors and Destination Drivers

**Alewife's retail activity is concentrated in three distinct hubs.** While these hubs are adjacent to one another, they are unique in scale, character, and type of retail offerings. As such, they serve as destinations for different trip purposes and audiences, including residents beyond their immediate surroundings:

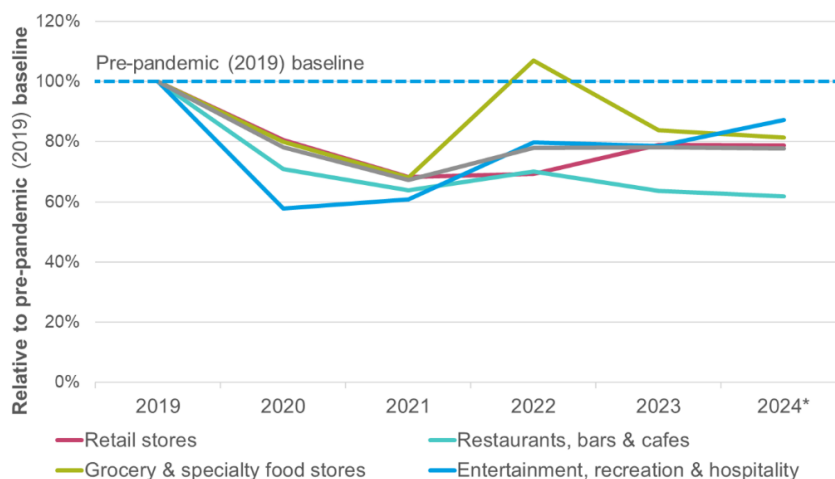
- *Fresh Pond Mall and Alewife Brook Parkway Shopping Center:* Two large-scale shopping centers with a mix of commercial offerings. Large retailers occupy a significant footprint. The malls are also home to the area's primary grocery stores which consist of large chains. National food caters to the nearby residents and office workers. In addition, the centers provide entertainment offerings like a movie theater, rock climbing gym, and yoga studio. There are large surface parking lots for customers driving to the area, suggesting that this hub is intended to serve a wide audience rather than just those nearby.
- *Concord Ave. and Bay State Rd, between Teeven Memorial Circle and Birch St.:* A smaller-scale commercial area in the district comprised of neighborhood dining and specialty shops, including a legacy business.
- *Fresh Pond Parkway, south of Brodette Memorial Circle:* A short corridor of automotive repair shops, car dealers, and gas stations. A small strip mall at the north of the corridor provides an eclectic mix of secondary storefronts including a bank, a cellphone store, a paint store, and a veterinary office.

The district is also home to the Alewife MBTA Station and Parking Garage and Danehy Park, both which serves, in many ways, as a multi-modal gateway into the City of Cambridge. Despite this key regional connection, many people might not find themselves stopping to explore the area and patronize local businesses because it lacks human-scale spaces. Instead, it becomes a steppingstone on the way to other destinations by train, bike, or by car.

### No retail category has seen its in-person spending recover past its pre-pandemic baseline

- According to the Replica model, entertainment, recreation and hospitality spending has shown the strongest recovery, but remains 6% below its pre-pandemic baseline (see Figure 9.2).
- Despite recovering through 2021 and 2022, spending at grocery and specialty food stores is still 19% down from 2019.
- Spending at restaurants, bars and cafes sits 38% below pre-pandemic levels. Retail store spending – Alewife's largest spending category – is still 20% down from 2019.

Figure 9.2 District in-person retail spending index, 2019-2024



Source: Replica.

Note: Data for 2024 to July only (indexed to same period - to July only - in 2019). Please see pages 3-4 for further information on Replica's methodology.

