Exploring Market Potential for Businesses in Downtown Fitchburg

Prepared for
City of Fitchburg
Economic Development Division

2023

Prepared by
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Sponsored by
Massachusetts Downtown Initiative

dhcd Massachusetts

Acknowledgements

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Thank you to all of the residents, Fitchburg State students & staff and Downtown employees who responded to our surveys.

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Overview and Summary of Key Findings

Project Overview

The purpose of this project was to conduct market research that could inform Fitchburg's economic development strategies and provide information beneficial to prospective and existing businesses.

This project aims to identify and qualify market potential for establishments in Downtown, particularly in the restaurant, retail, and entertainment/recreation sectors.

To investigate market opportunities, we analyzed demographics, expenditure and sales data, conducted surveys and interviews, and researched information about consumer habits. This report provides findings pertaining to the volume, characteristics, preferences and spending behavior within identified market segments.

Summary of Key Findings

Downtown Fitchburg businesses have the opportunity to attract customers living in the surrounding area, the Resident Market Segment, as well as Non-Resident Market Segments such as Fitchburg State students and staff, downtown employees, and visitors to area attractions.

The major potential customer base for businesses located in the Downtown is trade area residents, the permanent residential population living within a convenient travel distance. The primary trade area (where most repeat business is expected to be derived) is the City of Fitchburg with approximately 42,000 residents. Fitchburg residents spend well over $100 million annually at stores and restaurants outside the City. This sales leakage may represent market opportunity for new and existing Downtown businesses. The secondary trade area is a 15-minute drive time containing 80,000 residents.

Non-resident market segments offer additional market potential. The Fitchburg State market segment presents substantial opportunity with close to 7,000 students and 600 full time staff in such close proximity to Downtown, seeking meals, groceries, and other goods and services. (As discussed later, It could be particularly advantageous to target the student market segment.) Employees of Downtown businesses represent a market for meals, snacks and other purchasing done before, during or after work. In addition, visitors to area attractions represent market potential as they require dining establishments while traveling and may seek additional entertainment options, shopping or lodging.

In general, potential restaurant sales represent the most significant market opportunity for Downtown. Restaurant expenditures made by Fitchburg residents and the Fitchburg State market segment totals approximately $81 to $89 million per year. At least $16 to $25 million of restaurant expenditures are currently being made at establishments located outside the City. Furthermore, this sales leakage estimate does not include expenditures generated by other market segments such as downtown employees and visitors which present additional market opportunity.

The results of the consumer surveys offer supporting evidence of potential demand. A large percentage of Fitchburg residents (38%) and the majority of the Fitchburg State market segment (51%) is dissatisfied with the existing variety and extent of dining options available in Downtown.

The restaurant type most in demand is casual sit-down restaurants – 71% of residents, 73% of the Fitchburg State market segment and 80% of Downtown employees said they would patronize additional establishments of this type if available in Downtown. These market segments currently patronize restaurants in Leominster, Lunenburg, Westminster, Gardner and other surrounding communities in addition to Fitchburg. The restaurants outside of Fitchburg most frequently mentioned by residents include: 110 Grill, Logan's Table, Longhorn Steakhouse, Il Forno and Asian Imperial. The outside restaurants outside most frequently mentioned by the Fitchburg State market segment include: Asian Imperial, 110 Grill, Chipotle, Ixtapa and Starbucks.

Downtown employees further add to potential sales for Downtown restaurants. According to the survey results, employees make work-day associated restaurant purchases an average of 19 times per month (including coffee/breakfast, lunch, take-home prepared meals and dinner/drinks immediately after work). However, at present, Downtown employees make only 31% of these purchases in Downtown. The majority of employees said they would purchase more work day-associated meals and snacks in Downtown if there were a greater variety of restaurants.

The estimated 1.7 million visitors to Fitchburg's major attractions (Game On, Great Wolf Lodge, Fitchburg Art Museum and Fitchburg State's Center Stage) also present a substantial opportunity for restaurants. The Art Museum and Center Stage, located in close proximity to Downtown represent an easier potential capture.

Summary of Key Findings (cont'd)

Attracting patrons of Game On and Great Wolf, located 4 to 5 miles from Downtown, would require more targeted marketing, however, the investment might be worthwhile, given the large volume of visitors.

Fitchburg residents are not very frequent visitors to Downtown. Only 31% visit once per week or more and 28% said they "practically never" visit Downtown.

The Fitchburg State market segment visits Downtown even less frequently. Only 17% visit once per week or more and 40% said they "practically never" visit Downtown. When we asked consumers "What would encourage you to dine, shop or recreate in Downtown more often?", we received an abundance of comments about the need for a better mix of offerings, more restaurants, more shops, and more options.

Focusing marketing and promotion efforts on Fitchburg State students may help jump start revitalization. College students are typically not as deterred by less than pristine conditions and therefore are often a pioneer market segment in Downtowns that are in transition. Fitchburg State students could be early adopters and provide foot traffic not only resulting in Downtown spending but also contributing to a more vibrant atmosphere and increased feeling of safety.
Currently, Fitchburg State has a OneCard program that allows businesses to promote discounts to students. A few other ideas to help market Downtown to this segment are described below.

- Work with In-town Fitchburg and the Creative Cities Initiative to garner support for the goal of promoting Downtown to Fitchburg State students. Encourage these entities to host student-attracting events when they would be most likely to attend (e.g., Fall and early Spring) and perhaps when the university is most likely to have prospective students and parents visiting.
- It may also be effective to suggest that these organizations include Fitchburg State student representatives on advisory committees.
- Try to arrange for a business/marketing class to take on marketing Downtown as a class project or team exercise.
- Instruct/assist Downtown businesses to increase social media marketing.

The estimated 1.7 million annual visitors to Fitchburg's major attractions represent a largely untapped market. A couple of initial steps could help Downtown businesses capitalize on the visitor segment.

- Make existing and prospective Downtown businesses aware of the large visitor volume, their characteristics and schedule.
- Consider adding strategically placed signage directing people to Downtown particularly in West Fitchburg as visitors come off the highway and near major attractions (e.g., Game On and Great Wolf Lodge). Just having "Downtown" listed on a directional sign helps to send a signal that it may be a place worth going to, somewhere to explore and possibly find a meal.

Cultural events and activities can be used as a way to draw all market segments and promote the habit of coming to Downtown. Events are a good way to help build relationships between people and place, create awareness of available offerings and help encourage future patronage. The InTown Fitchburg organization and Creative Cities initiative play a key role in staging and promoting events.

The types of cultural programming most in demand include live music, arts festivals and food related events. Food events will attract the largest percentage of Fitchburg State students.

Would Attend if Available in Downtown	Residents	Fitchburg State	DT Employees
Live Music	70%	61%	72%
Art Festivals, Fairs	62%	56%	58%
Food/Culinary Events	53%	53%	62%

All market segments expressed considerable interest in additional entertainment/recreation options, consistent with the City's strategy to focus revitalization efforts around arts and culture. The majority of Fitchburg residents, the Fitchburg State market and Downtown employees indicated a desire for more entertainment venues in Downtown. A majority of the Fitchburg State students also indicated a desire for more recreation enterprises.

Would Attend if Available in Downtown	Residents	Fitchburg State	DT Employees
Entertainment Venues	62%	54%	57%

Summary of Key Findings (cont'd)

It's important to make consumers feel comfortable in a Downtown. The more comfortable they are, the longer they will linger and the more money they are likely to spend at local businesses. In Downtown Fitchburg, there is room for improvement in several areas that affect consumer comfort. However, it should be noted, we also received several comments about Downtown "getting better" and "having potential".

- **Appearance of Buildings/Storefronts and Vacancy/Abandoned Feeling**
  A large portion of consumers expressed dissatisfaction with "Appearance of Buildings/Storefronts" (Residents – 63%, Fitchburg State -68%, Downtown Employees – 57%).

  We received an abundance of comments about filling the large number of vacant storefronts and addressing the abandoned image presented by Downtown. Consumers said they felt "lonely", "all alone" and "like the only one there".

- **Safety, Feeling of Safety**
  A large portion of consumers expressed dissatisfaction with "Evening Safety" (Residents – 47%, Fitchburg State -57%, Downtown Employees – 55%).

  We received an abundance of comments about not feeling safe, the need for more police presence/walking patrols, and reduction of "undesirables", pan-handlers and drug-users.

- **Cleanliness and Maintenance**
  Cleanliness and the general appearance of being cared for makes a downtown more inviting and also adds to the feeling of comfort and safety.

  We received an abundance of comments about cleaning up the Downtown, removing trash and graffiti, the desire for better road conditions, and the repeated request to "fix the roads".

- **Public Spaces/Seating Areas**
  A large portion of consumers expressed dissatisfaction with "Public Spaces/Seating Areas" (Residents – 40%, Fitchburg State -46%, Downtown Employees – 45%).

  If you want people to linger in Downtown, to eat lunch outside, rest from a walk, or have a chance to socialize, they need a place to sit. Some time ago Fitchburg removed the majority of Downtown street furniture, presumably to discourage sleeping on benches and loitering. It might be worth reconsidering the introduction of carefully placed seating in combination with revitalization and safety strategies (utilizing urban design approaches and new seating models that could address concerns).

Many communities have found it necessary to have a dedicated Downtown management organization with a dependable funding source to coordinate and carryout strategies to address issues and opportunities like those highlighted in this report. It may be advantageous to consider expanding the role and transitioning the existing InTown Fitchburg organization into an organization with a sustainable funding stream. InTown Fitchburg is a young organization, currently funded through grants, and operated by staff and volunteers. The primary focus, according to the organization's website, is Downtown events. (At the time of this report writing, the organization had recently lost their staff person.)

Two models that Massachusetts Communities have implemented include a Business Improvement Districts and Parking Benefit Districts. These organizations can carryout a variety of duties such as managing additional cleaning and security services, facilitating public realm improvements, conducting promotional activities, hosting Downtown events, coordinating "parklets" (parking spaces used for expanded outdoor dining), etc.

- Business Improvement District (BID): Contiguous area within which property owners pay to develop, fund, and execute supplemental services to benefit the economic and social vitality of the business district. BIDs are self-sustaining through fees, typically collected with property taxes, and often supplemented by grants and fundraising. The district must be reauthorized every five years.

- Parking Benefit District (PBD): Geographically defined district in which parking revenues (e.g., meter fees, garage fees) are dedicated to related improvements. PBDs can be standalone or part of an existing downtown organization.

A summary Profile of the Key Downtown Market Segments is presented in the following chart.

Summary of Key Findings (cont'd)

Market Segment Profiles

Trade Area Residents

- The primary trade area, where most of the repeat business is expected to be derived) was identified as the City of Fitchburg.
- Approximately 42,000 residents with a large Hispanic segment (33%).
- Population is growing at a slower pace than the state, however, the household growth rate is similar to the state.
- Compared to the state overall, the population is a little younger and less likely to own their home, with the same likelihood to have children in the household and a similar vehicle ownership rate.
- Median household income is $65,172
- The secondary trade area is a 15-minute drive time containing 80,000 residents. Median household income of $71,007.
- There are 116,000 people living within a 20-minute drive time, considered to be a fringe area for customer attraction.

Fitchburg State

- 6,815 students and 615 full-time employees
- The vast majority (78%) of student respondents are between 18 and 24 years of age.
- 66% of students do not have a campus meal plan and therefore are dependent on grocery store shopping and purchasing restaurant meals.
- 61% of the student respondents live in Fitchburg; 32% in campus housing and 29% off campus housing.
- While all students represent market opportunity, the estimated 4,000 students who reside in Fitchburg are likely the most important market target for Downtown businesses.
- staff presumably spend a significant amount of time within close proximity to Downtown, 32% of respondents are Fitchburg residents; 68% live outside the City.

Downtown Area Employees

- Employees of downtown institutions such as the library and city hall, Montachusett Regional Transit Authority, manufacturing businesses, banks, retailers, and other businesses.
- The majority of employee respondents live outside of Fitchburg; 35% are Fitchburg residents. They range in age from 25 to 64, the average is 45.

Visitors to Area Attractions

- Fitchburg has several attractions that collectively draw close to 1.7 million visitors to the area each year.
- Fitchburg Art Museum, located right in Downtown, attracts 15,000 visitors. 1/3 are students of Fitchburg schools, 1/3 are individuals and families from North Central Massachusetts and 1/3 are from elsewhere, mostly Worcester, Metro West and Boston.
- Fitchburg State CenterStage events are held on campus, less than a mile from Downtown, and attract approximately 2,000 attendees annually. 5% are students, 35% are Fitchburg residents and 60% are from surrounding communities. Typically 50% of ticket sales are to Seniors.
- Game On Fitchburg, located 4 miles from Downtown, attracts 1 million visitors per year. On weekends, Game On hosts youth tournaments which bring players and their families who usually stay for at least 1 overnight. Weekend visitors come from New Jersey to Maine. During the week, Game On hosts youth practices, adult leagues and entertainment nights attracting visitors from Worcester to Vermont.
- Great Wolfe Lodge resort and water park, located 5 miles from Downtown, attracts 650,000 visitors per year. Guests are typically parents and children age 3 to 13 visiting from within a 3-hour drive. The average length of stay is 1.4 nights.
- Future Planned Theater in Downtown - Fitchburg State is planning a major theater restoration project including a 200-seat black box theater (planned opening - 2027) followed by a 1200-seat main theater (planned opening – 2032).

