

HARVARD UNIVERSITY

January 2007

Dear neighbors and colleagues:

We are pleased to provide you with a summary of findings of a recent survey on Harvard Square conducted by the University Planning Office. Over 2,600 members of the Harvard community including students, faculty, staff and alumni responded to the survey providing views about the Square's retail mix and urban character. Results will help inform the University's long-term approach to ensuring that its properties in the Square continue to support a vibrant commercial center with a distinctive character and identity.

Harvard Square is important to many people for the variety of goods and services it provides, its unique physical setting, and its symbolism as a center for cultural and intellectual exchange. Harvard has a strong interest in the continued vibrancy and character of the Square as both a property owner and generator of activity.

This survey dovetails with other efforts to support the Square's long-term vitality with which the University has partnered. The City of Cambridge's Economic Development Division initiated a series of community discussions in 2005 focused on maintaining a "Healthy Harvard Square" and has recently formed six subcommittees to study specific issues in more detail and to develop action plans. Representatives from Harvard University are participating in several of these subcommittees.

Harvard recently contributed \$1.3 million to the City of Cambridge to support physical improvements to Harvard Square. This major construction project, which began in summer 2006, will improve the pedestrian and biking experience with wider sidewalks, enhanced street lighting, new crosswalks, curb extensions, bike lanes, and opportunities for outdoor seating and events.

The Harvard Square Business Association (HSBA) has recently stepped up its efforts to market the Square, increase the number of visitors, and publicize information about the Square at its website, Harvardsquare.com.

Sustaining the energy and vibrancy of Harvard Square requires the work of many. Through the efforts of the City, community groups, the Harvard Square Business Association, local merchants, the University and others, Harvard Square will thrive as a vibrant cultural, historical and retail destination. We hope that the survey results serve as a useful tool to members of the Harvard Square community in this endeavor.

If you have any questions regarding the University Survey on Harvard Square, please contact any of us at your convenience.

Sincerely,

James Gray
Associate Vice President of
Harvard Real Estate Services
Tel. 617-496-5789

Tanya Iatridis
Director, University Planning
Office
Tel. 617-495-3630

Mary Power
Senior Director of Community
Relations
Tel. 617-495-4955



UNIVERSITY PLANNING OFFICE

University Survey on Harvard Square January 2007

This past year the Harvard University Planning Office undertook a survey of the broad Harvard community with regard to Harvard Square. The purpose was to understand the opinions of Harvard students, faculty, staff and alumni (collectively called Harvard affiliates) on the retail mix, urban character, and availability of information about events and resources of Harvard Square. Input from a cross section of Harvard affiliates was sought to help inform the University's long-term approach to ensuring that its properties in the Square continue to support a vibrant commercial center with a distinctive character and identity. Overall, 2,600 people responded to the primarily Internet-based survey. The key survey findings are summarized below.

Summary Findings

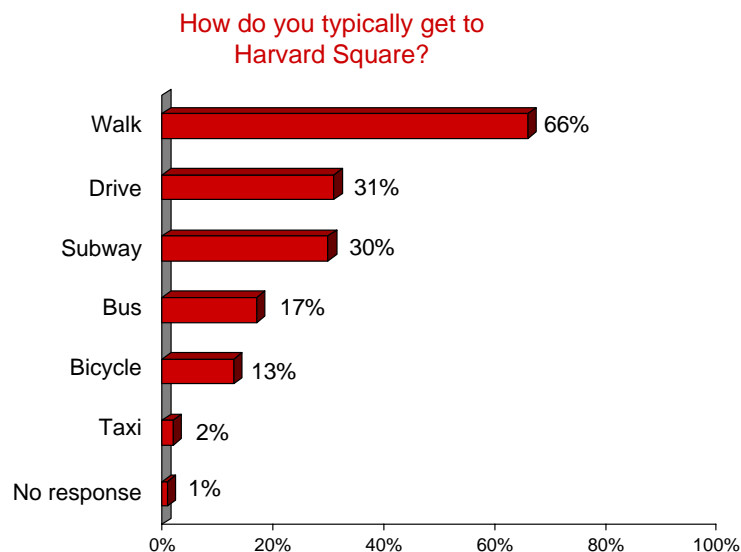
Key findings from the 2006 University Survey on Harvard Square represent the blended opinions of all Harvard affiliate groups, unless otherwise specified.

Harvard Square Today

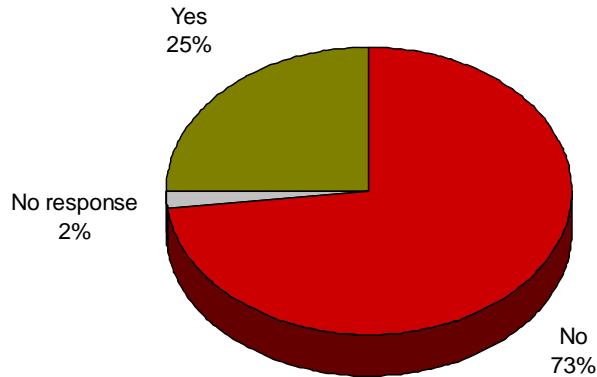
The section on Harvard Square today encompassed questions on how Harvard affiliates access Harvard Square; how informed they feel about Harvard Square; how they access information about Harvard Square; what affiliates do when they visit Harvard Square and why; what types of establishments affiliates visit most often; how satisfied affiliates are with key aspects of Harvard Square; and what affiliates like most and least about Harvard Square.

Transportation Access

- *Walking* (66%) is the typical method Harvard affiliates use to get to Harvard Square, with nearly one in three *driving* (31%) or taking the *subway* (30%).
- Access to MBTA subways or buses is the primary reason for going into Harvard Square for one in four (25%) Harvard affiliates.



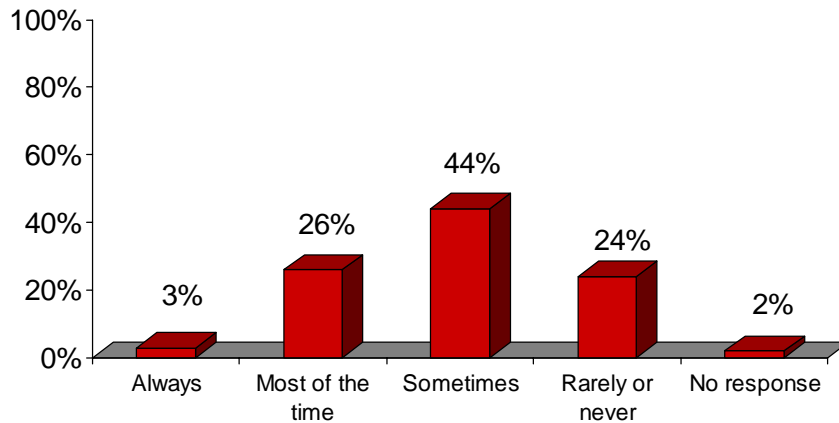
Is the ability to access the MBTA subway or buses your primary reason for going into Harvard Square?



