Market Analysis & Business District Assessment

Downtown Middleborough

Prepared for :

Town of Middleborough
Office of Economic and Community Development

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Contents

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FinePoint Associates LLC

List of Tables and Figures

Figures

Tables

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Project Scope, Purpose and Study Area

Scope: To work collaboratively with a small working group and the Director of Economic and Community Development to conduct a market analysis and assessment of the real estate, business conditions and commercial mix in Downtown Middleborough.

Purpose: To provide foundational research that will help to identify obstacles and assess opportunities that will inform possible future actions with regard to downtown vibrancy-maintaining strategies.

Study Area: Middleborough is located approximately 40 miles south of Boston surrounded by the towns of Taunton, Plymouth, Wareham, Carver, Lakeville, Halifax, Rochester and Plympton. (see Figure 1). The downtown business district study area extends between Cambridge Street/the rail line and the Nemasket River. Businesses are predominantly located along Center Street, Main Street, Wareham Street.

Figure 1. Regional Context

Figure 2. Downtown Study Area Map

Part I. Analysis of the Potential Market

A. Overview of Potential Market Segments

Businesses located in the Downtown Middleborough have the opportunity to serve several potential market segments:

- Residents of the Surrounding Area
- Resident Sub-segment – Oak Point 55+ Community
- Employees Working in and Nearby Downtown
- Massasoit Community College Students
- Visitors/Users/Attendees of Nearby Attractions and Events

Residents of the Surrounding Area

The major potential customer base for the Downtown is the adjacent residential population. The identified primary trade area (where most of the repeat business is expected to be derived) is a 3-mile radius containing approximately 22,600 residents. The secondary trade area is identified as the 6-mile radius, containing approximately 44,800 residents. The rationale for the trade area delineation and the demographic and consumer characteristics of the population in each trade area are is described in detail later in this report.

Resident Sub-Segment – Oak Point Residents

The residents of Oak Point represent a sub-segment of the surrounding resident market with a concentration of newer residents. This master-planned community within Middleborough, dedicated to people 55 and over, contains over 900 offers newly built custom manufactured homes in a 1,000 acre wooded setting.

Employees of Area Businesses

In addition to the residential customer base, there are over 500 employees who work in the 146 establishments within close proximity to the business district. This segment represents an opportunity for meal and snack purchases as well as other convenience goods and services purchased before and after work. A few large employers located nearby include: High Point Treatment Center (over 200 employees), the Town (approximately 75 employees including Town departments and Library) and Massasoit Community College (approximately 50 employees).

Massasoit Community College Students

A satellite location of Massasoit Community College is located right in the Downtown. The college has approximately 500 students with a growing enrollment.

Visitors/Users/Attendees of Nearby Attractions and Events

People are drawn to events and attractions that bring them into or within very close proximity to downtown. This creates potential opportunities for downtown restaurants, retailers and service providers. Market segments include:

- Visitors to Burt Wood Performing Arts School and Alley Theater
- Visitors and Users of the Downtown Athletic Fields
- Visitors to the Historic/Cultural Sites (Middleborough Historical Museum, Robbins Museum of Archaeology)

These market segments will be described in more detail in the following sections of this report.

B. Resident Market Segment

1. Trade Area Delineation

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 that live within the area as well as examine their characteristics and purchasing habits to provide a picture of the potential market.

The term retail trade area refers to the geographic area from which a retail entity generates its sales. The primary trade area for a commercial center, such as a downtown, business district or shopping plaza is the area from which most of the steady, repeat business is derived (typically, where 65-80% of the total sales are generated). A combination of factors determines the size and boundaries of the primary trade area: travel time and distance for shoppers, travel patterns, location of competing commercial centers, physical barriers that might effect access, socio economic characteristics, and the size and scope of the commercial center itself. (Generally, the larger the variety, breadth and uniqueness of the merchandise offerings, the greater distance customers are willing to travel, and therefore, the larger the trade area will be.)