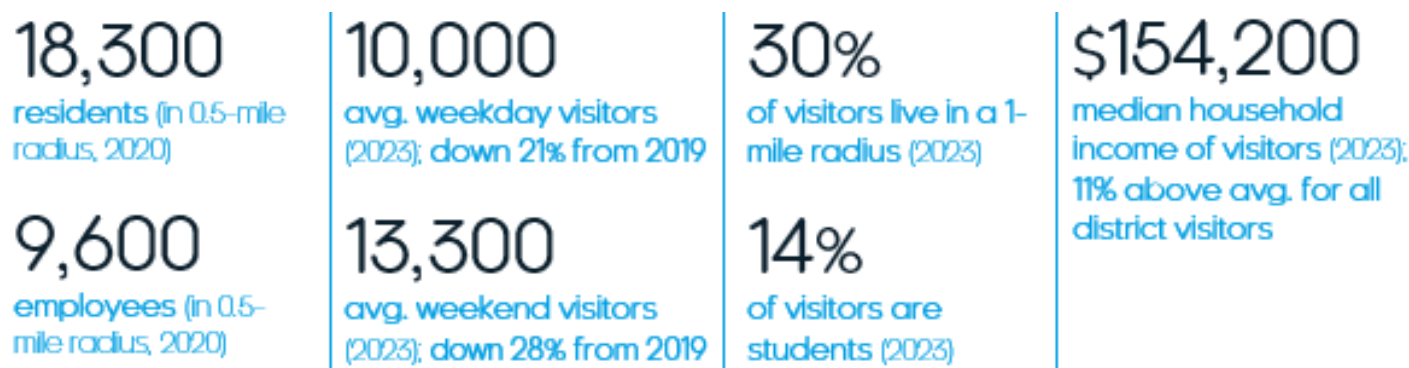
**Almost a quarter of the ground floor businesses active in the Alewife district before the pandemic are now closed, the same rate of closure experienced at the citywide level**

- Most Alewife ground floor businesses that closed during the pandemic were restaurants, bars and cafes (60%), with a smaller proportion being retail stores (20%), both similar shares to the citywide average.
- As of May 2024, Alewife had only 2 ground floor vacant storefronts (defined as those actively leasing, for sale, leased pending occupancy, or under redevelopment).

**Grocery stores generate a large surplus for the district, although other categories are not able to meet local demand**

- Alewife district could further build its offerings in specialty retail – most notably general merchandise and clothing and accessories.
- Such business attraction should focus on those that are reliant on in-person spending/provide an experiential offer, to ensure a greater share spending is kept in the district.
- The district does have a large surplus related to its large, national chain grocery stores, which bring in demand from non-residents and reinforce the status of such stores as destination drivers for the district.

### 9.3. Market Demand



A successful commercial district depends on a robust customer base. To understand market demand, this section quantifies and describes the typical customer base and spending habits, including residents and visitors.

**Alewife is a neighborhood/community district, with an older, more family-oriented age profile**

- With almost twice as many residents (18,300) living in the district compared to employees (9,600) working in it, the Alewife district has a strong residential base (only Mass. Ave and Observatory and Huron has a higher ratio of residents than employees).
- The district has seen significant growth in multi-family residential development over the past two decades, resulting in an older, family-oriented demographic; less than half of residents are “Millennials” or “Gen Z” \*the lowest of all districts), while only 6% (1,100 total) are of student age.

**Over half of jobs in Alewife could be done remotely**

- Based on industry mix, it is estimated 55% of Alewife district employees could do their job from home in 2021, below the citywide average (65%). This lower trend may have partially protected district retailers from

the retail impacts associated with remote work, especially in terms of weekday food and drink trade.

### Post-pandemic visitor numbers to Alewife have recovered slowly, especially for weekend visitors

- The Replica model shows average weekend visitor numbers in 2023 to Alewife are still down 28% from 2019, and 21% down for weekday visitors.
- In contrast to other districts, Alewife's decline in visitor numbers has not been accompanied by an increase in visitor trips, which means visitors are not only visiting the district less often but making fewer trips within the district when they do visit i.e., visiting only one store, rather than a store and café for instance.

### Alewife visitors are typically older than other districts, and have above average household incomes

- In 2023, 37% of Alewife visitors were over the age of 50, which exceeds the 32% average for all districts. The share that was students (14%) was the lowest of all districts in Cambridge.
- The median household income for Alewife visitors in 2023 was \$154,200, above the average of \$139,200 for visitors to other districts, and the second highest visitor incomes of all Cambridge districts, suggesting stronger buyer power among visitors

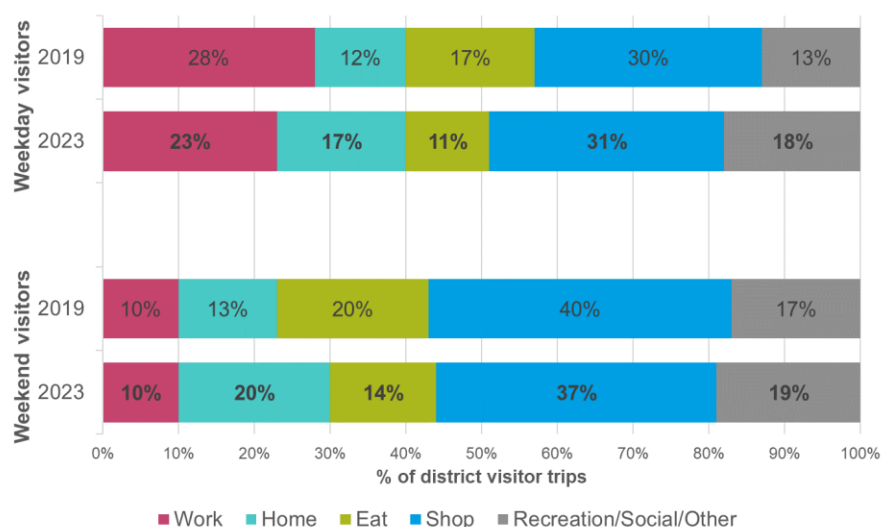
### Despite its emerging neighborhood status, a large number of Alewife visitors live outside of a 5-mile radius