Resident Market Segment

TRADE AREA RESIDENTS

Part 1

Demographics, Expenditures and Sales Opportunity

TRADE AREA RESIDENTS

Resident Market Segment: **Trade Areas**

The identified primary trade area for Downtown is the City of Fitchburg containing approximately 42,000 residents. The secondary trade area is a 15-minute drive time containing 80,000 residents.

The major potential customer base for businesses located in Downtown Fitchburg is the permanent residential population living in the surrounding area within a reasonable travel distance. The likely **primary trade area** (where most of the repeat business is expected to be derived) was identified as the City of Fitchburg (42,219 residents). The **secondary trade area** is a 15-minute drive time (80,024 residents). Additional customer draw from this secondary trade area is expected but at a lower penetration rate.

The rationale for the trade area delineation and the demographic and consumer characteristics of the population in each trade area are described in the following section of this report.

Trade Area Explained - Defining the trade area is the first step in determining market potential for a commercial district. Once the trade area is defined, we can quantify the amount of potential customers and examine their characteristics and purchasing habits to provide a picture of the potential market.

The term trade area refers to the geographic area from which an entity generates its sales. The primary trade area for a commercial center is the area from which most of the steady, repeat sales for all businesses are derived (typically 60 to 80% of the total sales). The secondary trade area is where most of the remaining sales are generated.

A combination of factors determines the size and boundaries of the trade area such as: location of competing commercial centers, travel time and distance, physical and socio-economic trade barriers, and the size and scope of the commercial center itself. Generally, the larger the variety, breadth and uniqueness of offerings, the further customers are willing to travel, and therefore, the larger the trade area will be.

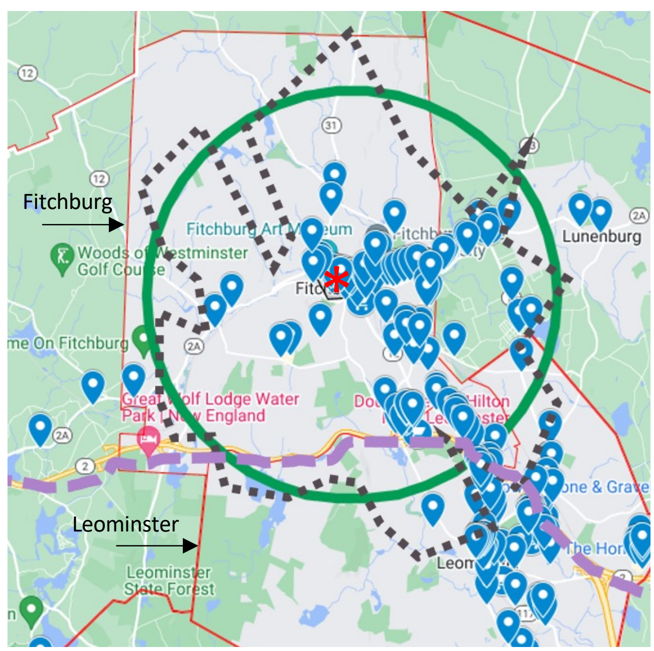
Primary and Secondary Trade Area Identification

After identifying the location of existing commercial facilities, reviewing input from consumer research, and analyzing travel times and circulation routes, it was determined that the likely **primary trade area (PTA)** for Downtown is the City of Fitchburg. Most of the City's population lives within reasonable proximity of Downtown (I.e., 10-minute drive time/3-mile radius). The residents in the northern part of the City, although slightly more than 10-mnutes away, have fewer commercial options, making them also potential customers.

The map below illustrates the location of surrounding commercial facilities along with the delineation of a 10-minute drive-time and 3-mile radius of Downtown.

Surrounding Commercial Facilities, Time & Distance

*	Downtown Fitchburg		Route 2
		▪▪▪	10 –Minute Drive Time
	Retail & Restaurants		3-Mile Radius



Note: This map is intended to be illustrative not exhaustive. All commercial facilities are not shown..

TRADE AREA RESIDENTS

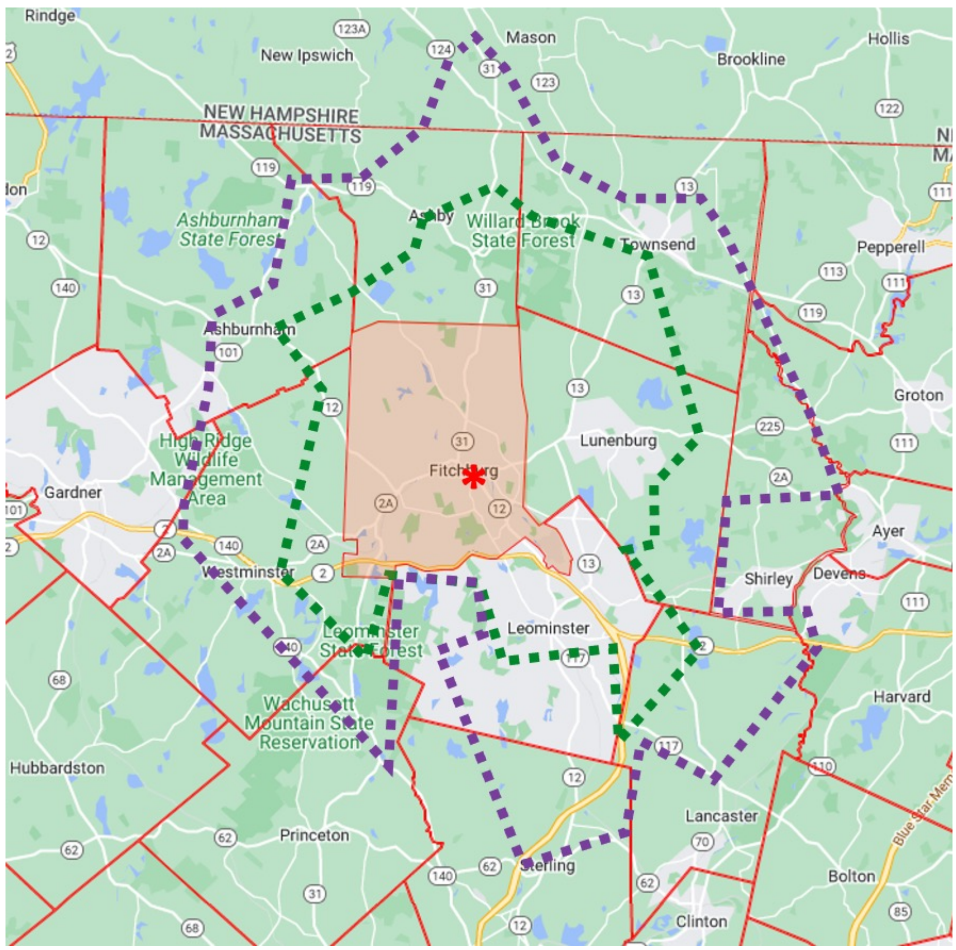
Resident Market Segment: **Trade Areas**

People living outside of the Fitchburg border to the south, are not included in the primary market, even though within fairly close proximity. A substantial amount of commercial development exists just over the border in Leominster. Route 2 appears to serve as a trade barrier for consumer behavior. People living south of Route 2 are likely to meet their day-to-day dining, retail and service needs without travelling north to Downtown Fitchburg.

There is also potential to attract some customers from a **secondary trade area (STA)**, identified as a 15-minite drive time (see map below).

The 20-minute drive time represents a fringe area for potential customer attraction.

Trade Areas Downtown Fitchburg	
*	Downtown Fitchburg
	City of Fitchburg Primary Trade Area (PTA)
▪ ▪ ▪	15-Minute Drive Time Secondary Trade Area (STA)
▪ ▪ ▪	20-Minute Drive Time Fringe Area



TRADE AREA RESIDENTS

Resident Market Segment: **Trade Area Demographics**

Primary Trade Area Demographics

There are approximately 42,219 people living within Fitchburg, the primary trade area. The trade area population growing at a slightly slower rate than the state overall however growth in number of households is occurring at the same rate. Between 2010 and 2023, population grew by 5% and the number of households grew by 8%, compared to statewide rates of 7% and 8%.

The population is predominantly of moderate income and education. The median household income of $65,172, 32% lower than the statewide median. Approximately 22% of the population over age 25 have at least a Bachelors Degree and 8% have a Masters Degree or higher (compared to 45% and 20% in Massachusetts).

The population is predominantly White (56%), along with 8% Black/African American, 4% Asian, and 33% other/more than one race. 33% of the population is Hispanic compared to 14% statewide.

Compared to the state overall, the PTA population is a little younger with a median age of 38.2, compared to the state median of 40.9. 16% of households contain residents over 65 years of age compared to 19% statewide.

The population is comprised predominantly of family households (61% compared to 63% statewide.) 33% of Fitchburg households contain children under age 18, similar to the state overall. The average household size of 2.5 persons is the same in the PTA as in the state.

The homeownership rate in the PTA is somewhat lower compared to statewide - 55% of the occupied homes are owner-occupied compared to 63% in MA overall.

The vast majority (87%) of households have access to a private vehicle for acquiring goods and services. In fact, 54% of the households have 2 vehicles or more. Only 13% of households are dependent on public transportation or walking to acquire goods and services.

The population of Fitchburg, the primary trade area, is of moderate income and education, with a large Hispanic segment (33%). The population is growing, although at a slightly slower pace than the state, while the increase in number of households is similar. Compared to the state overall, the population is a little younger and less likely to own their home, with the same likelihood to have children in the household and a similar vehicle ownership rate.

Population and Households 2023

	Fitchburg (PTA)	15-Minute (STA)	20-Minute
Population	42,219	80,024	115,502
Households	16,304	31,838	45,207

Growth 2010 - 2023

	Fitchburg (PTA)	15-Minute (STA)	20-Minute	MA
Population	5%	7%	7%	7%
Households	8%	9%	9%	8%

Data Source: Claritas, U.S. Census, Info USA, Social Explorer

TRADE AREA RESIDENTS

Resident Market Segment: **Trade Area Demographics**

Secondary Trade Area (STA)

There are approximately 80,024 people living within the STA (a 15-minute drive time). The population is growing at the same pace as the state overall. Compared to the PTA, the STA population is a little more affluent, with median household income of $71,007 and higher educational attainment rates. The STA population is older, with a median age of 40.3, closer to the statewide median. Hispanics comprise a smaller segment (27%) compared to the PTA .

Fringe Area

There are approximately 115,502 people living within a 20-minute drive time.

The population in the secondary trade area (STA) is higher in income and educational achievement than the PTA. The population is older and the growth rate is higher, the same as statewide.

	Fitchburg (PTA)	15-Minute (STA)	20-Minute	MA
Income, Education & Age				
Median Household Income	$65,172	$71,007	$77,526	$95,985
Average Household Income	$86,502	$93,535	$103,250	$135,840
Residents ≥25 with Bachelor's Degree+	22%	27%	30%	45%
Median Age	38.2	40.3	41.1	40.9
Population over Age 65	16%	18%	18%	19%
Households				
Average Household Size	2.5	2.5	2.5	2.5
Households with Children <18	33%	32%	32%	31%
Home Ownership	55%	57%	65%	63%
Households with ≥1 Vehicle	87%	89%	91%	88%
Avg. Vehicles per Household	1.6	1.7	1.8	1.6
Race & Ethnicity				
White Alone	56%	61%	66%	67%
Black/African American Alone	8%	7%	6%	7%
Asian Alone	4%	3%	3%	8%
Other Race Alone/More than 1 Race	33%	29%	25%	18%
Hispanic	33%	27%	22%	14%

Data Source: Claritas, U.S. Census, Info USA, Social Explorer

TRADE AREA RESIDENTS

Resident Market Segment: **Trade Area Demographics**

	Fitchburg PTA		15-Min. STA		20-Min.		MA
Est. Population by Age	#	%	#	%	#	%	%
Age 0 - 4	2,570	6	4,492	6	6,141	5	5
Age 5 - 9	2,591	6	4,593	6	6,306	5	5
Age 10 - 14	2,676	6	4,795	6	6,622	6	6
Age 15 - 17	1,777	4	3,094	4	4,320	4	4
Age 18 - 20	1,989	5	3,192	4	4,381	4	5
Age 21 - 24	2,295	5	3,943	5	5,609	5	5
Age 25 - 34	5,297	13	10,087	13	14,966	13	13
Age 35 - 44	5,942	14	10,963	14	15,213	13	13
Age 45 - 54	4,952	12	9,758	12	14,534	13	12
Age 55 - 64	5,313	13	10,889	14	16,611	14	14
Age 65 - 74	4,089	10	8,436	11	12,667	11	11
Age 75 - 84	1,872	4	4,002	5	5,780	5	5
Age 85 +	856	2	1,780	2	2,354	2	2

