



EAST HARLEM MANHATTAN

Commercial District Needs Assessment



Bill de Blasio
Mayor
Gregg Bishop
Commissioner



Hope Community Inc.
New Harlem East Merchants Association
Union Settlement Association



ABOUT EAST HARLEM



The Neighborhood 360° program was created by the **NYC Department of Small Business Services** to identify, develop, and launch commercial revitalization projects in partnership with local stakeholders. Through proactive planning and targeted investments, Neighborhood 360° supports projects that strengthen and revitalize the streets, small businesses, and community-based organizations that anchor New York City neighborhoods.

The Neighborhood 360° **Commercial District Needs Assessment (CDNA)** highlights a neighborhood's existing business landscape and consumer characteristics. This CDNA features the **125th Street, 116th Street, 110th Street, 106th Street, Lexington Avenue, 3rd Avenue, and 1st Avenue** commercial corridors in **East Harlem** and was conducted in partnership with the **New Harlem East Merchants Association, Union Settlement Association, and Hope Community Inc.** between January and June 2016.

Key issues and opportunities identified through this assessment will help prioritize SBS-supported, local investments, and serve as an informational and marketing resource for the neighborhood.

In This Report

Existing conditions, business data, and qualitative depictions of the neighborhood were gathered from more than **1,000 surveys**, as well as numerous interviews and workshops, with neighborhood merchants, shoppers, workers, community leaders, property owners, and residents.

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Background

For more than a century, Manhattan's East Harlem neighborhood has distinguished itself as a welcoming home for immigrants and entrepreneurs amid continual social and economic change. East Harlem sits between 96th Street to the south, 5th Avenue to the west, and the Harlem River to the north and east. The neighborhood became a transit-rich hub for commuters, residents, and visitors alike with the construction of local subway and regional rail lines in the late 19th century. East Harlem's connectivity to lower Manhattan, the Bronx, and Upstate has cultivated a multi-cultural community served by a series of vibrant commercial corridors.

East 125th Street is a transit-accessible home to a variety of small businesses and cultural institutions. Attractions like the National Black Theater and Triboro Plaza share the street with local restaurants, beauty salons, and national chains. In recent years, the community has come together to revitalize the space under the Metro-North station at Park Avenue (Northern Manhattan's only commuter rail stop) as "Uptown Grand Central."

East Harlem's 116th Street corridor marks the heart of "El Barrio," a name that embodies the thriving Hispanic and Latino community that has grown in the neighborhood over the past several decades. Mexican and Dominican restaurants line the commercial strip, surrounded by shops offering affordable goods for local shoppers and visitors. At the corridor's western edge sits La Marqueta, an iconic neighborhood market that has housed Latino-owned small businesses and other vendors for nearly a century and continues to bring new economic opportunity to the community.

Farther south, the Lexington, 3rd, 2nd, and 1st Avenue corridors, as well as the 110th and 106th cross streets, offer an array of restaurant, retail, and cultural options for the neighborhood. Situated between Central Park and the Harlem River, this district includes popular museums like El Museo del Barrio and the Museum of the City of New York, along with numerous small theaters, galleries, and murals that attest to the neighborhood's rich cultural history. These institutions, as well as major hospitals and schools, bring thousands of visitors and workers to the commercial strips every day to shop, dine, and explore.

Neighborhood Demographics

See more on page 17

More than 120,000 residents of varying ethnicities, nationalities, and incomes call East Harlem home. About 46% of residents identify as Hispanic or Latino, with large populations of Puerto Ricans, Mexicans, and Dominicans. The neighborhood also includes a large African American population (30%). In addition, East Harlem has the highest concentration of NYC Housing Authority (NYCHA) developments in Manhattan, with more than 28% of the neighborhood residing in NYCHA housing. Consistent with East Harlem's history as a host of immigrant groups, 26% of residents are foreign-born.

Future Opportunities

See more on page 5

East Harlem's growth as a neighborhood is unmistakably tied to a unique set of characteristics that have been cultivated over time: a cosmopolitan history, transit connectivity, cultural and educational assets, and affordability. In recent years, residential and commercial development has brought new economic activity to the neighborhood, with more developments, such as NYCEDC's East 125th Street Development, coming online in the next several years. Meanwhile, the **Second Avenue Subway** promises to increase access to the eastern side of the neighborhood for workers, residents, and tourists. Through initiatives like the **East Harlem Neighborhood Plan** and the **East Harlem Community Alliance**, the community's many social service and grassroots organizations continue to collaborate with public and private partners to ensure these new investments translate into economic opportunity for all East Harlem residents and entrepreneurs.

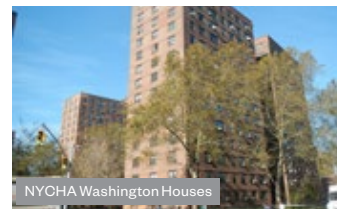
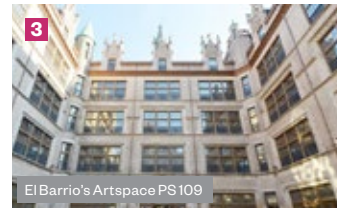
East Harlem



Points of Interest

- Assessed Commercial Corridors
- Business Improvement Districts (BIDs)
- NYCHA Housing Developments
- Public Facilities & Hospitals
- Arts & Cultural Destinations
- Incubators & Co-Working Spaces

Notable Places



Neighborhood Events

- Union Settlement Annual Ethnic Festival
- 116th Street Festival
- Dance of the Giglio Festival
- Three Kings Day Parade
- Mexican Independence Festival
- Uptown Restaurant Week
- Hope Fall Fest
- Cinco de Mayo Fiesta Block Party

Merchant & Business Groups

- Hope Community Inc.
- New Harlem East Merchants Association (NHEMA)
- Union Settlement Association
- East Harlem Business Alliance
- East Harlem Chamber of Commerce
- Hispanic Chamber of Commerce

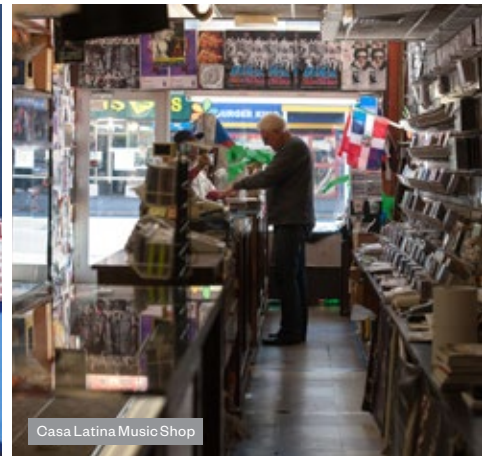
KEY FINDINGS & OPPORTUNITIES

Strengths

- ▶ Many longstanding small businesses in relatively affordable commercial spaces
- ▶ Affordable retail and dining options that represent East Harlem's rich ethnic, cultural, and culinary diversity
- ▶ Popular cultural anchors – including museums, galleries, theaters, and public spaces – that bring residents, visitors, and workers to the neighborhood's commercial corridors
- ▶ Excellent transportation accessibility via subway, bus, car, and commuter rail, with Phase 2 of the Second Avenue Subway set to bring additional transit options
- ▶ Large medical and educational institutions that employ local residents and bring thousands of commuters to the neighborhood
- ▶ New residential development bringing new potential customers to local businesses

