



CENTRAL HARLEM MANHATTAN

Commercial District Needs Assessment



careers
businesses
neighborhoods



Harlem Park to Park
125th Street BID



ABOUT CENTRAL HARLEM

Background

Avenue NYC is a competitive grant program created by the NYC Department of Small Business Services to fund and build the capacity of community-based development organizations to execute commercial revitalization initiatives. Avenue NYC is funded through the U.S. Department of Housing and Urban Development's Community Development Block Grant (CDBG) Program, which targets investments in low- and moderate-income neighborhoods.

Avenue NYC Commercial Revitalization grants provide multi-year commitments aimed at building the capacity of partner organizations to better understand neighborhood needs, develop impactful programs, and sustain their work in the community for at least three years.

The **Commercial District Needs Assessment (CDNA)** highlights a neighborhood's existing business landscape and consumer characteristics.

This CDNA features **St. Nicholas Avenue, Frederick Douglass Boulevard, Adam Clayton Powell Jr. Boulevard, Lenox Avenue, West 116 Street, and West 125 Street** commercial corridors in **Central Harlem**, and was conducted in partnership with **Harlem Park to Park** and the **125th Street BID** between September 2018 and April 2019.

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 **374 surveys** and various stakeholder meetings with neighborhood merchants, shoppers, workers, property owners, and residents.

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Globally recognized and historically prominent, Harlem's rich cultural legacy has positioned the neighborhood as a dining, lifestyle, and entertainment hub unlike any other in New York City. Central Harlem's organic borders include the Harlem River to the north, Central Park to the south, the Fordham Cliffs to the west, and Fifth Avenue to the east.

The neighborhood's proximity to several subway stations provides convenient access for residents traveling to and from other parts of the city, as well as the more than 5 million domestic and international tourists that visit Harlem each year. The geography of Central Harlem is defined by landmarked architecture, including the many historic churches in the neighborhood, and wide boulevards such as Lenox Avenue, Adam Clayton Powell Jr. Boulevard, and Frederick Douglass Boulevard. With its broad array of dining establishments and nightlife venues, Frederick Douglass Boulevard has become known as Harlem's "Restaurant Row," while Lenox Avenue enjoys a more historical significance as the heart of the Harlem Renaissance. Central Harlem's four historic parks include Marcus Garvey Park, Morningside Park, St. Nicholas Park, and Jackie Robinson Park, and provide ample public outdoor space for residents to enjoy throughout the year. The neighborhood also enjoys direct access to Central Park through a shared border along the length of Central Park North.

Harlem's premiere destinations include landmarks such as The Apollo Theater, The Studio Museum, and Sylvia's Restaurant off 125th Street — Central Harlem's largest commercial corridor. The neighborhood's rapid growth over the last decade has also introduced new businesses such as Whole Foods Market, Red Rooster Harlem, and W Hotel's Aloft Harlem Hotel. This unique mix of old and new helps sustain the neighborhood's historic legacy while embracing economic development.

Neighborhood Demographics

See more on page 16

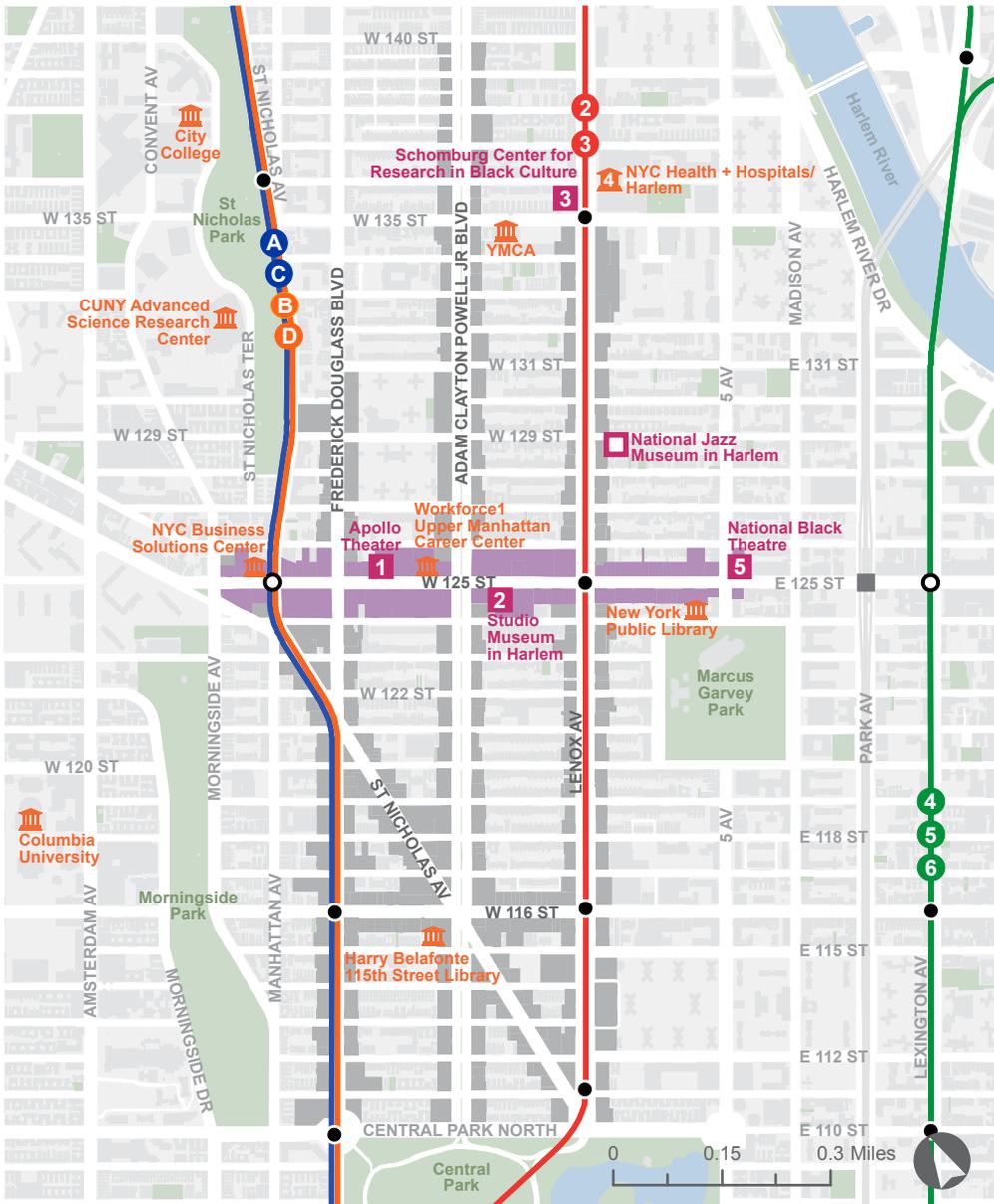
Central Harlem is home to 98,000 people, representing an increase of approximately 14,000 over the past 10 years. The development of hundreds of vacant lots into new residential buildings has brought an influx of diverse populations to the community. Presently, African Americans make up 55% of the population. The neighborhood also includes a large Hispanic and Latino community at 22%. White residents comprise 16% of the population, with Asian residents representing 4%. Central Harlem is also home to a variety of immigrant communities: 23% of all residents are foreign born. There is a significant community of West African immigrants, many of whom have launched businesses in the neighborhood.