	Fitchburg PTA	15- Min. STA	20-Min.	MA
Households by Income	**%**	**%**	**%**	**%**
Income < $15,000	9	9	7	8
Income $15,000 - $24,999	8	8	7	6
Income $25,000 - $34,999	10	8	7	6
Income $35,000 - $49,999	11	10	10	8
Income $50,000 - $74,999	19	18	17	13
Income $75,000 - $99,999	14	14	13	11
Income $100,000 - $124,999	9	10	11	10
Income $125,000 - $149,999	6	7	8	8
Income $150,000 - $199,999	7	7	9	11
Income $200,000 - $249,999	4	4	5	7
Income $250,000 - $499,999	2	3	4	7
Income $500,000+	1	1	2	5

Data Source: Claritas, U.S. Census, Info USA, Social Explorer

TRADE AREA RESIDENTS

Resident Market Segment: **Trade Area Demographics**

	Fitchburg PTA	15-Min. STA	20-Min.	MA
Estimated Population 16+ by Employment Status	**%**	**%**	**%**	**%**
Employed	62	63	64	65
Self Employed	7	7	8	9
Unemployed	5	4	4	3
Not in Labor Force	34	33	33	33

	Fitchburg PTA	15-Min. STA	20-Min.	MA
Estimated Pop Age 25+ by Education Attainment	**%**	**%**	**%**	**%**
Less than 9th Grade	5	4	3	4
Some High School, No Diploma	7	6	6	5
High School Graduate (or GED)	34	32	31	24
Some College, No Degree	22	21	20	15
Associate's Degree	10	11	11	7
Bachelor's Degree	15	18	19	25
Master's Degree	6	7	8	14
Professional Degree	1	1	1	3
Doctorate Degree	1	1	1	3

Data Source: Claritas, U.S. Census, Info USA, Social Explorer

TRADE AREA RESIDENTS

Resident Market Segment: **Expenditures**

Given the demographics, lifestyle and other consumer characteristics of the trade area population, the total annual expenditures for a variety of retail goods and services can be estimated. The table below represents the annual retail market demand by category for each trade area. These expenditures are currently being made by residents at a variety of locations both inside and outside of the identified trade areas.

Fitchburg residents spend approximately $441 million annually at retail stores and restaurants; residents living within 15 minutes of Downtown (the STA) spend $901 million. This does not include non-store retailers or vehicle and gas purchases.

Estimated Trade Area Resident Expenditures

	Fitchburg PTA	15-Min STA
Furniture & Home Furnishings Stores-442	$14,603,279	$30,020,040
Furniture Stores-4421	$7,522,990	$15,427,683
Home Furnishing Stores-4422	$7,080,288	$14,592,357
Electronics & Appliances Stores-443	$11,146,753	$22,676,342
Building Material, Garden Equipment Stores -444	$51,168,815	$105,661,827
Building Material & Supply Dealers-4441	$45,010,273	$92,914,579
Lawn/Garden Equipment/Supplies Stores-4442	$6,158,542	$12,747,248
Food & Beverage Stores-445	$104,507,063	$212,399,349
Grocery Stores-4451	$93,779,481	$190,472,974
Specialty Food Stores-4452	$2,698,474	$5,479,602
Beer, Wine & Liquor Stores-4453	$8,029,108	$16,446,774
Health & Personal Care Stores-446	$39,692,430	$81,059,624
Pharmacies & Drug Stores-44611	$34,140,197	$69,583,669
Cosmetics, Beauty Supplies, Perfume Stores-44612	$2,347,908	$4,784,387
Optical Goods Stores-44613	$1,084,629	$2,371,793
Other Health & Personal Care Stores-44619	$2,119,697	$4,319,776
Clothing & Clothing Accessories Stores-448	$33,329,974	$67,998,499
Clothing Stores-4481	$20,391,283	$41,628,180
Shoe Stores-4482	$5,421,866	$11,024,054
Jewelry, Luggage, Leather Goods Stores-4483	$7,516,825	$15,346,265
Sporting Goods, Hobby, Book, Music Stores-451	$10,717,870	$22,033,218
Sporting Goods, Hobby, Musical Instrument Stores-4511	$9,086,072	$18,746,817
Book Stores and News Dealers-4512	$1,631,799	$3,286,402
General Merchandise Stores-452	$87,694,059	$178,684,161
Department Stores 4522	$10,943,680	$22,323,275
Other General Merchandise Stores-4523	$76,750,379	$156,360,886
Miscellaneous Store Retailers-453	$16,269,390	$33,269,955
Florists-4531	$671,653	$1,391,554
Office Supplies, Stationery, Gift Stores-4532	$3,100,353	$6,337,817
Used Merchandise Stores-4533	$2,982,864	$6,064,265
Other Miscellaneous Store Retailers-4539	$9,514,520	$19,476,318
Food Service & Drinking Places-722 *(not incl. special food service)*	$71,389,125	$146,865,608
Full Service Restaurants-722511	$34,597,567	$71,264,128
Limited-Service Eating Places, Snack, Buffets-722513-15	$33,951,915	$69,679,030
Drinking Places -Alcoholic Beverages-7224	$2,839,643	$5,922,450
Total	$440,518,758	$900,668,623

** Does not include non-store retailers or motor vehicles and gasoline purchases.*

Data Source: Claritas, U.S. Census, Info USA, Social Explorer

TRADE AREA RESIDENTS

Resident Market Segment: **Sales Leakage Analysis**

Sales Leakage Analysis Explained

A sales leakage analysis compares the amount of estimated annual sales of existing trade area stores and restaurants with the total amount of resident expenditures. If the expenditures are greater than the sales, it indicates that residents are currently making purchases outside of the trade area.

A sales leakage analysis does not take into account the fact that some portion of sales may be attributable to non-resident market segments such as visitors, college students or nearby employees that do not live in the trade area. Therefore, the analysis provides an estimate for the minimum amount that residents are spending outside the trade area.

Retail or restaurant categories with significant positive sales leakage may point to possible opportunities for new or existing businesses within those categories[1].

Categories with negative sales leakage indicate that existing businesses are currently meeting more than just local demand. In these categories, sales are coming from customers that live outside of the identified trade area. (This could mean that sales are coming from non-resident market segments such as visitors travelling into the area for attractions or events, seasonal/temporary residents, or employees of nearby businesses. It could also mean that one or more business in the category is able to attract customers from outlying areas due to its size/specialty.)

In categories with only a small amount of sales leakage, or negative leakage, there is not clear evidence of an opportunity gap. In these categories, opportunity for new businesses or expansion of existing businesses may be dependent on the ability to attract expenditures from beyond the delineated trade area or from non-resident segments (or overtake market capture from existing businesses in the trade area).

Analysis of business sales compared with resident expenditures in the PTA shows sales leakage of at least 25%. Fitchburg residents spend at least $109 million annually at stores and restaurants outside the City. This is the minimum estimate for sales leakage because it is doesn't include expenditures made by non-resident market segments such as Fitchburg State students and staff. Sales leakage from the secondary trade area is estimated to be a minimum of $73 million.

The charts on the following two pages illustrate the sales leakage analysis for the primary and secondary trade area.

**Note: The sales leakage data does not include Non-Resident Market Segments such as Fitchburg State. The most significant additional market opportunity generated by Fitchburg State students and staff is in the category of restaurants (Full Service, Limited Service and Drinking Places). This opportunity is addressed in the sub-section entitled "Highlights of the Market Environment: Restaurant Sales Leakage (Opportunity) including Fitchburg Resident and Fitchburg State Market Segments".*

[1] *However, further analysis would be required to evaluate the relative strength of competing businesses outside the trade area currently attracting resident expenditures.*

TRADE AREA RESIDENTS

Resident Market Segment: **Sales Leakage Analysis – PTA (Fitchburg)**

Sales leakage (pertaining to the resident market segment) may point to opportunities for Downtown businesses.

PTA residents spend

$441 Million

per year at stores & restaurants[1]

More than

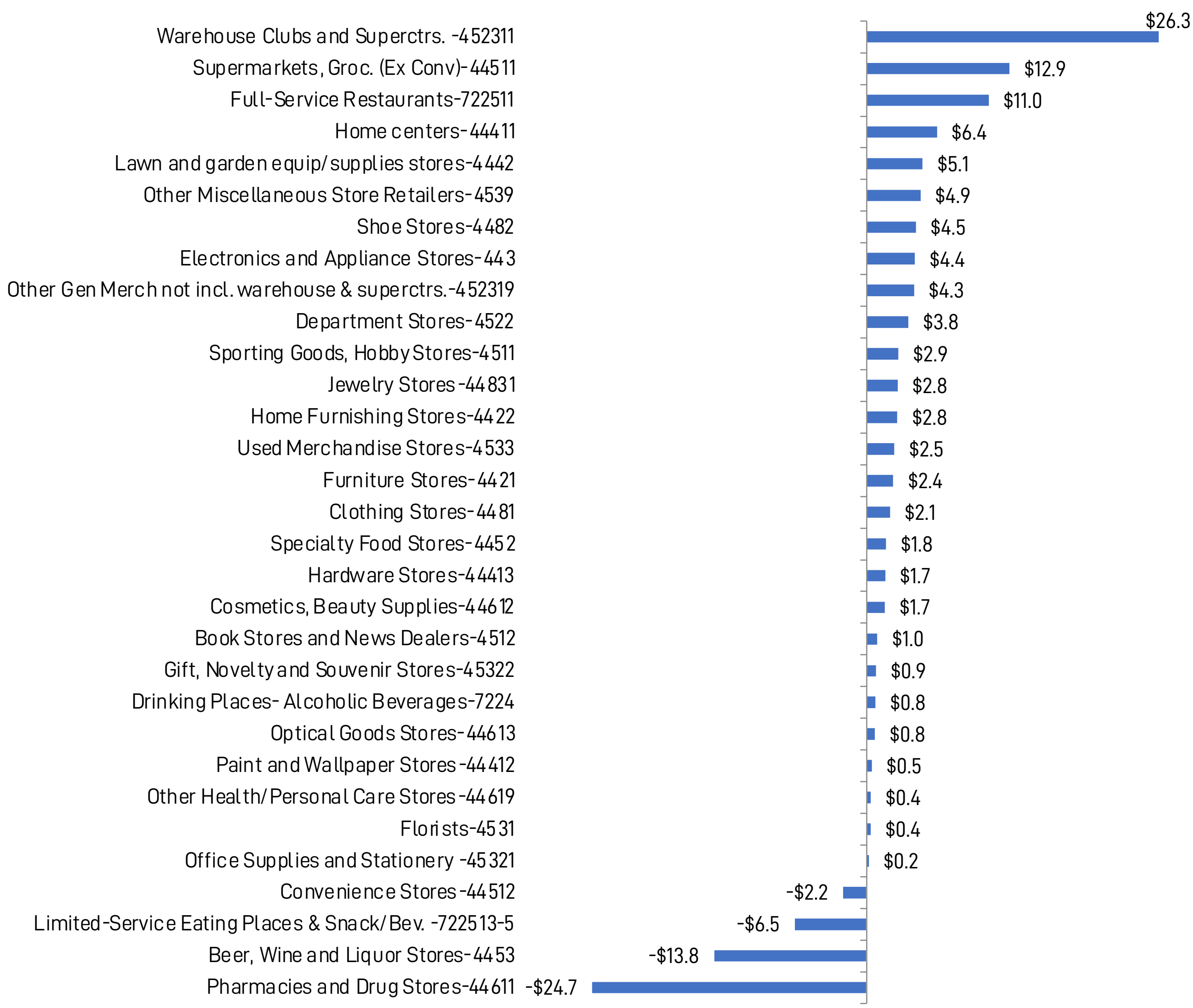
$109 Million

is spent outside PTA each year In Select Categories

25% $ $ $ $ $ $ $ $ $ $

1. Excludes vehicle and gas purchases and non-store purchases

Estimated Demand Compared to Business Sales in Select Categories (PTA)



Data Source: Claritas, U.S. Census, Info USA, Social Explorer

TRADE AREA RESIDENTS

Resident Market Segment: **Sales Leakage Analysis – STA (15-Minute Drive)**

Sales leakage (pertaining to the resident market segment) may point to opportunities for Main Street businesses.