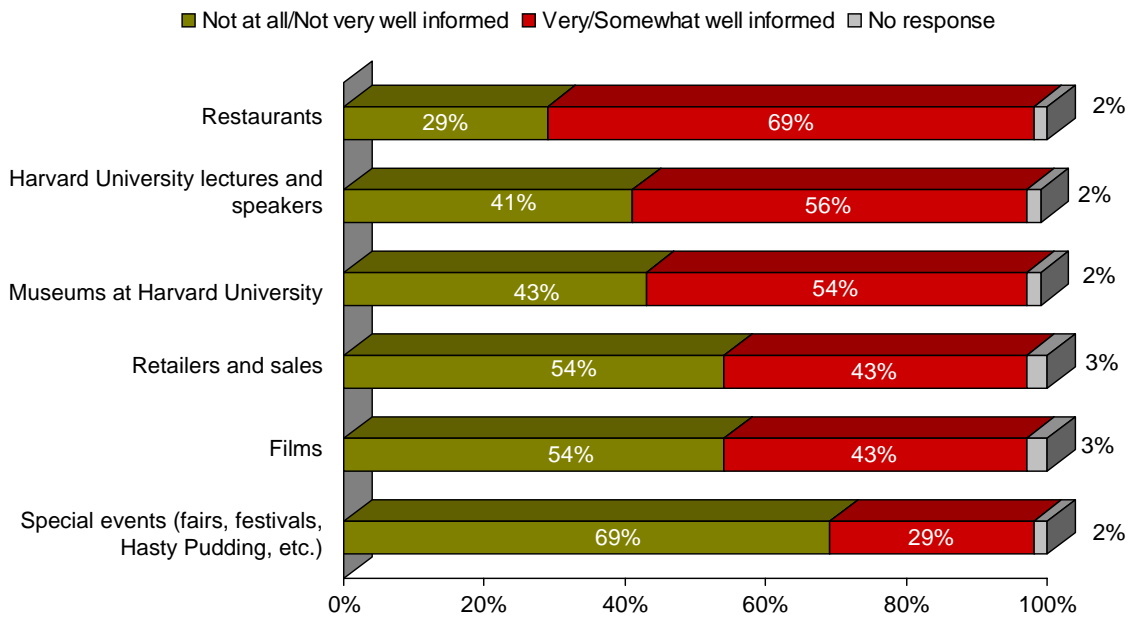
Information Access

- Only 29% of Harvard affiliates think information about what is available and going on in Harvard Square is easily accessible and useful *always or most of the time*.
- Harvard affiliates feel well-informed about *restaurants* (69%), *Harvard University lectures and speakers* (56%), and *museums at Harvard University* (54%). Harvard affiliates do not feel as well informed about *special events* in Harvard Square (69%), *retailers and sales* (54%), and *films* (54%).
- *Word-of-mouth* (68%) and *while visiting Harvard Square* (57%) are the primary sources of information about events and resources in Harvard Square. Secondary sources of information include *listings from specific organizations* (40%), the *Boston Globe* (34%), the *Harvard Crimson* (29%), and the *Harvard Gazette* (28%).

Do you think information about what is available and going on in Harvard Square is easily accessible and useful?



How well informed do you feel about each of the following in Harvard Square?



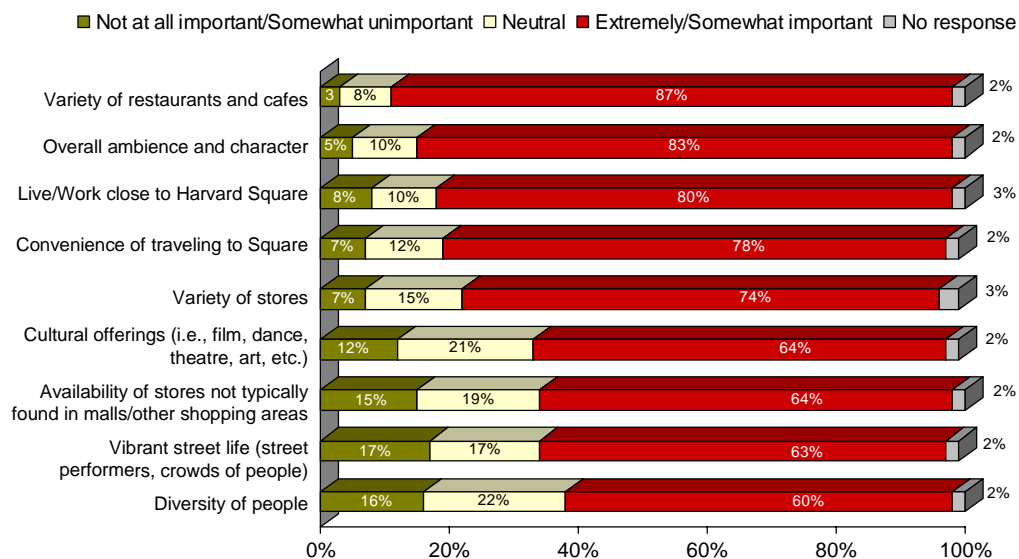
How do you find information on events and resources in Harvard Square?

Word-of-mouth	68%
While visiting Harvard Square	57
Listings from specific organizations (theaters, university departments, etc.)	40
Boston Globe	34
Harvard Crimson	29
Harvard Gazette	28
Harvie/Outings & Innings	16
Boston Phoenix	11
Harvard Resource	11
Metro	9
Boston Magazine	5
boston.citysearch.com	5
harvardsquare.com	3
Harvard Independent	2
Other	1
No response	3

Why Affiliates Visit in Their Free Time

- The two most important factors in Harvard affiliates' decision to spend their free time in Harvard Square include the *variety of restaurants and cafes* (87%) and the *overall ambience and character* (83%). The next three most important decision-making factors include *living/working close to Harvard Square* (80%), the *convenience of traveling to Harvard Square* (78%), and the *variety of stores* (74%). The comparatively less important decision-making factors are the *cultural offerings* (64%), *availability of stores not typically found in malls/other shopping areas* (64%), the *vibrant street life* (63%), and the *diversity of people* (60%).