Challenges

- ▶ High number of vacant storefronts (14%) and properties reduce activity and lighting on commercial corridors, contributing to safety concerns
- ▶ Rapidly increasing commercial rents apply pressure to local businesses and their ability to offer affordable goods and services
- ▶ Real and perceived safety concerns on commercial corridors, especially at night
- ▶ Changing demographics and tastes require longstanding businesses to adapt in order to grow and better serve a diverse clientele
- ▶ Lack of healthy food, sit-down restaurants, clothing options, supermarkets, and anchor retail on certain corridors, leading many residents to shop outside the neighborhood
- ▶ Inconsistent coordination and communication between City government and multiple community organizations that serve varying stakeholder groups
- ▶ Large concentration of social services in and around the neighborhood contributes to the strain on public realm maintenance





East Harlem Neighborhood Plan Final Community Forum



New Residential Development



El Museo del Barrio



Lexington Avenue Storefronts

Opportunities

- ▶ Attract new businesses to vacant storefronts that meet the neighborhood's demand for healthy food, groceries, and restaurant and clothing options
- ▶ Create and market a unified district identity for the East Harlem neighborhood, including neighborhood-wide events
- ▶ Develop wayfinding materials and guides to direct more workers, residents, and visitors to the full array of local retail and restaurant options
- ▶ Expand support services for business owners that plan on growing in place
- ▶ Support existing coalitions and community groups to actively organize merchants, property owners, and other stakeholders around small business and streetscape needs
- ▶ Clean, beautify, and maintain streets and sidewalks across East Harlem's various commercial corridors
- ▶ Enhance lighting on key commercial streets to address safety concerns and encourage increased foot traffic
- ▶ Program existing open spaces and add new streetscape amenities and beautification elements

What's Next?

To address these key findings and opportunities, Neighborhood 360° Grants will be made available by SBS to not-for-profit organizations.

For more information, visit: nyc.gov/neighborhood360

BUSINESS LANDSCAPE: EAST HARLEM

Business Inventory

778

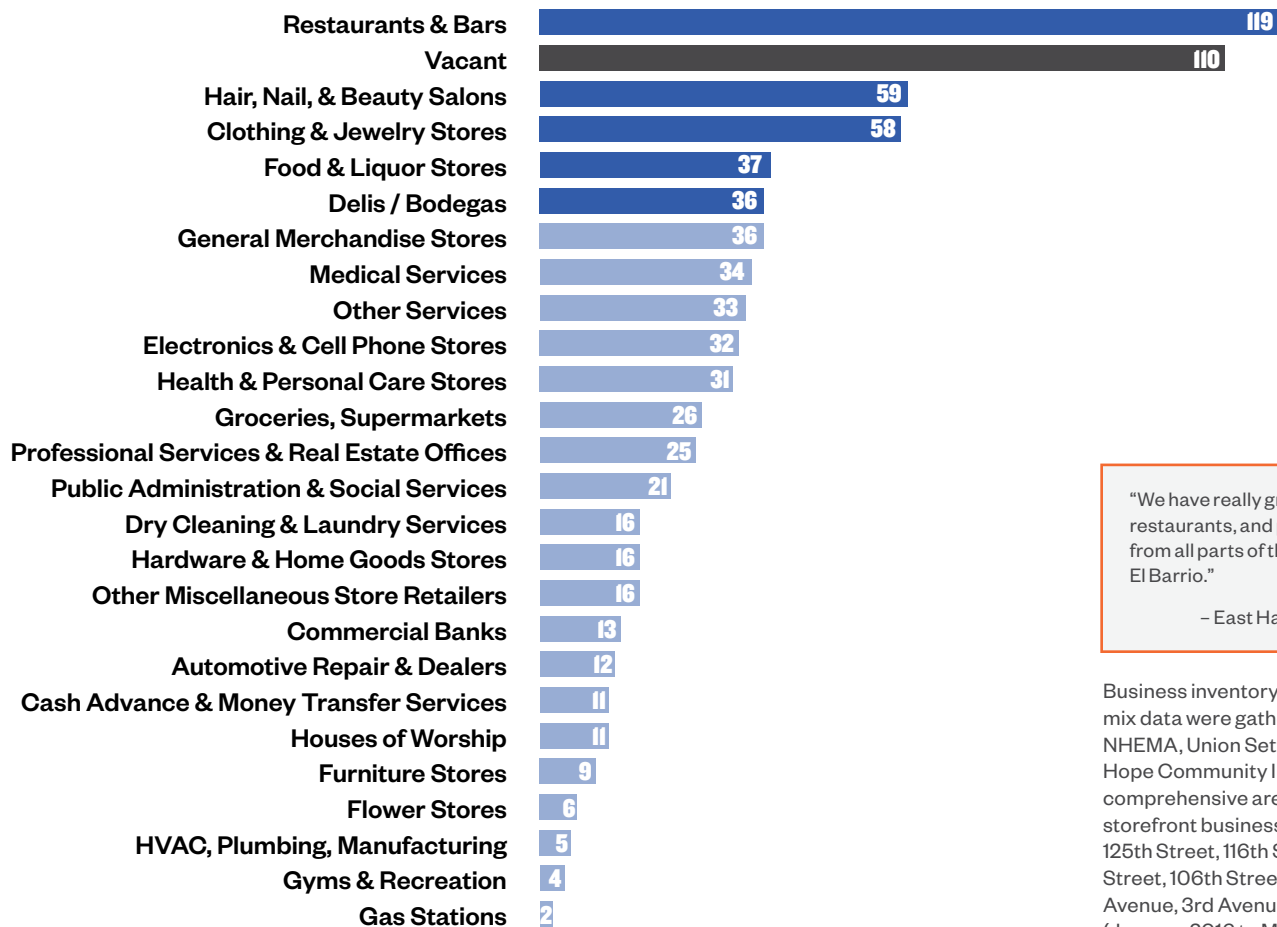
Total Number of Storefronts

14%

Storefront Vacancy*

*Note: In 2015, New York City's 69 Business Improvement Districts reported an average ground floor vacancy rate of 8.3% and median ground floor vacancy rate of 5.6% (SBS BIDs Trends Report, 2015).