STA residents spend

$901 Million

per year at stores & restaurants[1]

More than

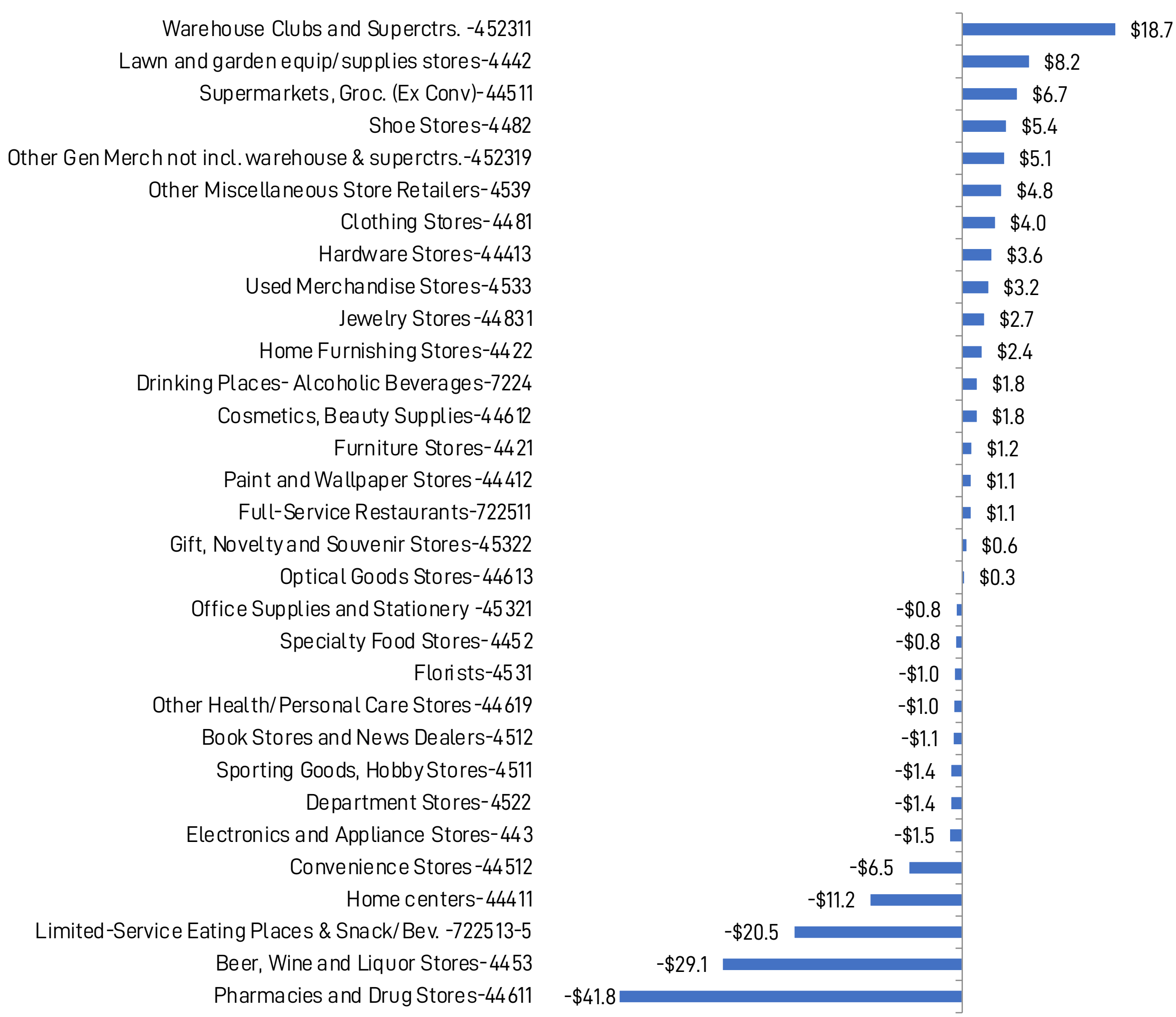
$73 Million

is spent outside STA each year in Select Categories

8% $ $ $ $ $ $ $ $ $ $

1. Excludes vehicle and gas purchases and non-store purchases (e.g. Amazon)

Estimated Demand Compared to Business Sales in Select Categories (PTA)



Data Source: Claritas, U.S. Census, Info USA, Social Explorer

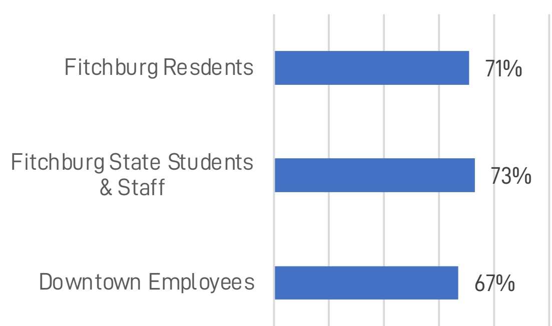
TRADE AREA RESIDENTS

Resident Market Segment: **Restaurant Sales Leakage (Opportunity) including Fitchburg Resident and Fitchburg State Market Segments**

The estimated sales leakage in the restaurant category is significant which may point to potential opportunity, particularly for Full Service Restaurants.

At least $16 to $25 million in restaurant expenditures made by Fitchburg residents and the Fitchburg State market segment is being spent outside of Fitchburg. The sales leakage is most significant in the Full Service restaurant category . The consumer survey results provide additional evidence of demand. 71% of Fitchburg residents and 73% of Fitchburg State students and staff, and 67% of Downtown employees said they would likely patronize additional casual sit-down restaurants if available in Downtown. Furthermore, a large percentage of survey respondents in each market segment expressed dissatisfaction with the current selection of restaurants (residents - 38%, Fitchburg State - 51%, Downtown employees - 51%).

Would Patronize Additional Casual Sit-down Restaurants with Wait Staff if Available in Downtown



Restaurant Sales Leakage
(Full Service, Limited Service, Drinking Places)

$16.4 – $25 million

Fitchburg Residents and Fitchburg State
Annual Restaurant Spending

$80.5 – $89.1 million

Fitchburg Residents (PTA)
Annual Restaurant Spending

$71.4 million

Fitchburg State Market Segment
Annual Off-Campus Restaurant Spending

$9.1 – $17.7 million

Note: This sales leakage analysis includes projected expenditures by Fitchburg residents and the Fitchburg State market segment only. (It does not include expenditures generated by other market segments such as visitors and downtown employees which may present additional market opportunity.)

** More information about Fitchburg State market segment estimated restaurant expenditures can be found in Section 4 of this report.*

Definitions

Full Service Restaurant: This industry group comprises establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating.

Limited Service Restaurants: This industry group comprises establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as bringing food to seated customers or delivery.

Drinking Places: This industry group comprises establishments primarily engaged in preparing and serving alcoholic beverages for immediate consumption.

Resident Market Segment

TRADE AREA RESIDENTS

Part 2

Consumer Patterns and Preferences

Resident Market Segment: **Consumer Profiles and Habits**

We conducted a survey during May and June, 2023 to explore the characteristics, consumer habits, and opinions of Fitchburg residents. We received 247 responses. The following section contains results from that survey.

Residents Consumer Habits

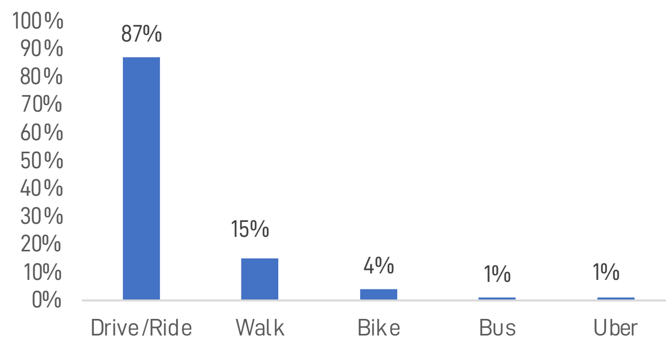
Fitchburg residents said they typically shop, dine and find recreation in Fitchburg as well as surrounding communities. Leominster was the most cited response, followed by Fitchburg, Lunenburg, Worcester and New Hampshire.

Patronage of Downtown Fitchburg varies among residents. Approximately 31% of residents visit Downtown oncer per week or more. Another 26% visit 1 to 3 times per month, 16% visit less than once once per month and 28% practically never go Downtown.

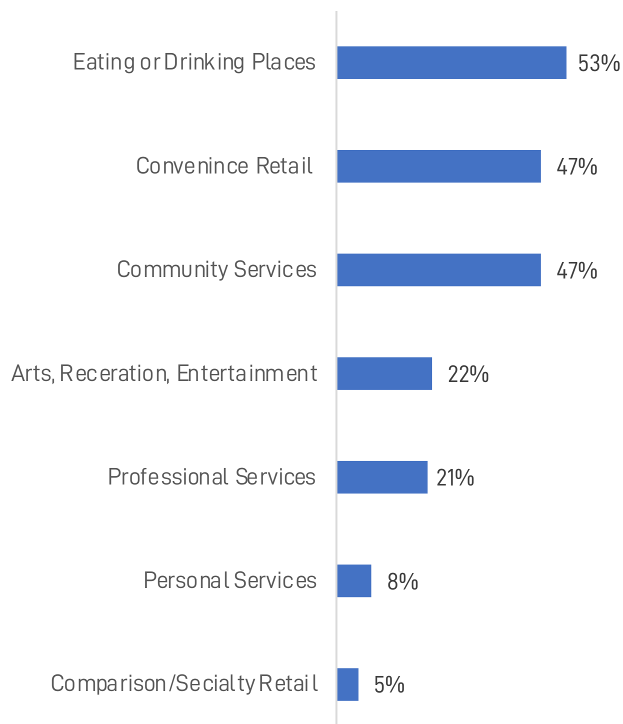
Driving is the most frequent mode of transportation used to get to Downtown (88%) followed by walking, biking, bus and Uber/Lift.

Restaurants generate the most visits from Fitchburg residents. 53% visited a Downtown eating or drinking place in the last 30 days. Convenience retail establishments (e.g., grocery and drug stores) and community services (such as a post office, library or church) generate the next most visits. 47% of residents visited these types of establishments in the last 30 days.

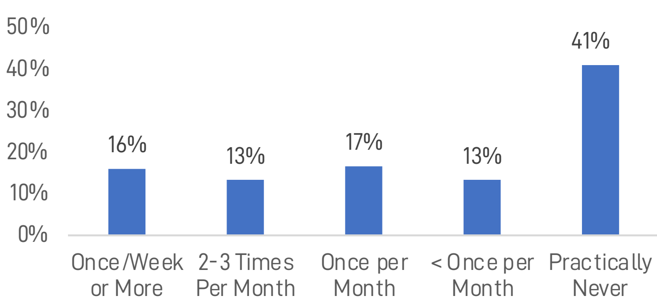
Typical Mode of Transport to Downtown
(Respondents selected more than one mode)



Downtown Establishments Visited
(Last 30 Days)



Frequency of Visits to Downtown



TRADE AREA RESIDENTS

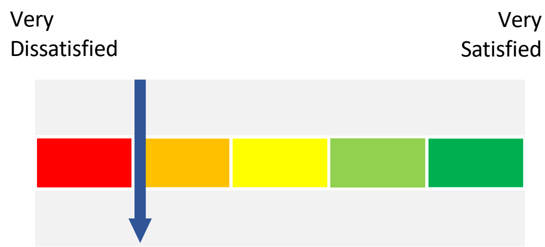
Resident Market Segment: **Satisfaction with Downtown Fitchburg**

The majority of the Fitchburg residents are dissatisfied with the selection of retail, and entertainment options in Downtown. 38% are dissatisfied with the selection of restaurants.

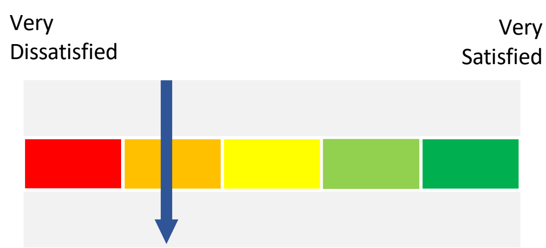
78% of survey respondents indicated they are dissatisfied with the selection of retail stores. 68% are dissatisfied with the recreation/entertainment options.

The majority of respondents are neutral or satisfied regarding public transportation.

Selection of Retail Stores

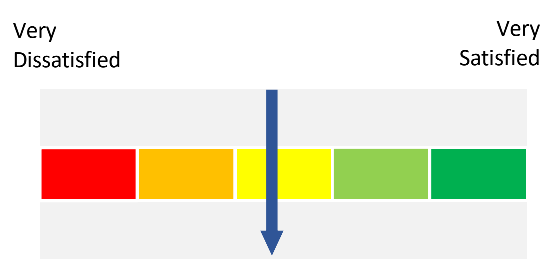


Recreation & Entertainment Options



Selection of Restaurants

Public Transportation



TRADE AREA RESIDENTS

Resident Market Segment: **Satisfaction with Downtown Fitchburg**

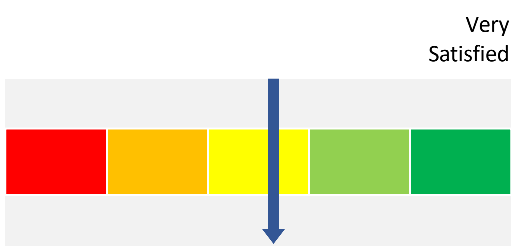
The majority of Fitchburg residents are dissatisfied with the appearance of buildings/storefronts. Close to one-half of residents are dissatisfied with evening safety.