- The Replica model shows 30% of visitors to Alewife live within a 1-mile radius of the district, identical to the average for other districts. This is also an increase on the 26% share recorded in 2019.
- At the same time, Alewife attracts a good number of visitors from farther away; 38% of visitors in 2023 travelled from beyond a 5-mile radius of the district, largely from other communities in Greater Boston – only Kendall Square attracted a higher share of visitors from outside this radius.

### The purpose of visitor trips reinforces Alewife's diverse offer as a destination for living, work, shopping and leisure

- According to the Replica model, on both weekdays (31% of total trips) and weekends (37%) the largest proportion of visitor trips are for shopping purposes (see Figure 9.4). Both are largely unchanged since 2019.
- The district has the second highest share of trips for home purposes of all districts in Cambridge, reflecting its neighborhood status.
- Some 23% of weekday trips are for work, but down from 28% in 2019, reflecting the uptake of remote/hybrid working.

Figure 9.3: Purpose of visitor trips to district, 2019 and 2023



Source: Replica. Please see pages for 3-4 for further information on Replica's methodology.



## 9.4. Physical Environment

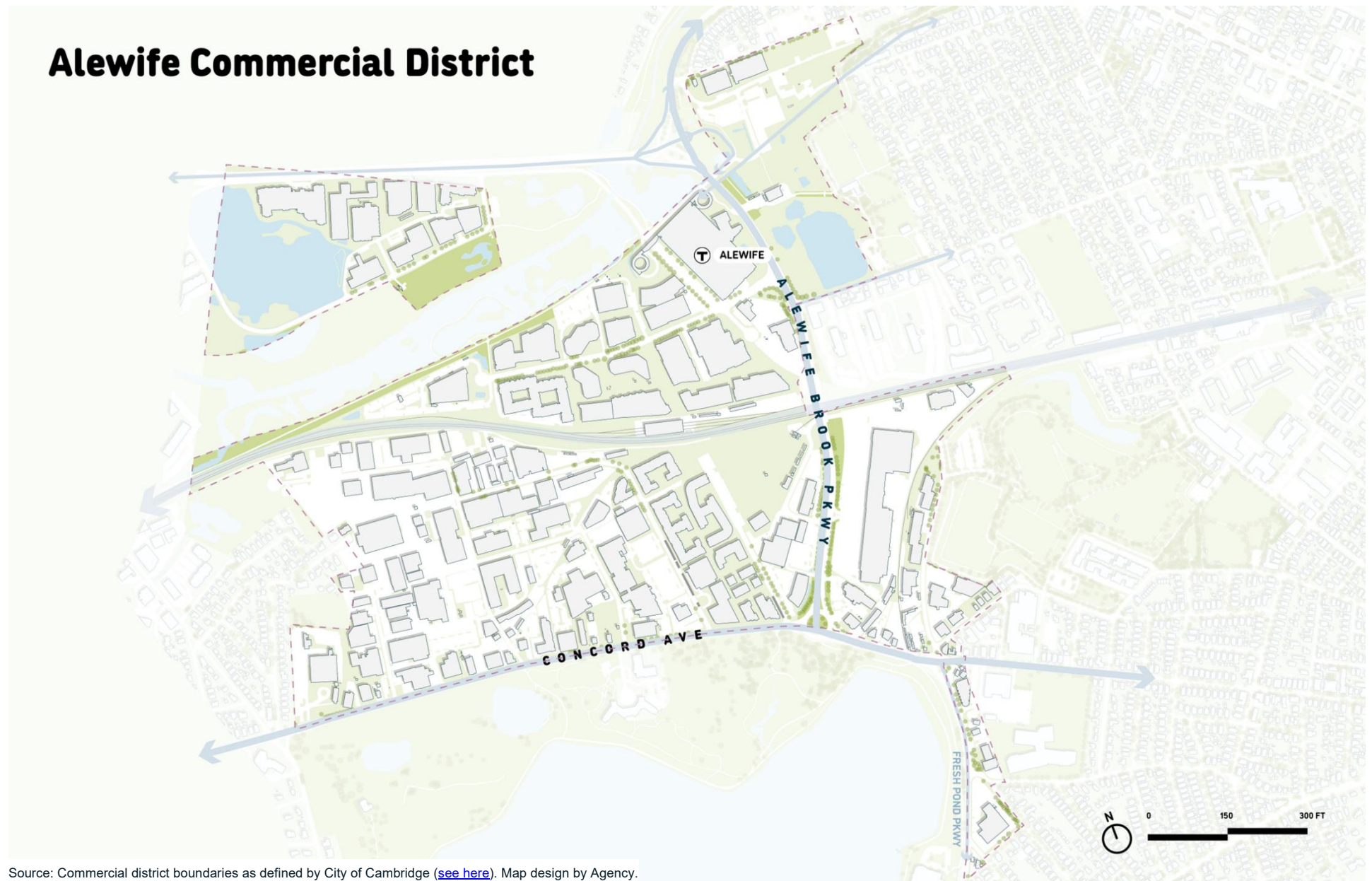
The physical environment of a retail district includes the following:

- **Public realm:** sidewalks, streets, and plazas. The quality, character, and programming in the public realm impacts the retail experience. The City, neighborhood associations, and business district organizations typically manage this realm.
- **Private realm:** includes storefront displays, areas immediately outside of storefronts, and outdoor dining areas. Business owners typically manage signage and art, styling, seating, and programming in this realm.
- **Access:** includes vehicular, pedestrian, biking, transit, parking, and gateways and transitions between districts.
- **Branding and placemaking:** help define a district's unique identity and character. Branding includes graphics and signage, advertising, and wayfinding. Placemaking includes public art installations, outdoor furniture and planting, and other physical elements.

The physical environment of the Alewife district (**Figure 9.5**) is generally characterized by:

- Large blocks with big building footprints occupied by low- to mid-rise office, retail, and multi-family residential uses
- Wide, high-traffic avenues, parkways, and several parking lots promote driving over walking in the district
- Minimal signage, wayfinding, or sense of visual identity exists throughout the district
- Railways and parkways bisect the district and physically separate the triangle to the north from the quadrangle below. Pedestrian connections often include navigating overpasses and underpasses to cross major infrastructure barriers

Figure 9.4 The Alewife commercial district



## Public Realm



Images show young tree canopy along the north side of Concord Ave. (left). Bike racks located adjacent to private apartment buildings (center). Bike lane running along Concord Ave. (right)

**Fast-moving car and bicycle traffic dominates the Alewife district.** There are narrow sidewalks, infrequent crosswalks and busy intersections throughout the district. Sidewalks generally feature a sparse or young tree canopy with exception to the south side of Concord Ave. due to its adjacency to Fresh Pond Reservation. Bike lanes are fully separated raised to the same elevation as sidewalks.

Design of the public realm within this district is primarily tailored towards vehicular circulation, and spaces are predominantly designed as throughways rather than a place to linger. Public amenities (such as bike racks) are located adjacent to private buildings, potentially hidden from public view or easy use.

## Private Realm



Images show large plaza parking lots (left and center) and entry onto the Alewife Brook Parkway (right)

**Generally, function takes precedence over form within the Alewife district.** Minimal plantings and street ornamentation exist outside of new construction apartment complexes and large research facilities.

**Commercial activity in the Alewife district is primarily composed of big-box retailers and fast-dining establishments.**

- Facades of buildings are relatively nondescript with exception to large retailers.



- Big-box retailers within the Fresh Pond Mall and adjacent plazas predominantly serve local residents and nearby offices.
- Small, independent businesses are interspersed within large employment / office areas and are hard to distinguish from their facade.

**The south-west quadrant between the commuter rail and Concord Ave. reflects physical conditions typical to employment zones.**

- Office spaces feature a mix of pharmaceutical, biotech, and tech companies within large building footprints.
- Service businesses within the district include a mix of medical, fitness (e.g., yoga, pilates, fencing, climbing and martial arts), and automotive.
- Most privately-owned businesses and offices feature a substantial surface parking lots.
- Large parking lots with minimal shade or foliage fragment the site and create a hostile pedestrian environment.