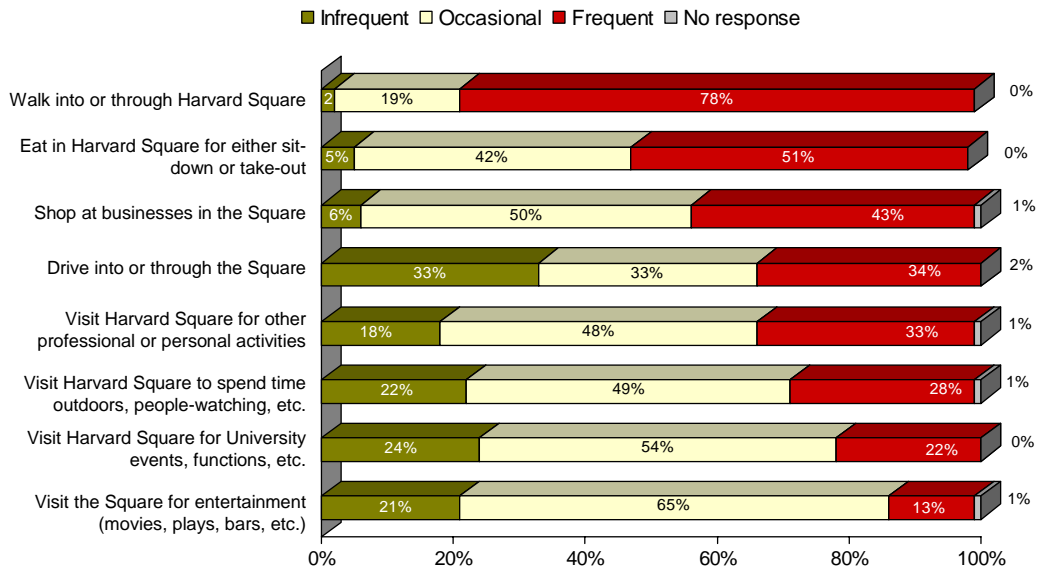
How important are each of the following factors in your decision to spend your free time in Harvard Square?



What Affiliates Do When They Visit

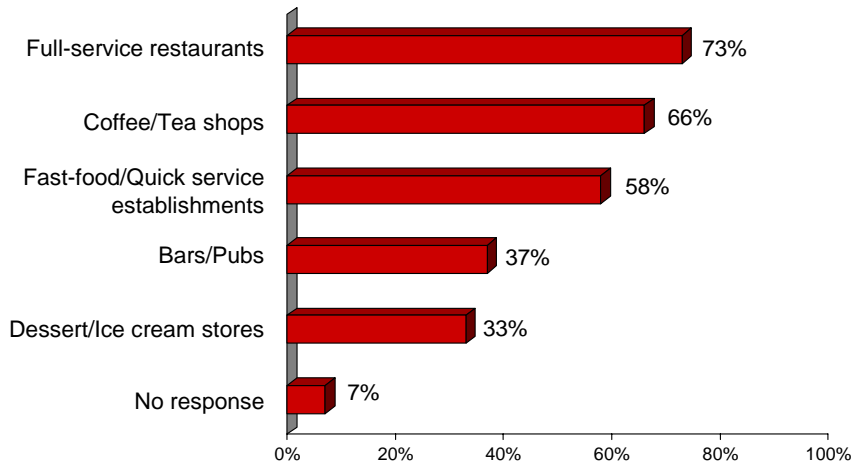
- The top two activities Harvard affiliates do on a frequent basis when they visit Harvard Square are *walk into or through Harvard Square* (78%) and *eat in Harvard Square for either sit-down or take-out* (51%). Less than half frequently *shop at businesses in the Square* (43%), *drive into or through the Square* (34%), or *visit Harvard Square for other professional or personal activities* (33%). Less than one in three Harvard affiliates frequently *visit Harvard Square to spend time outdoors, people-watching, etc.* (28%), *visit Harvard Square for University events, functions, etc.* (22%), and *visit the Square for entertainment* (13%).

In your free time, how often do you:



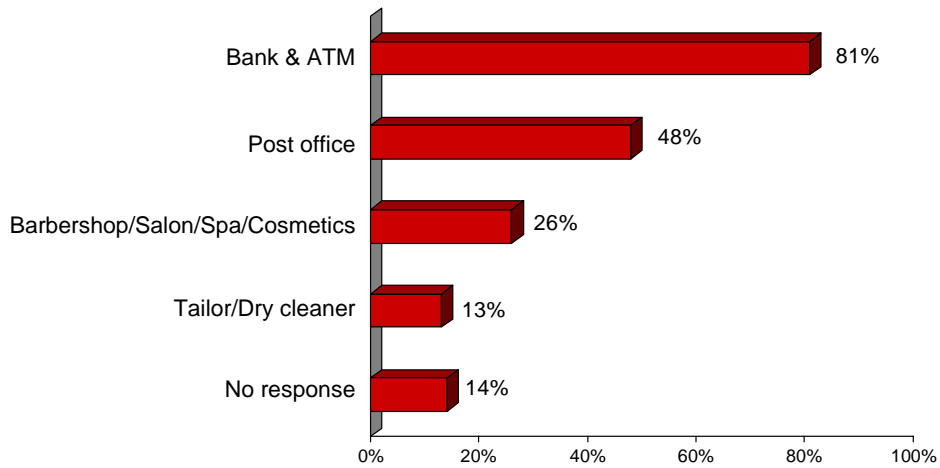
- Among food and beverage establishments in Harvard Square, Harvard affiliates most often visit *full-service restaurants* (73%), *coffee/tea shops* (66%), and *fast-food/quick service establishments* (58%) at least once per month. About one-third of Harvard affiliates visit *bars/pubs* (37%) and *dessert/ice cream stores* (33%) at least once per month.

Which types of food and beverage establishments do you visit at least once per month in Harvard Square?



- Among types of personal services in Harvard Square, Harvard affiliates most often use *bank and ATM services* (81%) and *post office services* (48%) at least once per month. Less than one-third of Harvard affiliates use *barbershop/salon/spa/cosmetics services* (26%) and *tailor/dry cleaner* (13%) services at least once per month.

Which types of personal services do you use at least once per month in Harvard Square?



- Among retail establishments in Harvard Square, Harvard affiliates most often visit *bookstores/newsstands* (76%), *pharmacies/drugstores* (52%), *convenience stores* (47%), and *office supplies/stationary stores* (43%) at least once per month in Harvard Square. Less than one-third of Harvard affiliates visit *fashion/clothing stores* (32%), *music/video/audio stores* (26%) or *gift shops* (26%) on a monthly basis. The remaining 12 retail establishments asked about in the survey are visited at least once per month by less than one-quarter of Harvard affiliates, with *cell phone stores* (2%), *eyewear stores* (3%), and *jewelry/watch stores* (5%) being the least visited retail establishments.

Which types of retail establishments do you visit at least once per month in Harvard Square?