63% of survey respondents indicated they are dissatisfied with the appearance/aesthetic appeal of buildings, storefronts and signs. 47% are dissatisfied with evening safety.

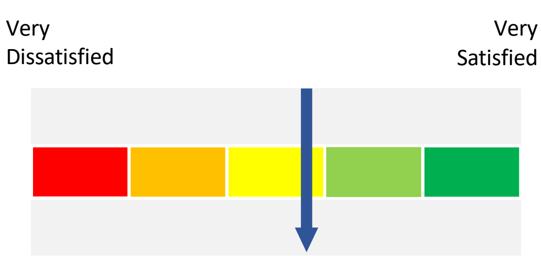
Residents also expressed a low level of satisfaction with public spaces and seating areas – 40% are dissatisfied.

Average satisfaction ratings are in the neutral range for pedestrian safety, ability to find parking and daytime safety.

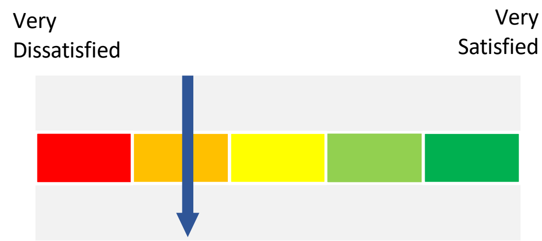
Ability to Find Parking



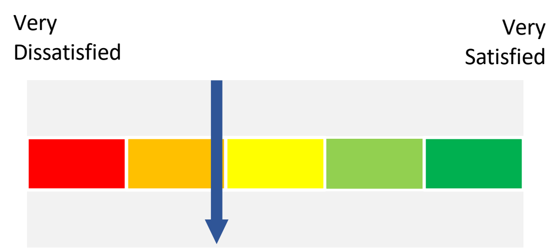
Daytime Safety



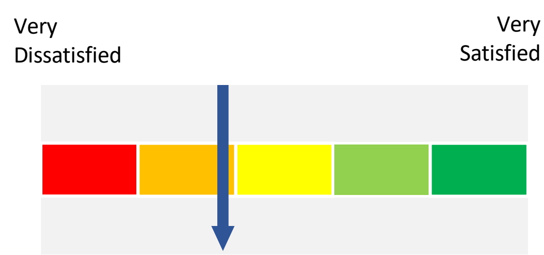
Aesthetic Appeal of Buildings, Signs & Storefronts



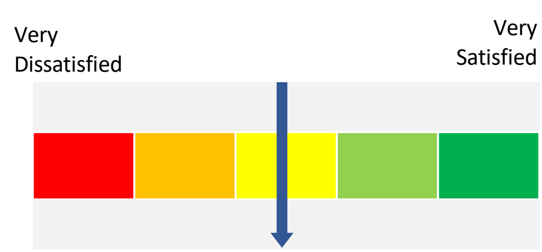
Evening Safety



Public Spaces/Seating Areas



Pedestrian Safety/Accommodations



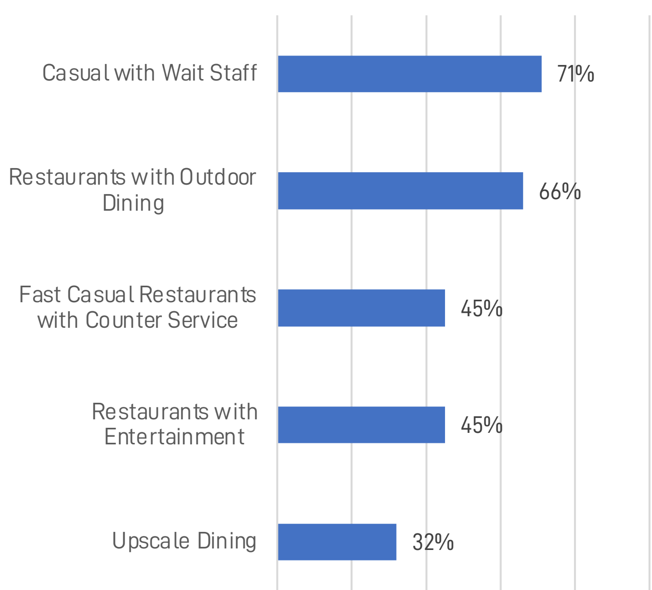
TRADE AREA RESIDENTS

Resident Market Segment: **Restaurant Opportunity and Preferences**

47% of residents purchase dinner from a restaurant once per week or more (including takeout). This amounts to a significant amount of sales, most of which is happening outside of Downtown.

The majority of residents indicated a desire for more restaurants in Downtown. The restaurant type most in demand is casual sit-down restaurants – 71% of employees said they would patronize additional establishments of this type. 66% of residents would patronize additional restaurants with outdoor dining.

Would Patronize Additional Restaurants if Available in Downtown



Fitchburg residents reported frequenting casual and ethnic restaurants, cafes and pizza places in Fitchburg.

The most frequented restaurants are listed below in order.

Top 20 Most Frequented Restaurants in Fitchburg

1. The 99 Restaurant
2. Rise & Grind
3. Espresso's Pizza
4. Dario's
5. Tacos & Tequila
6. Gold Bowl
7. Park Hill Pizza
8. Slattery's
9. Moran Square Diner
10. El Toro
11. Zapata
12. Markario's
13. Legend's
14. Dunkin Donuts
15. Country Pizza
16. Mill No. 3
17. Cleghorn House
18. SS Lobster
19. El Bohio
20. 50/50 Diner

Fitchburg residents reported frequenting restaurants in Leominster, Lunenburg, Westminster, Gardner and other surrounding communities in addition to Fitchburg.

The most frequented restaurants outside of Fitchburg are listed below. This is in indicative of the type of restaurant students and staff are finding appealing in other areas and may suggest the type they would frequent if located in Downtown.

Top 20 Most Frequented Restaurants Outside Fitchburg

1. 110 Grill
2. Logan's Table
3. Longhorn Steakhouse
4. Il Forno
5. Asian Imperial
6. Il Camino
7. Brady's
8. Old Mill
9. Texas Roadhouse
10. Luca's
11. Ixtapa
12. Olive Garden
13. Wachusett Brewing
14. Ember's
15. The Fix
16. Applebee's
17. Outback
18. Uno's
19. A Taste of Viet Nam
20. Barber's Crossing

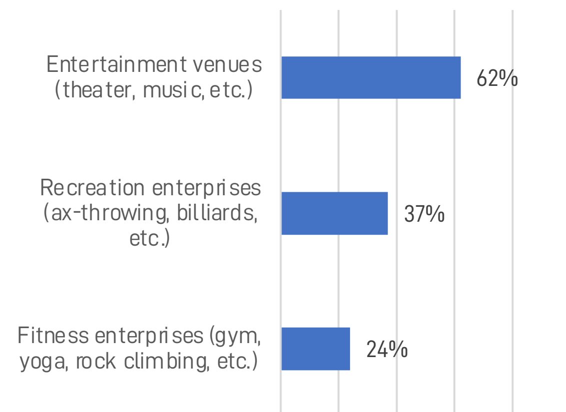
TRADE AREA RESIDENTS

Resident Market Segment: **Recreation, Entertainment, Arts Preferences**

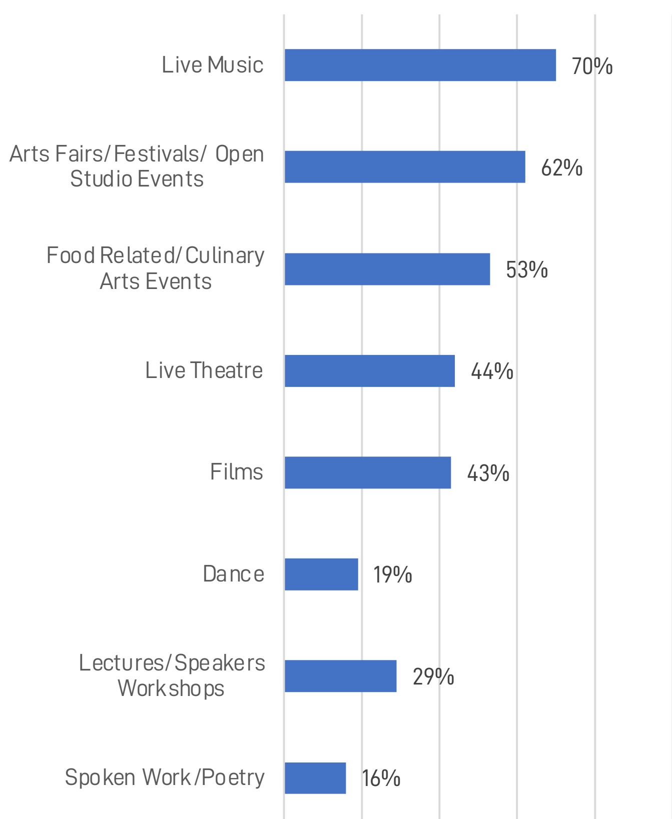
The majority of the Fitchburg residents indicated a desire for more entertainment venues in Downtown.

The types of cultural programming most in demand include live music, arts festivals and food related events.

Would Patronize Additional if Available in Downtown



Would Attend if Available in Downtown



Fitchburg residents reported frequenting entertainment options in Fitchburg as well as Leominster, Littleton, Lunenburg, Gardner, Westminster and Princeton

The most frequently mentioned sites are listed below in order.

Most Frequented Entertainment Options

1. Cinema World - Fitchburg
2. Fitchburg Art Museum
3. O'Neil Cinema - Littleton
4. Coggshall Park
5. Fitchburg Public Library
6. Putnam Street Lanes – Fitchburg
7. Wachusett Mountain/Hiking
8. Entertainment Cinema - Leominster
9. Hollis Hill Farm – Fitchburg
10. The Boulder Café – Fitchburg
11. Game On Fitchburg
12. Hanover Theater – Worcester
13. Launch Trampoline Park –Leominster
14. Apex - Marlborough

TRADE AREA RESIDENTS

The Fitchburg State Market Segment: **Desired Downtown Improvements**

When asked "What would encourage you dine, shop or recreate in Downtown more often?" . . . Comments from Fitchburg residents centered around a few major themes:

1. **Better Selection of Offerings, More Options**
2. **Increase Feeling of Safety (Police Presence, Panhandling)**
3. **Public Realm Improvements, Road Conditions**
4. **Clean it Up (trash, graffiti, pavement)**
5. **Less Empty Storefronts, Vacancy**

Fitchburg State Market Segment

FITCHBURG STATE

FITCHBURG STATE

The Fitchburg State Market Segment: **Consumer Profiles and Habits**

Fitchburg State is located one-half mile from Downtown Fitchburg. The students and staff (employees) are considered to be a potential market for Downtown businesses.

We conducted a survey during February, 2023 to explore the characteristics, consumer habits, and opinions of Fitchburg State students and employees. We received 228 responses. The following section contains results from this survey along with additional research on spending habits and market potential.

Student Consumer Segment Overview

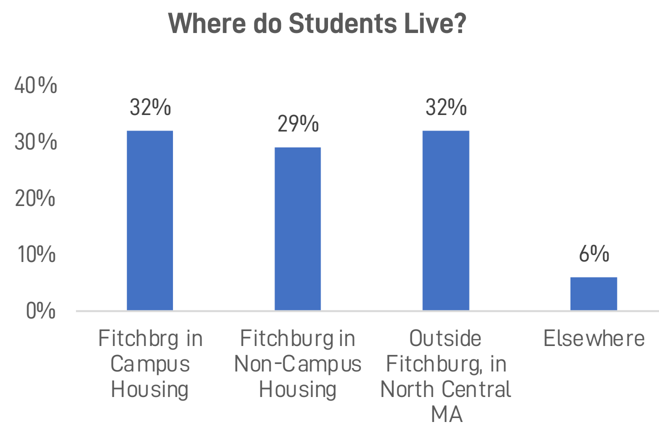
The university has an enrollment of **6,815 students.** College students are a distinct consumer segment with considerable spending power. Students spend money on eating out, groceries, alcohol, entertainment, hair cuts, supplies and other items.

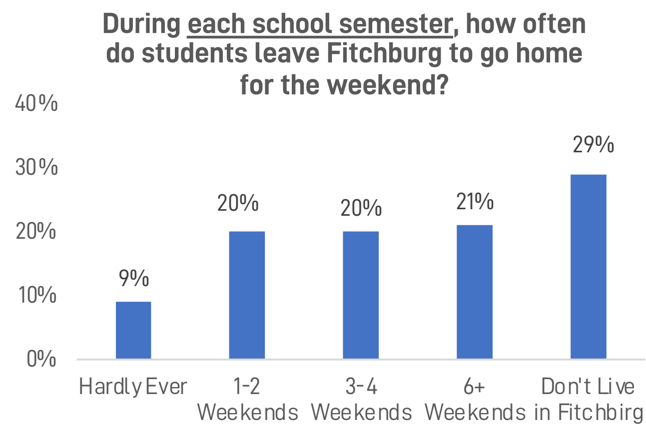
61% of the student respondents live in Fitchburg; 32% in campus housing and 29% in non-campus housing. The other 39% live outside of Fitchburg. Most students living in Fitchburg go home at least some weekends; 30% of students living in Fitchburg go home at least 6 weekends per semester. (Note: The graph reflects all student respondents.)