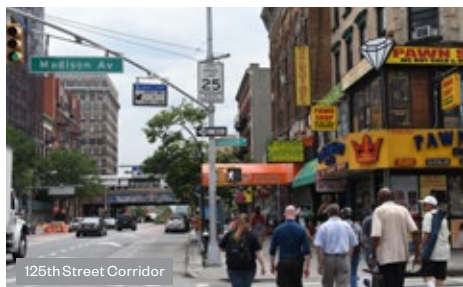
Storefront & Retail Mix



"We have really great restaurants, and people come from all parts of the city to eat in El Barrio."

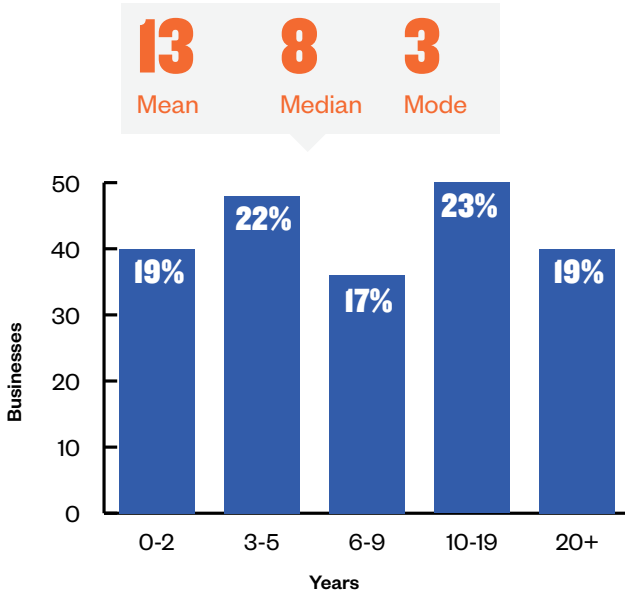
– East Harlem Merchant

Business inventory and retail mix data were gathered by NHEMA, Union Settlement, and Hope Community Inc. through a comprehensive area inventory of storefront businesses located along 125th Street, 116th Street, 110th Street, 106th Street, Lexington Avenue, 3rd Avenue, and 1st Avenue (January 2016 to May 2016).



What We've Heard from East Harlem Merchants

How many years have you been in business here?



How many employees do you have?

4 Mean
3 Median
2 Mode

Do you own or rent your property?

83% Rent
15% Own
2% No Response

Over the past year, has your business improved, stayed the same, or decreased?

15% Improved
35% Stayed the Same
25% Decreased
25% No Response

What changes need to occur on or around your corridor to attract more shoppers?

	% Merchants
► Safety	21%
► Sanitation	21%
► Parking	21%
► Business-to-business communication	16%
► Storefront improvements	15%
► Landscaping	14%
► Community events	12%

What kind of resources would help you grow your business?

	% Merchants
► Marketing support	31%
► Financing	25%
► Space improvements	17%
► New equipment	10%
► Legal / lease support	9%
► Training for staff	8%
► Assistance with regulatory compliance	7%



BUSINESS LANDSCAPE: EAST HARLEM

What We've Heard from East Harlem Merchants

What changes would you suggest to improve the East Harlem commercial district for residents, pedestrians, and shoppers?

"They should put signs up that say 'El Barrio'."

"More activities and oversight for kids are needed."

"The street isn't safe, especially at night."

"More good food that is open late...
Everyone closes early here."

"More supermarkets and restaurants that bring a lot of foot traffic."

"In order to compete we need affordable rent."

What We've Heard from East Harlem Shoppers

What new kinds of businesses would you like to see in East Harlem?

"More Spanish food and shorter lines in the supermarkets."

"Nicer restaurants,
like a date spot."

"Family friendly restaurants where
I can go with my wife and kids."

"I would really like to see more neighborhood
businesses, owned by people originally from 'El Barrio'."

"More healthy food ... It would be nice if
they had a salad spot or a place to pick
up a rotisserie chicken."

"We need a pharmacy like Walgreens for the
elderly that has prices we can afford."

What We've Heard from East Harlem Shoppers

What changes would you like to see to improve the East Harlem commercial district?

"Things to combat the wideness and car-dominated vibe – maybe some parklets."

"Banners that say, 'Welcome to El Barrio.'"

"There's always garbage on the sidewalks and people who don't pick up after their dogs."

"I wish there were more services for people with drug and alcohol problems."

"Sanitation is a major need, and a bit of more lighting in some areas."

"Sidewalks are congested and not safe for kids."

"Some streets could use better street lighting."

"Help possible new business in their starting years so they can stay in the area. I believe some new businesses that offer different goods / services do not last because of limited marketing."

What We've Heard from 125th Street Merchants

Business Inventory & Retail Mix

98

Total Storefronts

25%

Storefront Vacancy

Do you own or rent your property?

80%

Rent

16%

Own

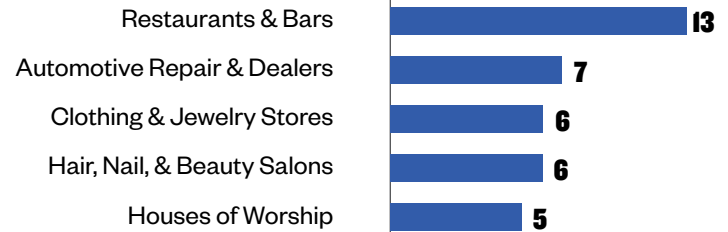
4%

No Response



125th Street Storefronts

Most Common Businesses



What changes need to occur on or around your corridor to attract more shoppers?



What We've Heard from 3rd Avenue Merchants

Business Inventory & Retail Mix

105

Total Storefronts

12%

Storefront Vacancy

Do you own or rent your property?

74%

Rent

21%

Own

5%

No Response



3rd Avenue Storefronts

Most Common Businesses



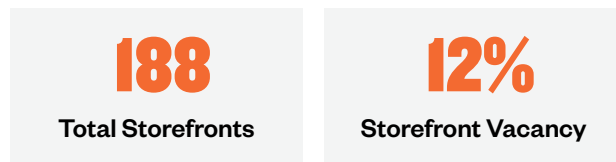
What changes need to occur on or around your corridor to attract more shoppers?



Source: Based on 25 merchant surveys conducted on 125th Street and 19 merchant surveys conducted on 3rd Avenue by NHEMA in Winter - Spring 2016.

What We've Heard from 116th Street Merchants

Business Inventory & Retail Mix



Do you own or rent your property?



Most Common Businesses

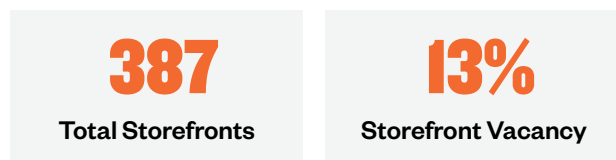


What changes need to occur on or around your corridor to attract more shoppers?

