



DOWNTOWN STATEN ISLAND

Commercial District Needs Assessment



Bill de Blasio
Mayor
Gregg Bishop
Commissioner



Staten Island Chamber of Commerce



ABOUT DOWNTOWN STATEN ISLAND



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 ODNA features the **Bay Street** commercial corridor in **Downtown Staten Island**, and was conducted in partnership with the **Staten Island Chamber of Commerce** between November 2015 and March 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 **235 surveys** and **20 stakeholder meetings** with neighborhood merchants, shoppers, workers, property owners, and residents.

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Background

Located on the New York Harbor, Downtown Staten Island is home to a variety of civic, cultural, and transportation amenities and is the gateway to the borough. Downtown Staten Island consists of several distinct towns that are linked by the Bay Street corridor, which follows the northeast coastline of Staten Island. The Bay Street commercial corridor is anchored at the north by the Staten Island Ferry Terminal at Richmond Terrace and runs south to Townsend Avenue through the neighborhoods of St. George, Tompkinsville, and Stapleton.

St. George, the area surrounding the Staten Island Ferry Terminal, is Staten Island's civic center, with courthouses and municipal offices serving as the centerpieces of the neighborhood. St. George also offers a wide array of cultural and entertainment options for Staten Islanders and visitors, including the home of the Staten Island Yankees, the St. George Theatre, and the Staten Island Museum. Bay Street acts as St. George's central boulevard with multiple traffic lanes and landscaped street medians. Because of the topography of St. George, residential and commercial buildings that are located upland allow for sweeping views of the Staten Island waterfront and New York harbor from Bay Street.

Tompkinsville, which abuts St. George to the south, was once the home of a Naval Frontier Base and to this day maintains a charming commercial node at Tompkinsville Park, where Bay Street meets Victory Boulevard. Tompkinsville is demographically and culturally diverse, with an eclectic mix of cuisines, art, and entertainment venues, making it a prime location for the ongoing revitalization of vacant lots and shops that front Bay Street.

Stapleton, which adjoins Tompkinsville to the south, surrounds one of the borough's oldest parks, Tappen Park, giving it a distinctive "village center" feel. Once one of Staten Island's foremost shopping areas, Stapleton's building stock consists primarily of low-rise mixed-use buildings with ground floor retail. To this day, these attributes continue to make Stapleton a traditionally-scaled, walkable shopping district that is both accessible to a changing waterfront and home to a growing blend of vibrant "mom & pop" shops and multicultural cuisines.

Neighborhood Demographics

See more on page 13

Downtown Staten Island is demographically and socioeconomically diverse with approximately 25,700 residents. The area's foreign-born population is 28%, which is higher than Staten Island as a whole (21%). Tompkinsville is home to one of the largest Sri Lankan communities in the United States, and also has a significant African community. Downtown Staten Island's cultural diversity can be seen in the unique and vibrant restaurants and shops on and around Bay Street.

Future Opportunities

See more on page 5

With **70,000 daily passengers** riding the Staten Island Ferry, Downtown Staten Island is the gateway to Staten Island for both visitors and residents. Recently, **more than \$1 billion** has been invested in major development projects throughout Downtown Staten Island, including the New York Wheel and Empire Outlets, and these projects will further position **Bay Street as the civic, business, and cultural hub for Staten Island**. Despite a high 21% retail vacancy rate and the need for commercial revitalization projects, both long-standing small businesses and new businesses on Bay Street are positioned to leverage these new community investments and serve a growing population in the years to come.

Downtown Staten Island



Points of Interest

- Bay Street Corridor
- Current & Planned Developments
- Staten Island Railway Stations
- Incubators & Co-Working Spaces
- Public Facilities
- Arts & Entertainment

Notable Places



Current & Planned Developments



Neighborhood Events

- | | |
|-----------------------------------|---|
| North Shore Restaurant Crawl | Celebrate Stapleton |
| Staten Island Arts LUMEN Festival | St. George Day Festival |
| Illuminate Stapleton | Staten Island Black Heritage Family Day |