Bookstores/Newsstands	76%
Pharmacies/Drugstores	52
Convenience stores	47
Office supplies/Stationary stores	43
Fashion/Clothing stores	32
Music, video, audio stores	26
Gift shops	26
Specialty foods stores	24
Hardware stores	20
Wine/Liquor stores	17
Art supplies/Craft stores	15
Sporting goods stores	14
Shoe stores	14
Home furnishing stores	8
Photo supplies/Processing stores	7
Children's clothing/Toy stores	6
Jewelry/Watch stores	5
Eyewear stores	3
Cell phone stores	2
No response	10

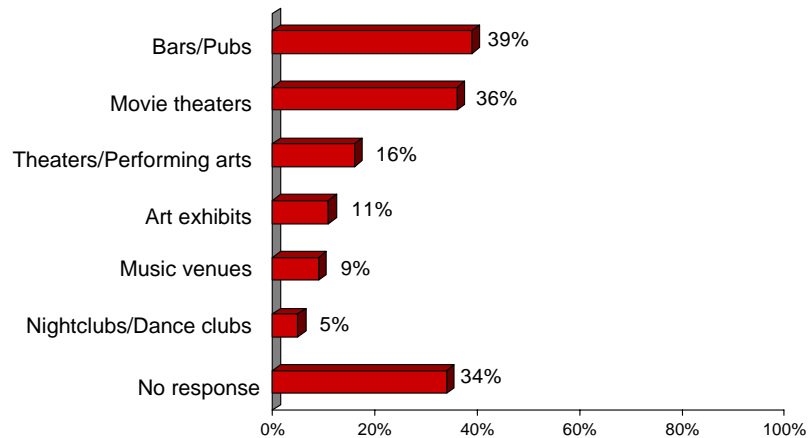
- Harvard affiliates' three most frequently cited favorite retail establishments in Harvard Square are the *Harvard Book Store* (24%), *The Coop* (22%), and *CVS* (14%).

Please list your three favorite retail establishments in Harvard Square.

Harvard Book Store	24%
The Coop	22
CVS	14
Bob Slate Stationers	8
Cardullo's Gourmet Shoppe	7
Urban Outfitters	6
Jasmine Sola	5
Felipe's Taqueria	5
The Gap	5
Newbury Comics	4
Peet's Coffee & Tea	4
Dickson Bros. True Value Hardware	4
Crate and Barrel	4

- Among entertainment establishments in Harvard Square, Harvard affiliates most often visit *bars/pubs* (39%) and *movie theaters* (36%) at least once per month. Less than one in five Harvard affiliates visit *theaters/performing arts* (16%), *art exhibits* (11%), *music venues* (9%), or *nightclubs/dance clubs* (5%) at least once per month.

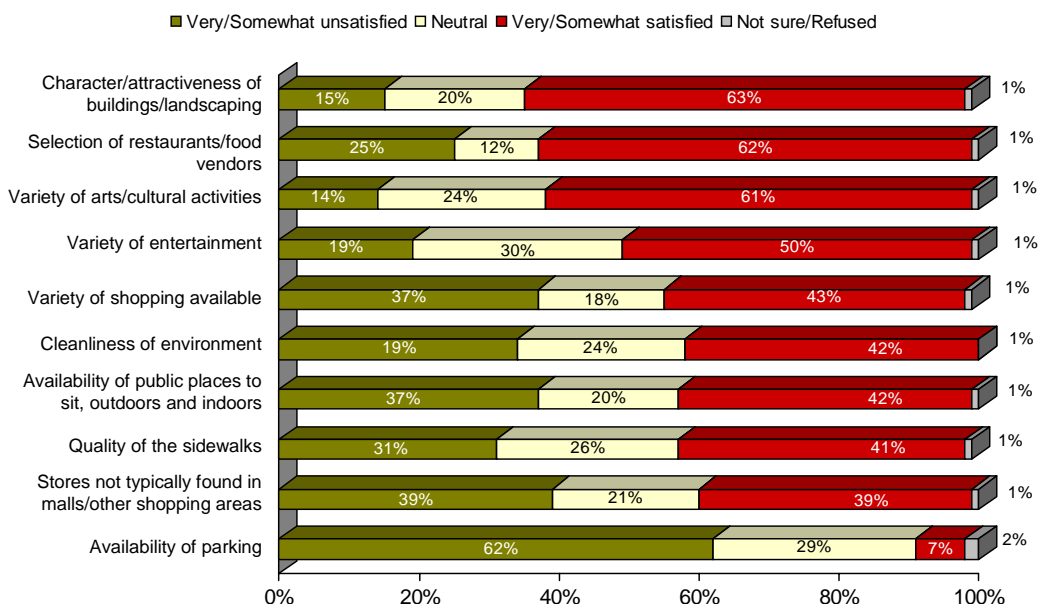
Which types of entertainment establishments do you visit at least once per month in Harvard Square?



Satisfaction with Services and Environment

- Harvard affiliates are most satisfied with the *character/attractiveness of buildings/landscaping* (63%), the *selection of restaurants/food vendors* (61%), and the *variety of arts/cultural activities* (61%) in Harvard Square. Half or less of Harvard affiliates are satisfied with the *variety of entertainment* (50%), the *variety of shopping available* (43%), the *cleanliness of the environment* (42%), the *availability of places to sit* (42%), the *quality of the sidewalks* (41%), and *stores not typically found in malls/other shopping areas* (39%). Harvard affiliates are least satisfied with the *availability of parking* (7%).

Reflecting on your experience as a Harvard Square visitor, please rate your satisfaction with the following aspects of Harvard Square:



Most Liked Aspects

- The three most liked aspects of Harvard Square today identified by Harvard affiliates are the *selection of restaurants and food vendors* (29%), the *diversity of people and businesses* (26%), and the *lively/vibrant atmosphere* (18%). The next most liked aspects of Harvard Square today include the *shopping* (13%), *independent/non-chain establishments* (12%), *street performers/entertainers* (11%), and the *bookstores* (10%).

What do you like most about Harvard Square as it exists today?

Selection of restaurants and food vendors	29%
Diversity of people, business, etc.	26
Lively/vibrant atmosphere	18
Shopping (general)	13
Independent/non-chain establishments	12
Street performers/entertainers	11
Bookstores	10
Convenient — close to work/home/school	8
Eclectic/Has character	7
Pedestrian-friendly	6
Architecture/Landscaping	5
People-watching	4
Proximity to public transportation	4

Least Liked Aspects

- The three least liked aspects of Harvard Square today identified by Harvard affiliates include *becoming less unique/too many chains* (44%, voiced most strongly by Harvard alumni, faculty and staff), *too expensive/overpriced* (16%), and the *traffic/congestion* (13%). The next least liked aspects of Harvard Square today include the *aggressive panhandling* (9%), *lack of good/affordable restaurants* (9%—voiced most strongly by Harvard students), *lack of available/affordable parking* (9%), and the *dirty/bad smell* (7%).