Future Opportunities

See more on page 5

Central Harlem continues to experience ongoing economic investment, with more than a dozen commercial and residential development projects planned or currently underway. At the same time, community stakeholders are working together to ensure that small businesses, larger companies, and landmark institutions continue to coexist and preserve the distinct character of the neighborhood. In recent years, the neighborhood has become home to many up-and-coming makers and entrepreneurs producing locally made products. Ongoing support of Harlem's small businesses will aid in the preservation of Harlem's cultural legacy, which continues to be one of the community's strongest assets.

Central Harlem



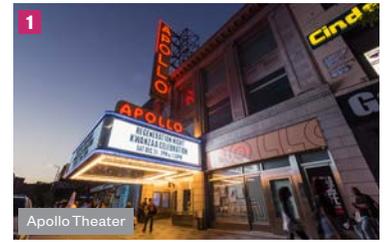
▲ Points of Interest

- Assessed Commercial Corridors
- Business Improvement District
- Arts & Cultural Destinations
- Public Facilities

Merchant & Business Groups

- 125th Street BID
- Frederick Douglass Boulevard Alliance
- Greater Harlem Chamber of Commerce
- Harlem Business Alliance
- Harlem Commonwealth Council
- Harlem Community Development Corporation
- Harlem Park to Park
- Upper Manhattan Empowerment Zone Development Corporation

◀ Notable Places



Apollo Theater



Studio Museum in Harlem



Schomburg Center for Research in Black Culture



NYC Health + Hospitals/Harlem



National Black Theatre



St. Nicholas Park and City College

KEY FINDINGS & OPPORTUNITIES

Strengths

- ▶ Internationally known destination that welcomes millions of tourists each year from all over the world
- ▶ Rich history and legacy of African American art, culture, music, and commerce
- ▶ Diverse population of residents and business offerings
- ▶ Easily accessible by public transportation with 10 subway lines and 15 bus routes serving the neighborhood
- ▶ Residents and merchants share a strong sense of community pride
- ▶ Home to numerous unique architectural and cultural landmarks such as The Apollo Theater
- ▶ Strong network of merchants and business organizations enables collaboration and innovation
- ▶ Numerous new public and private investments in residential and commercial development are underway
- ▶ Home to a popular collection of historic parks, community gardens, and public spaces

Challenges

- ▶ Rapid economic growth and investment has brought about a perception among longstanding residents and merchants of an intense pressure to change
- ▶ Perception that Harlem is far from other parts of Manhattan
- ▶ Certain corridors suffer from illegal dumping and other sanitation concerns, including an insufficient number of litter baskets
- ▶ Relatively small office market results in lower daytime foot traffic
- ▶ Lack of affordable retail space
- ▶ Diverse needs of new and long-standing Harlem residents are a challenge for many businesses to balance





Morningside Park



Harlem Nightlife



Red Rooster Harlem



Sylvia's Restaurant

Opportunities

- ▶ Develop more platforms and resources for Harlem entrepreneurs that do not yet have a brick and mortar business
- ▶ Leverage strong network of community-based organizations and residents to support commercial revitalization efforts
- ▶ Engage neighborhood youth in planning and implementing local economic development projects, and connect youth with direct business experience
- ▶ Connect residents to local shopping opportunities and continue to promote Harlem as a major regional destination
- ▶ Leverage significant local demand for new retail goods and services to fill vacant storefronts
- ▶ Clean, beautify, and maintain the streetscape to make it more attractive to shoppers and pedestrians, including by adding new litter baskets and implementing trash mitigation strategies
- ▶ Expand cultural programming to promote new and long-standing businesses, including public events in the evening
- ▶ Encourage connections between new residents and long-standing businesses, and long-standing residents and new businesses

What's Next?

To address these key findings and opportunities, Avenue NYC Grants have been awarded by SBS to nonprofit organizations.

For more information, visit: nyc.gov/avenuenyc

BUSINESS LANDSCAPE

Business Inventory

898

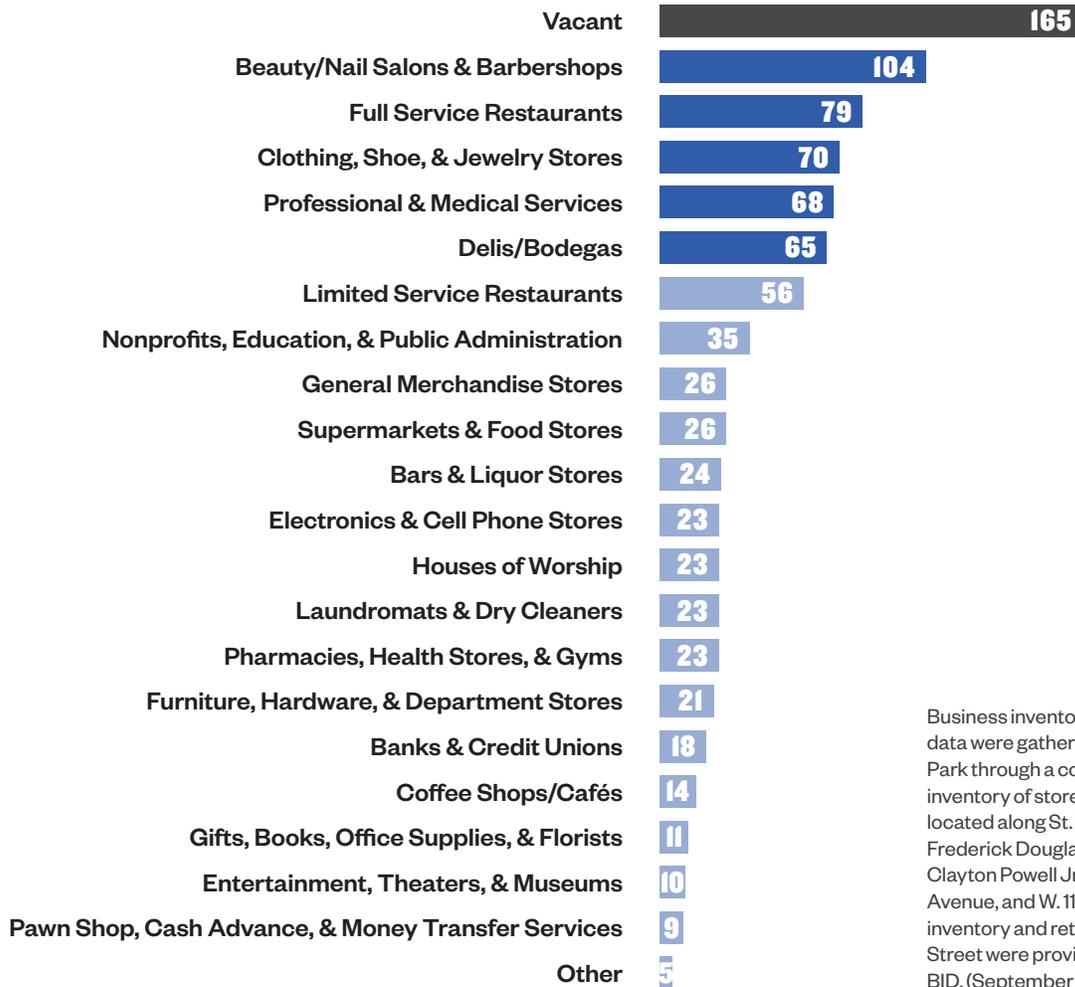
Total Number of Storefronts

18.4%

Storefront Vacancy*

*Note: In 2018, New York City's 75 Business Improvement Districts reported an average ground floor vacancy rate of 8.9% and median ground floor vacancy rate of 7.3% (SBS BIDs Trends Report, 2018).

