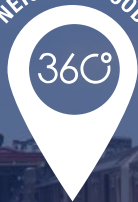




NEIGHBORHOOD



INWOOD

MANHATTAN

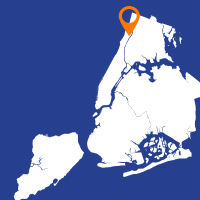
Commercial District Needs Assessment



careers
businesses
neighborhoods



Washington Heights BID





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 main commercial corridors in **Inwood** and was conducted in partnership with the **Washington Heights Business Improvement District** between February 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 **220 surveys**, as well as numerous interviews and workshops, with neighborhood merchants, shoppers, workers, community leaders, property owners, and residents.

Jump to...

Key Findings	4-5
Business Inventory	6
What Merchants Say	7-8
Business Outlook	9
What Shoppers Say	8, 10
Physical Environment	11
Data Appendix	12-15

Background

Inwood sits at the northern tip of Manhattan, at the confluence of the Harlem River, the Hudson River, the Spuyten Duyvil Creek, and some of Manhattan's most beautiful parks. A plaque in Inwood Hill Park, the only remaining natural forest in Manhattan, marks the spot where Dutch colonists purchased the island from the Lenape tribe in 1626. Today, Inwood is home to a diverse community of residents, small businesses, and cultural and medical institutions. The neighborhood is connected to the rest of Manhattan and the Bronx by the A and 1 subway lines, as well as the University Heights, Broadway, and Henry Hudson bridges.

Dyckman Street forms the southern boundary of the neighborhood, connecting a lower-density, mixed-use area along the Harlem River waterfront with a dense residential neighborhood across to the Hudson. Along Dyckman, longstanding bodegas, restaurants, clothing stores, and salons mix with newer restaurants and lounges to form one of Northern Manhattan's most popular commercial strips. The street is also home to Dyckman Houses, the neighborhood's only NYC Housing Authority development, alongside many quintessential prewar apartment buildings. This diverse mix of residents and storefronts extends north from Dyckman along Broadway, 10th Avenue, and the streets in between.

Along Inwood's western edge, parks and open spaces stretch from Fort Tryon Park around to the northern tip of the island. Just south of Inwood, the Met Cloisters brings visitors from around the world to its exhibits of medieval Europe. Farther north, Inwood Hill Park's rolling hills expose residents and visitors alike to scenic views of the Hudson River Palisades. At the northern tip of Inwood lie institutional anchors such as Columbia University's athletic facilities and New York-Presbyterian / The Allen Hospital.

The Harlem River waterfront, meanwhile, includes a mix of commercial, residential, utility, educational, and industrial uses alongside a partially accessible waterfront. In the Sherman Creek area (named for an inlet along the river), retail, wholesale, and auto businesses share the streets with Con Edison facilities, public schools, and a Metropolitan Transportation Authority rail yard. Despite the heavy rail and utility presence along significant frontage of the Harlem River, Inwood community members have worked hard to revitalize the waterfront for parks, recreation, and wildlife preservation.

Neighborhood Demographics

See more on page 13

A diverse population of workers, entrepreneurs, and residents contributes to Inwood's thriving commercial and cultural life. Inwood's population of more than 40,000 residents represents a broad mix of ethnicities, national origins, and socioeconomic positions. Half of the population was born outside of the United States, largely in the Dominican Republic and Mexico, and about 75% identify as Hispanic or Latino.

Future Opportunities

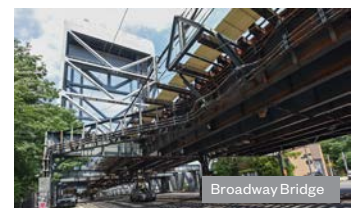
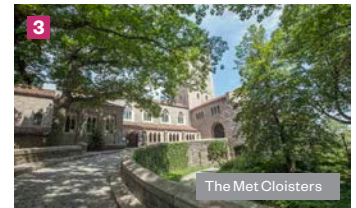
See more on page 5

A growing, culturally-rich population of residents, long-standing businesses, new entrepreneurs, and active community organizations position Inwood for continued vibrancy. Community members continue to invest in their local businesses, open spaces, and natural assets in partnership with institutional anchors and the City. New investments to organize merchants, enhance the neighborhood's retail diversity, and beautify its commercial corridors stand to make Inwood's streets even more attractive places for all residents and visitors to shop, work, live, and play.

