



WASHINGTON HEIGHTS

MANHATTAN

Commercial District Needs Assessment



careers
businesses
neighborhoods



Community League of the Heights



ABOUT WASHINGTON HEIGHTS

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 the **Broadway and St. Nicholas Avenue** commercial corridors in **Washington Heights** which was conducted in partnership with the **Community League of the Heights (CLOTH)** between August 2018 and January 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 **395 surveys** and various stakeholder meetings with neighborhood merchants, shoppers, workers, property owners, and residents.

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Located in Upper Manhattan, Washington Heights extends north from 155th Street to Dyckman Street, and is bordered on the west by the Hudson River and the east by the Harlem River. Broadway, a major New York City thoroughfare, runs north and south through the heart of Washington Heights, converging with St. Nicholas Avenue at 168th Street where the 1, A, and C trains stop. On 178th Street is the George Washington Bridge Bus Station, a major transportation hub that provides easy access to multiple subway and bus lines that connect visitors and commuters from New Jersey to various destinations throughout the city.

The Audubon Terrace Historic District, located between 155th and 156th streets, Broadway and Riverside Drive, is a landmarked 20th century historical district and cultural center named after the renowned Ornithologist John James Audubon. This is among the many cultural institutions located in Washington Heights, including the American Academy of Arts & Letters, the Hispanic Society Museum & Library, and Boricua College. Located further north are such neighborhood anchors as the United Palace, New York-Presbyterian hospital, and the Malcolm X & Dr. Betty Shabazz Memorial and Educational Center (The Shabazz Center). The center, located in the former lobby of the Audubon Ballroom where Malcolm X was assassinated, is dedicated to the contributions that Malcolm X and his wife Dr. Shabazz made during the civil rights movement. These iconic neighborhood institutions are easily accessible by various means of public transportation.

Washington Heights has a rich immigrant history and is a living tribute to the immigrant experience in New York City. The opening of the 157th Street subway station in 1906 spurred a major construction boom; apartments and tenements were built, attracting newly arrived immigrants — mostly of Irish, Greek, and Jewish descent. After World War II, a secondary wave of immigration occurred when a large population of Spanish-speaking immigrants arrived in Washington Heights; first Puerto Rican, followed by Cubans, and finally Dominicans.

Neighborhood Demographics

See more on page 12

Washington Heights has a population of 92,476 residents. Approximately 48% of its residents are foreign born. The top three Latinx groups are Dominicans (62%), followed by the more recent arrival of Mexicans (10.5%), and Puerto Ricans (approximately 7%). Known as “Little Dominican Republic,” many tourists and New Yorkers who live outside of Washington Heights come to eat and shop at the many long-standing Dominican-owned restaurants and businesses dotting Broadway and St. Nicholas Avenue. Along St. Nicholas Avenue it is not uncommon to observe an impromptu, outdoor game of dominoes along the corridor, a favorite game among members of the Dominican and Puerto Rican communities.

Future Opportunities

See more on page 5

Current development projects in Washington Heights include extensive plans for office, hotel, and retail space, as well as affordable and market-rate apartments. In the past decade, new bars and restaurants have popped up along Broadway, serving the local community, students from Boricua College, and employees of New York-Presbyterian. Further north on the Broadway corridor — near the United Palace — are quaint eateries, specialty food shops, and grab-and-go food options reflective of the diverse population of Washington Heights. Together with an emerging nightlife that includes new and old bars and restaurants, and the recent opening of the boutique Edge Hotel on 168th Street between Audubon and Amsterdam avenues, Washington Heights has become a destination for all.

Washington Heights



Merchant & Business Groups

The Chamber of Commerce of Washington Heights & Inwood

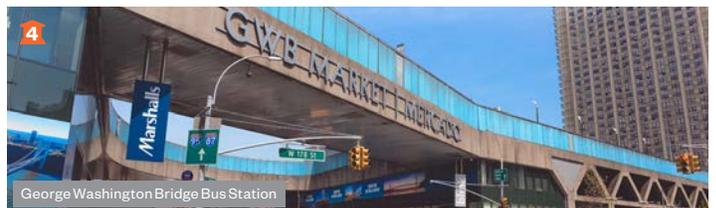
Washington Heights and Inwood Development Corporation

Washington Heights Business Improvement District (BID)

Points of Interest

- Assessed Commercial Corridors
- Washington Heights BID
- Incubators & Co-Working Spaces
- Arts & Entertainment
- Public Facilities