Storefront & Retail Mix



Business inventory and retail mix data were gathered by Harlem Park to Park through a comprehensive area inventory of storefront businesses located along St. Nicholas Avenue, Frederick Douglass Boulevard, Adam Clayton Powell Jr. Boulevard, Lenox Avenue, and W. 116 Street. Business inventory and retail mix data for W. 125 Street were provided by the 125th Street BID. (September to November 2018).



Adam Clayton Powell Jr. Boulevard Storefronts



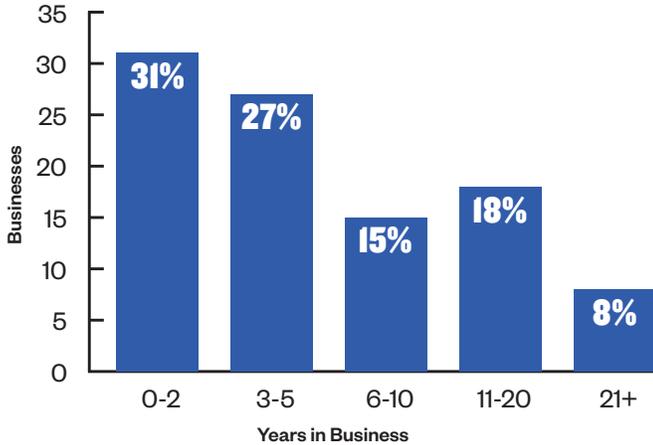
W. 116 Street Storefronts



Frederick Douglass Boulevard

What We've Heard from Harlem Merchants

How many years have you been in business here?

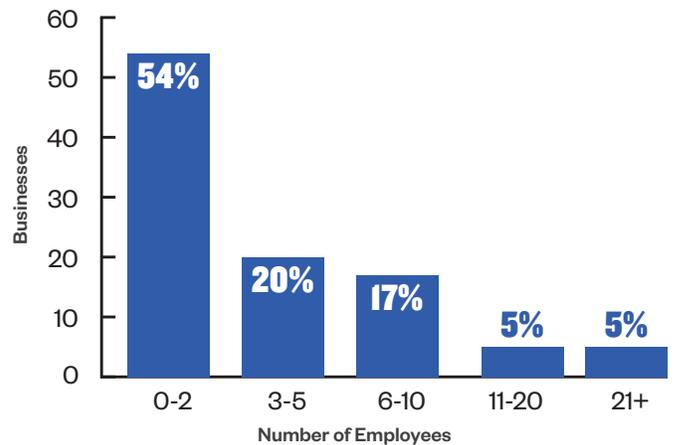


8 Mean
4 Median
1 Mode

9 businesses surveyed have been in the neighborhood for more than 20 years

*Note: The mean is the average of all responses, the median is the middle number when all responses are arranged in ascending order, and the mode is the most common response.

How many full-time employees do you have?



6 Mean
3 Median
1 Mode

Do you own or rent your property?



What kinds of resources would help you grow your business?

% Merchant Responses

▶ Marketing support	27%
▶ Access to financing	20%
▶ Legal services	11%
▶ Lease support	10%
▶ New equipment	10%
▶ Training for staff	10%
▶ Assistance with regulatory compliance	7%
▶ Other services	4%

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



In the coming year, do you plan to expand, stay, relocate, or close?



Source: Based on 119 merchant surveys conducted by Harlem Park to Park and the 125th Street BID in Winter and Spring 2019.

BUSINESS LANDSCAPE

125th Street - Dr. Martin Luther King Jr. Boulevard

Harlem's historic 125th Street, also known as Dr. Martin Luther King Jr. Boulevard, serves as the social, cultural, and economic backbone of Harlem. With a unique character and many distinct assets upon which to build, 125th Street has been a symbol of urban vitality and resilience for more than two centuries. Many know 125th Street as the birthplace of the Harlem Renaissance and one of the nation's most vibrant cultural and entertainment centers showcasing the African American experience.

Following a comprehensive neighborhood study and zoning changes in 2008, the city and state have initiated major investments in local amenities and institutions while also attracting significant private investment. 125th Street is more than a tourist destination or place to experience African American cultural and entertainment achievements; it is also one of New York's most important economic hubs with a business sector serving the diverse Harlem community and the 21st century global economy. 125th Street also serves as a gateway for residents and visitors to the greater Harlem area due to its excellent transportation connectivity.

The successful revitalization of 125th Street has been, in no small measure, due to the creation of the 125th Street Business Improvement District. After the city invested \$17 million in a major street reconstruction project, the business community recognized the need to form an organization that could plan the next phase of economic development and work with the broader Harlem community to promote business investment and ensure safe, clean, and healthy conditions on the iconic corridor. Since its creation in 1993, the 125th Street BID has been working effectively towards its goal of transforming the street into a vibrant and sustainable business and cultural district that improves the quality of life for all community residents. The corridor's unique appeal was recognized in 2007, when the American Planning Association designated 125th Street as one of 10 Great Streets in America.