Merchant & Business Groups

- | | |
|-----------------------------------|--|
| Staten Island Chamber of Commerce | Historic Tappen Park Community Partnership |
| North Shore Business Association | Staten Island Economic Development Corporation |
| Staten Island Downtown Alliance | |

KEY FINDINGS & OPPORTUNITIES

Strengths

- ▶ Prominent waterfront location with expanded public access points and views of New York Harbor
- ▶ Multi-modal transportation hub, including the Staten Island Ferry with 70,000 daily passengers and the Staten Island Railway with 7,300+ weekday passengers
- ▶ Historic heart of Staten Island with unique town centers
- ▶ Many long-standing small businesses and relatively affordable commercial spaces
- ▶ Civic center of Staten Island with significant daytime worker population
- ▶ Diverse ethnic and cultural communities
- ▶ Growing concentration of co-working and incubator spaces that foster entrepreneurship
- ▶ Staten Island's center for arts, entertainment, and creative activities
- ▶ Numerous active neighborhood and small business organizations

Challenges

- ▶ High storefront vacancy rate along the corridor (21%)
- ▶ Vacant lots are noticeable eyesores that break up the continuity of the corridor
- ▶ Litter and sidewalk cleanliness are visible issues throughout Bay Street
- ▶ Staten Island Railway stations have poor lighting and uninviting entrances
- ▶ Local parks and other public spaces are underutilized
- ▶ Poor perception of neighborhood safety, especially at night
- ▶ High proportion of storefronts are in need of physical improvements
- ▶ Inadequate wayfinding signage prevents visitors from exploring beyond the ferry terminal





Staten Island Black Heritage Family Day



5050 Skatepark



Stapleton



San Rasa Sri Lankan Restaurant

Opportunities

- ▶ Leverage significant local demand for new retail goods and services by filling vacant storefronts
- ▶ Market Downtown Staten Island as a home for a broad mix of retail offerings and as a destination for entertainment, cultural, and creative activities
- ▶ Clean, beautify, and maintain streets and sidewalks along Bay Street
- ▶ Encourage community connections between upland communities, Bay Street, and the waterfront
- ▶ Promote shop & buy local campaigns to better connect new developments with existing small businesses
- ▶ Connect local entrepreneurs and merchants to business support services
- ▶ Make Bay Street more welcoming and vibrant during the day and night by activating vacant spaces and revitalizing local public spaces, including Tappen Park’s Village Hall
- ▶ Enhance accessibility and character of Staten Island Railway stations in Tompkinsville and Stapleton
- ▶ Improve storefront conditions along Bay Street
- ▶ Build capacity of community-based organizations that serve Downtown Staten Island

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: BAY STREET

Business Inventory

232

Total Number of Storefronts

21%

Storefront Vacancy*

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

Storefront & Retail Mix



Bay Street Storefront Vacancy by Neighborhood

- ▶ St. George 24%
- ▶ Tompkinsville 11%
- ▶ Stapleton 24%

Business inventory and retail mix data were gathered by the Staten Island Chamber of Commerce through a comprehensive area inventory of storefront businesses located along the Bay Street corridor between Richmond Terrace and Townsend Avenue. (November 2015 to March 2016).



What We've Heard from Bay Street Merchants

How many years have you been in business here?

14

Mean

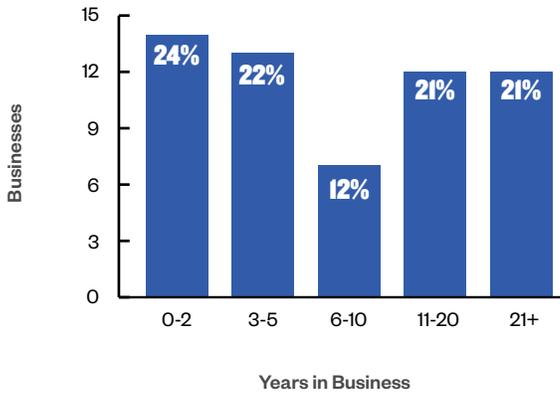
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Median