Notable Places



KEY FINDINGS & OPPORTUNITIES

Strengths

- ▶ High foot traffic throughout the corridor facilitated by the presence of local institutions, such as the United Palace, that provide engaging community programming to Washington Heights residents and visitors
- ▶ Accessible transportation options including the George Washington Bridge Bus Station, which is centrally located in Washington Heights and serves as a transit hub for commuters in and outside of New York
- ▶ Various opportunities for entrepreneurship and small business development via community assets like La Plaza de Las Americas
- ▶ Significant parks and greenspaces throughout the commercial district on Broadway and St. Nicholas Avenue, in addition to the green spaces bounding the Washington Heights community on the east and west
- ▶ Large employers, such as NewYork-Presbyterian hospital which help fuel the Washington Heights economy by bringing visitors and employees into the commercial district to purchase locally
- ▶ Diverse eateries and restaurants that offer residents and visitors a variety of dining options
- ▶ Strong community pride and local commitment to support small businesses in Washington Heights

Challenges

- ▶ High number of vacant storefronts in the district as a result of property speculation and poor landlord and tenant relationships
- ▶ Poor storefront conditions, including blocked windows and lack of signage, are uninviting for consumers and negatively impact local businesses
- ▶ Unsightly sidewalk conditions due to scaffolding and ongoing construction on St. Nicholas Avenue and Broadway, which attracts trash and rodents
- ▶ Limited parking options for consumers along the corridor due to existing parking regulations, including the recent implementation of loading zones
- ▶ Lack of consistent programming in parks and open spaces, such as McKenna Square Park on St. Nicholas Avenue, resulting in the underuse of public spaces by the community
- ▶ Overflowing trash cans and animal waste throughout the commercial corridor negatively impacts pedestrian traffic and deters both residents and visitors from visiting the commercial district





Opportunities

- ▶ Develop programming to activate existing plazas and small park spaces, including McKenna Square, Haven Avenue Plaza, and Ilka Tanya Payán Park to foster a sense of place for residents
- ▶ Encourage collaboration between local artists and small businesses to provide improvements to storefronts — particularly signage and roll-down gates
- ▶ Work in partnership with local businesses, community members, and other stakeholders to improve the quality and conditions of tree beds
- ▶ Partner with local institutions and large employers to provide additional community programming and events
- ▶ Collaborate with local merchants, residents, and community stakeholders to launch a district marketing campaign that celebrates and highlights the corridor's diverse cultural events, small businesses, and anchor institutions
- ▶ Connect Washington Heights youth to job training opportunities through innovative partnerships
- ▶ Provide one-on-one technical assistance to the small business community in Washington Heights to help them adapt to the needs of the community
- ▶ Develop a plan in collaboration with local community-based organizations, property owners, and local artists, to activate vacant storefronts and underused spaces, and to attract new retail opportunities

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

449

Total Number of Storefronts

18.5%

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 the Community League of the Heights (CLOTH) through a comprehensive area inventory of storefront businesses located along Broadway and St. Nicholas Avenue. (October 2018)



Coogan's



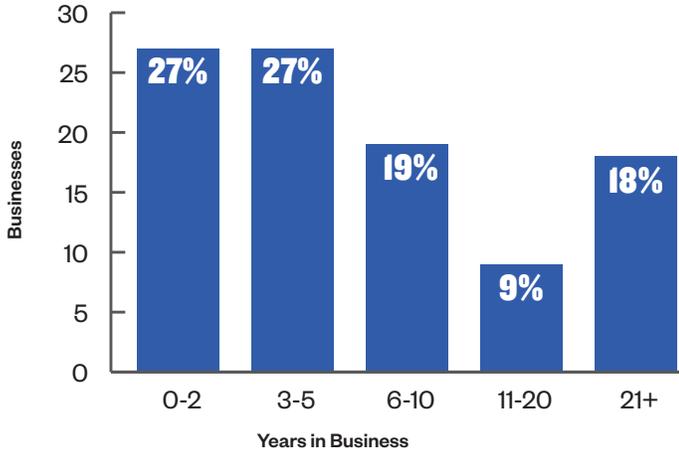
Broadway Corridor Storefront Mural



La Blanda Meat Market

What We've Heard from Washington Heights Merchants

How many years have you been in business here?



*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.

Do you own or rent your property?



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



How many employees do you have?



What changes need to occur in Washington Heights to attract more visitors/shoppers?