While all students represent market opportunity for lunch, snacks and other purchases, the estimated 4,000 students who reside in Fitchburg (either on-campus or off-campus housing) are likely the most important market target for Downtown businesses.

66% of students do not have a campus meal plan and therefore are dependent on grocery store shopping and purchasing restaurant meals. 44% have a meal plan ranging from "commuter" to "unlimited meals".

The vast majority (78%) of student respondents are between 18 and 24 years of age. The remainder are older students. The racial composition of respondents includes: 70% white, 13% of more than one race, 9% Black/African American, 4% Asian and 4% some other race. 23% are Hispanic.





FITCHBURG STATE

The Fitchburg State Market Segment: **Consumer Profiles and Habits**

Univerity Staff Consumer Segment Overview

Fitchburg State has **615 full-time employees**. It is the largest non-municipal employer in Fitchburg.

University Staff (faculty and non-faculty employees) represent market potential as they might purchase lunch, groceries, or other goods and services in Downtown during or after their work day.

Of the Fitchburg State staff who responded to our survey, 32% live in Fitchburg. The other 68% live outside of Fitchburg but presumably spend a significant amount of time in the city within close proximity to Downtown.

Students and Staff Consumer Habits

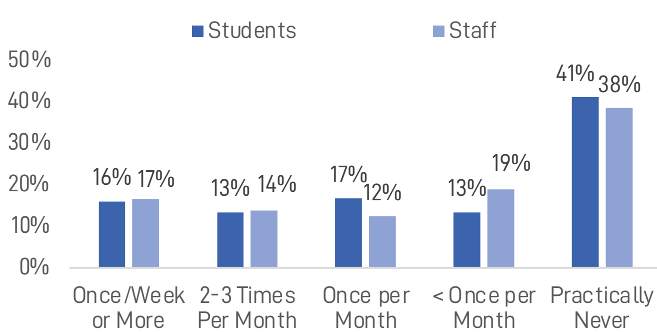
Around 30% of students and staff visit Downtown 2 to 3 times per month or more. Another 30% visit once per month or less and 40% practically never go Downtown.

Driving is the most frequent mode of transportation used to get to Downtown by both students and staff (70% and 80% respectively) followed by walking/biking and Uber. 2% of students use the campus shuttle .

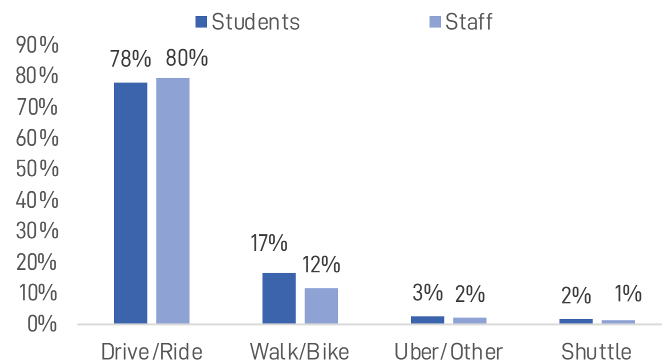
Restaurants and convenience retail establishments (e.g., grocery and drug stores) generate the most visits from the Fitchburg State Market segment. 36% of students and 46% of staff visited a Downtown eating or drinking place in the last 30 days. 43% of students and 34% of visited a convenience retail establishment (frequently mentioning Market Basket).

Community services generate the next most visits. 29% of staff and 13% of students visited establishments such as a post office, library or church in the last 30 days.

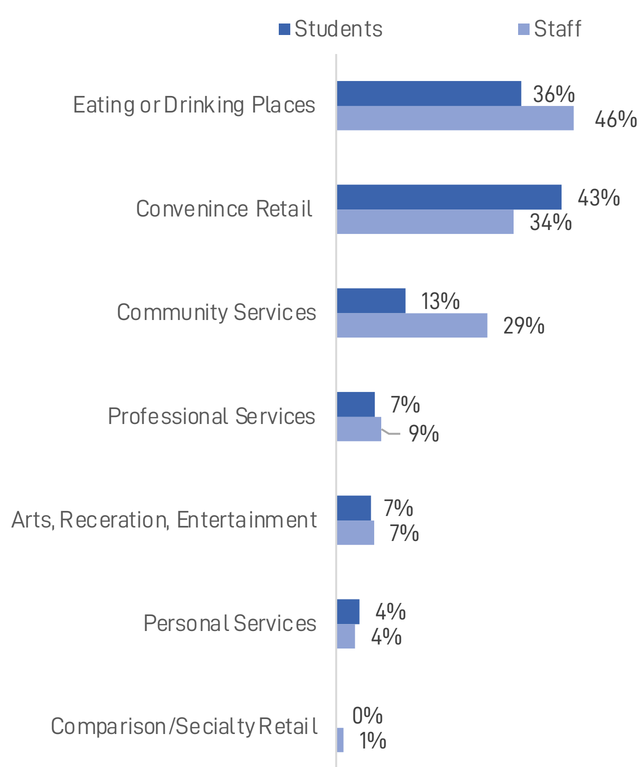
Frequency of Visits to Downtown



Typical Mode of Transport to Downtown
(Respondents selected more than one mode)



Downtown Establishments Visited
(Last 30 Days)



FITCHBURG STATE

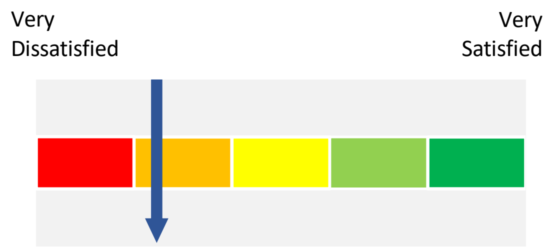
The Fitchburg State Market Segment: **Satisfaction with Downtown Fitchburg**

The majority of the Fitchburg State market segment are dissatisfied with the selection of retail, entertainment options, and restaurant selection in Downtown.

74% of survey respondents indicated they are dissatisfied with the selection of retail stores and recreation/entertainment options. 51% are dissatisfied with the variety and extent of dining options available.

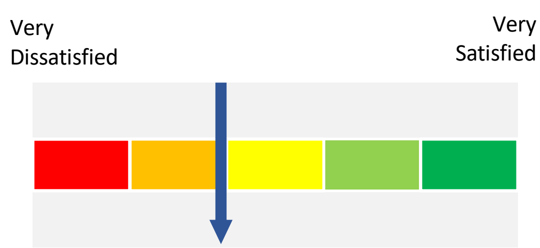
The majority of respondents (57%) are neutral regarding public transportation. 22% indicated they are "satisfied" or "very satisfied" while the same percentage indicated they are "dissatisfied" or "very dissatisfied".

Selection of Retail Stores

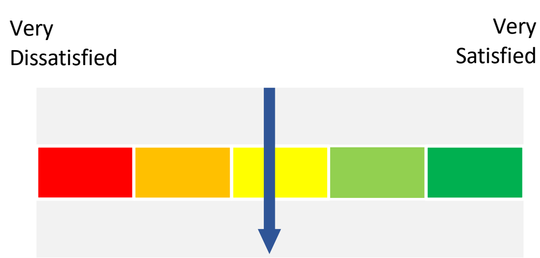


Recreation & Entertainment Options

Selection of Restaurants



Public Transportation



The Fitchburg State Market Segment: **Satisfaction with Downtown Fitchburg**

The majority of the Fitchburg State market segment expressed dissatisfaction with the appearance of buildings/storefronts and evening safety.

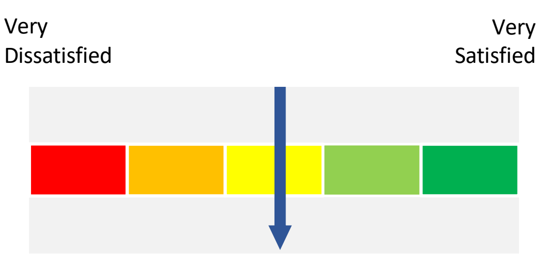
68% of survey respondents indicated they are dissatisfied with the appearance/aesthetic appeal of buildings, storefronts and signs. 57% are dissatisfied with evening safety.

The market segment also expressed a low level of satisfaction with public spaces and seating areas – 46% expressed dissatisfaction.

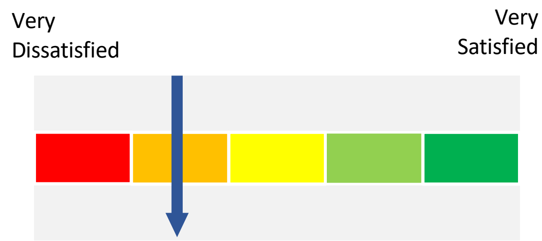
Average satisfaction ratings are in the neutral range for pedestrian safety, ability to find parking and daytime safety.

Ability to Find Parking

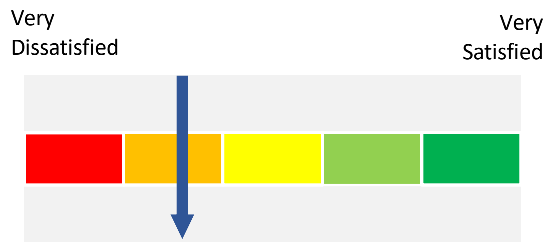
Daytime Safety



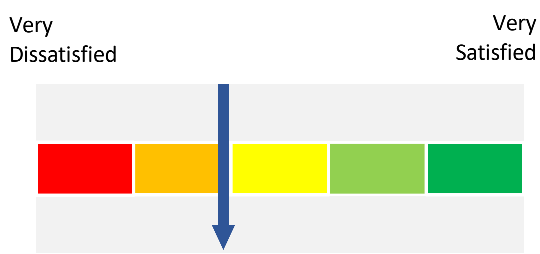
Aesthetic Appeal of Buildings, Signs & Storefronts



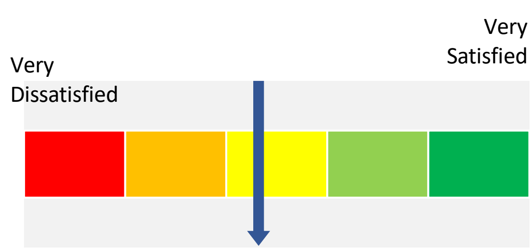
Evening Safety



Public Spaces/Seating Areas



Pedestrian Safety/Accommodations



FITCHBURG STATE

The Fitchburg State Market Segment: **Restaurant Opportunity and Preferences**

Restaurant Spending

Restaurant spending (including eating out and take-out/delivery) done by Fitchburg State students and staff represents a significant opportunity for Downtown Fitchburg businesses. We estimate annual restaurant expenditures attributable to this segment to be between $10 and 18 million annually.

Currently, the Fitchburg State market segment is making these expenditures at restaurants located both inside and outside of Fitchburg. There is opportunity to capture more of these sales in Fitchburg.

Students, of course, represent the biggest opportunity. According to Education Data Initiative, college students that don't have a meal plan spend an average of $410 per month at restaurants off-campus. Students with meal plans spend less, but still over $100 per month. If we use this national data and the estimated number of students with and without meal plans, the resulting estimate for restaurant spending done by Fitchburg students totals approximately $17 million per year.

Using a low-end estimate, based on consumer survey findings regarding restaurant patronage, the estimate for restaurant spending done by Fitchburg students would still total over $9 million per year.

Staff/faculty expenditures represent a smaller but not insignificant opportunity. We estimate their annual purchases of coffee, snacks, breakfast and lunch during their work day amount to over $600,000 in restaurant spending.