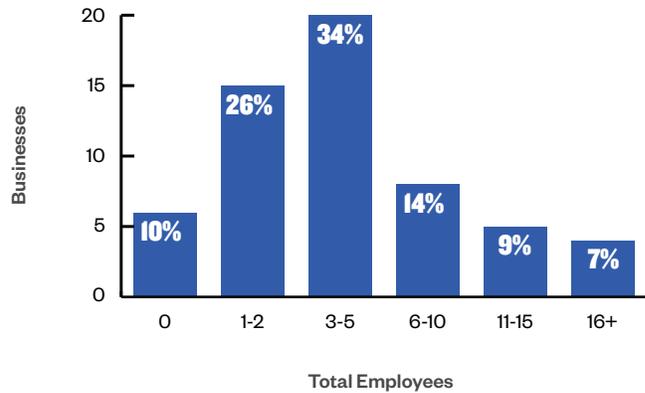
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Mode

6 businesses surveyed have been in the neighborhood for more than 35 years



How many employees do you have?



Do you own or rent your property?

67%

Rent

21%

Own

12%

No Response

What kinds of resources would help you grow your business?

% Merchant Responses

▶ Marketing support	34%
▶ Financing	22%
▶ Space improvements	18%
▶ New equipment	10%
▶ Other services	16%

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

34%

Improved

42%

Stayed the Same

3%

Decreased

21%

N/A or No Response

What changes need to occur on/around Bay Street to attract more visitors/shoppers?

- ▶ Cleaner streets, reduced litter, and area beautification
- ▶ Safety improvements, including improved lighting
- ▶ New stores to provide a better retail mix, attract more customers, and provide basic neighborhood goods and services
- ▶ Improved infrastructure
- ▶ Reduce traffic and improve parking options

Source: Based on 67 merchant surveys conducted by the Staten Island Chamber of Commerce in Winter 2016.

BUSINESS LANDSCAPE: BAY STREET

What We've Heard from Bay Street Merchants

What changes need to occur to bring more people to your shop or use your services?

"Cleaner streets and better security."

"More people. More stores."

"Some of the façades of the buildings could use sprucing up."

"Change the verbiage on the ferry to draw the people to explore the island."

"Less traffic and more lighting at night to make people feel safe."

What do you like about the commercial corridor?

"Rents are still reasonable and close to the ferry."

"The waterfront view and the camaraderie with fellow business owners."

"The people in the community are wonderful and diverse."

"Accessibility to St. George, Manhattan, and Verrazano Bridge."

"Old world charm."

"Good transportation, nice people."

"It's neighborhood-ish. Walkable. Mixture of work and play."

What do businesses need?

"Ability to attract quality clients."

"Clean the area up. Prevent littering. Install more trash cans... Focus on quality of life issues."

"Better street lighting."

"Better infrastructure. More bus service."

"Things to bring people to the area."

"Parking and good traffic flow."

"More marketing. And give people reasons to come here."

How is this area different from other shopping districts?

"Only real downtown shopping."

"Heart of old Staten Island."

"Unique neighborhood poised on the windowsill of the greatest city in the world."

"It's walkable. It's accessible via public transit."