	% Merchant Responses
▶ Community events	30%
▶ Parking	13%
▶ Safety	11%
▶ Better landscaping	10%
▶ Street lighting	10%
▶ Storefront improvements	9%
▶ Business-to-business communication	8%
▶ Sanitation	7%
▶ Other	2%

What kinds of resources would help you grow your business?

	% Merchant Responses
▶ Marketing support	34%
▶ Financing	24%
▶ Legal/lease support	19%
▶ Space improvements	9%
▶ New equipment	5%
▶ Other	4%
▶ Training for staff	4%
▶ Assistance with regulatory compliance	1%

BUSINESS LANDSCAPE

What We've Heard from Washington Heights Merchants

What do you like about the commercial corridor?

"The corridor is close to the hospital, meaning a lot of doctors and students rent in the neighborhood."

"I like the people, diversity, and community in this corridor."

"We are close to a lot of transit options, such as the A, 1, and C trains, as well as bus stops."

"Love the neighborhood."

"The corridor is fast paced, with a lot of foot traffic and movement around subway stops."

"It's a theater community. It's diverse and LGBT friendly."

"I'm Dominican and these are my people."

"The people are friendly and the corridor is safe."

"I grew up in this area and have had my family business here since 1961."

What would you say are the most pressing needs of businesses on this corridor?

"I don't know what's going to happen when my lease expires. I think my rent is going to be increased too much."

"Competition with street vendors."

"In the summer months, sales drop for small businesses."

"Drugs are a persistent problem and sold openly. This affects all businesses on the block."

What We've Heard from Washington Heights Shoppers

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

"[We need] more businesses that target children and youth, such as bookstores with the purpose of developing historical/social awareness."

"We are a family of four with two adults and two small kids. There is no place to buy clothes for us, within walking distance, of decent quality. We also would love to see more art galleries and live music venues for local artists."

"More jobs for local people."

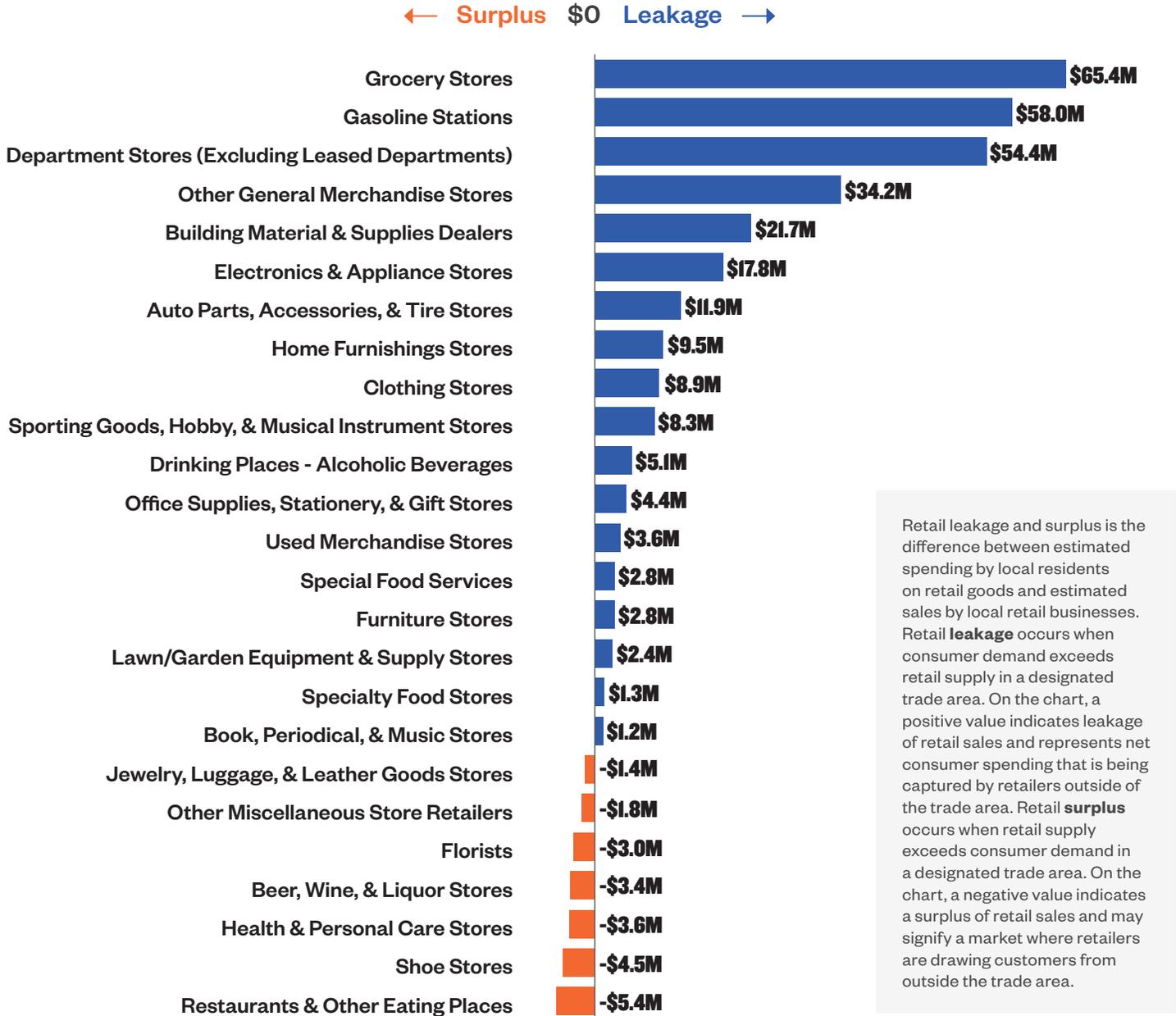
"A well stocked supermarket with reasonable prices, and fresh produce. [Something that is] affordable and carries a huge selection."