The competing commercial facilities surrounding Downtown Middleborough are identified on the following page (see Figure 3). (Note that this map is intended to be illustrative of key competitors; not all commercial facilities are shown.) The competition becomes greater beyond a 4-mile radius from the center of Downtown.

Figure 4 shows computer-generated drive times. The 4-mile radius is roughly equivalent to an 8-10 minute drive time.

After discussing consumers patterns with local business owners and residents and reviewing the location of existing commercial facilities, travel times and circulation routes, it was determined that the likely potential **Primary Trade Area** for the Business District is a 4-mile radius (see Figure 5).

There may also be potential to attract some customers from a **Secondary Trade Area,** the area included in a 6-mile radius from the District (see Figure 5). This secondary trade area was identified because it represents a relatively reasonable travel time to acquire goods and services. However, it is expected that capture rate would be significantly less than in the primary trade area and would depend on the uniqueness and quality of the merchandise or services being offered.

The demographic and consumer characteristics of the population in these trade areas are described throughout the following section.

Sources: The Nielsen Company, U.S. Census, InfoUSA, American Community Survey, Primary Data Collection, FinePointAssociates

Figure 3.
Location of Surrounding Commercial Facilities

Regional Malls (apparel, home goods, restaurants, etc.)
- ☑ Kingston Collection
- ☑ Silver City Galleria

Lifestyle Centers (restaurants, entertainment, apparel, home goods, specialty chains, in open-air, town center-like setting, etc.)
- ☑ Colony Place
- ☑ Wareham Crossing

Performing Arts Theatres/Companies
- ☑ Applause Academy
- ☑ Burt Wood School of Performing Arts/Alley Theatre/Nemasket River Productions
- ☑ BSU Theater
- ☑ Kreative Kidz Theatre
- ☑ Rogue Theatre Company/Roseland Ballroom
- ☑ Spire Center for Performing Arts

Downtown/Village Center Business Districts
Taunton Downtown
- ☑ Downtown Bridgewater
- ☑ Downtown Plymouth
- ☑ Downtown Middleborough
- ☑ Downtown Taunton

Other Commercial
- Small Shopping Plazas (few stores, typically Marshalls, T.J. Maxx**)**
- Walmart, Walmart Supercenter
- Major Supermarkets