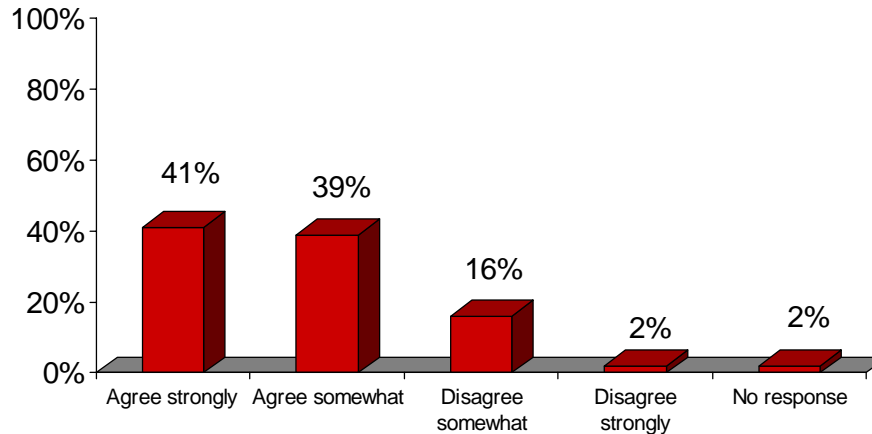
What do you like least about Harvard Square as it exists today?

Becoming less unique/Too many chains (banks, cell phone stores)	44%
Too expensive/overpriced	16
Traffic/Congestion	13
Aggressive panhandling	9
Lack of good/affordable restaurants	9
Lack of available/affordable parking	8
Dirty/Bad smell	7
Loss of bookstores	6
No grocery store	6
No nightlife/Should extend entertainment hours	5
Overflow of homeless	5
Pedestrian issues (dilapidated sidewalks/hard to cross streets)	5

Attitudes Toward Banks in Prime Locations

- A large majority (80%) of Harvard affiliates agree with the following statement: “*There are too many banks taking up prime locations in Harvard Square.*”

Do you agree or disagree with the following statement: *There are too many banks taking up prime locations in Harvard Square.*



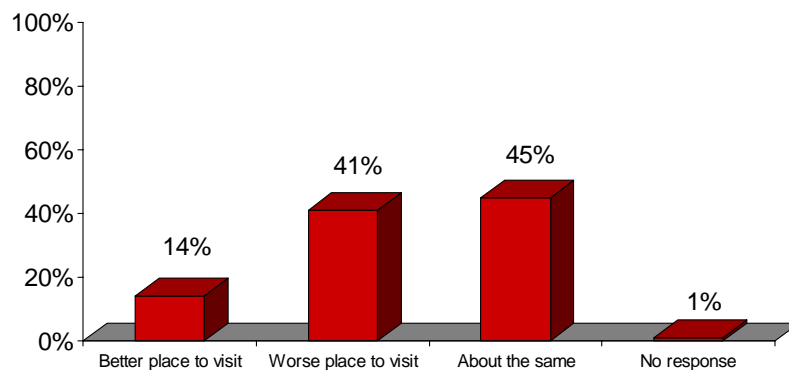
Opinions of the Character of Harvard Square

The section on Opinions of the Character of Harvard Square encompassed questions on whether affiliates feel Harvard Square has changed, why and how affiliates describe Harvard Square today, and how they would like it to be in the future.

Overall Opinion of Harvard Square Since First Visiting

- Close to half of Harvard affiliates (45%) think Harvard Square is *about the same* as their first while 41% think Harvard Square is a *worse place to visit*. Just 14% of Harvard affiliates think Harvard Square is a *better place to visit* since their initial visit. Harvard College students are the affiliate group most likely to think Harvard Square is a *better place to visit*. Harvard graduate or professional school students and Harvard College students are the affiliate groups most likely to think Harvard Square is *about the same*. Harvard alumni, faculty and staff are more likely to think Harvard Square is a *worse place to visit* since their first visit.

Since your first visit, in your opinion, is Harvard Square a better place to visit, a worse place to visit, or about the same?



Why Harvard Square is a Better Place to Visit

- Among those who consider Harvard Square to be a better place to visit since their first visit, the most frequently cited reasons include: *more/better restaurants/cafes* (23%), *know the area better now* (22%), *more stores/unique businesses* (21%), and *cleaner/less trashy* (18%).

Why do you consider Harvard Square a better place to visit than before?

More/better restaurants/cafes	23%
Know the area better now (nooks, hidden gems)	22
More stores/Unique businesses	21
Cleaner/Less trashy	18
Better/Nicer	7
More things to do now/More entertainment options	6
Less construction/MBTA stop completed	6
Safer/Less crime — Feel comfortable	5
More vibrant/alive atmosphere	4

Why Harvard Square is About the Same Place to Visit

- Among those who consider Harvard Square to be about the same place to visit since their first visit, the most frequently cited reasons include: *don't notice change much/at all* (39%), *I am new/relatively new to the area* (15%), *good/better things opened/bad things closed* (12%), and *atmosphere/vibe is the same* (11%).

Why do you consider Harvard Square about the same as before?

Don't notice change much/at all	39%
I am new/relatively new to the area	15
Good/better things opened/Bad things closed	12
Atmosphere/vibe is the same	11
Key/iconic restaurants/stores still here	6
Too many banks	4

Why Harvard Square is a Worse Place to Visit

- Among those who consider Harvard Square to be a worse place to visit since their first visit, the most frequently cited reasons include: *unique/independent stores lost/gone/driven away* (28%), *loss of character/charm/atmosphere* (23%), *too many chain businesses taking over* (23%), *too many banks* (20%), *bring back past stores/restaurants/icons* (18%), *too upscale/commercialized/mall-like/homogenized* (15%), and *loss of bookstores/used bookstores* (10%).

Why do you consider Harvard Square a worse place to visit than before?