Based on 67 merchant surveys and 328 consumer surveys conducted by the Community League of the Heights in Fall 2018.

Washington Heights Retail Opportunity

<p>Residents spend</p> <p>\$841.6M</p> <p>each year in goods and services</p>	<p>Local businesses make</p> <p>\$510.9M</p> <p>each year in retail sales</p>	<p>Every year,</p> <p>\$330.8M</p> <p>is spent outside the neighborhood</p>
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Retail Leakage & Surplus



Source: ESRI and Infogroup, January 2019.

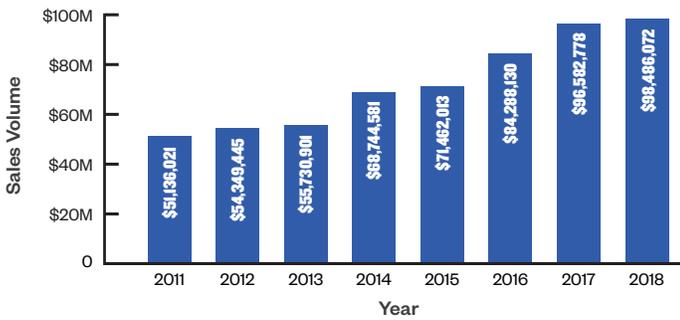
BUSINESS OUTLOOK

Business Trends

Change in Total Business Sales, 2011-2018



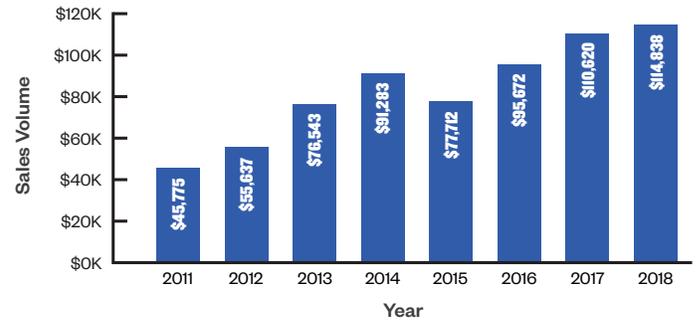
Washington Heights Total Business Sales



Change in Median Sales by Business, 2011-2018



Washington Heights Median Sales by Business



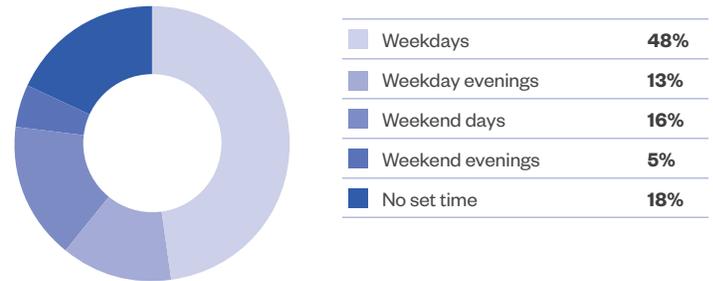
Source: Division of Tax Policy, NYC Department of Finance