4-Mile Radius

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

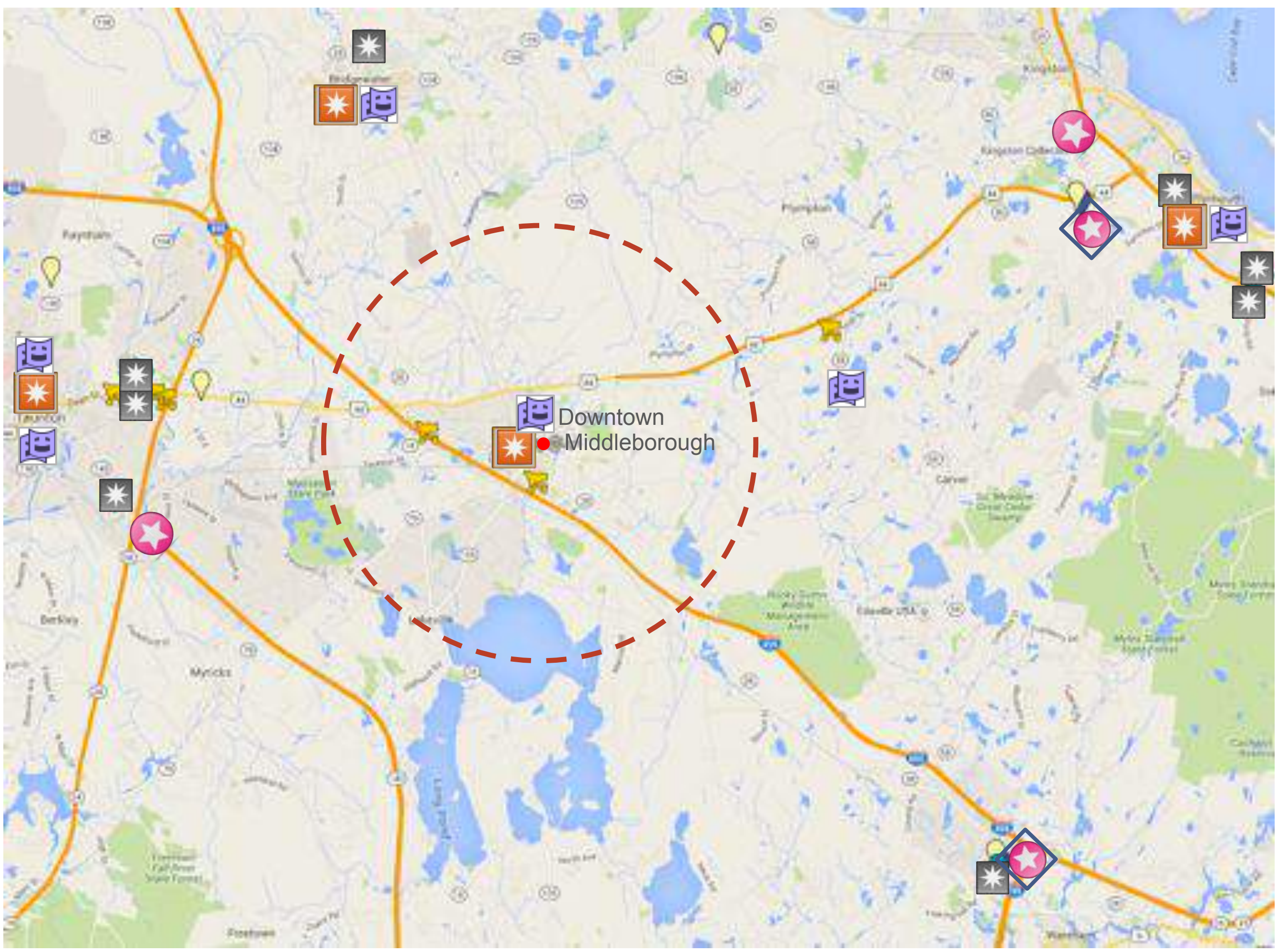


Figure 4.

Drive Time (computer -generated)