Business Inventory

195

Total Storefronts

8%

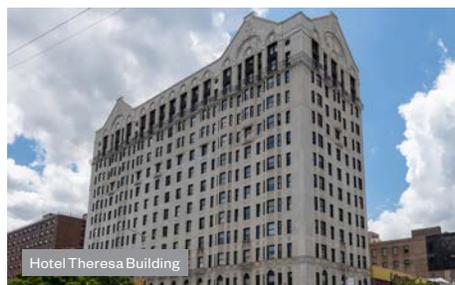
Storefront Availability

Most Common Businesses



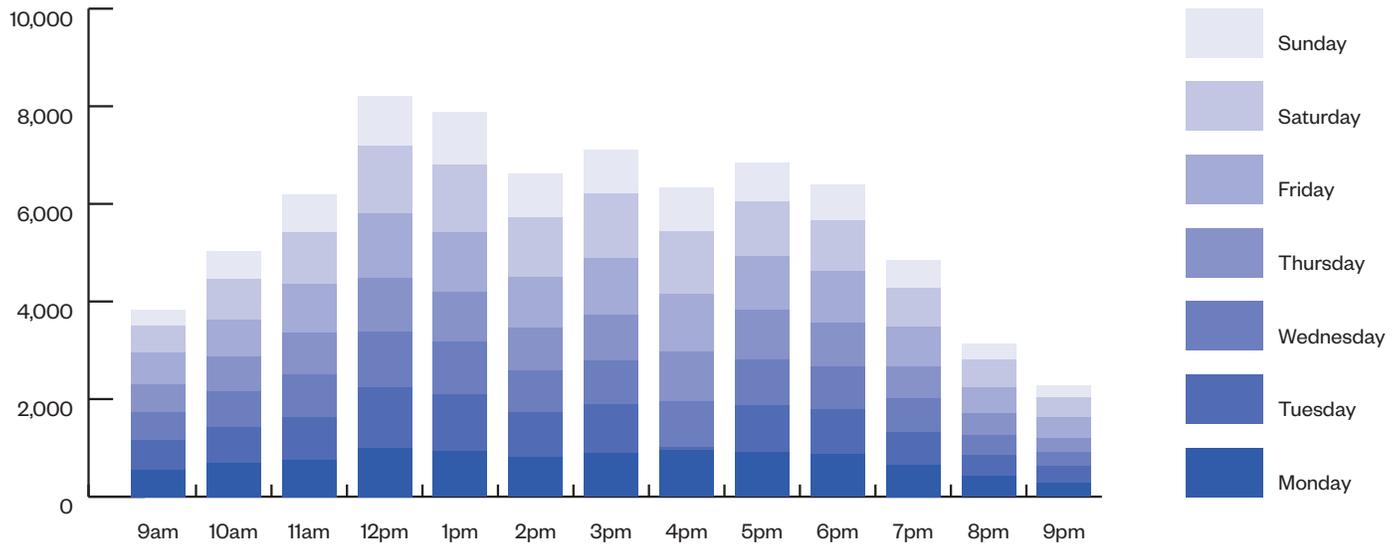
Current & Planned Developments

- ▶ Columbia University Manhattanville Campus
- ▶ 362 W. 125th Street Mixed Use Site
- ▶ 233-235 W. 125th Street Victoria Theater Site
- ▶ 142 W. 125th Street Studio Museum Site
- ▶ 121 W. 125th Street Urban League Site
- ▶ 54-62 W. 125th Street Mixed Use Site
- ▶ 288 Lenox Avenue Commercial Site



Source: Based on storefront inventory data gathered by the 125th Street BID in Spring 2019.

Average Hourly Pedestrian Traffic on W. 125th Street



What We've Heard from 125th Street Merchants

Do you own or rent your property?

87%

Rent

3%

Own

10%

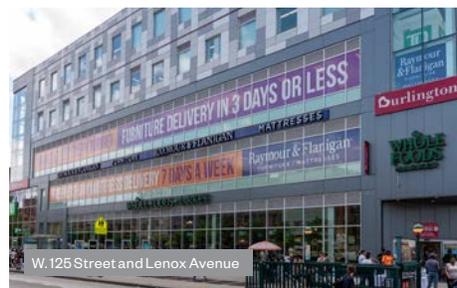
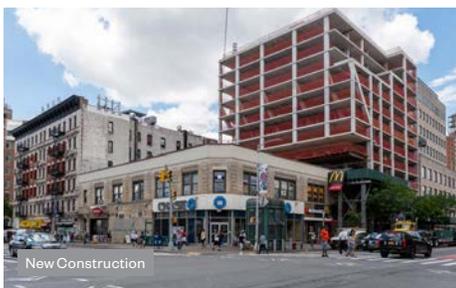
No Response

Long-Standing Businesses

These businesses have served Harlem for more than 25 years

- ▶ Burger King (130 W. 125th Street)
- ▶ Carver Federal Savings Bank (75 W. 125th Street)
- ▶ House of Hoops/Footlocker (268 W. 125th Street)
- ▶ Lady Love Boutique (44 W. 125th Street)
- ▶ Lane Bryant (224 W. 125th Street)
- ▶ Lazarus for Kids (162 W. 125th Street)
- ▶ Manna's Restaurant (2353 Frederick Douglass Boulevard)
- ▶ McDonalds (354 W. 125th Street)
- ▶ Payless ShoeSource (208 W. 125th Street)*
- ▶ Watkins Health Foods (46 W. 125th Street)

*Note: This information may have changed since the publication of this report.



Source: Average hourly pedestrian traffic data gathered by the 125th Street BID in 2018.

BUSINESS LANDSCAPE

What We've Heard From Central Harlem Merchants

What do you like about the commercial corridor?

"That it's starting to thrive."

"Strong sense of community, vibrant culture, growing population."

"It is full of opportunities and positive change."

"I love the community and small business growth that is fostered in Harlem."

"The endless possibilities."

"It's still vibrant with people and a sense of the importance of community. Historical significance."

"Cultural diversity."

"Central to major transportation."

"High traffic location."

"The diversity of small businesses mixed with large retail chains."

What makes the Central Harlem commercial district unique?

"Beautiful integration of people from all backgrounds."

"Still feels like a community."

"Entrepreneurship from people of color in my community."

"Community commitment to supporting local businesses."

"Multicultural and quite accessible by public transportation."

"It's a rich combination of culture and history as well modern opportunities."

"Harlem is a very diverse community. It can be seen in the different businesses that make up the village. There is something for everyone in Harlem."

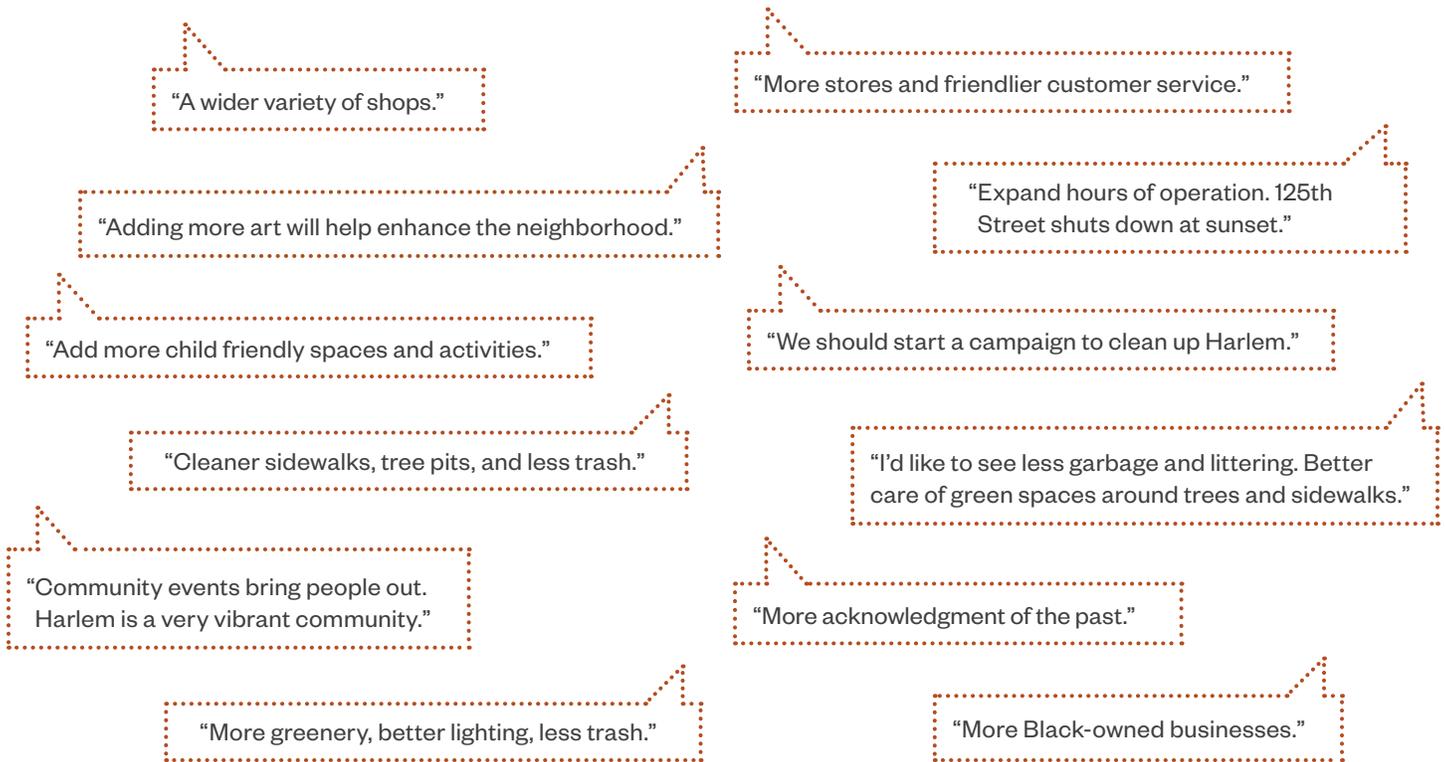
"The attitude and passion of the people in Harlem."