What We've Heard from Shoppers

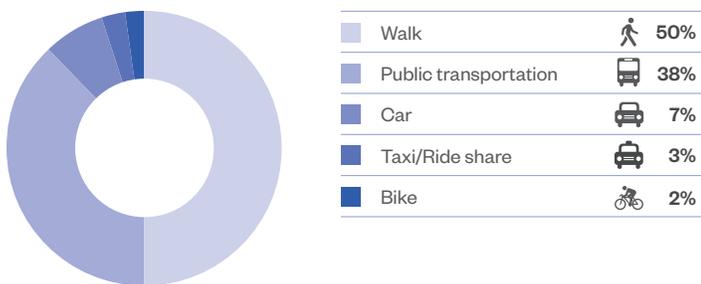
What additional types of businesses would you like to see in Washington Heights?

- ▶ Department stores 
- ▶ Clothing stores 
- ▶ Full-service restaurants 
- ▶ Healthy, affordable grocery stores 
- ▶ Shoe stores 

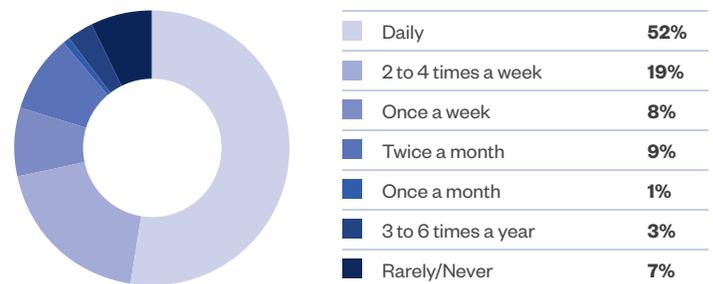
When do you usually shop in Washington Heights?



How do you usually get to Washington Heights?

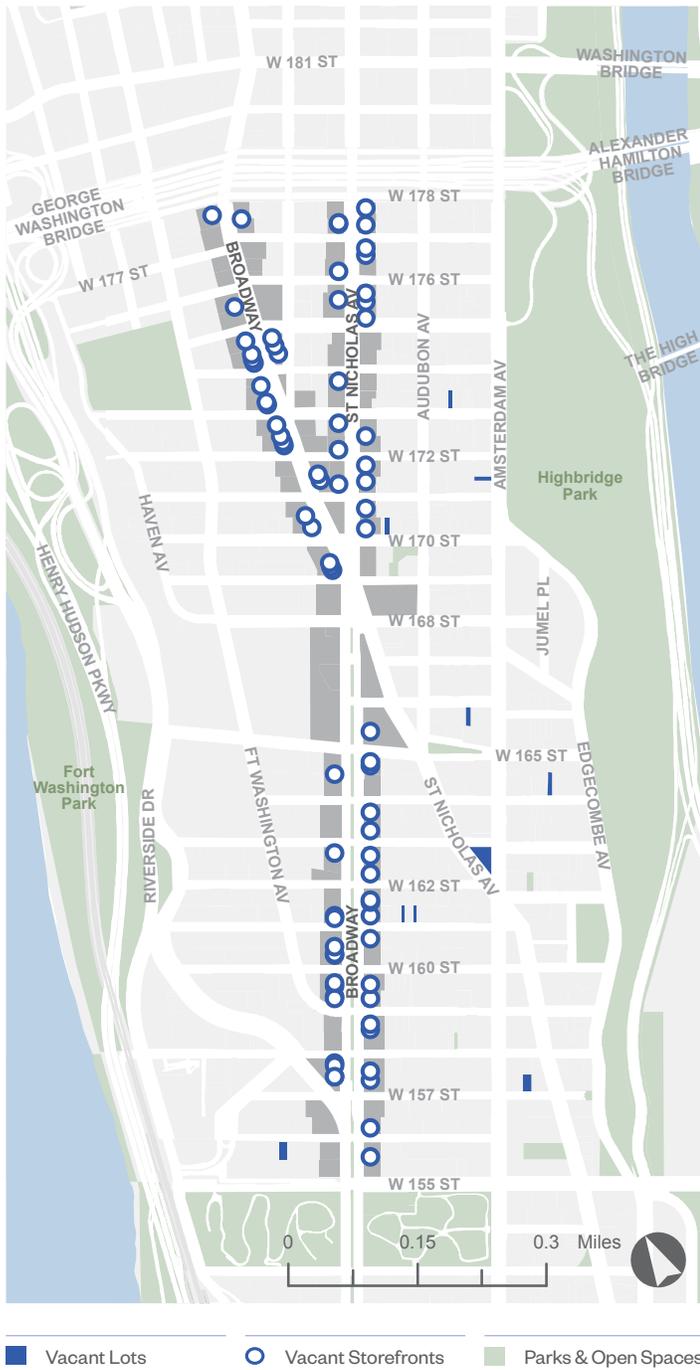


How often do you shop in Washington Heights?