Unique/Independent stores lost/gone/driven away	28%
Loss of character/charm/atmosphere	23
Too many chain businesses taking over	23
Too many banks	20
Bring back past stores, restaurants, icons	18
Too upscale/Commercialized/Mall-like/Homogenized	15
Loss of bookstores/used bookstores	10
Dirty/Grungy/Smelly/Sticky	8
Loss of affordable/diverse retail stores	8
Loss of affordable/funky restaurants	8
Too expensive (stores/restaurants)	7
Traffic — bad	4
Parking — bad	4

Current and Desired Atmosphere

- From a list of 17 words or phrases, Harvard affiliates were asked to select three that best describe Harvard Square today. Harvard affiliates most often select the words *bustling* (51%), *expensive* (46%), and *diverse* (34%). Under one-third of Harvard affiliates choose the words *corporate* (28%) and *historic* (28%), and 16% each select *boring* or *intellectual*. Harvard College students, graduate and professional school students, and staff are more likely to describe Harvard Square today as *expensive*, while Harvard faculty and alumni are more likely to describe Harvard Square as *corporate*.
- From the same list of 17 words of phrases, Harvard affiliates were asked to select three that best describe what they would like Harvard Square to become in the future. The most frequently selected words are *unique* (41%) and *affordable* (41%). More than one-quarter of Harvard affiliates choose the words *diverse* (30%), *independent* (29%), *intellectual* (26%), and *funky* (26%). Less than one-quarter of Harvard affiliates choose the words *artsy* (21%), *bustling* (19%), *historic* (15%), and *practical* (15%). Harvard College students are more likely to select *affordable* and *practical*, Harvard alumni are more likely to choose *unique* and *diverse*, and Harvard faculty are more likely to choose *intellectual*.

Choose three of the words or phrases below
that best describe Harvard Square today, and what
you would like it to become in the future.

	Today	Future
Affordable	1%	41%
Artsy	9	21
Boring	16	—
Bustling	51	19
Conservative	5	1
Corporate	28	1
Diverse	34	30
Expensive	46	1
Funky	10	26
Historic	28	17
Independent	5	29
Intellectual	16	26
Modern	4	7
Old-fashioned	3	4
One-stop shopping	3	10
Practical	7	15
Unique	18	41

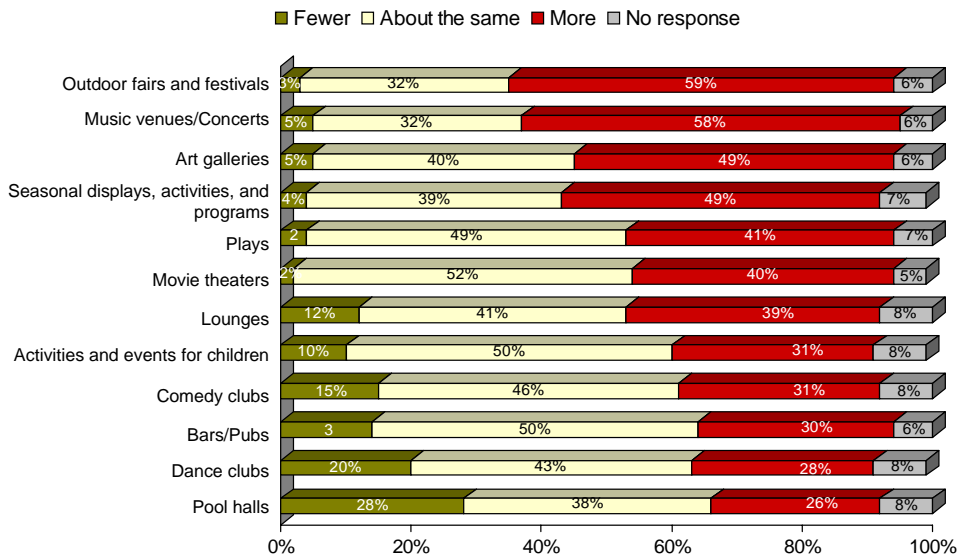
Preferences for Improvements to Harvard Square

The section on Preferences for Improvements to Harvard Square gauged: whether affiliates want more, less, or the same of a number of entertainment, food and beverage, and retail options; the types of public spaces that affiliates think would improve the Harvard Square experience; preferences for the type and size of stores in Harvard Square; preferences for improvements to Harvard Square; and the types of attractions that increase visitation to Harvard Square.

Entertainment

- A majority of Harvard affiliates want more *outdoor fairs and festivals* (59%) and more *music venues/concerts* (58%). The next most frequently desired entertainment options include *art galleries* (49%), *seasonal displays, activities and programs* (49%), *plays* (41%), and *movie theaters* (40%).

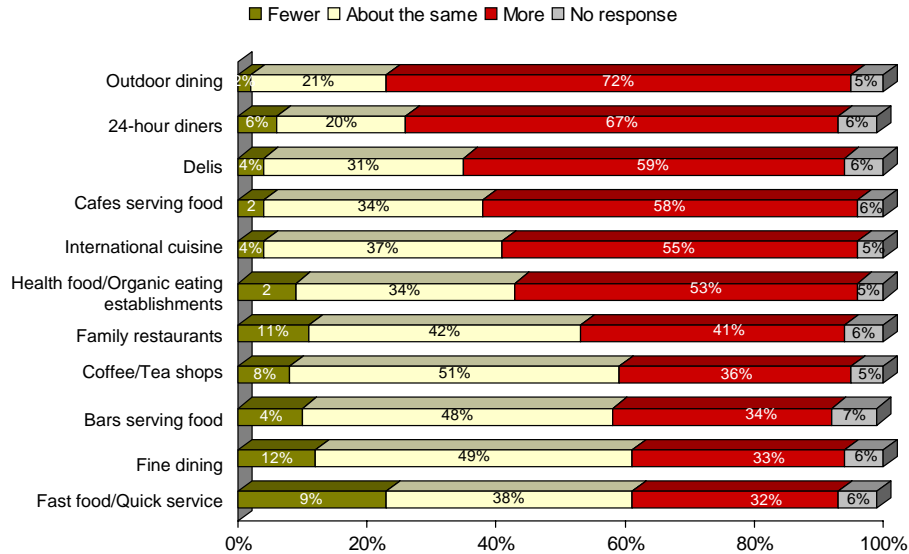
Do you feel that Harvard Square needs more or fewer of the following types of entertainment?



Food & Beverage Establishments

- More than two-thirds of Harvard affiliates want more *outdoor dining* (72%) and *24-hour diners* (67%). More than half of Harvard affiliates also want more *delis* (59%), *cafes serving food* (58%), *international cuisine* (55%) and *health food/organic eating establishments* (53%). Forty-two percent of Harvard affiliates want fewer *fast-food/quick service establishments*.