Inwood



▼ Notable Places



▲ Current and Planned Developments

- Inwood Commercial Corridors
- Arts & Culture Destinations
- Public Facilities
- Co-Working Spaces

Neighborhood Events

- #WHIN and Dine Uptown Restaurant Week
- Dyckman Basketball Tournament
- Inwood Film Festival
- Medieval Festival at Fort Tryon Park
- Uptown Arts Stroll

Merchant & Business Groups

- Washington Heights Business Improvement District
- Northern Manhattan Improvement Corporation
- Sherman Creek Business Owners
- National Supermarket Association
- Northern Manhattan Restaurant and Lounge Association
- Community League of the Heights
- Washington Heights and Inwood Development Corporation
- Chamber of Commerce of Washington Heights and Inwood

KEY FINDINGS & OPPORTUNITIES

Strengths

- ▶ Abundant parks and open spaces surrounding the neighborhood
- ▶ Beautiful rivers and waterfronts surrounding the residential and commercial area, with large untapped potential for activity
- ▶ Busy, well-known commercial corridors that attract residents as well as visitors from Manhattan, the Bronx, and beyond
- ▶ Premier cultural attractions, including the Met Cloisters and Dyckman Farmhouse, in or immediately around the neighborhood
- ▶ Large number of entrepreneurs and small businesses, including a significant number of long-standing businesses
- ▶ Vibrant and growing artist community invested in the neighborhood and looking for opportunities to contribute and grow in place
- ▶ Diverse collection of neighbors actively involved in community organizations and causes

Challenges

- ▶ Public safety and noise concerns along commercial corridors, especially at night
- ▶ Graffiti and sidewalk issues reduce the walkability and appeal of the corridors for shoppers and residents
- ▶ Traffic congestion, limited parking, and safety concerns negatively affect both the pedestrian and driving experience along the corridors
- ▶ Lack of retail diversity, especially in arts, entertainment, healthy food options, and recreation
- ▶ Limited affordable commercial space for local small businesses to start and grow in
- ▶ Lack of recreational and cultural activities for youth and families
- ▶ Social and spatial boundaries that limit full use of the neighborhood by all residents





Patacon Pisao Food Truck



Good Shepherd Church



215th Street 1 Train Station



Characteristic Prewar, Mixed-Use Housing

Opportunities

- ▶ Activate Inwood’s parks, sidewalks, and vacant storefronts with diverse cultural and arts attractions
- ▶ Attract new businesses to vacant storefronts that meet the neighborhood’s demand for healthy food, family-friendly restaurants, arts, and entertainment
- ▶ Bring the natural beauty of Inwood’s parklands into its commercial district by beautifying the streets and expanding family-friendly outdoor activities in open spaces
- ▶ Invest in sanitation services to address litter and graffiti and make Inwood’s commercial corridors more inviting to residents and visitors alike
- ▶ Connect more local business owners to business support services that help them attract customers and thrive in place
- ▶ Leverage Inwood’s growing artist community to support local business through public art initiatives
- ▶ Support local small business owners’ efforts to organize, promote, and advocate collectively, including exploring the feasibility of a Business Improvement District (BID)
- ▶ Enhance lighting on key commercial streets to address safety concerns
- ▶ Market Inwood’s diverse array of restaurants and retailers with a unified, bilingual website, advertising, and social media strategy