Source: Based on 328 consumer surveys conducted by the Community League of the Heights (CLOTH) of Washington Heights in Fall 2018.

Storefront Vacancies



An analysis of 449 storefronts along Broadway and St. Nicholas Avenue revealed that 35% of storefronts are in poor condition, 56% are in average condition, and 9% are in good condition.



Streetscape Observations

St. Nicholas Avenue

- ▶ Trash overflow from garbage cans poses a health and pedestrian hazard and discourages consumers from walking along the commercial corridor.
- ▶ Poor storefront conditions impact perceptions on the quality of goods offered throughout commercial corridor.
- ▶ Poorly maintained sidewalks make it difficult for pedestrians to safely navigate the commercial corridor.

Broadway

- ▶ Sidewalks and storefronts along Broadway are generally clean and well maintained.
- ▶ Traffic congestion along the Broadway corridor creates traffic flow issues that impact Washington Heights consumers, merchants, and residents.

DATA APPENDIX

Study Area Boundaries

Assessed Commercial Corridors

Primary data on Washington Heights storefront businesses presented on pg. 6-8 was gathered along Broadway and St. Nicholas Avenue.

Washington Heights Context Area

Demographic and employment data on pg. 12-13 correspond to the Washington Heights context area.

Trade Area

Retail leakage, surplus, and retail opportunity data on pg. 9 correspond to the 0.25 mile trade area.



Area Demographics

Total Population

100,433	Washington Heights
1,634,989	Manhattan
8,461,961	New York City

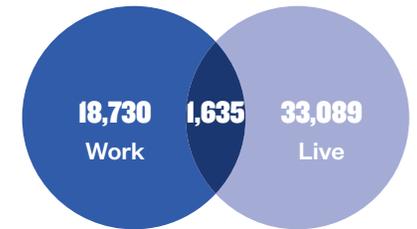
Population Density (per square mile)

107,697	Washington Heights
71,617	Manhattan
27,986	New York City

Average Household Size

3.1	Washington Heights
2.09	Manhattan
2.65	New York City

Commuting Patterns



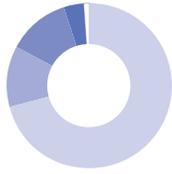
18,730	Work in Washington Heights, live elsewhere
1,635	Live & Work in Washington Heights
33,089	Live in Washington Heights, work elsewhere

Car Ownership

21.4%	Washington Heights
23%	Manhattan
45%	New York City

Area Demographics

Race/Background



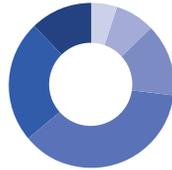
	Washington Heights	Manhattan	NYC
Hispanic or Latino (of any race)	71%	26%	29%
White alone	12%	47%	32%
Black or African American alone	12%	13%	22%
Asian alone	4%	12%	14%
Two or more races	1%	2%	2%
Some other race alone	0%	0%	1%
American Indian and Alaska Native alone	0%	0%	0%
Native Hawaiian and Other Pacific Islander	0%	0%	0%

Educational Attainment



	Washington Heights	Manhattan	NYC
12th Grade or Less, No Diploma	31%	13%	19%
High School Graduate	20%	13%	24%
Some College, No Degree	15%	10%	14%
Associate's Degree	6%	4%	6%
Bachelor's Degree	18%	32%	36%
Graduate or Professional Degree	10%	29%	15%

Population Age



	Washington Heights	Manhattan	NYC
Under 5 Years	5%	5%	7%
5-14 Years	8%	7%	11%
15-24 Years	14%	12%	13%
25-44 Years	37%	37%	32%
45-64 Years	24%	24%	25%
65+ Years	12%	14%	13%

Median Age

34.5	Washington Heights
36.7	Manhattan
35.9	New York City

Foreign-Born Population

47%	Washington Heights
29%	Manhattan
37%	New York City

Income

Median Household Income

\$40,125	Washington Heights
\$75,513	Manhattan
\$55,191	New York City

Pop. Below Poverty Line

22%	Washington Heights
18%	Manhattan
20%	New York City

Employment

Population in Labor Force

65%	Washington Heights
68%	Manhattan
64%	New York City

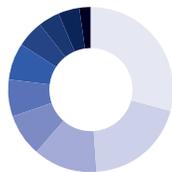
Unemployment*

13%	Washington Heights
6.9%	Manhattan
8.6%	New York City

*Note: Unemployment figures are based on data from 2012-2016. 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 Washington Heights is not available.