"It's one of a kind, a landmark, a heritage, a tribe, one to hold on to."

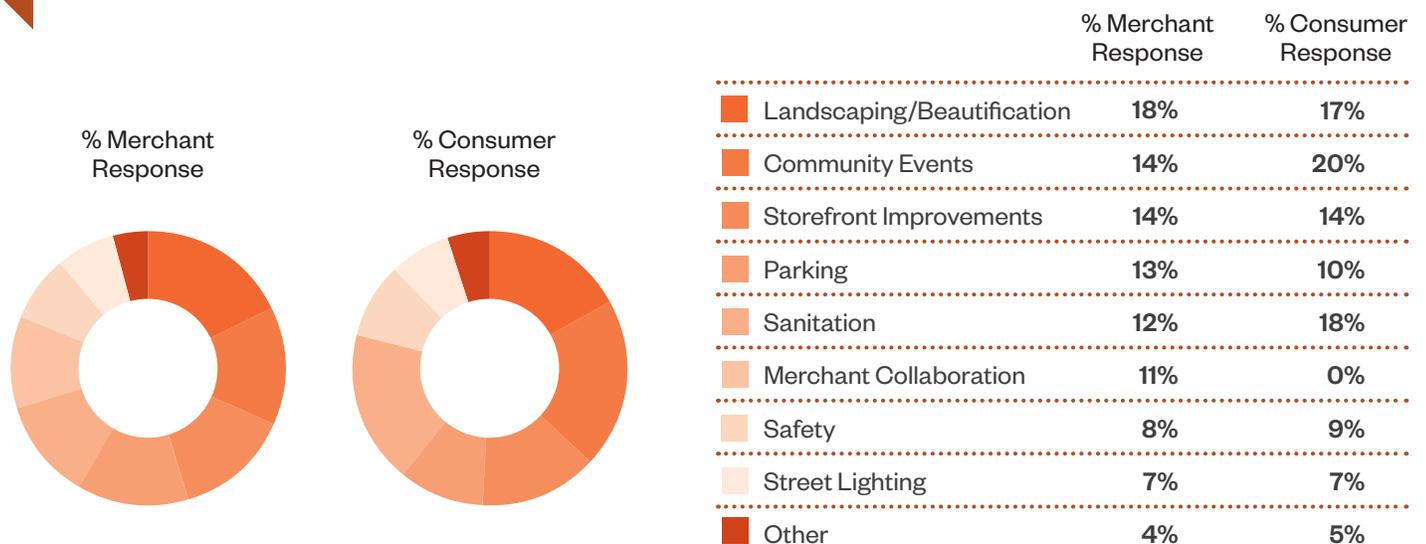
"Strong ties to African & African American Heritage."

What We've Heard From Harlem Shoppers

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



What changes need to occur to attract more visitors/shoppers to the Central Harlem commercial district?



Source: Based on 119 merchant surveys and 255 consumer surveys conducted by Harlem Park to Park and the 125th Street BID in Winter and Spring 2019.