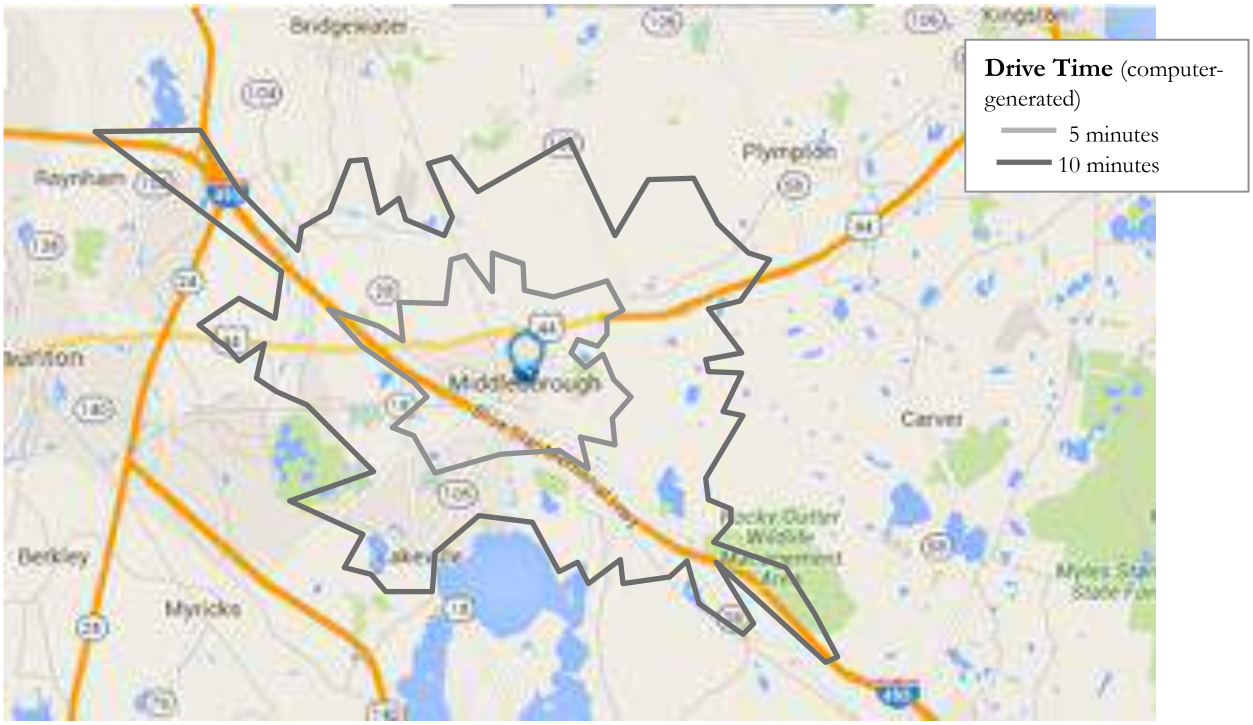
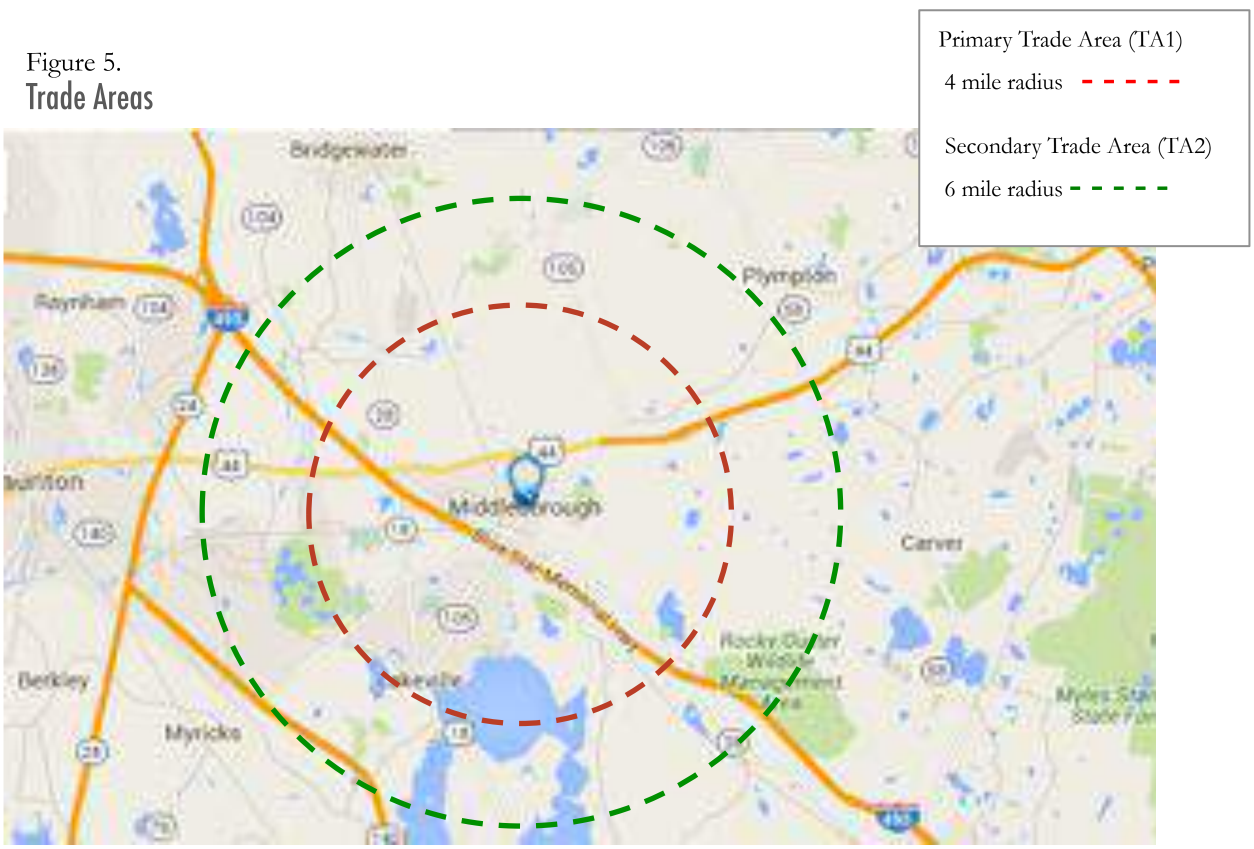