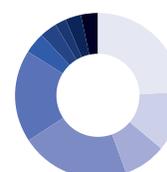
Local Jobs and Employment

Local Residents' Employment



Educational Services, Health Care, Social Assistance	28%
Accommodation, Food Services, Arts, Entertainment	19%
Retail Trade	12%
Professional, Scientific, & Technical Services	8%
Finance, Insurance, Real Estate	7%
Other Services	7%
Transportation, Warehousing, Utilities	5%
Construction	4%
Manufacturing	4%
Public Administration	2%

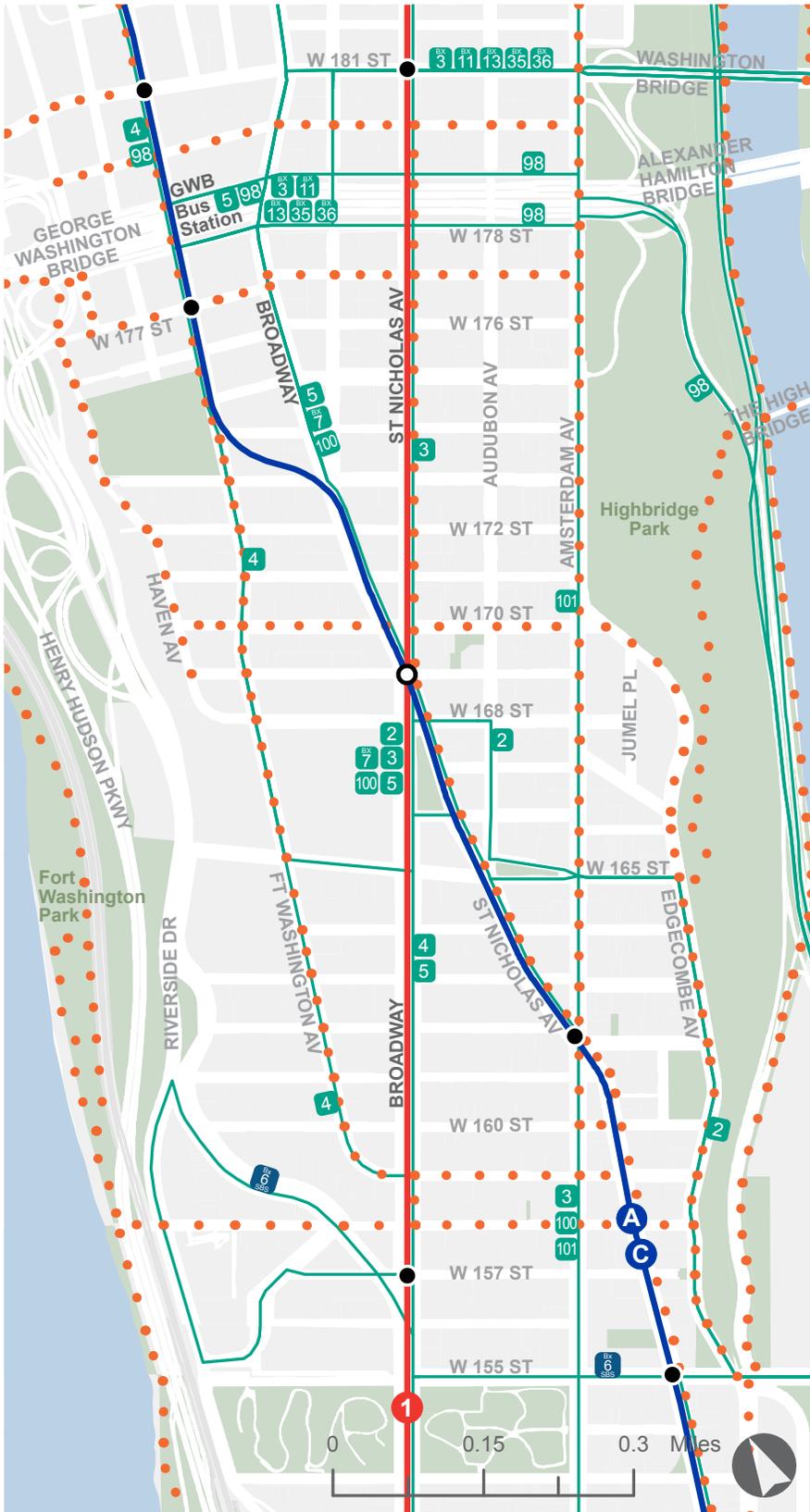
Jobs Located in Washington Heights



Educational Services, Health Care, Social Assistance	23%
Accommodation, Food Services, Arts, Entertainment	11%
Retail Trade	8%
Professional, Scientific, & Technical Services	20%
Finance, Insurance, Real Estate	17%
Other Services	4%
Transportation, Warehousing, Utilities	3%
Construction	2%
Manufacturing	3%
Public Administration	3%

DATA APPENDIX

Washington Heights Transportation



Washington Heights Transportation

- Bus Routes
- NYC Subway
- Bicycle Lanes

Pedestrian Counts

West 181st Street/St. Nicholas Avenue

1,386 Weekday Morning (7 - 9 a.m.)

7,668 Weekday Afternoon (4 - 7 p.m.)

6,307 Weekend (12 - 2 p.m.)

Vehicular Traffic

23,606 between W. 155th Street and W. 179th Street on Broadway

5,384 between W. 173rd Street and W. 180th Street on Wadsworth Street

Average Weekday Subway Ridership (2017)

10,802 1 157th Street

25,589 A C 1 168th Street

13,217 A 175th Street

10,981 A 181st Street

11,693 1 181st Street

MTA Annual Bus Ridership (2017)

4.0M M3

4.5M M4

2.2M M5

5.0M M100

4.3M Bx7

Sources: MTA 2017; NYC DOT September 2017; NYS DOT 2015 Annual Average Daily Traffic Data.

Recent SBS Investments in the Neighborhood

- ▶ *Commercial Revitalization*, Avenue NYC multi-year grant, awarded to Community League of the Heights, 2018-2021.
- ▶ *Neighborhood Design Lab* services, awarded to Community League of the Heights, 2019.
- ▶ *Placemaking*, Avenue NYC grant of \$30,000 awarded to the Washington Heights BID, 2018.