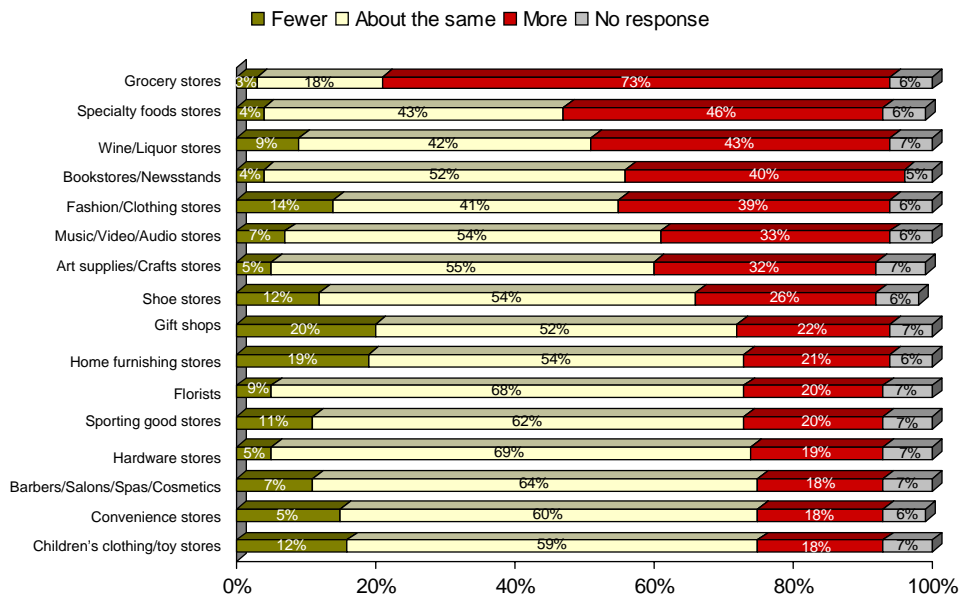
Do you feel that Harvard Square needs more or fewer of the following types of food and beverage establishments?



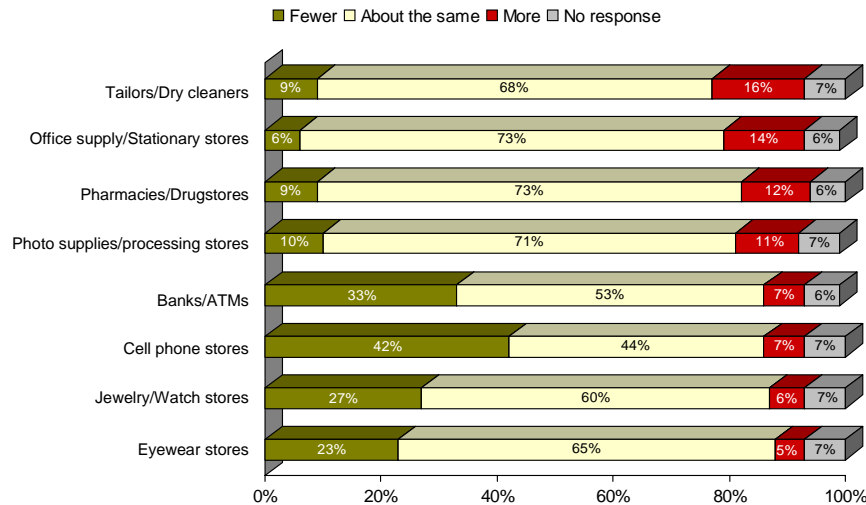
Retail Stores

- A large majority of Harvard affiliates, particularly Harvard College students, want more *grocery stores* (73%). The next most frequently identified retail stores that Harvard affiliates want more of include *specialty food stores* (45%), *wine/liquor stores* (43%), *bookstores/newsstands* (40%), and *fashion/clothing stores* (39%). Harvard affiliates are most likely to want fewer of the following types of retail stores: *cell phone stores* (42%), *banks/ATMs* (33%), *jewelry/watch stores* (27%), and *eyewear stores* (23%).

Do you feel that Harvard Square needs more or fewer of the following types of retail stores?



Do you feel that Harvard Square needs more or fewer of the following types of retail stores? (cont'd)



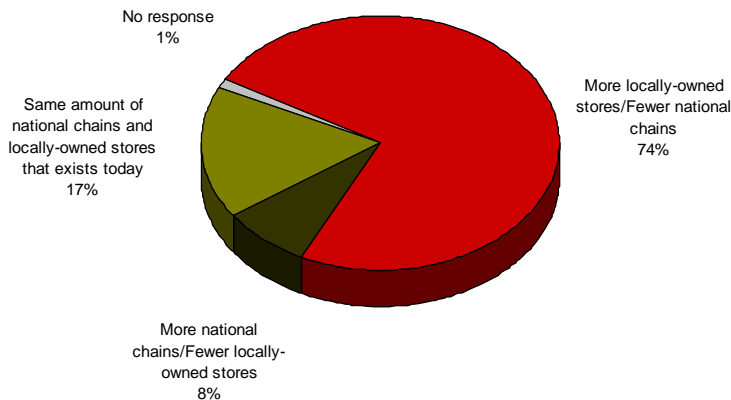
Public Spaces

- The top two types of public spaces that Harvard affiliates think would improve their experience of visiting Harvard Square are *more outdoor green spaces* (80%) and *more outdoor seating* (78%). Two-thirds of Harvard affiliates also think that *more weather-protected public spaces* (68%) and *more trash receptacles/more street cleaning* (66%) would improve their Harvard Square experience.

National Chains versus Local Ownership

- A large majority of Harvard affiliates (74%), particularly Harvard alumni and faculty, prefer that Harvard Square have *more locally-owned stores and fewer national chains*, while 18% prefer the *same amount of national chain stores and locally-owned stores that exists today*. Only eight percent prefer *more national chain stores and fewer locally-owned stores*.

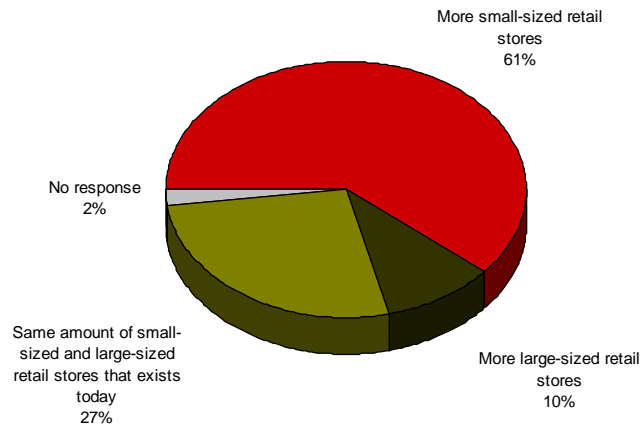
Considering the existing number of restaurants, entertainment, and retail stores in the Harvard Square, would you prefer...



Retail Store Size

- A majority of Harvard affiliates (61%) prefer that Harvard Square have *more small-sized retail stores*, while 27% prefer that Harvard Square have the *same amount of small-sized and large-sized retail stores that exists today*. Only 10% percent prefer that Harvard Square have *more large-sized retail stores*.

Considering the existing amount of retail space, should Harvard Square have...



Top Preferences for Improvement

- The top three improvements for Harvard Square that are suggested by Harvard affiliates include *fostering unique/independent stores* (14%), *stopping chain stores from replacing "Mom & Pop" stores* (14%), and *better parking* (10%).