Figure 5.

Trade Areas



B. Resident Market Segment (cont'd)

2. Trade Area Consumer Characteristics

Primary Trade Area (TA1)

There are approximately 22,601 people living within the primary trade area. The population is predominantly White with average or above average income. Educational attainment rate is similar to the United States but lower than Massachusetts. The estimated median household income for 2015 is $71,541, which is 5% higher than the statewide median. There is a significant upper income segment – 31% of the households earn over $100,000 per year. The population is predominantly white (95%), with a small portion comprised of Asians (1%), Black/African Americans (1%) and other races. Only 2% of the population is Hispanic compared to 11% in the State. The most significant cultural concentrations are Irish (21%) Italian (15%), English (11%) and Portuguese (6%) and compared concentration in the United States of 7%, 4%, 5% and <1% respectively. Approximately 35% of the population over the age of 25 has at least an Associates Degree or higher (compared to 47% in Massachusetts and 37% in the United States).

Compared to Massachusetts overall, the primary trade area population, on average, is older, more likely to be married, have children under 18 in the household, own their home and have a car. The median age is 43.3, about 9% higher than in Massachusetts and 14% higher than in the US. 19% of the population is 65 years of age or older compared to 15% in the state and the U.S. The population is comprised predominantly of family households (71%), meaning more than one person in the household related by blood or marriage, with an average percentage of single parent households. 34% of the households contain children under 18 compared to 31% statewide and 33% in the U.S.

About 22% of the households contain only one person, compared to 29% statewide. Homeownership is significantly higher --76% of the occupied homes are owner-occupied compared to 62% statewide. The vast majority of the market is mobile with access to a private vehicle for acquiring goods and services. Only a very small portion of households (4%) do not own a vehicle and therefore represent a market segment dependent on public transportation or walking to acquire goods and services. In fact, two-thirds of the households have 2 cars or more.

Projected Growth - The population and the number of households in the Primary Trade Area has been growing at a substantially higher rate than Massachusetts overall. Between 2000 and 2010, population grew by 15% and the number of households grew by 20%, compared to statewide rates of 3% and 4%. According to projections obtained from Nielsen, between 2010 and 2020, the population is expected to grow annually by approximately .91% and the number of households by 1.0%, while the statewide projections are .67% and .74%. These projections are based on data from the American Community Survey (conducted more frequently than the decennial census), data from the United States Post Office, new construction data, and the Nielsen Master Address File.

Secondary Trade Area (TA2)

There are approximately 44,761 people living within the secondary trade area. The characteristics of this population are fairly similar to the primary trade area, however median household of $78,597 is about 10% higher.

A summary analysis of primary and secondary trade area consumer characteristics, expenditures and sales leakage is presented in the following sections of this report.

Sources: The Nielsen Company, U.S. Census, InfoUSA, American Community Survey, Social Explorer

B. Resident Market Segment(cont'd)

3. Market Demand and Sales Leakage

Market Demand - Trade Area Resident Expenditures

Given the demographic, lifestyle and other consumer characteristics of the trade area population (presented in the previous section), their total annual expenditures for a variety of retail goods and services can be estimated.