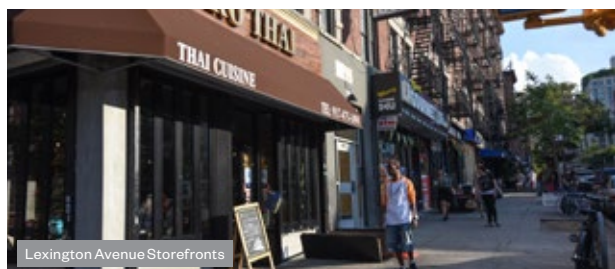


What We've Heard from Merchants South of 112th Street

Business Inventory & Retail Mix



Do you own or rent your property?



Most Common Businesses



What changes need to occur on or around your corridor to attract more shoppers?



BUSINESS OUTLOOK

East Harlem Retail Opportunity

Residents spend

\$2.91B

each year in
goods and services

Local businesses make

\$2.10B

each year in
retail sales

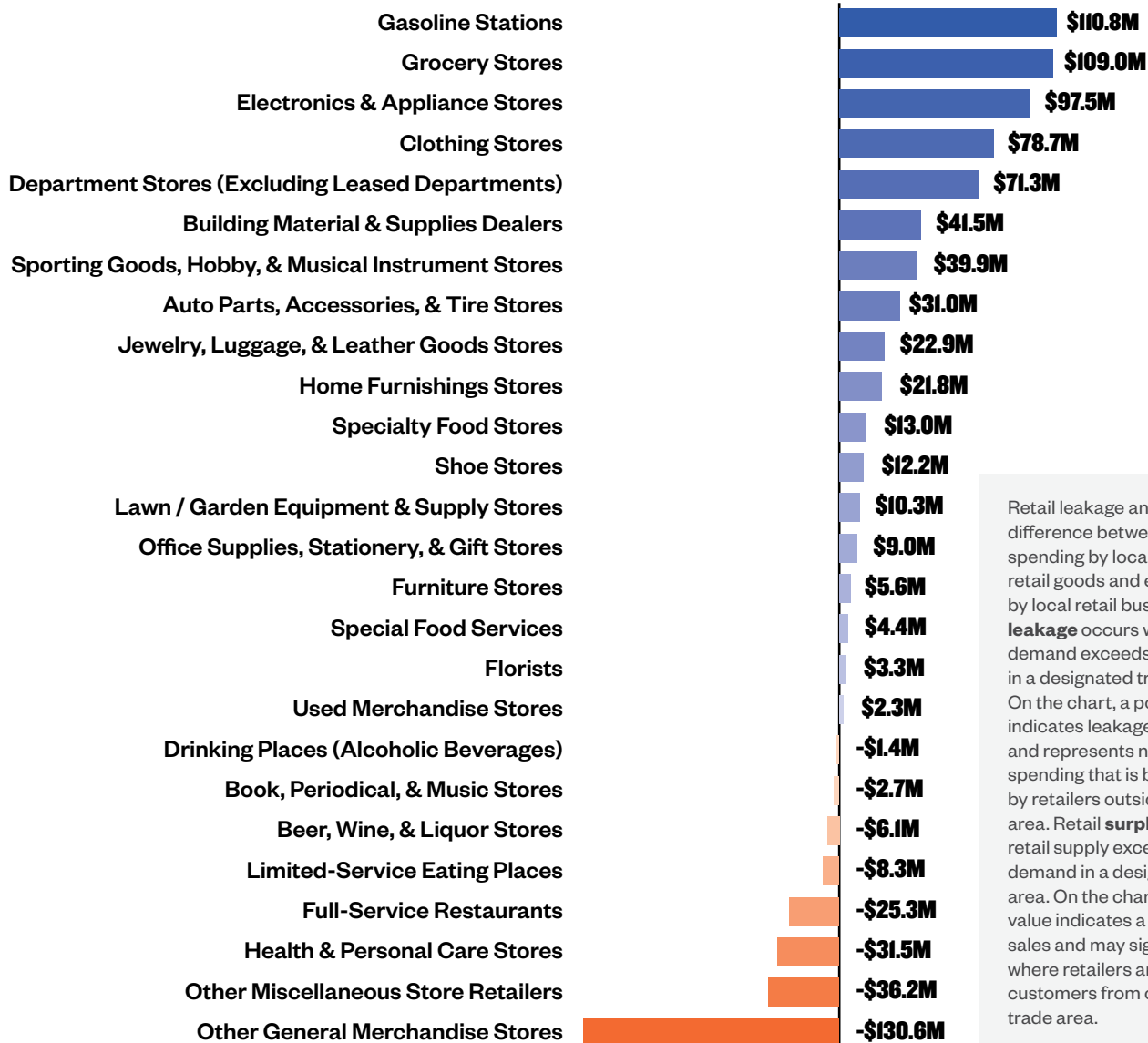
Every year,

\$804.6M

is spent outside
the neighborhood

Retail Leakage & Surplus

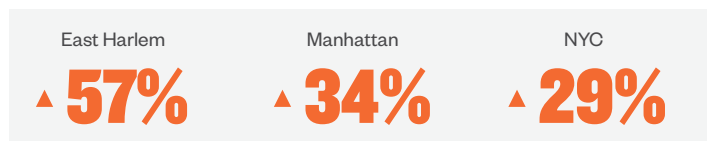
← Surplus \$0 Leakage →



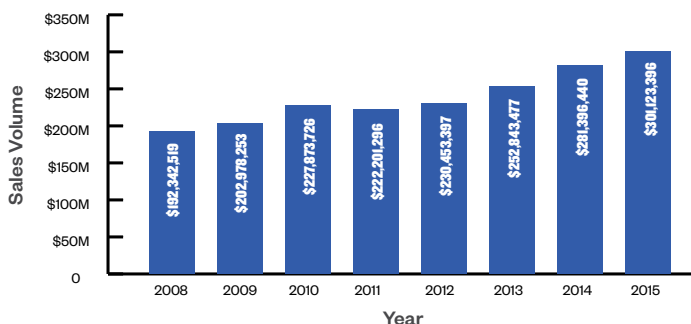
Retail leakage and surplus is the difference between estimated spending by local residents on retail goods and estimated sales by local retail businesses. Retail **leakage** occurs when consumer demand exceeds retail supply in a designated trade area. On the chart, a positive value indicates leakage of retail sales and represents net consumer spending that is being captured by retailers outside of the trade area. Retail **surplus** occurs when retail supply exceeds consumer demand in a designated trade area. On the chart, a negative value indicates a surplus of retail sales and may signify a market where retailers are drawing customers from outside the trade area.