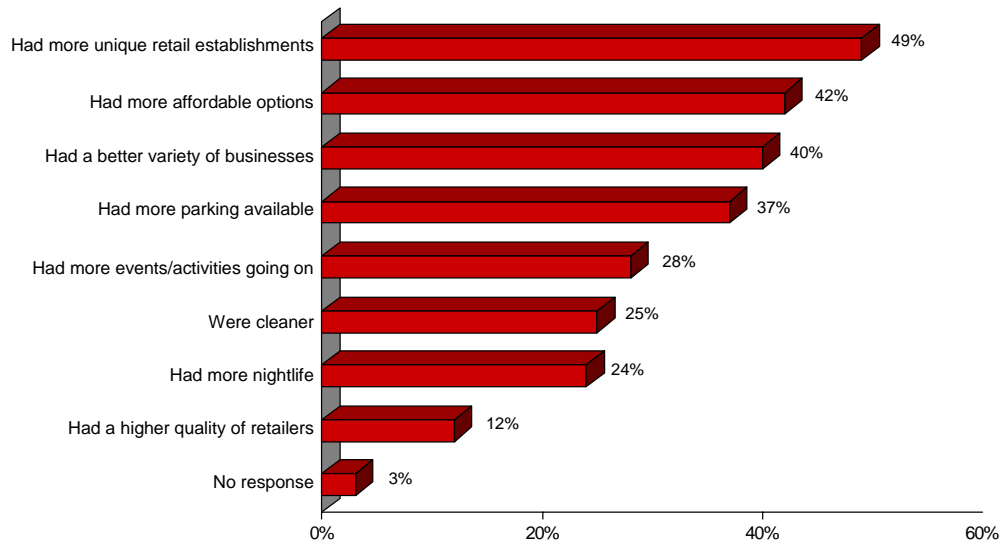
In your opinion, what is the most important thing that could be done to improve Harvard Square?

Foster unique/independent stores	14%
Stop chain stores from replacing "Mom & Pop" stores	14
Parking — More spaces/More convenient	10
Cleanliness/Too dirty	8
More diverse/Better variety of stores	8
Better/More diverse restaurants/bars	7
Decrease traffic	6
Too many banks	6
More space to sit/relax — Add more benches	5
Lower rents	5
Sidewalks — Improve/Widen/Repair bricks	4
More grocery store/supermarket(s)	4
Incentives to attract/retain desired businesses	4
More pedestrian-friendly	4
Extend business/entertainment hours	4

Top Attractions That Would Increase Visitation and Patronage

- From a list of eight potential improvements, Harvard affiliates were asked to select the three that would influence them to visit and patronize Harvard Square more often. Nearly half of Harvard affiliates (49%), particularly Harvard alumni and faculty, say they would visit and patronize Harvard Square more often if it *had more unique retail establishments*. The next most frequently selected improvements include if Harvard Square *had more affordable options* (42%—strongly supported by students), *had a better variety of businesses* (40%), and *had more parking available* (37%). Harvard College students (48%) are more likely to say they would visit and patronize Harvard Square more often if it *had more nightlife*.

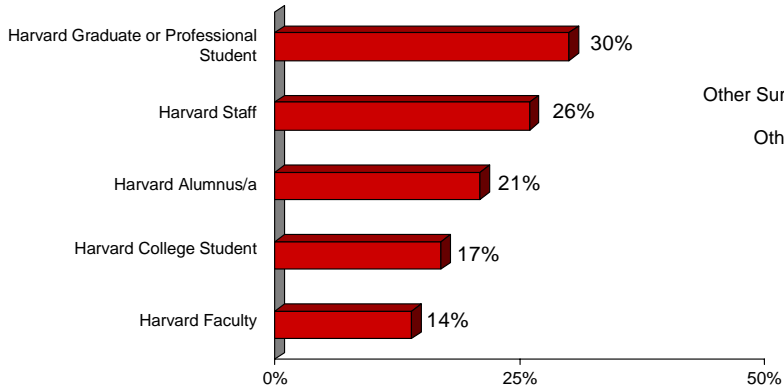
Please answer the following: *I would visit and patronize Harvard Square more often if it:*



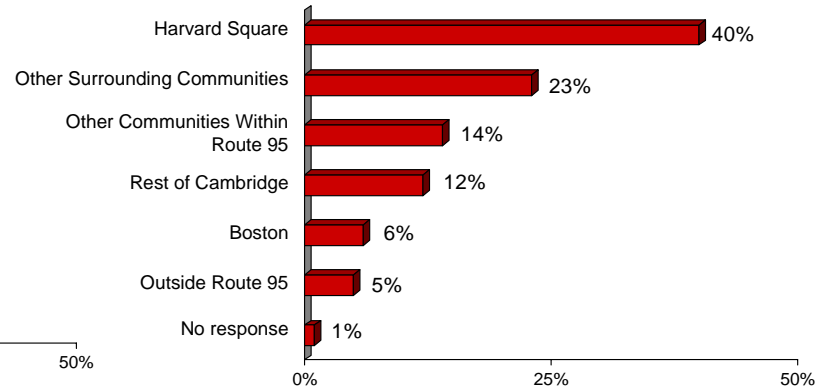
Respondent profile

Harvard University invited a sampling of Harvard students, faculty, staff and alumni to take this survey. More than 2,600 people responded to the survey.

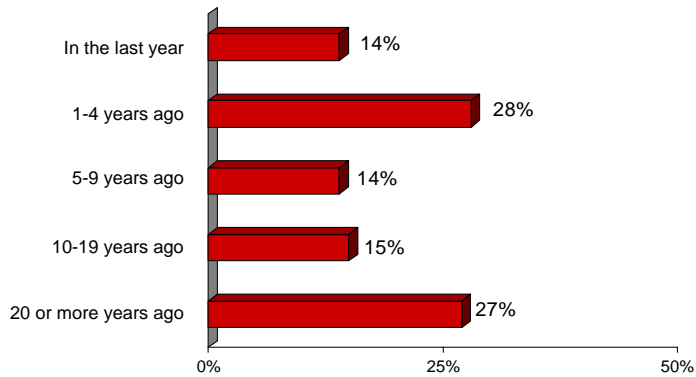
Harvard Affiliation



Current Residence Area



When Did You First Begin Spending Time Regularly in Harvard Square?



General Demographics

Where did you grow up?

Elsewhere in the United States	67%
Outside of the United States	15
Greater Boston area	15
Cambridge	2

What is your current age?

18-20	9%
21-29	33
30-39	18
40-49	13
50-59	13
60 and older	9
No response	4

What is your marital status?

Single	53%
Married/Partnered	45
No response	1

Gender

Female	53%
Male	46
No response	1

Children under 18 years of age?

Yes	19%
No	80
No response	1