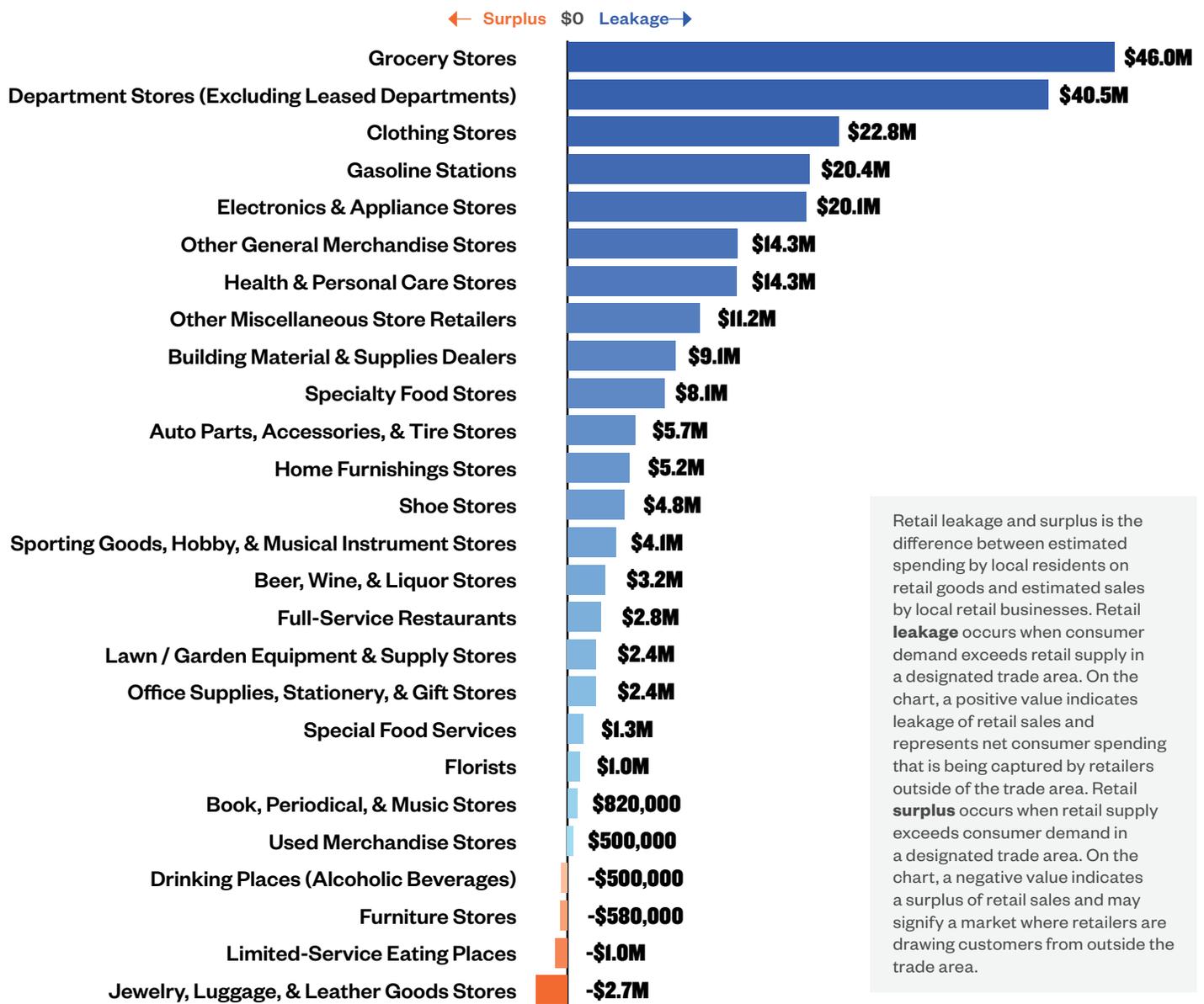
"There is a lot of room to grow."

BUSINESS OUTLOOK

Downtown Staten Island Retail Opportunity



Retail Leakage & Surplus



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, August 2016; does not include projected expenditures from Empire Outlets or other current and planned developments.

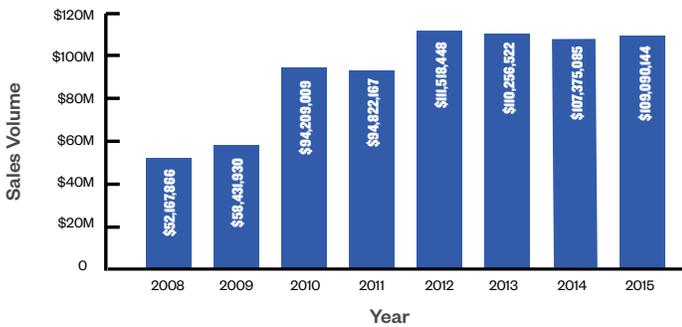
BUSINESS OUTLOOK

Business Trends

Change in Total Business Sales, 2008-2015



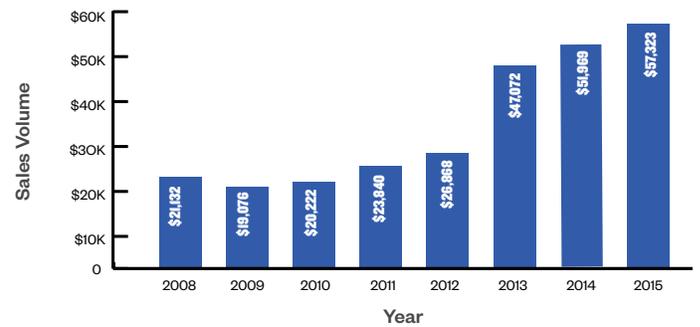
Downtown Staten Island Total Business Sales