BUSINESS LANDSCAPE

Frederick Douglass Boulevard

Business Inventory

138

Total Storefronts

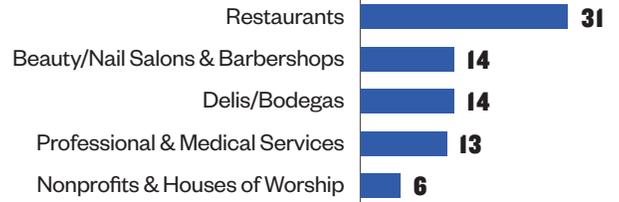
9%

Storefront Vacancy



Frederick Douglass Boulevard Storefronts

Most Common Businesses



Adam Clayton Powell Jr. Boulevard

Business Inventory

235

Total Storefronts

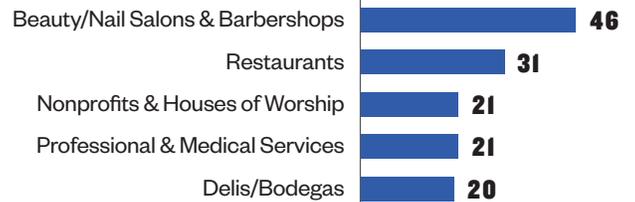
23%

Storefront Vacancy



Adam Clayton Powell Jr. Boulevard Storefronts

Most Common Businesses



Lenox Avenue

Business Inventory

208

Total Storefronts

18%

Storefront Vacancy



Lenox Avenue and W. 125 Street

Most Common Businesses

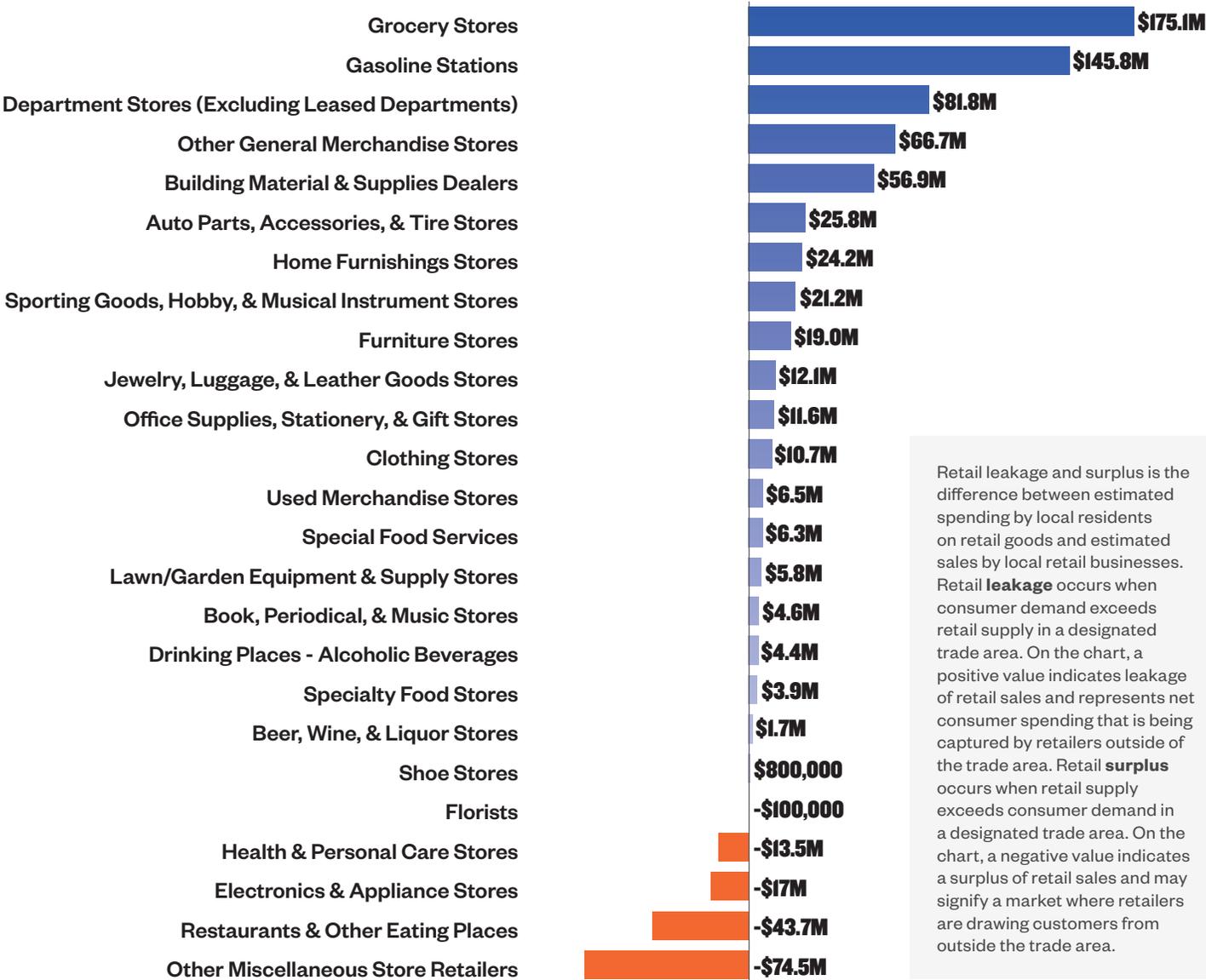


Central Harlem Retail Opportunity

<p>Residents spend</p> <p>\$1.81B</p> <p>each year in goods and services</p>	<p>Local businesses make</p> <p>\$1.10B</p> <p>each year in retail sales</p>	<p>Every year,</p> <p>\$709M</p> <p>is spent outside the neighborhood</p>
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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.

Source: ESRI and Infogroup, 2018.

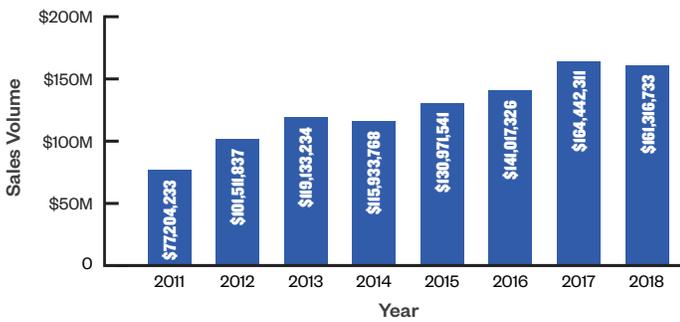
BUSINESS OUTLOOK

Business Trends

Change in Total Business Sales, 2011-2018



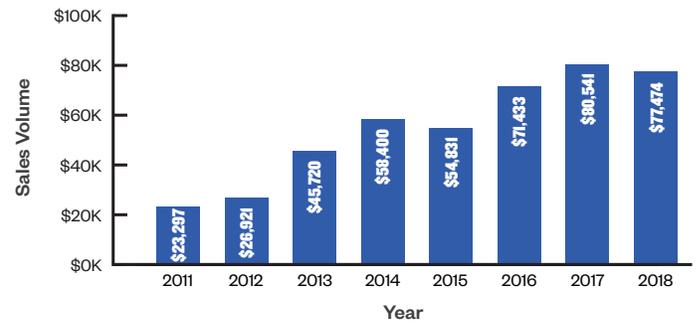
Central Harlem Total Business Sales



Change in Median Sales by Business, 2011-2018



Central Harlem Median Sales by Business



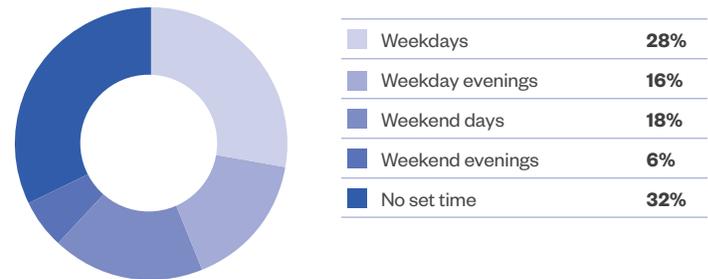
Source: Division of Tax Policy, NYC Department of Finance

What We've Heard from Shoppers

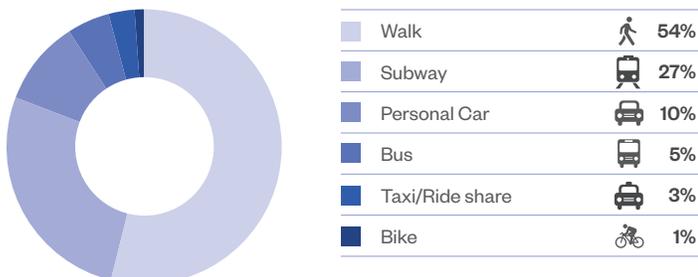
What additional types of businesses would you like to see in Central Harlem?

- ▶ Grocery stores & healthy food options 
- ▶ Bookstores 
- ▶ Bakeries, cafés, juice bars 
- ▶ Movie theaters & family friendly entertainment 
- ▶ Gyms & recreation 
- ▶ Clothing stores 

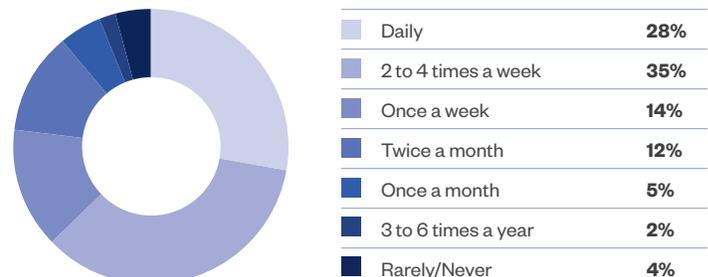
When do you usually shop in Central Harlem?



How do you usually get to Central Harlem?



How often do you shop in Central Harlem?



Source: Based on 255 consumer surveys conducted by Harlem Park to Park in Winter and Spring 2019.