- ▶ *Placemaking*, Avenue NYC grant of \$30,000 awarded to the Washington Heights BID, 2017.
- ▶ *Business Attraction*, Avenue NYC grant of \$25,000 awarded to Community League of the Heights, 2016.
- ▶ *Placemaking*, Avenue NYC grant of \$20,000 awarded to the Washington Heights BID, 2016.
- ▶ *Capacity Building*, Avenue NYC grant of \$25,000 awarded to Community League of the Heights and Broadway United Businesses, 2015.
- ▶ *Placemaking*, Avenue NYC grant of \$20,000 awarded to the Washington Heights BID, 2015.

Existing Plans & Studies

- Inwood Library*, Community League of the Heights with NYC Department of Housing Preservation Development (HPD), 2022 (proposed completion date).
- Inwood NYC Planning Initiative*, NYC Economic Development Corporation, 2018.

Sources

ESRI and Infogroup, Inc. January 2019 ESRI Retail Market Place Profile.

Metropolitan Transportation Authority. 2017. Average Weekday Subway Ridership.

NYS Department of Labor. December 2018. Unemployment Rate Rankings by County.

NYS Department of Transportation. 2015 Annual Average Daily Traffic, using Traffic Data Viewer.

NYC Department of Finance, Division of Tax Policy, using 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.

NYC Department of Small Business Services. Fiscal Year 2018. Business Improvement Districts Trends Report.

NYC Department of Transportation. September 2017. Bi-Annual Pedestrian Counts.

U.S. Census Bureau. 2015. OnTheMap Application. Longitudinal-Employer Household Dynamics Program.

U.S. Census Bureau. American Community Survey, 2013 American Community Survey 4-Year Estimates, using NYC Census FactFinder. Washington Heights Census Tracts: 263, 261, 253, 251, 245, 241, 243.01, 247, 255, 249, 265, 239, 237

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ABOUT SBS

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

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Manhattan Community Board 12
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Washington Heights Shoppers and Residents