Change in Median Sales by Business, 2008-2015



Downtown Staten Island Median Sales by Business



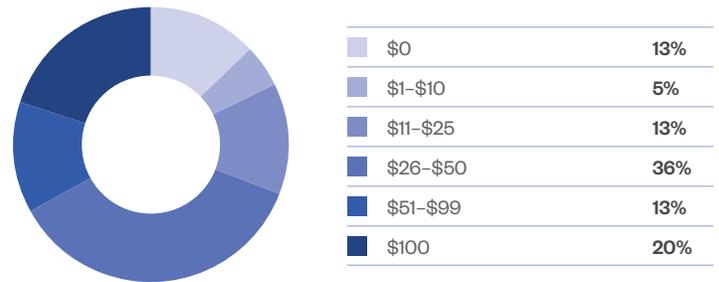
What We've Heard from Shoppers

What additional types of businesses would you like to see on Bay Street?

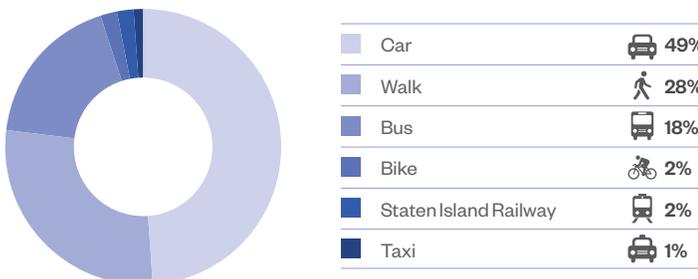
- ▶ Healthy food options, fresh produce, specialty food stores, bakery 
- ▶ Restaurants, coffee shop, café 
- ▶ Clothing, shoe stores 
- ▶ Family/kid-friendly activities and businesses 
- ▶ Arts, entertainment, movie theater 

Source: Division of Tax Policy, NYC Department of Finance

How much do you typically spend when shopping on Bay Street?



How do you usually travel to get to Bay Street?



How often do you visit Bay Street to go shopping?



Source: Based on 168 consumer surveys conducted by the Staten Island Chamber of Commerce in Winter 2016