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: INWOOD

Business Inventory

382

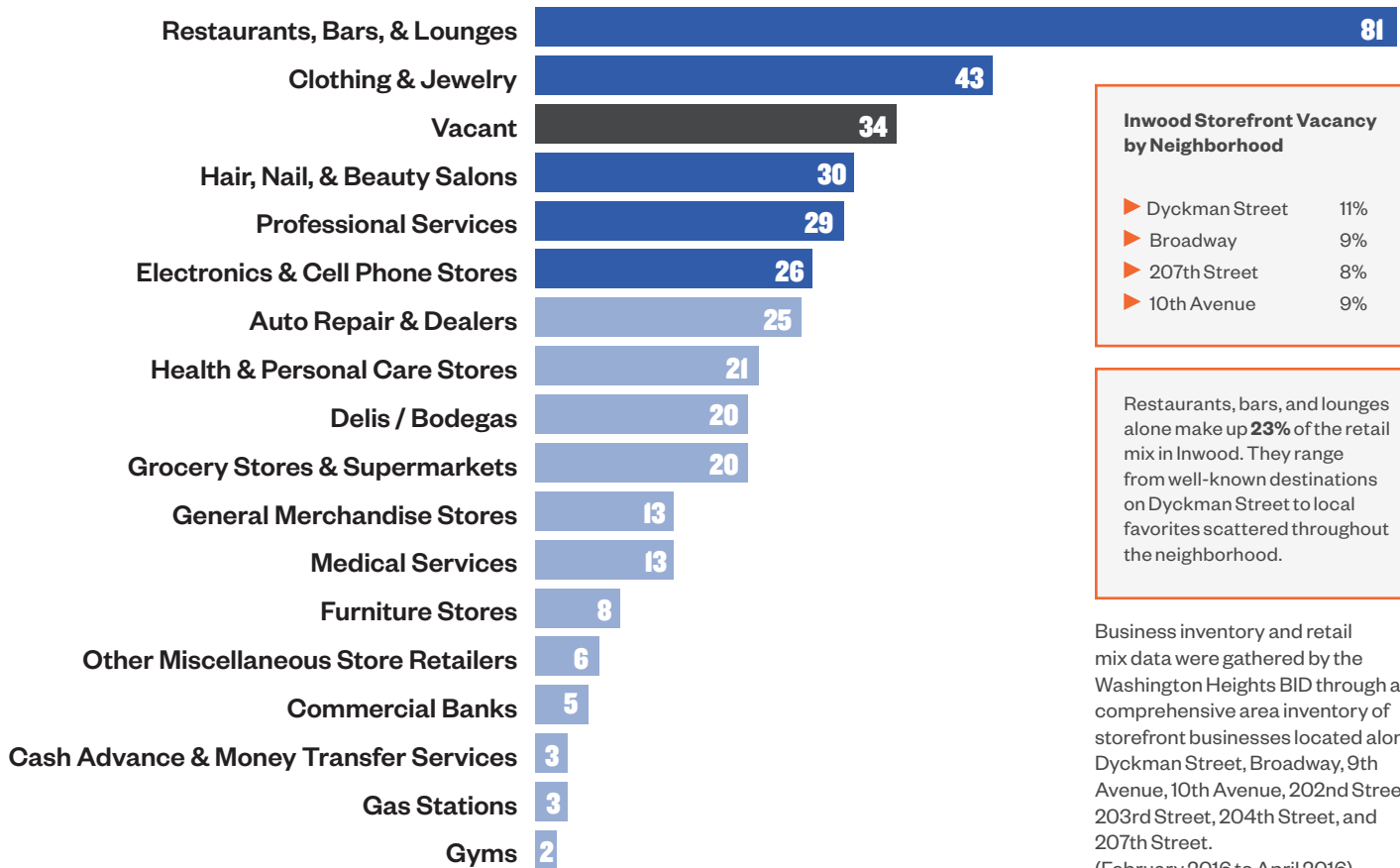
Total Number of Storefronts

8.9%

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 of 5.6% (SBS BIDs Trends Report, 2015).

Storefront & Retail Mix

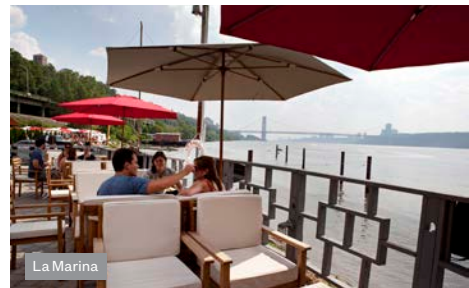
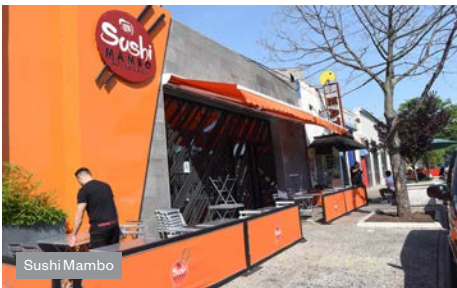


Inwood Storefront Vacancy by Neighborhood

- ▶ Dyckman Street 11%
- ▶ Broadway 9%
- ▶ 207th Street 8%
- ▶ 10th Avenue 9%

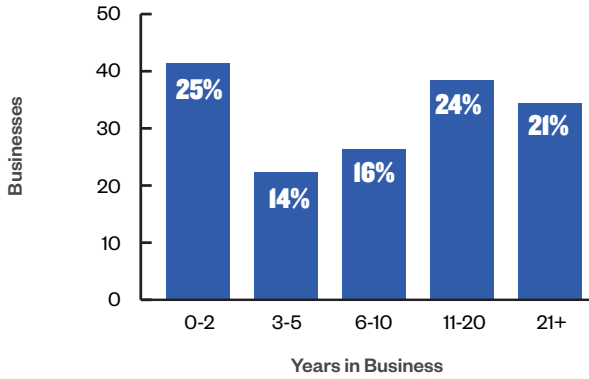
Restaurants, bars, and lounges alone make up **23%** of the retail mix in Inwood. They range from well-known destinations on Dyckman Street to local favorites scattered throughout the neighborhood.

Business inventory and retail mix data were gathered by the Washington Heights BID through a comprehensive area inventory of storefront businesses located along Dyckman Street, Broadway, 9th Avenue, 10th Avenue, 202nd Street, 203rd Street, 204th Street, and 207th Street. (February 2016 to April 2016).



What We've Heard from Inwood Merchants

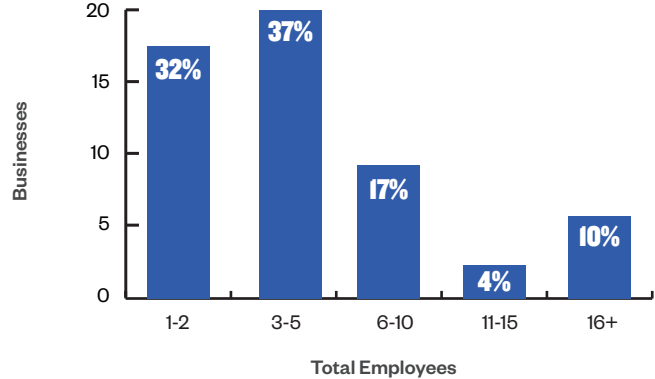
How many years have you been in business here?