Business Trends

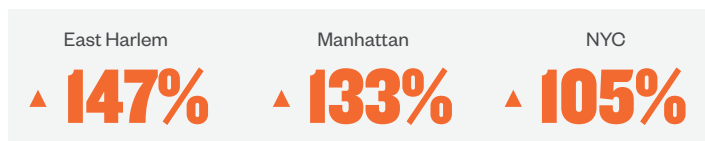
Change in Total Business Sales, 2008-2015



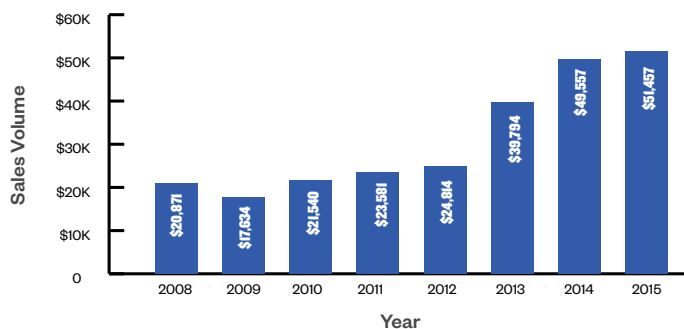
East Harlem Total Business Sales



Change in Median Sales by Business, 2008-2015



East Harlem Median Sales by Business



Source: Division of Tax Policy, NYC Department of Finance.

What We've Heard from Shoppers

What additional types of businesses would you like to see in East Harlem?

▶ Healthy food options	
▶ Supermarkets	
▶ Sit-down restaurants	
▶ Higher quality clothing stores	
▶ Coffee shops / cafes	

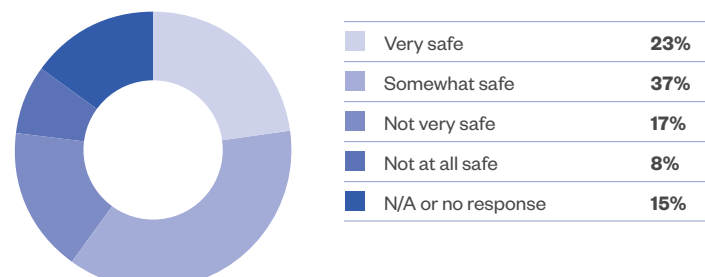
When do you usually go shopping in East Harlem?

	% Shoppers
▶ Weekdays	62%
▶ Weekday evenings	16%
▶ Weekend days	26%
▶ Weekend evenings	14%
▶ No set time	21%

How do you usually travel to get to East Harlem?

	% Shoppers
▶ Subway	51%
▶ Walk	46%
▶ Bus	42%
▶ Taxi/Car service	16%
▶ Car	11%
▶ Bike	1%

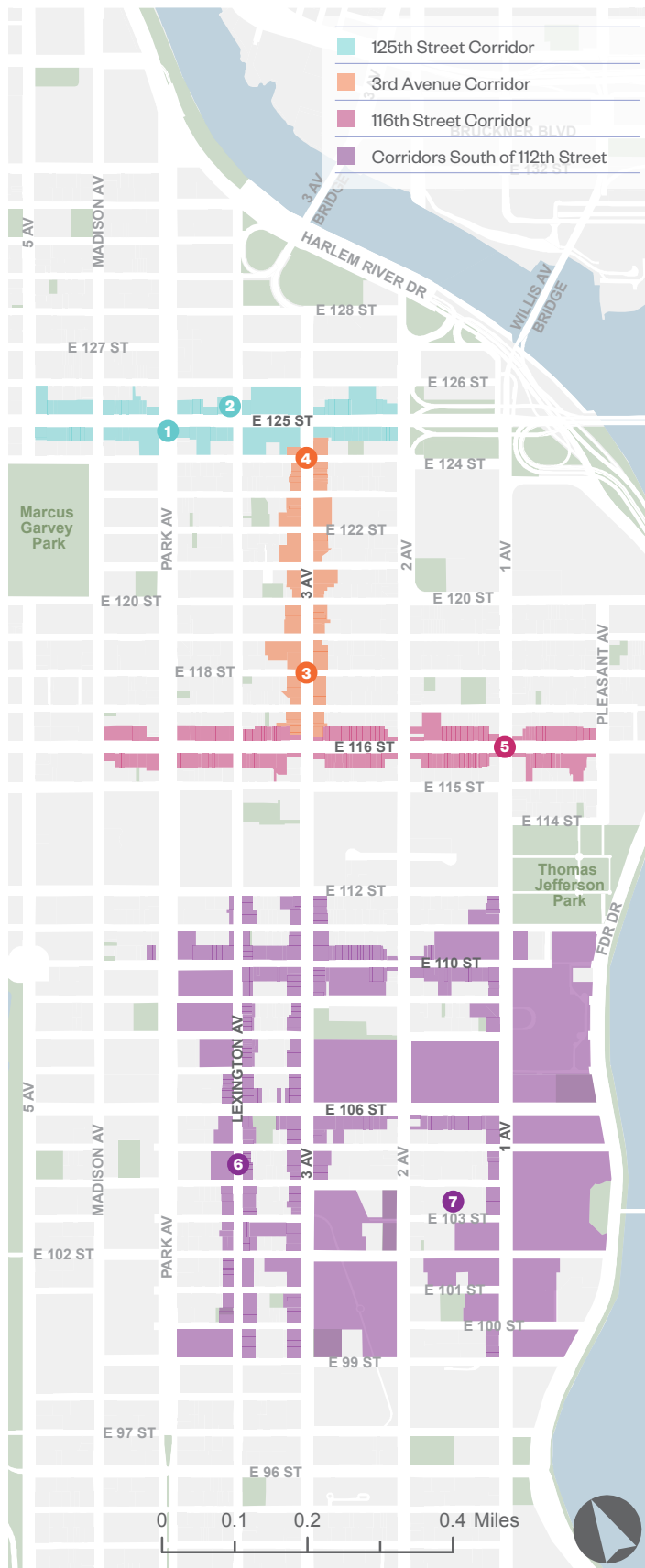
How safe do you feel shopping in East Harlem at night?



Source: Based on 810 consumer surveys conducted by NHEMA, Union Settlement, and Hope Community Inc. in Spring 2015 (on 125th Street) and Spring 2016 (on all other corridors).

PHYSICAL ENVIRONMENT

Streetscape Conditions



Observations

125th Street

- ▶ 25% of storefronts and at least 12 lots were identified as vacant, many for several years.
- 1 The long-underutilized space under the elevated Metro-North line at Park Avenue has been repurposed as “Uptown Grand Central” with new programming, including events, farmers markets, and public art.
- 2 The 125th Street & Lexington Avenue bus stop, which serves a high volume of commuters and riders traveling to surrounding social service facilities, lacks sufficient nearby public amenities.