PHYSICAL ENVIRONMENT

Streetscape Observations



Bay Street Storefronts



SIR Stapleton Station



Vacant Storefronts



Bay Street Litter



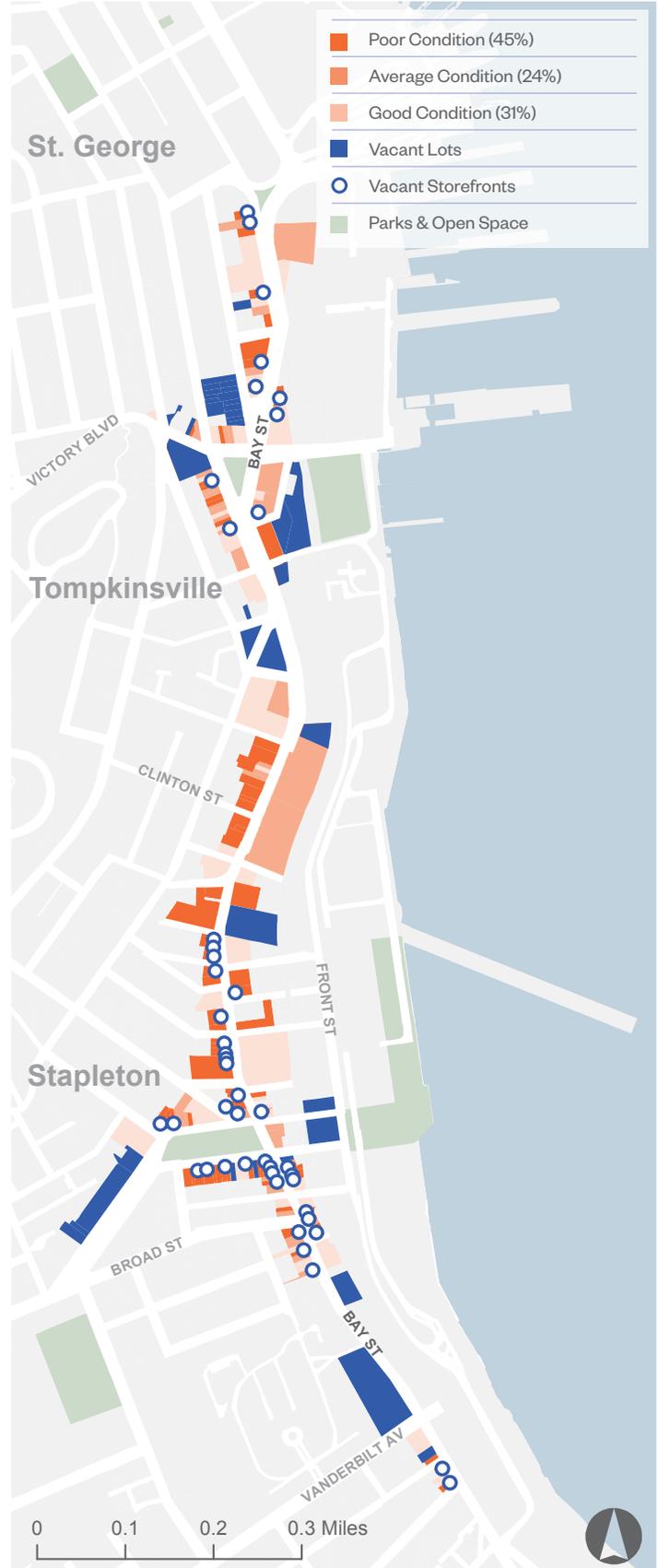
Bay Street and Victory Boulevard



Village Hall in Tappen Park

- ▶ An analysis of 213 properties along Bay Street reveals that 45% of storefronts are in poor condition, 24% are in average condition, and 31% are in good condition.
- ▶ Litter and sidewalk cleanliness are visible issues throughout Bay Street, especially in and around tree pits.
- ▶ The numerous vacant storefronts break up the continuity of the corridor and deprive the neighborhood of street activity and lighting in the evening.
- ▶ There is a large variation in the age and quality of the building stock in the area.
- ▶ Long-standing businesses across the corridor are models of well-maintained and visually appealing storefronts.
- ▶ The Staten Island Railway train yard and facilities create a disjointed streetscape between Tompkinsville and Stapleton.
- ▶ The corridor lacks the necessary street furniture, amenities, public art installations, and district signage that can enliven the pedestrian experience and collectively promote the neighborhood.

Storefront Conditions



DATA APPENDIX

Study Area Boundaries

■ Assessed Commercial Corridor

Primary data on Bay Street storefront businesses presented on pg. 6-8 was gathered along the Bay Street corridor between Richmond Terrace and Townsend Avenue

— Downtown Staten Island Context Area

Demographic and employment data on pg. 12-13 correspond to the Downtown Staten Island neighborhood context area

⋯ Trade Area

Retail leakage, surplus, and retail opportunity data on pg. 9 correspond to the 0.75 mile trade area



Area Demographics

Total Population

25,698	Downtown Staten Island
470,223	Staten Island
8,268,999	New York City

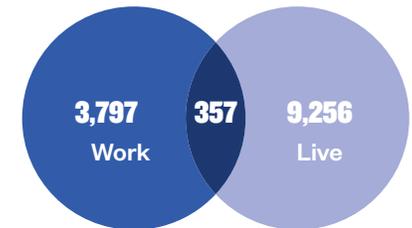
Population Density (per square mile)

19,522	Downtown Staten Island
7,943	Staten Island
27,027	New York City

Average Household Size

2.7	Downtown Staten Island
2.8	Staten Island
2.6	New York City

Commuting Patterns



3,797	Work in Downtown SI, live elsewhere
357	Live & Work in Downtown SI
9,256	Live in Downtown SI, work elsewhere