11 Mean
 8 Median
 1 Mode

34 businesses, about a fifth of total respondents, have been in Inwood for 20 or more years

How many employees do you have?



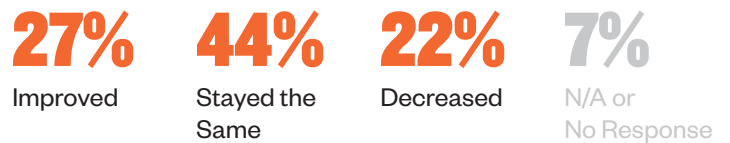
Do you own or rent your property?



How affordable is your commercial rent?

	% Merchants
Affordable	11%
Moderately affordable	12%
Barely affordable	53%
No response	24%

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



What kinds of resources would help you grow your business?

	% Merchants
▶ Marketing support	51%
▶ Financing	31%
▶ Space / storefront improvements	24%
▶ New equipment	18%
▶ Legal / lease support	14%

What changes need to occur in the Inwood commercial district to help your business grow?

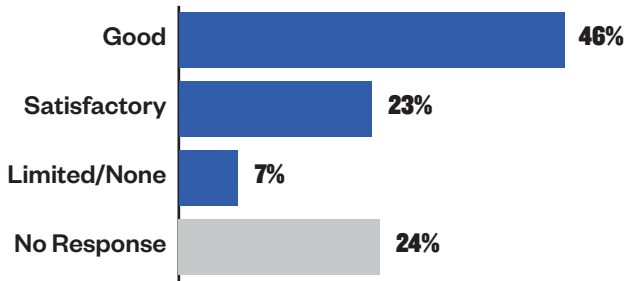
	% Merchants
▶ More parking enforcement and availability	78%
▶ Increased sanitation services	42%
▶ Additional landscaping to beautify the corridors	42%
▶ Improve storefront conditions	29%
▶ Public safety enhancements, especially lighting	26%

Source: Based on 171 merchant surveys conducted by the Washington Heights BID in Spring 2016.

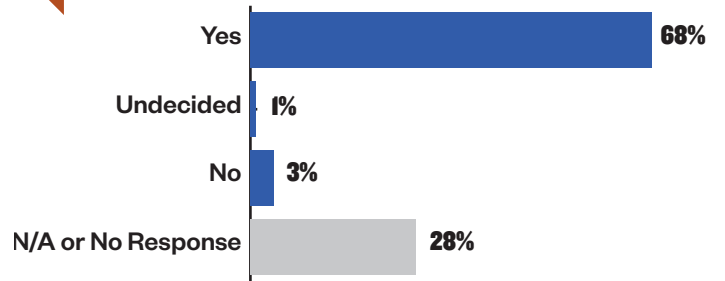
BUSINESS LANDSCAPE: INWOOD

What We've Heard from Inwood Merchants

How would you describe your relationship with your landlord?



Do you plan to renew your commercial lease?



What We've Heard from Inwood Shoppers

What changes would improve the Inwood commercial district?

- "Keep it clean and support local businesses."
- "The garbage pick-up must be increased. The amount of garbage in the street from the street vendors and pedestrians is so large it is hazardous."
- "More trees and greenery, more places to sit, less loud music on the street, less loitering on the street."
- "Outdoor community events and other community-member participatory commercial initiatives."
- "Preserve the architectural character of Inwood."

What types of businesses would you like to see in Inwood?