3rd Avenue

- ▶ An analysis of 97 storefronts revealed that 66% are in good condition, 26% are in fair condition, and 8% are in poor condition.
- 3 Of the 66 tree pits identified along the corridor, many of them are in poor condition, particularly between 117th and 119th streets.
- 4 Rush-hour congestion at 124th Street approaching the Triborough Bridge causes cars to block the intersection, making pedestrian crossing dangerous.

116th Street

- ▶ An analysis of 165 storefronts found 57% in good condition, 37% in fair condition, and 6% in poor condition.
- ▶ Trash receptacles along the corridor frequently overflow and spill onto the street.
- ▶ Insufficient lighting on both the street and building frontages contributes to safety concerns among consumers, especially at night.
- 5 Street furniture is limited along the corridor, mostly concentrated at bus stops between Pleasant and 2nd Avenues.

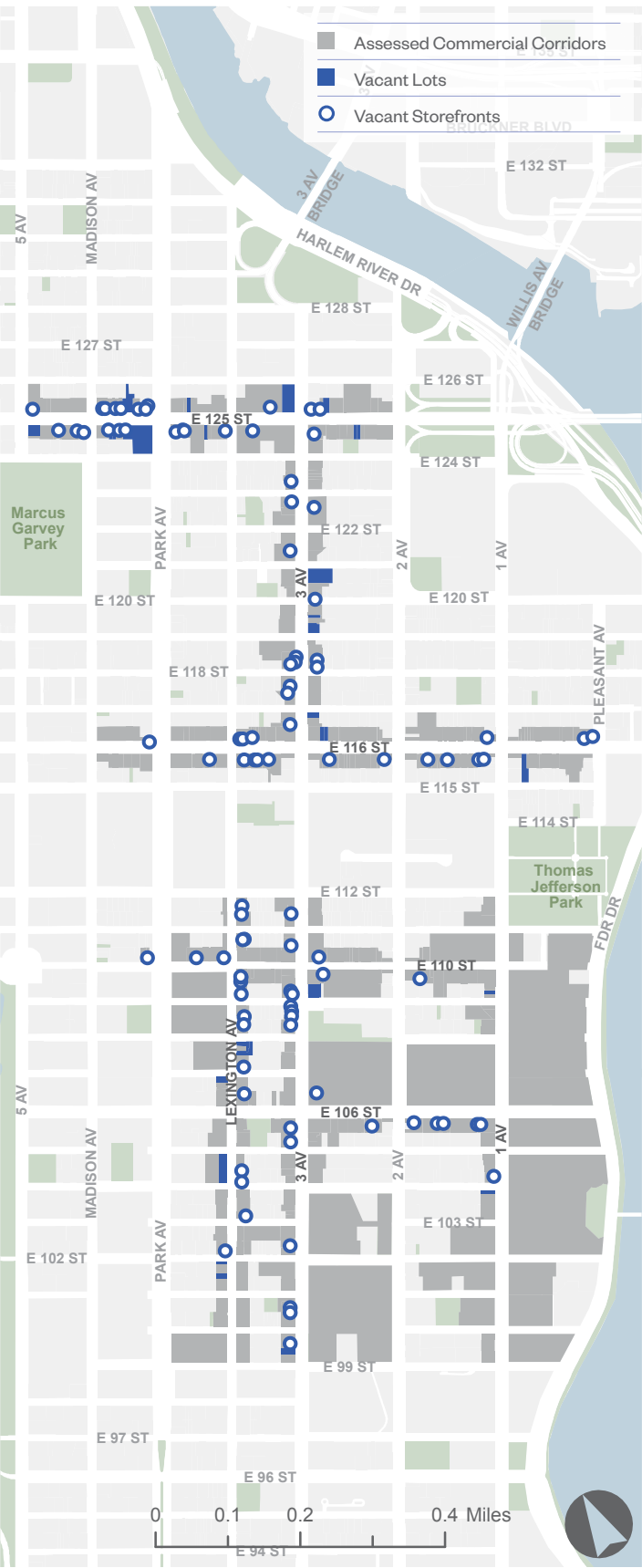
South of 112th Street

- ▶ An analysis of 382 storefronts along the corridors south of 112th Street revealed 40% in good condition, 54% in fair condition, and 6% in poor condition.
- 6 Murals and mosaics line many of the neighborhood’s commercial corridors, including at least eight works along Lexington Avenue between 103rd and 106th Streets.
- 7 Heavy traffic congestion, street and sidewalk disrepair, and relatively poor façade conditions were found along 1st and 2nd Avenues.

Observations



Storefront Vacancies



DATA APPENDIX

Study Area Boundaries

Assessed Commercial Corridors

Primary data on East Harlem storefront businesses presented on pg. 6-7, 10-11 was gathered along the following commercial corridors:

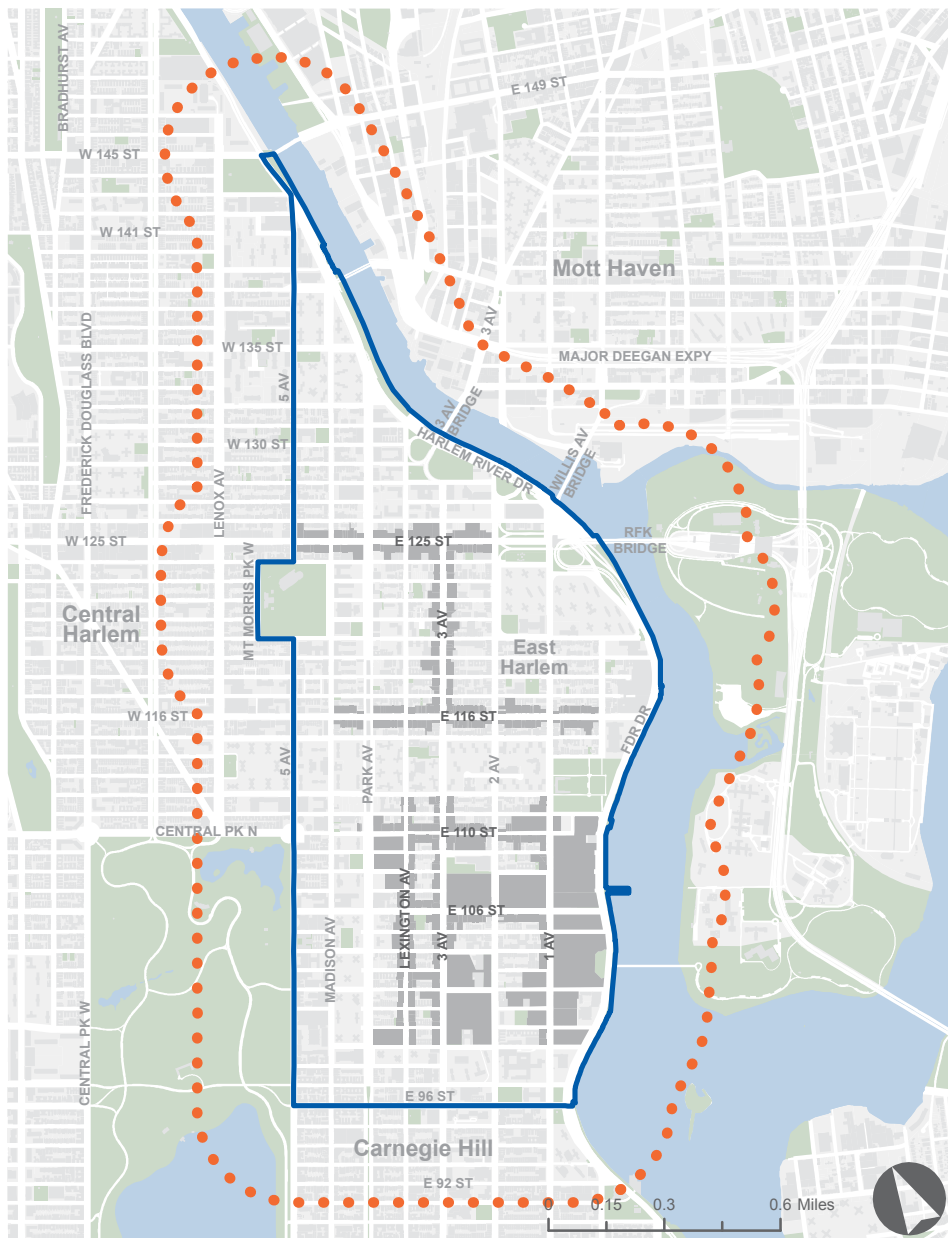
- ▶ 125th Street: 5th Avenue to 2nd Avenue
- ▶ 116th Street: Madison Avenue to Pleasant Avenue
- ▶ 110th Street: Park Avenue to 2nd Avenue
- ▶ 106th Street: 3rd Avenue to 1st Avenue
- ▶ Lexington Avenue: 99th Street to 112th Street
- ▶ 3rd Avenue: 116th Street to 125th Street; 99th Street to 112th Street
- ▶ 1st Avenue: 99th Street to 112th Street

East Harlem Context Area

Demographic and employment data on pg. 16-17 represents the population within the East Harlem neighborhood context area.

Trade Area

Retail leakage, surplus, and retail opportunity data on pg. 12 corresponds with the 0.25 mile trade area.



Area Demographics

Total Population

120,386	East Harlem
1,605,272	Manhattan
8,268,999	New York City

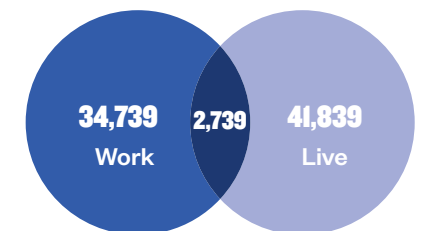
Population Density (per square mile)

78,506	East Harlem
69,803	Manhattan
27,027	New York City

Average Household Size

2.5	East Harlem
2.1	Manhattan
2.6	New York City

Commuting Patterns



34,739	Work in East Harlem, live elsewhere
2,739	Live & Work in East Harlem
41,839	Live in East Harlem, work elsewhere

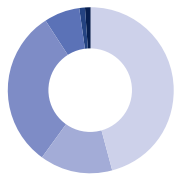
Car Ownership

18%	East Harlem
22%	Manhattan
45%	New York City

DATA APPENDIX

Area Demographics

Race / Background



	East Harlem	MN	NYC
Hispanic or Latino (of any race)	46%	26%	29%
White alone	14%	48%	33%
Black or African American alone	31%	13%	23%
Asian alone	7%	11%	13%
Native Hawaiian and Other Pacific Islander	0%	0%	0%
American Indian and Alaska Native alone	0%	0%	0%
Some other race alone	1%	0%	1%
Two or more races	1%	2%	1%

Population Age



	East Harlem	MN	NYC
Under 5 Years	6%	5%	7%
5–14 Years	12%	7%	11%
15–24 Years	16%	13%	14%
25–44 Years	31%	37%	31%
45–64 Years	23%	24%	25%
65+ Years	12%	14%	12%

Income

Median Household Income

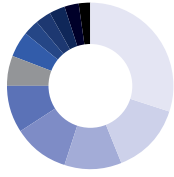
\$30,938	East Harlem
\$69,659	Manhattan
\$52,259	New York City

Pop. Below Poverty Line

31%	East Harlem
18%	Manhattan
20%	New York City

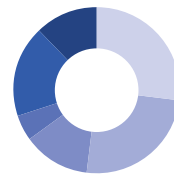
Local Jobs and Employment

Local Residents' Employment



Educational Services, Health Care, Social Assistance	30%
Accommodation, Food Services, Arts, Entertainment	14%
Retail Trade	11%
Professional, Scientific, & Technical Services	11%
Finance, Insurance, Real Estate	9%
Other	6%
Transportation, Warehousing, Utilities	5%
Information	3%
Public Administration	3%
Manufacturing	3%
Construction	3%
Wholesale trade	2%

Educational Attainment



	East Harlem	MN	NYC
12th Grade or Less, No Diploma	27%	14%	20%
High School Graduate	25%	13%	25%
Some College, No Degree	13%	11%	15%
Associate's Degree	5%	3%	6%
Bachelor's Degree	18%	31%	20%
Graduate or Professional Degree	12%	28%	14%

Median Age

33.4	East Harlem
36.5	Manhattan
35.6	New York City

Foreign-Born Population

26%	East Harlem
29%	Manhattan
37%	New York City

Employment

Population in Labor Force

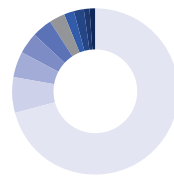
56%	East Harlem
67%	Manhattan
63%	New York City

Unemployment*

12.4%	East Harlem
8.8%	Manhattan
10.6%	New York City

*Note: The unemployment rate for Manhattan is at 4.4% and for New York City is at 5.1%, as of June 2016 (NYSDOL); updated neighborhood-level data for East Harlem is not available.