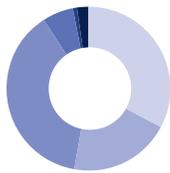
Car Ownership

54%	Downtown Staten Island
83%	Staten Island
45%	New York City

DATA APPENDIX

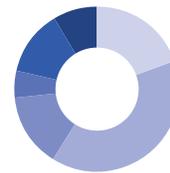
Area Demographics

Race / Background



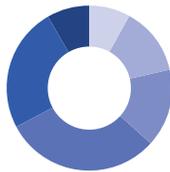
	Downtown SI	SI	NYC
Hispanic or Latino (of any race)	33%	17%	29%
White alone	20%	64%	33%
Black or African American alone	38%	10%	23%
Asian alone	6%	8%	13%
Native Hawaiian and Other Pacific Islander	0%	0%	0%
American Indian and Alaska Native alone	0%	0%	0%
Some other race alone	1%	0%	1%
Two or more races	2%	1%	1%

Educational Attainment



	Downtown SI	SI	NYC
12th Grade or Less, No Diploma	23%	12%	20%
High School Graduate	29%	32%	25%
Some College, No Degree	17%	19%	15%
Associate's Degree	6%	7%	6%
Bachelor's Degree	15%	18%	20%
Graduate or Professional Degree	10%	12%	14%

Population Age



	Downtown SI	SI	NYC
Under 5 Years	8%	6%	7%
5-14 Years	13%	13%	11%
15-24 Years	15%	14%	14%
25-44 Years	30%	26%	31%
45-64 Years	24%	28%	25%
65+ Years	8%	13%	12%

Median Age

32.4	Downtown SI
38.8	Staten Island
35.6	New York City

Foreign-Born Population

28%	Downtown SI
21%	Staten Island
37%	New York City

Income

Median Household Income

\$42,896	Downtown SI
\$72,569	Staten Island
\$52,259	New York City

Pop. Below Poverty Line

28%	Downtown SI
12%	Staten Island
20%	New York City

Employment

Population in Labor Force

61%	Downtown SI
60%	Staten Island
63%	New York City

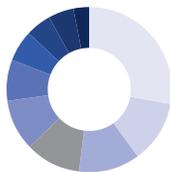
Unemployment*

9.6%	Downtown SI
7.9%	Staten Island
10.6%	New York City

*Note: As of June 2016, unemployment rates for Staten Island and New York City are both at 5.1% (NYSDOL); updated neighborhood-level data for Downtown Staten Island (Downtown SI) is not available.

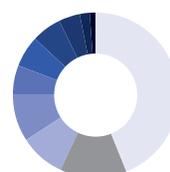
Local Jobs and Employment

Local Residents' Employment



Educational Services, Health Care, Social Assistance	28%
Retail Trade	12%
Accommodation, Food Services, Arts, Entertainment	12%
Other	11%
Professional, Scientific, & Technical Services	10%
Construction	8%
Finance, Insurance, Real Estate	6%
Public Administration	5%
Transportation, Warehousing, Utilities	5%
Manufacturing	3%

Jobs Located in Downtown Staten Island



Educational Services, Health Care, Social Assistance	44%
Other	13%
Public Administration	9%
Retail Trade	9%
Construction	6%
Professional, Scientific, & Technical Services	6%
Accommodation, Food Services, Arts, Entertainment	6%
Finance, Insurance, Real Estate	4%
Transportation, Warehousing, Utilities	2%
Manufacturing	1%

DATA APPENDIX

Downtown Staten Island Transportation



▲ Downtown Staten Island Transportation Routes

— Bus Routes
 — Staten Island Railway
 - - - Staten Island Ferry
 · · · Bicycle Lanes

Bus Routes

22 MTA Bus Routes

Staten Island Railway

6,612 Average weekday trips at the St. George Station (2015)

731 Average weekday trips at the Tompkinsville Station (2015)

Staten Island Ferry

70,000 Daily passengers

22.0 M Annual passengers

Pedestrian Counts

Staten Island Ferry Terminal Entrance at Richmond Terrace (2016)