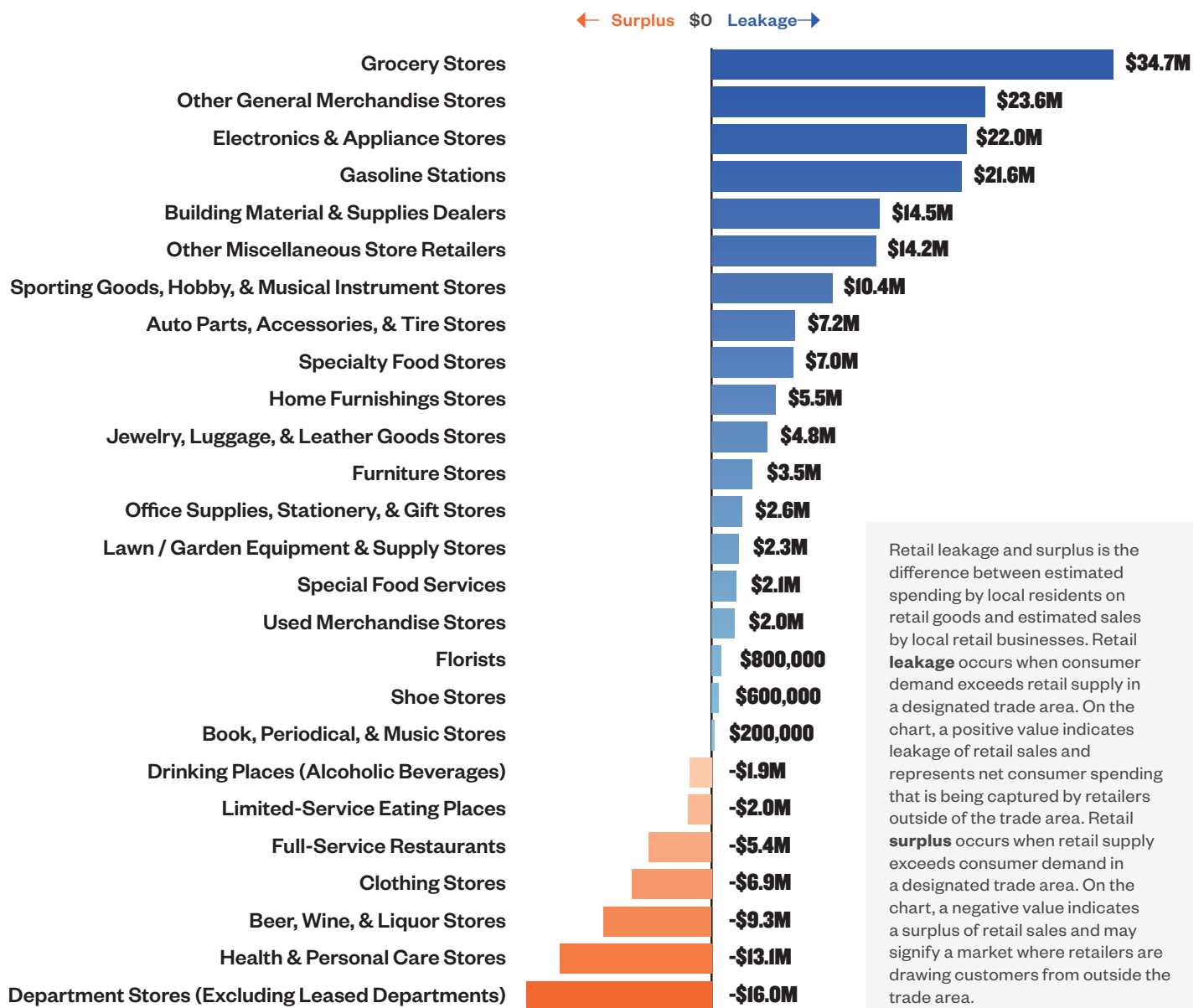
- "We need businesses that cater to teens and young adults so they can entertain themselves in their community."
- "What we need is a supermarket, fresh fish, and a meat market. Most of us are crossing into the Bronx to buy our food."
- "I would say more family-style restaurants – more affordable and with a large menu selection. Think diner-ish with a ton of different foods for everyone."
- "We don't have a lot of entertainment options, other than bars and restaurants."
- "Arts and entertainment, small-stall retail indoor market."

BUSINESS OUTLOOK

Inwood Retail Opportunity



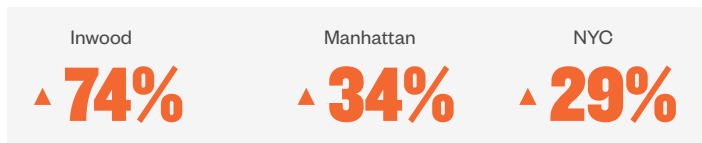
Retail Leakage & Surplus



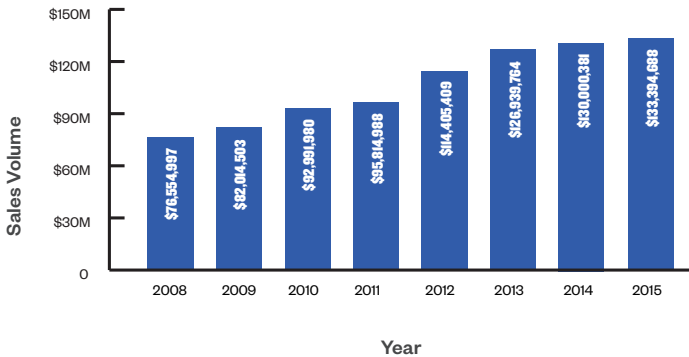
BUSINESS OUTLOOK

Business Trends

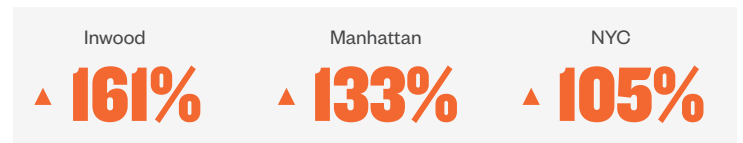
Change in Total Business Sales, 2008-2015