Fitchburg State Market Segment
Annual Off-Campus Restaurant Spending

$9.1 – 17.7 million

Fitchburg State Students
Off-Campus Restaurant Spending

Low Estimate	Estimate based on National Averages
$8.5 million	**$17.1 million**

Fitchburg State Staff/Faculty
Off-Campus Restaurant Spending
on Coffee/Breakfast/Lunch

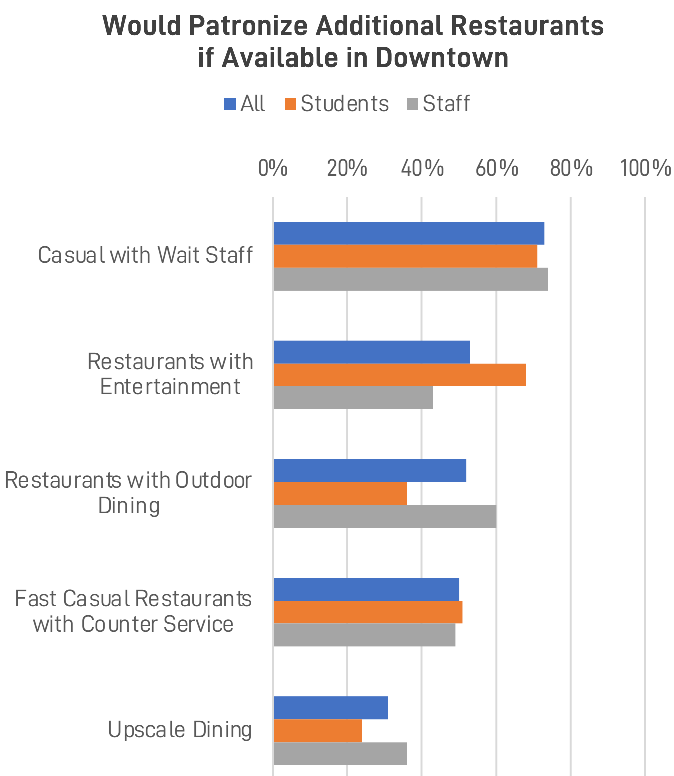
$.6 million

The Fitchburg State Market Segment: **Restaurant Opportunity and Preferences**

The majority of the Fitchburg State market segment indicated a desire for more restaurants in Downtown. The restaurant type most in demand by both students and staff is casual sit-down restaurants -- 73% said they would patronize additional establishments of this type.

68% of students favor restaurants with entertainment (music, games). Outdoor dining was popular with staff (60% would patronize).

Approximately 50% of students and staff said they would patronize fast casual restaurants. Upscale dining received a minority response from both groups



The Fitchburg State market segment reported frequenting casual and ethnic restaurants, cafes and pizza places in Fitchburg.

The most frequented restaurants are listed below.

Top 20 Most Frequented Restaurants in Fitchburg

1. Makarios
2. Zapata
3. Tacos & Tequila
4. The 99 Restaurant
5. Slattery's
6. Dunkin Donuts
7. Gold Bowl
8. Country Pizza
9. Espresso's Pizza
10. Mill No. 3
11. Bion Greek
12. D'Angelo's
13. McDonald's
14. El Bohio
15. River Styx Brewing
16. Legend's
17. Park Hill Pizza
18. Moran Square Diner
19. Thirsty Robot
20. Pammie's Place

The Fitchburg State market segment reported frequenting restaurants in Leominster, Lunenburg, Gardner and Westminster in addition to Fitchburg.

The most frequented restaurants outside of Fitchburg are listed below. This is indicative of the type of restaurant students and staff are finding appealing in other areas and may suggest the type they would frequent if located in Downtown.

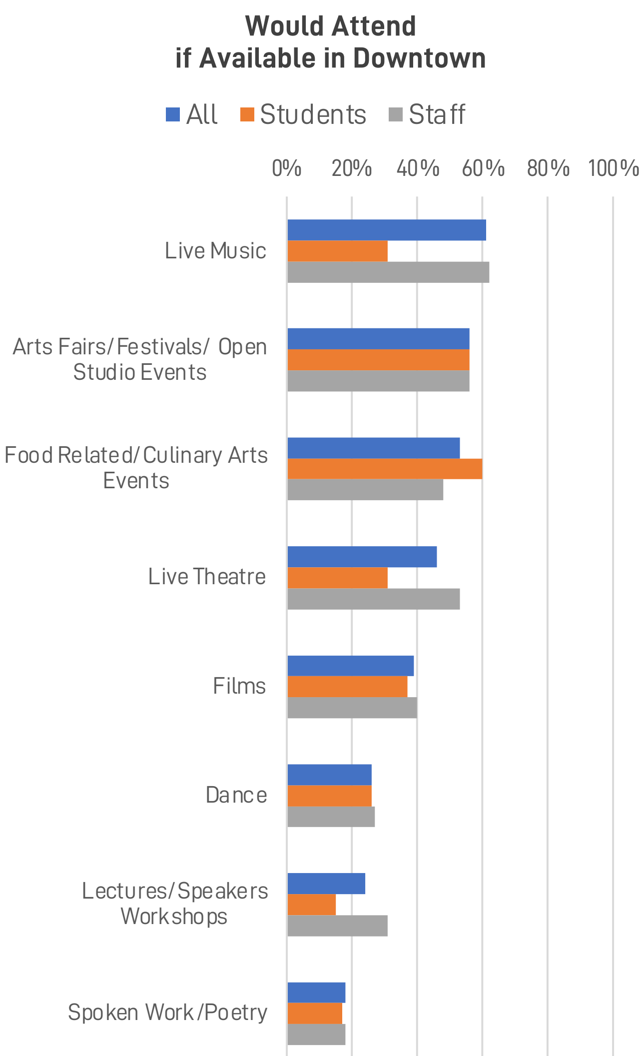
Top 20 Most Frequented Restaurants Outside Fitchburg

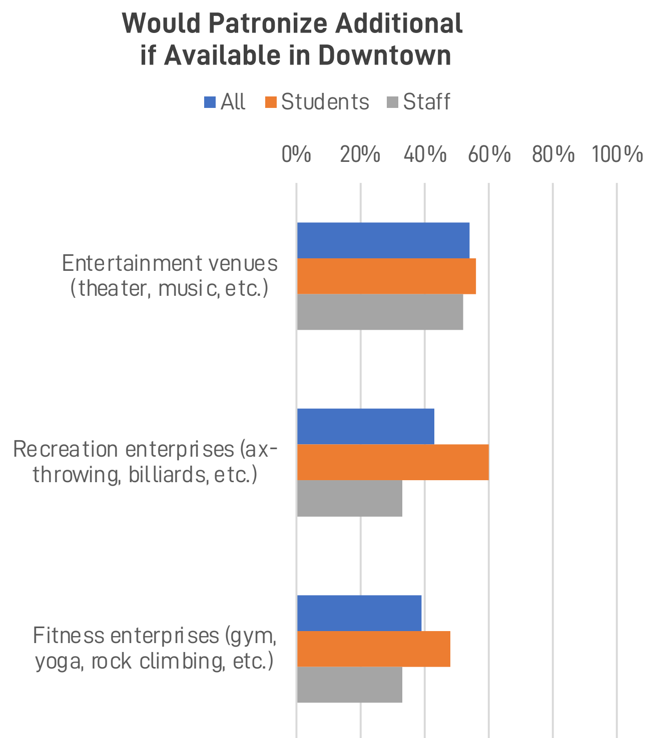
1. Asian Imperial
2. 110 Grill
3. Chipotle
4. Ixtapa
5. Starbucks
6. Il Forno
7. Logan's Table
8. Il Camino
9. Chilli's
10. The Fix
11. Smokestack
12. Olive Garden
13. Texas Roadhouse
14. Luca's
15. Brady's
16. Blue Print
17. Gardner Ale House
18. Roots
19. Wachusett Brewing
20. Yamato

The Fitchburg State Market Segment: **Recreation, Entertainment, Arts Preferences**

The majority of the Fitchburg State market segment indicated a desire for more entertainment venues in Downtown. The majority of students would like more recreation enterprises.

The types of cultural programming most in demand include live music, food related events and arts festivals. Students are most interested in food related/culinary events.





The Fitchburg State market segment reported frequenting entertainment options in Fitchburg as well as Leominster, Lunenburg, Gardner, Westminster and Princeton

The most frequently mentioned sites are listed below in order.

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Most Frequented Entertainment Options

1. Cinema World - Fitchburg
2. Entertainment Cinema - Leominster
3. Game On - Fitchburg
4. Wachusett Mountain – Westminster/Princeton
5. Hiking/Biking Trails
6. Planet Fitness – Leominster
7. Putnam Street Lanes – Fitchburg
8. Gardner Cinema

FITCHBURG STATE

The Fitchburg State Market Segment: **Desired Downtown Improvements**

When asked "What would encourage you dine, shop or recreate in Downtown more often?" . . . Comments from Fitchburg State students and staff centered around a few major themes:

1. **Less Empty Storefronts, Abandoned Feeling**
2. **Better Selection and More Offerings Especially Dining Options**
3. **Increase Feeling of Safety**
4. **Public Realm Conditions & Cleanliness**

Downtown Employee Market Segment

DOWNTOWN EMPLOYEES

Downtown Employee Market Segment: **Restaurant Consumer Habits and Preferences**

We conducted a survey during March/April, 2023 to explore the characteristics, consumer habits, and opinions of Downtown Fitchburg employees. We received 51 responses. The following section contains results from this survey.

The majority of employee respondents live outside of Fitchburg; 35% are Fitchburg residents. They range in age from 25 to 64, the average is 45.

Employee Restaurant Habits and Preferences

Employees represent a market opportunity because they often make purchases and do errands during their lunch break on their way to or from their place of employment. Restaurant expenditures are the most common.

Employees make work-day associated restaurant purchases an average of 19 times per month. Currently, they make only 31% of these purchases in Downtown. A majority of employees said they would "definitely" or vey probably" purchase more work day-associated meals and snacks in Downtown Fitchburg if there were a greater variety of restaurants.

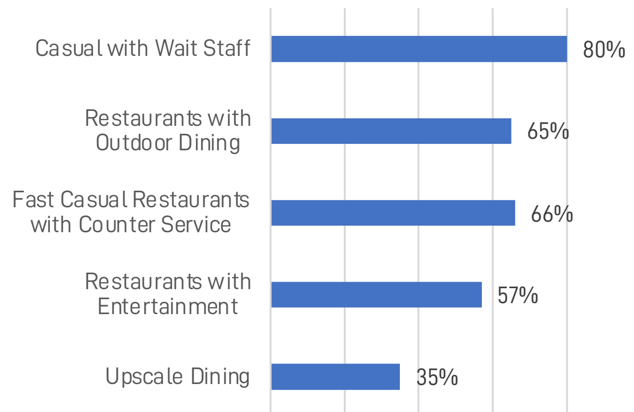
Employees make several types of restaurant purchases associated with their work day including coffee, snacks, breakfast, lunch, dinner/drinks immediately after work and picking up takeout dinner on the way home. Employees report making only 31% of these purchases in Downtown and 69% elsewhere. 55% said if Downtown Fitchburg had a greater variety of restaurants, they would "definitely" or vey probably" purchase more work day-associated meals and snacks there.

Times Per Month
Engage in Work Day Associated Purchasing
(Before, During or Immediately After Work)

	Average
Buy coffee/beverage/snack	6.6
Buy breakfast	3.6
Buy lunch	4.3
Go out for dinner/drinks	1.4
Pick up take-out/prepared dinner	3.2
Total	**19.1**

The majority of employees indicated a desire for more restaurants in Downtown. The restaurant type most in demand is casual sit-down restaurants – 80% said they would patronize additional establishments of this type.

Would Patronize Additional Restaurants if Available in Downtown



DOWNTOWN EMPLOYEES

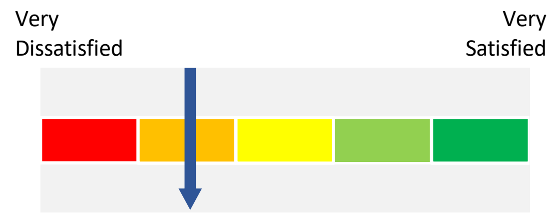
Downtown Employee Market Segment: **Satisfaction with Downtown Fitchburg**

The majority of the Downtown Employee respondents are dissatisfied with the selection of retail, entertainment options, and restaurant selection in Downtown.

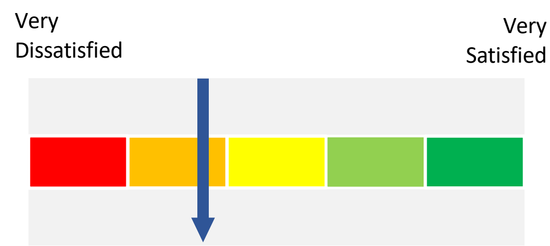
61% of survey respondents indicated they are dissatisfied with the selection of retail stores. 53% and 51% expressed dissatisfaction with the recreation/entertainment and dining options available.

The majority of respondents are neutral or satisfied regarding public transportation.

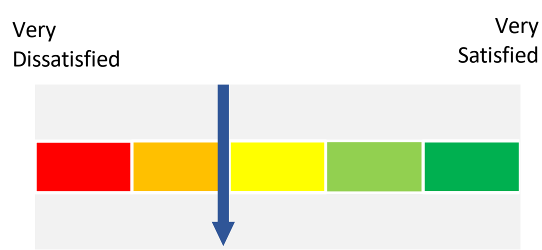
Selection of Retail Stores



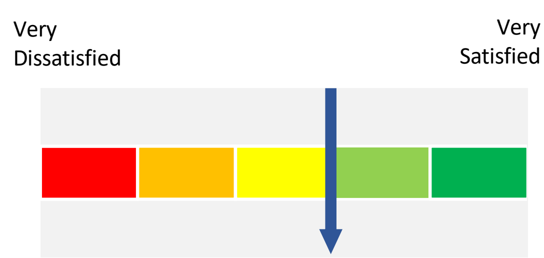
Recreation & Entertainment Options



Selection of Restaurants



Public Transportation



DOWNTOWN EMPLOYEES

Downtown Employee Market Segment: **Satisfaction with Downtown Fitchburg**

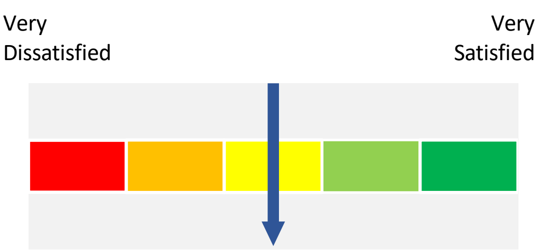
The majority of Downtown Employees are dissatisfied with the appearance of buildings/storefronts and evening safety.