DATA APPENDIX

Study Area Boundaries

Assessed Commercial Corridors

Primary data on Central Harlem storefront businesses presented on pg. 6-7 was gathered along the following corridors:

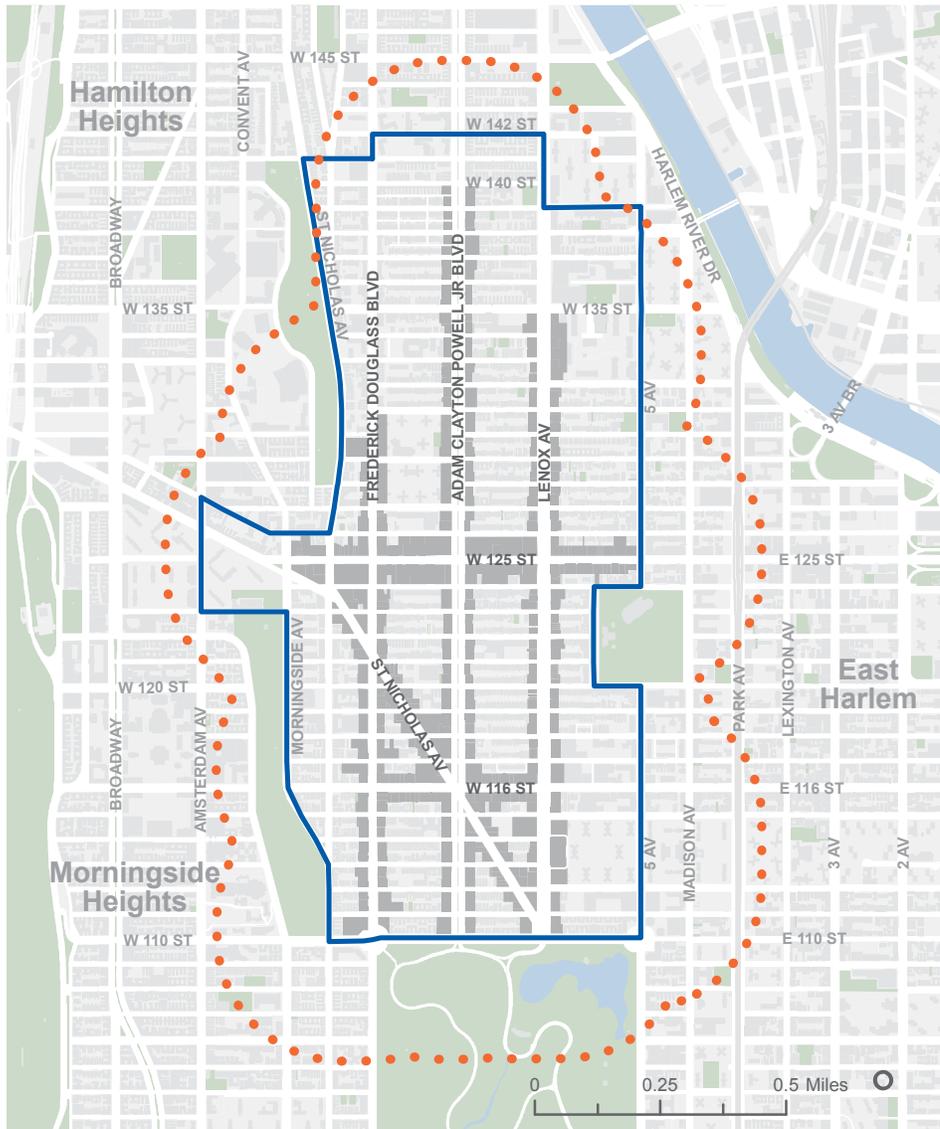
- ▶ St. Nicholas Avenue between Central Park North and W. 125 Street
- ▶ Frederick Douglass Boulevard between Central Park North and W. 131 Street
- ▶ Adam Clayton Powell Jr. Boulevard between Central Park North and W. 140 Street
- ▶ Lenox Avenue between Central Park North and W. 135 Street
- ▶ W. 116 Street between Frederick Douglass Boulevard and Lenox Avenue
- ▶ W. 125 Street between Morningside Avenue and 5th Avenue

Central Harlem Context Area

Demographic and employment data on pg. 16-17 correspond to the Central Harlem neighborhood context area.

Trade Area

Retail leakage, surplus, and retail opportunity data on pg. 13 correspond to the 0.25 mile trade area.



Area Demographics

Total Population

98,209	Central Harlem
1,634,989	Manhattan
8,461,961	New York City

Population Density (per square mile)

95,883	Central Harlem
71,617	Manhattan
27,986	New York City

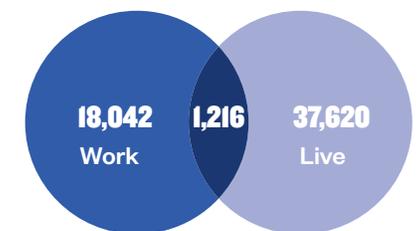
Average Household Size

2.47	Central Harlem
2.09	Manhattan
2.65	New York City

Car Ownership

22%	Central Harlem
23%	Manhattan
45%	New York City

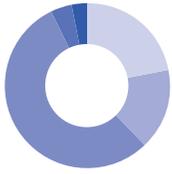
Commuting Patterns



18,042	Work in Central Harlem, live elsewhere
1,216	Live & Work in Central Harlem
37,620	Live in Central Harlem, work elsewhere

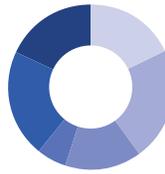
Area Demographics

Race/Background



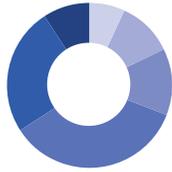
	Central Harlem	MN	NYC
Hispanic or Latino (of any race)	22%	26%	29%
White alone	16%	47%	32%
Black or African American alone	55%	13%	22%
Asian alone	4%	12%	14%
Two or more races	3%	2%	2%
Some other race alone	0%	0%	1%
American Indian and Alaska Native alone	0%	0%	0%
Native Hawaiian and Other Pacific Islander	0%	0%	0%

Educational Attainment



	Central Harlem	MN	NYC
12th Grade or Less, No Diploma	18%	13%	19%
High School Graduate	22%	12%	24%
Some College, No Degree	15%	10%	14%
Associate's Degree	6%	4%	7%
Bachelor's Degree	21%	32%	21%
Graduate or Professional Degree	18%	29%	15%

Population Age



	Central Harlem	MN	NYC
Under 5 Years	7%	5%	6%
5-14 Years	11%	8%	11%
15-24 Years	13%	12%	13%
25-44 Years	35%	37%	32%
45-64 Years	25%	24%	25%
65+ Years	9%	14%	13%

Median Age

34.8	Central Harlem
36.7	Manhattan
35.9	New York City

Foreign-Born Population

23%	Central Harlem
29%	Manhattan
37%	New York City

Income

Median Household Income

\$45,623	Central Harlem
\$75,513	Manhattan
\$55,191	New York City

Pop. Below Poverty Line

29%	Central Harlem
18%	Manhattan
20%	New York City

Employment

Population in Labor Force

63%	Central Harlem
68%	Manhattan
64%	New York City

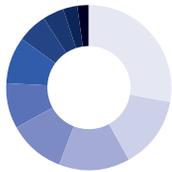
Unemployment*

9.7%	Central Harlem
6.9%	Manhattan
8.6%	New York City

*Note: As of November 2018, the unemployment rate is 3.3% for Manhattan and 3.7% for New York City (NYSDOL); updated neighborhood-level data for Central Harlem is not available.