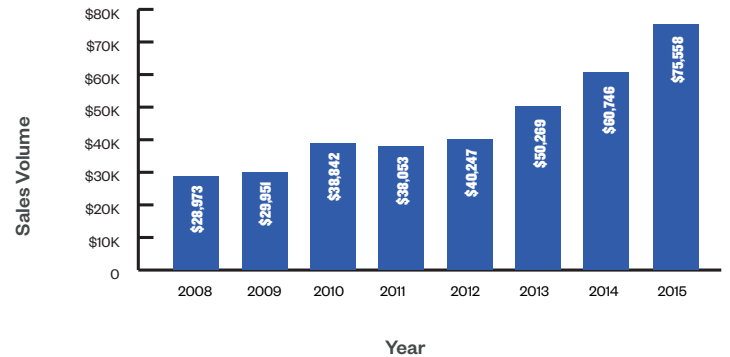
Inwood Total Business Sales



Change in Median Sales by Business, 2008-2015



Inwood Median Sales by Business



What We've Heard from Shoppers

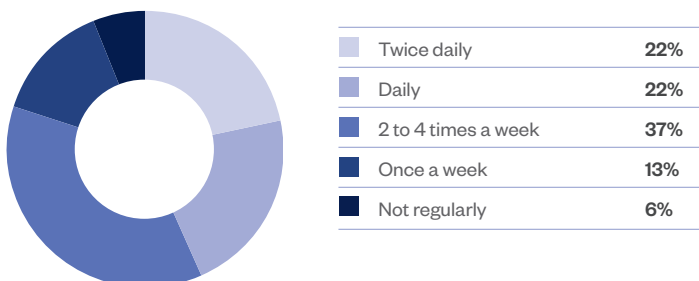
What additional types of businesses would you like to see in Inwood?

Business Type	% Shoppers
Full-service restaurants	37%
Supermarkets, grocery stores	33%
Arts and entertainment	29%
Bookstores	14%
Greater variety of clothing, accessories	14%
Children's activities, recreation	12%
Hardware stores	12%
Cafes, coffee shops, bakeries	10%

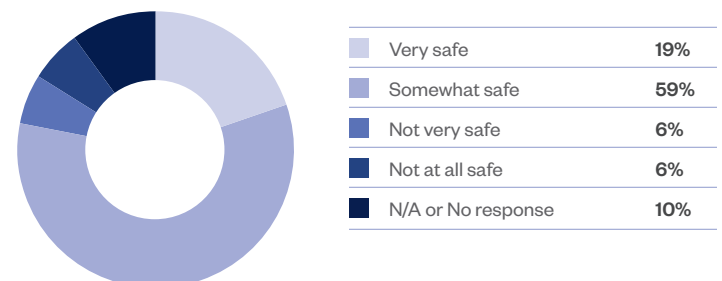
What types of businesses do you typically visit in Inwood?

Business Type	% Shoppers
Restaurants, bars	71%
Supermarkets, grocery stores	67%
Pharmacies	29%
Bodegas, delis	18%
Coffee shops, cafes	12%
Pet shops	12%

How often do you go shopping in Inwood?



How safe do you feel shopping in Inwood at night?

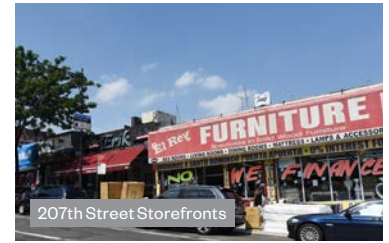


Source: Division of Tax Policy, NYC Department of Finance.

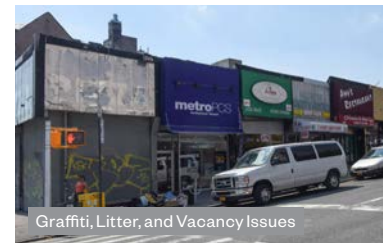
Source: Based on 51 consumer surveys conducted by the Washington Heights BID in Spring 2016.