57% of survey respondents indicated they are dissatisfied with the appearance/aesthetic appeal of buildings, storefronts and signs. 55% are dissatisfied with evening safety.

The market segment also expressed a low level of satisfaction with public spaces and seating areas – 45%are dissatisfied.

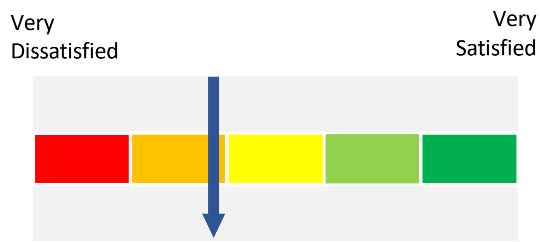
Average satisfaction ratings are in the neutral range for pedestrian safety, ability to find parking and daytime safety.

Daytime Safety

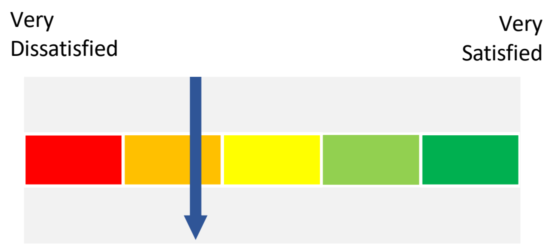


Ability to Find Parking

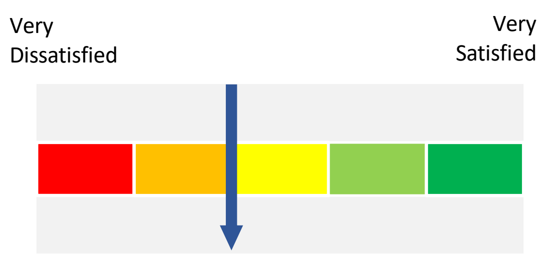
Aesthetic Appeal of Buildings, Signs & Storefronts



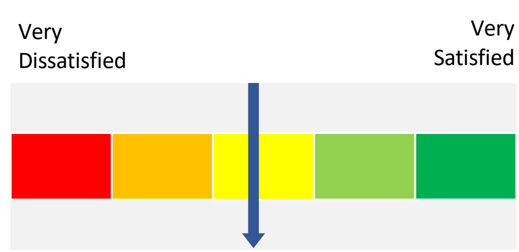
Evening Safety



Public Spaces/Seating Areas



Pedestrian Safety/Accommodations



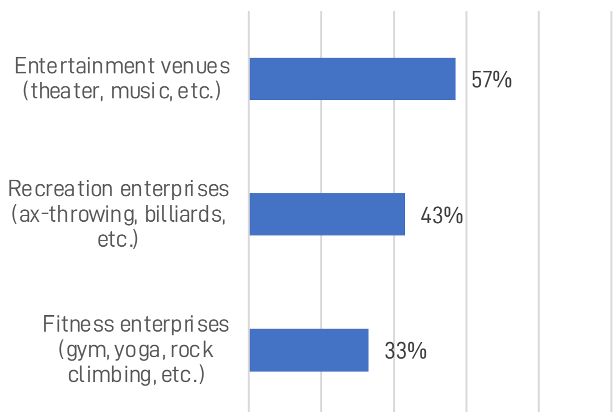
DOWNTOWN EMPLOYEES

Downtown Employee Market Segment: **Entertainment & Cultural Event Preferences**

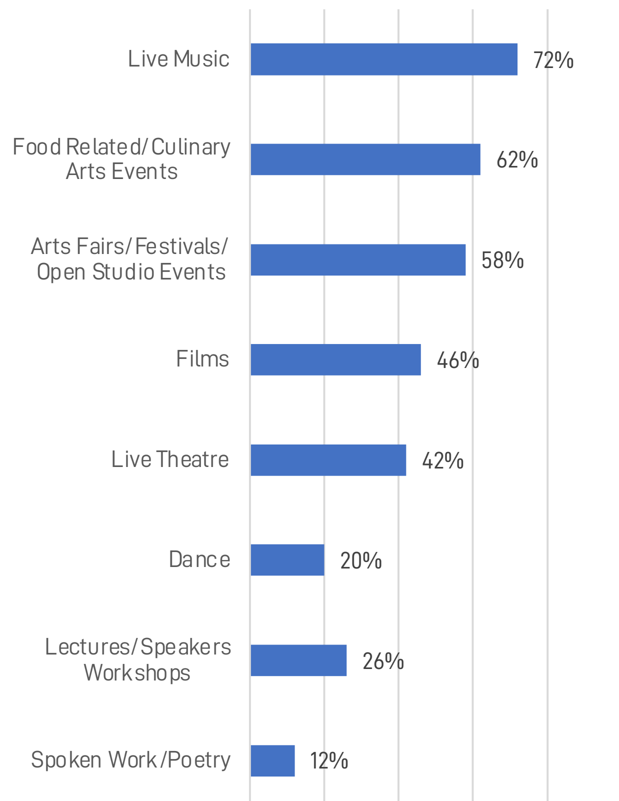
The majority of employees indicated a desire for more entertainment venues in Downtown.

The types of cultural programming most in demand include live music, food related events and arts festivals.

Would Patronize Additional if Available in Downtown



Would Attend if Available in Downtown



DOWNTOWN EMPLOYEES

Downtown Employee Segment: **Desired Downtown Improvements**

When asked "What would encourage you dine, shop or recreate in Downtown more often?" . . . Comments from Downtown employees centered around a few major themes:

1. **Better Selection and More Offerings**
2. **Increase Feeling of Safety**
3. **Public Realm Conditions & Cleanliness**

Visitor Market Segment

VISITORS

Visitor Market Segment: **Attraction Visitor Volume and Profiles**

Fitchburg has several attractions that collectively draw close to 1.7 million visitors to the area each year. These visitors represent a potential market opportunity for Downtown businesses as they may be inclined to dine at restaurants, find entertainment, browse for retail and seek lodging or other services.

Existing and new Downtown businesses may be able to capitalize on this opportunity if they target marketing efforts to this segment.

The following section profiles the visitors of four major attractions in Fitchburg:

- **Fitchburg Art Museum**
- **Game On Fitchburg**
- **Great Wolfe Lodge**
- **Fitchburg State Center Stage and Hub**

Fitchburg Art Museum

The Fitchburg Art Museum (FAM) is located right in the Downtown and is one of only 4 museums in Worcester County. It serves the cities of Fitchburg and Leominster and surrounding communities in North Central Massachusetts and Southern New Hampshire.
FAM is comprised of over 20,000 square feet of space, featuring exhibitions from its collections as well as special loan exhibitions focused on regional contemporary art. Collections include 19th Century American Art, photography, African Art, Greek and Roman Art and Egyptian Art (presented in an interactive gallery designed for families and school groups).

Annual Visitors: 15,000

Visitor Characteristics:
- 1/3 are students of schools in Fitchburg either field trips or sent on assignments
- 1/3 are individuals and families from North Central Massachusetts
- 1/3 are from elsewhere, mostly Worcester, Metro West and Boston

Seasonality:
- Highest volume in winter, holidays and During April "Art in Bloom" event which attracts 1,000 visitors
- Less busy during summer months

Length of Stay:
- Generally visit for less than a day, rarely overnight
- 3 times/year have art opening receptions; the artist, friends and family might stay overnight in the area

What else do visitors look for/like to do during visit?
- Restaurants and coffee shops particularly within walking distance
- Other museums
- Possible linkage opportunities: restaurants, browsing retail, other attractions

VISITORS

Visitor Segment: **Attraction Visitor Volume and Profiles**

Game On Fitchburg

Game On is a sports & performance center located approximately 4 miles from Downtown off Route 2A. Game On's state-of-the-art facilities include 6 full-sized outdoor turf fields, 10 indoor basketball courts, 14 volleyball courts, and 8 pickleball courts, along with an arcade, party areas, axe-throwing lanes, restaurant, and bar.

Annual Visitors: Over 1 million

Visitor Characteristics:

- Weekends - Hosts youth tournaments approximately 42 weekends of the year. Visitors include the players and their families, they come from as far south as New Jersey up to Maine (3,000 – 10,000 per day).
- Weekdays
  - youth practices, most 25 minute radius (basket, soccer, volleyball)
  - adult leagues – corn hole, pickle ball, volleyball, from south as far as Worcester, east to 495 and to Vermont
  - Thursday and Friday Nights, have College Partnership event (free corn hole, discount on axe-throwing and food)

Seasonality:

- Stay busy most months, outdoor fields are closed mid December to mid March
- August is slowest month

Length of Stay:

- Weekdays - patrons usually come for a few hours
- Weekends – visitors typically stay at least one overnight

What else do visitors look for/like to do during visit?

- Visitors complain about difficulty finding hotel rooms
- Restaurants - Some visitors use on-site restaurant but there is not capacity for all. Some get back on Route 2 and go to Leominster, Devens or elsewhere to look for restaurants and aren't aware or don't think about heading toward Downtown.
- Families often have siblings looking for other entertainment/recreation options (some shared patronage with Great Wolfe Lodge)
- Possible linkage opportunities : second hand sports equipment, restaurants, lodging, other attractions

Great Wolf Lodge

Great Wolfe Lodge is a resort offering an indoor water park and land attractions including kid-friendly activities, a range of dining options, and interactive games. It is located approximately 5 miles from Downtown off Route 2.

Annual Visitors: 650,000

Visitor Characteristics:

- Children 3 to 13 years old and their parents
- Typical mother age 24 to 45
- Target market is 3-hour drive (Boston, Hartford, Providence, Nashua, NH, Portland, ME and Upstate NY)

Seasonality:

- When first open, primarily winter lodge, now busy most months
- Very busy during school breaks, Christmas and all summer.
- Slowest months are May and September.

Length of Stay:

- Average is 1.4 nights

What else do visitors look for/like to do during visit?

- Biggest request from guests is for activities to do outside – bike trails, walking paths, etc.
- Guest sometimes combine visit with trip north to go camping, or skiing/hiking at Mount Wachusett
- Guests do a lot of their dining on site. Other popular restaurant locations include Leominster's Twin City Plaza (e.g., Outback Steakhouse, Moe's, Boston Chicken) and Wachusett Brewery.
- Significant crossover patronage with Game On but tournaments often coincide with peak times at GWL
- Possible linkage opportunities : family-friendly attractions, restaurants, FAM

VISITORS

Visitor Segment: **Attraction Visitor Volume and Profiles**

Fitchburg State Center Stage

Fitchburg State CenterStage events feature national and international artists as well as collaborations with student and community groups. These events attract attendees from surrounding communities and are held at 2 facilities located on the Fitchburg State campus, less than 1 mile from Downtown. The Weston Auditorium is a traditional 800 seat venue where CenterStage hosts larger shows and the Hammond Hall Falcon Hub, with just over 150 seats, features smaller events in a relaxed, coffeehouse-style atmosphere. Generally, CenterStage hosts 4 or 5 large events per year.

Annual Visitors: 2,000

Visitor Characteristics:
- 5% Students
- 35% Fitchburg residents
- 60% from surrounding communities, mostly Leominster, Lunenburg, Westminster, Townsend, Sterling, Ashburnham, Ashby, Gardner
- Typically 50% of ticket sales are to Seniors

Seasonality:
- Events are scheduled during the school year, typically October to April
- Holiday performance usually is the best seller and often sells out.

What else do visitors look for/like to do during visit?
- Possible linkage opportunities: restaurants

Fitchburg State – Planned Downtown Theater

Fitchburg State purchased the "Theater Block" in Downtown Fitchburg and is planning a major restoration project. This will start with the establishment of a 200-seat black box theater with a planned opening in 2027 and then a 1200-seat main theater with a planned opening in 2032.

When these theaters are established, future event attendees will provide additional opportunity for Downtown businesses. Part of enjoying a performance may include dining out, having dessert or a drink afterward and even possibly shopping at a local retail store or staying overnight at local lodging.

National research conducted by Americans for the Arts in 2015 estimated average spending done by audience participants when they attend an event. Adjusted for inflation to May, 2023, this research indicates that attendees spend an average of $17.77 per person on meals, snacks and refreshments*.

**Source: Arts & Prosperity 5, Americans for the Arts, Washington, DC 2015 (data adjusted to May 2023)*