### Access and Visibility

**Alewife is a commuter hub anchored by the Alewife MBTA Station and Parking Garage.** Many regional commuters use the station as a place to park for the day and take the subway farther into Cambridge or Boston to work. Two major state parkways, the Alewife Brook Parkway and Fresh Pond Parkway, and the primary east-west arterial of Concord Ave., connect Cambridge to surrounding suburbs and see heavy car traffic at peak rush hours.

**Despite this substantial through-traffic, circulation within the district proves more difficult and less frequent.** Alewife's northern triangle is cut off from the southern part of the district by a railroad which is not easy to cross by foot or bicycle. With infrequent crosswalks, walking along or across the wide parkways can be challenging. To the south, Concord Ave provides a more pedestrian and cyclist-friendly route with painted bike lanes and slower traffic.

**Alewife is the most car-dependent district in Cambridge, although walking and cycling are becoming more popular**

- The Replica model shows on both weekdays and weekends, approximately two-thirds of visitor trips to Alewife were by car in 2023, only slightly down on the share recorded in 2019.
- Between 2019 and 2023, walking and cycling became more popular, especially weekdays where it has increased from 20% of all trips to 30%. At the same time, trips by public transportation decreased from 16% in 2019 to 9% in 2023.
- Given its low population density and large number of external visitors, trips to Alewife have the second longest travel time among Cambridge commercial districts, at just under 25 minutes in 2023.

### Branding and Placemaking

**The visual landscape of Alewife is eclectic and defined by branded signage from storefronts and malls**

- Malls have branded directories oriented towards informing and attracting drivers along the parkways.
- Lab and office facades are often unmarked other than an address number and small nameplate, contributing



little in the way of visual variety.

### Small-scale instances of place-making are scattered throughout the district

- Exterior dining is available near the Concord Ave and Alewife Brook Parkway roundabout.
- Plaza at Discovery Way and Wim Way serve individuals using the nearby parking garage and the surrounding research facilities.
- Mural and MBTA Sculpture located at the entrance of the Alewife Station parking garage.



Images show examples of branding and signage within the district, highlighting a prevalence of national chains (top row), of placemaking interventions such as planting (bottom left), sculptural works (bottom center) and outdoor dining (bottom right)

## 9.5. Adaptive Capacity

Alewife is recognized as currently undergoing rapid change with lots of new development. Given its geographic location in the city and its surrounding urban landscape of roads, trainlines and waterways, it is somewhat disconnected from the other commercial districts. There is currently no local organization that represents the Alewife business community.

**Although Cambridge has an active network of citywide business associations such as** the Cambridge Chamber of Commerce, Cambridge Local First, and Cambridge and Somerville Black Business Network, these organizations are less active in Alewife compared to other areas where the concentration businesses is higher.

## 9.6. Recommendations

## Recommendation 1: Establish a visual identity through placemaking and branding

**Rationale:** Because of Alewife's primary role as an employment district, there is little in the way of retail-oriented placemaking and no clear district identity.

**Objective:** Align with the citywide goal of district placemaking to define and communicate Alewife's character as a commercial district.

- Collaborate with local business leaders to conduct a workshop with the aim of creating a unique district brand. In doing so, focus on the unique qualities or quirks of the area, like the Alewife fish the district is named after.
- Develop wayfinding in the form of banners, signage, or mapping to highlight local businesses, denote key destinations, and maintain visual continuity throughout the district.

## Recommendation 2: Improve pedestrian walkways through small-scale, streetscape interventions

**Rationale:** The physical environment of the Alewife district is reflective of a typical employment zone with large blocks and building footprints. Wide, high-traffic avenues, parkways, and large parking lots promote driving over walking in the district. Sidewalks are frequently adjacent to fast-moving car and bicycle traffic with minimal barriers between them, making the overall pedestrian experience challenging.

**Objective:** Reduce the impacts of roads and parking lots and improve connectivity to encourage pedestrian movement throughout the district.

### Placemaking and Branding

Los Angeles, CA, USA (left), Port Philip (center), and Austin, TX, USA (right)

These different forms of wayfinding and signage are visible at multiple scales (pedestrian and vehicular).



### Planting to Improve Pedestrian Walkways

London, England (left) and Rennes, France (center and right)

These images demonstrate how planting can be strategically used to improve views along roads, showcasing both temporary and permanent interventions such as planters and landscaping to enhance the public realm.



- Create buffers between walkways, amenities, and vehicular routes through strategic landscaping, street furniture, or barriers. Frame sightlines to retail and commercial goods through the use of signage, street trees, and sculptural works to reduce the visual impact of parking lots.
- Explore options to implement traffic calming measures in areas with high pedestrian traffic starting with low-cost tools like painted markings or movable barriers or planters.