PHYSICAL ENVIRONMENT

Storefront Conditions



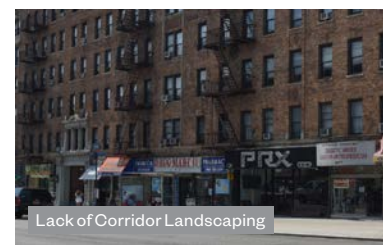
207th Street Storefronts



Graffiti, Litter, and Vacancy Issues



MTA Rail Yard 10th Avenue Frontage



Lack of Corridor Landscaping

Streetscape Observations

- ▶ The 8.9% storefront vacancy rate disrupts the continuity of Inwood's corridors and reduces lighting and perceptions of safety.
 - ▶ An analysis of all 348 occupied storefronts along Inwood's commercial corridors found that 19% are in poor condition, 39% are in average condition, and 42% are in good or excellent condition.
 - ▶ The elevated 1 train along 10th Avenue and the adjacent MTA rail yard create challenges for lighting, pedestrian and traffic safety, and street beautification.
 - ▶ With some exceptions, Inwood's corridors lack amenities like street furniture, public art, and signage.
- 1 Dyckman Street has the highest concentration of good or excellent storefront conditions, which include both new and long-standing small businesses.
 - 2 207th Street contains some of the poorest storefront conditions in the neighborhood, an issue among older and newer businesses alike.
 - 3 An inventory of sidewalk conditions on the corridors found 223 incidents of cracking, missing pavement, and other hazardous conditions, including 38 incidents on one block of Dyckman between Sherman and Broadway.
 - 4 66 incidents of graffiti were also identified, including 30 incidents on the two blocks of 207th between Broadway and Sherman.
 - 5 An inventory of crosswalk conditions found 67 instances of potholes or missing / hard-to-see crosswalk lines, including 16 incidents on 9th Avenue between 204th and 207th.
 - 6 117 incidents of missing or broken tree pit guards were identified on the corridors, including 10 on 204th Street between 9th and 10th Avenues.

Note: Colors on the storefront conditions map represent a block-by-block average of storefront scores.

DATA APPENDIX

Study Area Boundaries

- **Assessed Commercial Corridors**
 - Primary data on Inwood storefront businesses presented on pg. 6-7 was gathered along the following corridors:
 - ▶ Dyckman St.: Payson Ave. to Nagle Ave.
 - ▶ 207th St.: Broadway to 10th Ave.
 - ▶ Broadway: Dyckman St. to 207th St.
 - ▶ 10th Ave.: 204th St. to 216th St.
 - ▶ 9th Ave.: 204th St. to 207th St.
 - ▶ 202nd St. to 204th St.: 9th Ave. to 10th Ave.

- **Inwood Context Area**
 - Demographic and employment data from pg. 12-13 corresponds with the Inwood neighborhood context area.
- **Trade Area**
 - Retail leakage, surplus, and retail opportunity data on pg. 9 corresponds with the 0.25-mile trade area surrounding Inwood's commercial district.

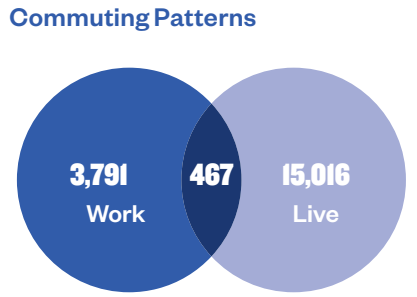


Area Demographics

Total Population	
40,715	Inwood
1,605,272	Manhattan
8,268,999	New York City

Population Density (per square mile)	
46,493	Inwood
69,803	Manhattan
27,027	New York City

Average Household Size	
2.8	Inwood
2.1	Manhattan
2.6	New York City



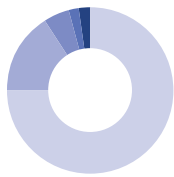
3,791	Work in Inwood, live elsewhere
467	Live & Work in Inwood
15,016	Live in Inwood, work elsewhere

Car Ownership	
25%	Inwood
22%	Manhattan
45%	New York City

DATA APPENDIX

Area Demographics

Race / Background



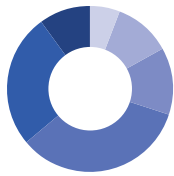
	Inwood	MN	NYC
Hispanic or Latino (of any race)	75%	26%	29%
White alone	16%	48%	33%
Black or African American alone	5%	13%	23%
Asian alone	2%	11%	13%
Native Hawaiian and Other Pacific Islander	0%	0%	0%
American Indian and Alaska Native alone	0%	0%	0%
Some other race alone	0%	0%	1%
Two or more races	2%	2%	1%

Educational Attainment



	Inwood	MN	NYC
12th Grade or Less, No Diploma	29%	14%	20%
High School Graduate	20%	13%	25%
Some College, No Degree	14%	11%	15%
Associate's Degree	5%	3%	6%
Bachelor's Degree	19%	31%	20%
Graduate or Professional Degree	13%	28%	14%

Population Age



	Inwood	MN	NYC
Under 5 Years	6%	5%	7%
5-14 Years	11%	7%	11%
15-24 Years	13%	13%	14%
25-44 Years	34%	37%	31%
45-64 Years	26%	24%	25%
65+ Years	10%	14%	12%

Median Age

36.5	Inwood
36.5	Manhattan
35.6	New York City

Foreign-Born Population

50%	Inwood
29%	Manhattan
37%	New York City

Income

Median Household Income

\$40,395	Inwood
\$69,659	Manhattan
\$52,259	New York City

Pop. Below Poverty Line

26%	Inwood
18%	Manhattan
20%	New York City

Employment

Population in Labor Force

70%	Inwood
67%	Manhattan
63%	New York City

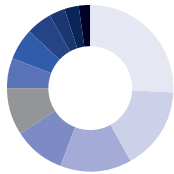
Unemployment*

16.1%	Inwood
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 Inwood is not available.