1,090 Weekday Morning Pedestrians

1,660 Weekday Afternoon Pedestrians

996 Weekend Pedestrians

Victory Boulevard Between Bay Street and Van Duzer Street at Tompkinsville Park (2016)

579 Weekday Morning Pedestrians

693 Weekday Afternoon Pedestrians

471 Weekend Pedestrians

Vehicular Traffic

15,941 Average daily vehicles on Bay Street between Richmond Terrace and Hannah Street (2014)

13,224 Average daily vehicles on Bay Street and Canal Street (2014)

6,040 Average daily vehicles on Front Street and Water Street (2014)

13,691 Average daily vehicles on Victory Boulevard and Corson Avenue (2014)

7,366 Average daily vehicles on Canal Street between Water Street and Broad Street (2014)

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

Recent SBS Investments in the Neighborhood

- ▶ *Stapleton Rewards & Celebrate Stapleton*, Avenue NYC placemaking grant of \$30,000 awarded to Historic Tappen Park Community Partnership, 2016.
- ▶ *Illuminate Stapleton*, Neighborhood Challenge placemaking grant of \$70,000 awarded to Historic Tappen Park Community Partnership, 2015.
- ▶ *Stapleton Village Merchants Association*, Avenue NYC capacity building grant of \$20,000 awarded to Historic Tappen Park Community Partnership, 2014.
- ▶ *Stapleton Village Merchants Association*, Avenue NYC merchant organizing grant of \$10,000 awarded to Historic Tappen Park Community Partnership, 2013.
- ▶ *Stapleton 10304 Brand Campaign*, Avenue NYC placemaking grant of \$15,000 awarded to Historic Tappen Park Community Partnership, 2013.

Current & Planned Developments

New York Wheel

- ▶ 630-foot-tall observation wheel that will be the tallest in the world
- ▶ Opening 2018
- ▶ Includes 5 acres of public open space

Lighthouse Point

- ▶ Mixed-use waterfront project that includes a 12-story residential building
- ▶ Opening 2019
- ▶ Includes 85,000 square feet of retail space, 1 acre of waterfront public open space, and 32,000 square feet of co-working space

Existing Plans & Studies

Future Culture: Connecting Staten Island's Waterfront, Staten Island Arts and the Design Trust for Public Space, 2016 (in progress).

Staten Island North Shore Transportation Improvement Strategy, NYC Economic Development Corporation and NYC Department of Transportation, 2016 (in progress).

North Shore 2030, NYC Economic Development Corporation and NYC Department of City Planning, 2011.

Downtown Staten Island Urban Design Plan, Downtown Staten Island Council, 2008.

A Historic Opportunity: Spurring Community and Economic Development in Stapleton, SI Bank & Trust Foundation and Independence Community Foundation, 2006.

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

Infogroup, Inc. 2016. From ReferenceUSA database.

Metropolitan Transportation Authority. 2015. Average Weekday Subway Ridership.

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

NYS Department of Transportation. 2014 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 2015. Business Improvement Districts Trends Report.

NYC Department of Transportation. May 2016. Bi-Annual Pedestrian Counts.

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 in to, out of, and within the context area.

U.S. Census Bureau. American Community Survey, 2013 American Community Survey 4-Year Estimates, using NYC Census FactFinder. Staten Island Census Tracts 3, 7, 9, 11, 17, 21, 27, 29.

Photo Credits: © NYC & Company: Jen Davis, Julianne Schaer, Tagger Yancey IV. Office of Borough President James Oddo. LUMEN 2013 presented by Staten Island Arts, photo courtesy of Glen DiCrocco. The New York Wheel. BFC Partners - Empire Outlets. Ironstate Development - Urby. Triangle Equities - Lighthouse Point. 5050 Skatepark: Chris Marshall. Historic Tappen Park Community Partnership. Staten Island Black Heritage Family Day. NYC SBS: Andrew Marcus.



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 Bay Street Commercial District Needs Assessment:

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Local Initiatives Support Corporation (LISC)
Bay Street Merchants
Downtown Staten Island Shoppers and Residents