Local Jobs and Employment

Local Residents' Employment



Educational Services, Health Care, Social Assistance	28%
Accommodation, Food Services, Arts, & Entertainment	14%
Professional, Scientific, & Technical Services	14%
Finance, Insurance, Real Estate	9%
Retail Trade	9%
Transportation, Warehousing, Utilities	6%
Public Administration	4%
Manufacturing	3%
Construction	2%
Other Services	11%

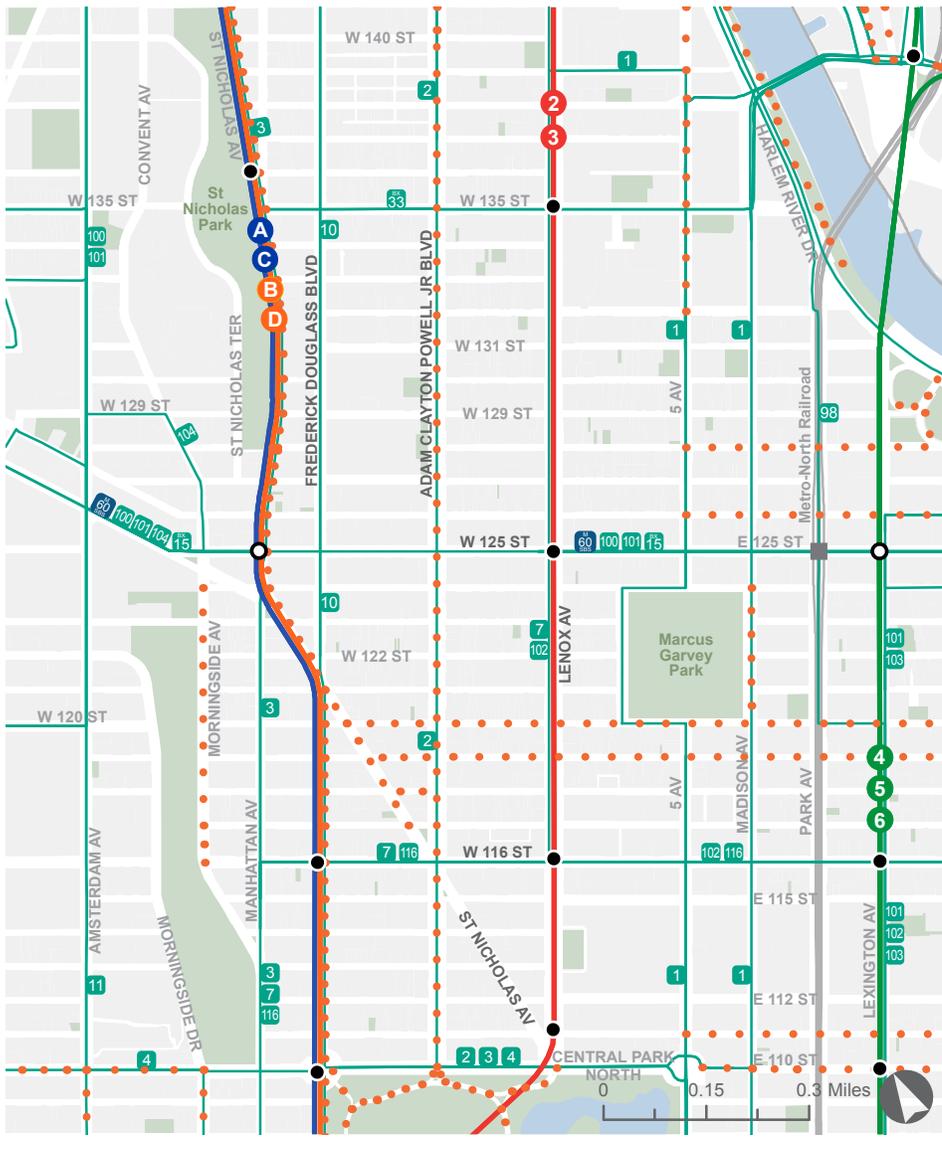
Jobs Located in Central Harlem



Educational Services, Health Care, Social Assistance	51%
Accommodation, Food Services, Arts, & Entertainment	13%
Professional, Scientific, & Technical Services	2%
Finance, Insurance, Real Estate	6%
Retail Trade	11%
Transportation, Warehousing, Utilities	0%
Public Administration	6%
Manufacturing	0%
Construction	1%
Other Services	10%

DATA APPENDIX

Central Harlem Transportation



▲ Central Harlem Transportation



Vehicular Traffic

20,239	Average daily vehicles on Lenox Avenue between Central Park North and W. 145 Street
23,354	Average daily vehicles on Adam Clayton Powell Jr. Boulevard between Central Park North and W. 155 Street
10,988	Average daily vehicles on Frederick Douglass Boulevard between Central Park North and W. 125 Street
18,326	Average daily vehicles on W. 125 Street between Frederick Douglass Boulevard and 5th Avenue
14,233	Average daily vehicles on W. 135 Street between St Nicholas Avenue and 5th Avenue

Average Weekday Subway Ridership (2017)

7,232	B C	116 Street
11,553	2 3	116 Street
28,680	A C B D	125 Street
15,692	2 3	125 Street
29,065	4 5 6	125 Street
5,770	B C	135 Street
15,023	2 3	135 Street

Total MTA Bus Routes

15 MTA Bus Routes

MTA Annual Bus Ridership

2.9M	M1
2.7M	M2
4.0M	M3
4.6M	M4
4.0M	M7
2.1M	M10
5.2M	M60 SBS
5.0M	M100
7.1M	M101
3.7M	M102
2.9M	M103
2.8M	M104
3.0M	M116
8.0M	Bx15
0.8M	Bx33

Sources: MTA 2017; NYS DOT, 2015 Annual Average Daily Traffic data.

Recent SBS Investments in the Neighborhood

- ▶ *Commercial Revitalization*, Avenue NYC multi-year grant, awarded to Harlem Park to Park, 2018-2021.
- ▶ *Shop Local Event and Marketing Campaign*, Avenue NYC placemaking grant of \$30,000 awarded to Harlem Park to Park, 2018.
- ▶ *Bradhurst Business Attraction and Support Program*, Avenue NYC business attraction and retention grant of \$30,000 awarded to Harlem Congregations for Community Improvement, 2017.
- ▶ *Shop Local Event and Marketing Campaign*, Avenue NYC placemaking grant of \$30,000 awarded to Harlem Park to Park, 2017.
- ▶ *Harlem Restaurant & Retail Week, Harlem Harvest Festival, and Welcome to the Neighborhood Events*, Avenue NYC placemaking grant of \$30,000 awarded to Harlem Park to Park, 2016.
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The NYC Department of Small Business Services (SBS) helps unlock economic potential and create economic security for all New Yorkers by connecting New Yorkers to good jobs, creating stronger businesses, and building thriving 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 Central Harlem Commercial District Needs Assessment:

Manhattan Borough President Gale Brewer
NYC Council Member Bill Perkins
Manhattan Community Board 10
Harlem Merchants
Harlem Shoppers and Residents