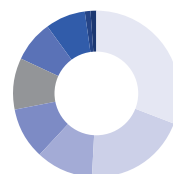
Local Jobs and Employment

Local Residents' Employment



Educational Services, Health Care, Social Assistance	26%
Accommodation, Food Services, Arts, Entertainment	16%
Retail Trade	14%
Professional, Scientific, & Technical Services	10%
Other	9%
Finance, Insurance, Real Estate	6%
Manufacturing	6%
Transportation, Warehousing, Utilities	5%
Information	3%
Public Administration	3%
Construction	2%

Jobs Located in Inwood



Educational Services, Health Care, Social Assistance	31%
Retail Trade	20%
Information	11%
Accommodation, Food Services, Arts, Entertainment	10%
Other	10%
Professional, Scientific, & Technical Services	8%
Finance, Insurance, Real Estate	8%
Construction	1%
Transportation, Warehousing, Utilities	1%
Public Administration	0%
Manufacturing	0%

DATA APPENDIX

Inwood Transportation

▼ Inwood Transportation



Bus Routes

4	Total MTA Bus Routes
1	Select Bus Service (SBS) Route Bx12

Average Weekday Subway Ridership (2015)

9,317	A Inwood - 207 St. Station
7,233	1 Dyckman St. Station
6,831	A Dyckman St. Station
6,541	1 207 St. Station
2,012	1 215 St. Station

MTA Annual Bus Ridership (2015)

16M	Bx12 SBS
5M	M100
4M	Bx7
204,173	Bx20

Vehicular Traffic

94,288	Average daily vehicles at Henry Hudson Parkway
36,917	Average daily vehicles at the University Heights Bridge
31,139	Average daily vehicles on Broadway between W 218th Street and Dyckman Street
24,928	Average daily vehicles on 10th Avenue between Dyckman Street and Broadway
11,709	Average daily vehicles on W 207th Street between Broadway and 10th Avenue
10,853	Average daily vehicles on Dyckman Street between Nagle Avenue and 10th Avenue

Recent SBS Investments in the Neighborhood

► *Explora!*, Neighborhood Challenge marketing grant of \$50,000 awarded to the Washington Heights BID, 2013.

Existing Plans & Studies

Washington Heights-Inwood Planning & Land Use Study, Manhattan Community Board 12 and City College, 2008.

Sherman Creek Planning Study, NYC Department of City Planning, 2007.

Sources

ESRI and Infogroup, Inc. August 2016 ESRI Retail MarketPlace Profile.

Infogroup, Inc. 2016. From ReferenceUSA database.

Metropolitan Transportation Authority. 2015. Average Weekday Subway Ridership and Annual Bus Ridership.

NYC Department of Finance, Division of Tax Policy, using sales tax data from NYS Department of Taxation and Finance. Business sales are reported by tax year, which runs from March 1st to February 28th. Sales data are compiled from sales tax returns, which are rolled up by tax filer within a year, excluding returns with negative sales amounts. For each year, each tax filer is reported according to the address listed on their latest return. Large outliers were removed.

NYS Department of Labor. June 2016. Unemployment Rate Rankings by County.

NYS Department of Transportation. 2014. Annual Average Daily Traffic, using Traffic Data Viewer.

U.S. Census Bureau, 2009-2013 American Community Survey. Manhattan Census Tracts 291, 293, 295, 297, 299, 303, 307.

U.S. Census Bureau. 2014. OnTheMap Application. Longitudinal-Employer Household Dynamics Program (LEHD). Commuting Pattern data is representative of LEHD Origin-Destination Employment Statistics for the second quarter of 2014. LEHD data is based on different administrative sources, primarily Unemployment Insurance (UI) earnings data and the Quarterly Census of Employment and Wages (QCEW), and other censuses/surveys. In this context, only the highest paying job that is held over two consecutive quarters by an individual worker is counted toward worker flows into, out of, and within the context area.

Photo Credits: © Flickr: Charley Lhasa / CC BY, Alejandro A Castro / CC BY; NYC Economic Development Corporation; NYC & Company: Christopher Postlewaite, Julienne Schaer, Marley White; NYC Department of Parks & Recreation; New York Restoration Project: Anna Yatskevich.



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.

ACKNOWLEDGMENTS

We would like to recognize and thank the following individuals and organizations for their contributions to the development of the Inwood Commercial District Needs Assessment:

Manhattan Borough President Gale Brewer
NYC Council Member Ydanis Rodriguez
Manhattan Community Board 12
Washington Heights Business Improvement District (BID)
Inwood NYC Stakeholder Working Group
Friends of Sherman Creek Conservancy
Community League of the Heights (CLOTH)
Northern Manhattan Improvement Corporation (NMIC)
Sherman Creek Business Owners
Washington Heights and Inwood Development Corporation
New York Restoration Project
Friends of Inwood Hill Park
Local Initiatives Support Corporation (LISC)
Inwood Merchants
Inwood Shoppers and Residents