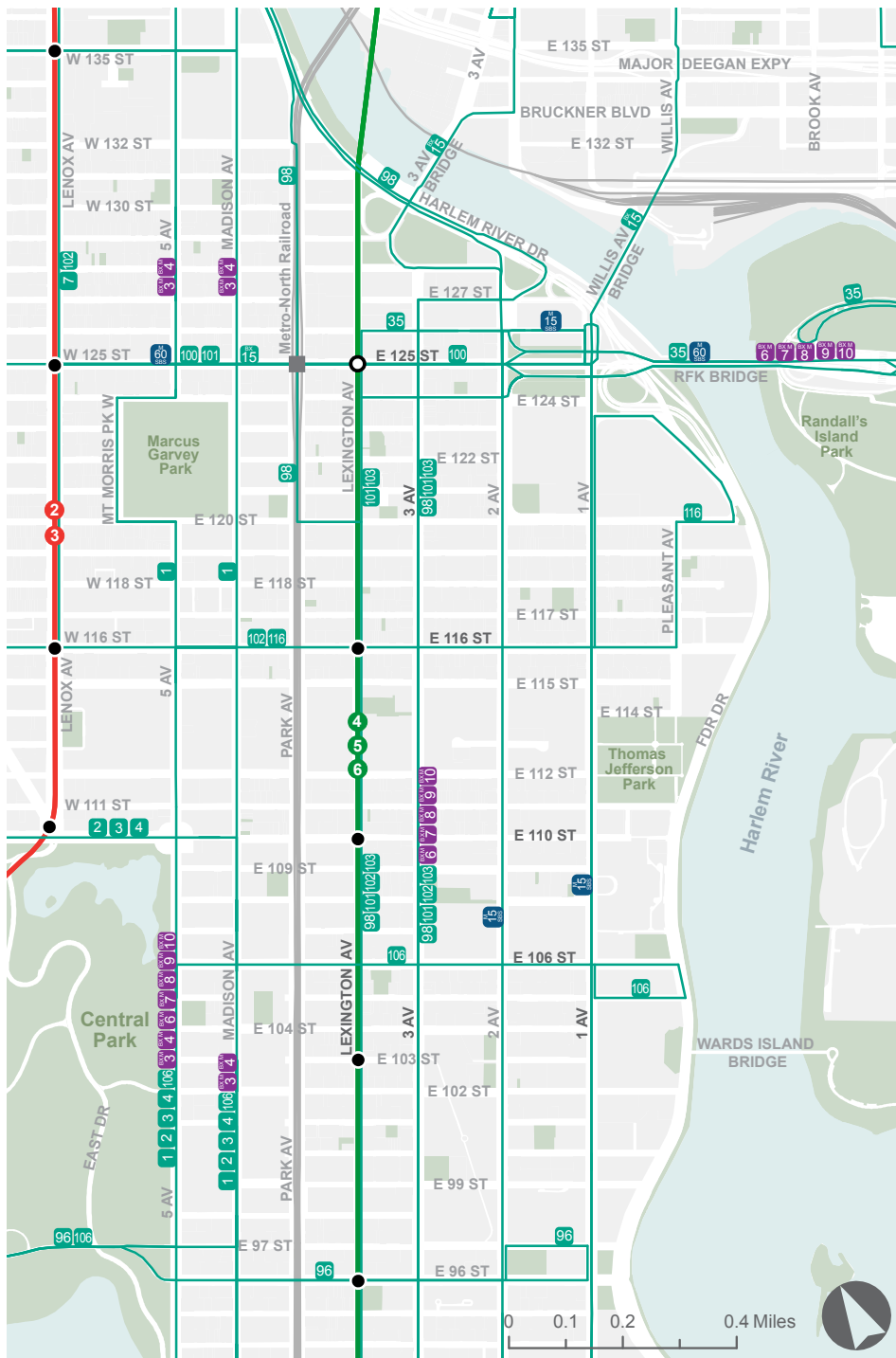
Jobs Located in East Harlem



Educational Services, Health Care, Social Assistance	71%
Retail Trade	7%
Accommodation, Food Services, Arts, Entertainment	5%
Finance, Insurance, Real Estate	4%
Transportation, Warehousing, Utilities	4%
Other	3%
Construction	2%
Professional, Scientific, & Technical Services	2%
Information	1%
Manufacturing	1%
Wholesale Trade	0%
Public Administration	0%

DATA APPENDIX

East Harlem Transportation



▲ East Harlem Transportation

Bus Routes

Metro-North Railroad

NYC Subway

MTA Annual Bus Ridership (2015)

3.2M

M1

14.6M

M15 SBS

470,499

M35

5.5M

M60 SBS

3.2M

M116

Average Weekday Subway Ridership (2015)

28,060

6 96 St. Station

13,409

6 110 St. Station

16,702

6 116 St. Station

30,277

4 5 6 125 St. Station

Pedestrian Counts

Third Avenue Bridge

185

Weekday Morning Pedestrians

324

Weekday Afternoon Pedestrians

175

Weekend Pedestrians

Wards Island Bridge

160

Weekday Morning Pedestrians

484

Weekday Afternoon Pedestrians

300

Weekend Pedestrians

Vehicular Traffic

22,536

2nd Avenue between 96th Street and 125th Street

17,335

3rd Avenue between 116th Street and 125th Street

13,941

E. 116th Street between FDR Drive and 5th Avenue

19,388

E. 125th Street between Lexington Avenue and 5th Avenue

85,622

RFK Bridge (Manhattan Span)

Sources: MTA 2015; NYC DOT May 2016; NYS DOT, 2014 Annual Average Daily Traffic data.

Recent SBS Investments in the Neighborhood

- ▶ *Neighborhood 360 Fellowship Host Organization*, awarded to Union Settlement Association, 2016.
- ▶ *Metro-North Viaduct Plaza Activation*, Avenue NYC placemaking grant of \$20,000 awarded to New Harlem East Merchants Association, 2015.
- ▶ *East Harlem Community Alliance*, Avenue NYC merchant organizing grant of \$20,000 awarded to Union Settlement Association, 2015.
- ▶ *Small Business Profiles & Courses*, Avenue NYC business retention grant of \$20,000 awarded to Union Settlement Association, 2015.
- ▶ *Website Development / Business Surveying*, Avenue NYC merchant organizing grant of \$20,000 awarded to New Harlem East Merchants Association, 2014.
- ▶ *Uptown Grand Central*, Neighborhood Challenge placemaking grant of \$100,000 awarded to New Harlem East Merchants Association, 2014.
- ▶ *East Harlem Harvest Festival*, Avenue NYC placemaking grant of \$20,000 awarded to Hope Community Inc., 2013.
- ▶ *Merchant Association Incorporated / Shop New Harlem East*, Avenue NYC merchant organizing grant of \$20,000 awarded to New Harlem East Merchants Association, 2013.
- ▶ *Visit El Barrio*, Avenue NYC placemaking grant of \$25,000 awarded to Hope Community Inc., 2012.
- ▶ *Visit El Barrio*, Avenue NYC placemaking grant of \$33,000 awarded to Hope Community Inc., 2011.

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ABOUT SBS

The NYC Department of Small Business Services helps unlock economic potential and create economic security for all New Yorkers by connecting New Yorkers to good jobs, creating stronger businesses, and building a fairer economy in neighborhoods across the five boroughs.

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