Table 1 represents the annual retail market demand by category.

Note: These expenditures are currently being made by residents at a variety of locations both inside and outside of the identified trade areas.

Sources: The Nielsen Company, U.S. Census, InfoUSA, American Community Survey, Social Explorer

Table 1.
Resident Annual Expenditures

	TA1	TA2
Furniture & Home Furnishings Stores-442	$8,211,036	$16,022,583
Furniture Stores-4421	$4,349,534	$8,504,618
Home Furnishing Stores-4422	$3,861,502	$7,517,965
Electronics & Appliances Stores-443	$7,395,629	$14,348,371
Building Material, Garden Equipment Stores -444	$44,482,758	$86,740,886
Building Material & Supply Dealers-4441	$38,184,169	$74,400,732
Lawn/Garden Equipment/Supplies Stores-4442	$6,298,590	$12,340,154
Food & Beverage Stores-445	$53,576,669	$101,229,145
Grocery Stores-4451	$34,939,719	$66,075,392
Specialty Food Stores-4452	$4,306,150	$8,156,934
Beer, Wine & Liquor Stores-4453	$14,330,800	$26,996,819
Health & Personal Care Stores-446	$22,311,639	$41,960,549
Pharmacies & Drug Stores-44611	$17,758,918	$33,314,860
Cosmetics, Beauty Supplies, Perfume Stores-44612	$1,538,727	$2,882,999
Optical Goods Stores-44613	$1,032,313	$2,043,850
Other Health & Personal Care Stores-44619	$1,981,681	$3,718,840
Clothing & Clothing Accessories Stores-448	$19,188,533	$37,858,210
Clothing Stores-4481	$10,021,328	$19,781,848
Shoe Stores-4482	$1,432,896	$2,813,260
Jewelry, Luggage, Leather Goods Stores-4483	$7,734,309	$15,263,102
Sporting Goods, Hobby, Book, Music Stores-451	$7,191,194	$14,129,626
Sporting Goods, Hobby, Musical Instrument Stores-4511	$6,229,749	$12,232,607
Book, Periodical & Music Stores-4512	$961,445	$1,897,020
General Merchandise Stores-452	$47,757,421	$91,794,998
Department Stores, Excluding Leased Departments-4521	$20,014,298	$38,874,691
Other General Merchandise Stores-4529	$27,743,123	$52,920,308
Miscellaneous Store Retailers-453	$11,415,680	$21,821,673
Florists-4531	$435,228	$845,773
Office Supplies, Stationery, Gift Stores-4532	$5,287,302	$10,205,203
Used Merchandise Stores-4533	$817,445	$1,611,766
Other Miscellaneous Store Retailers-4539	$4,875,705	$9,158,932
Eating & Drinking Places-722 *(not including special foodservice)*	$44,949,710	$85,514,169
Full-Service Restaurants-7221	$20,308,655	$38,660,245
Limited-Service Eating Places-7222	$17,893,081	$34,021,300
Drinking Places -Alcoholic Beverages-7224	$1,824,918	$3,466,742
	$261,557,213	$502,054,329

B. Resident Market Segment (cont'd)

Sales Leakage Analysis - General

A sales leakage analysis estimates the amount and type of annual purchases that residents are currently making outside of the trade area. If the analysis shows significant leakage within certain retail categories, it might point to possible opportunities for new or existing businesses within those categories.

- More than 22,000 residents live within the 4-mile primary trade area (TA1) and they spend over $262 million per year at stores and restaurants. Currently, more than $94 million (36%) is being spent outside of the primary trade area. There is sales leakage in most categories, the most significant sales leakage is in the following categories: **Specialty Food Stores, Liquor, Sporting Goods/Hobby, Gifts/Novelty, Other Misc. Stores (pets/supplies, art, other) and Electronics**. For the purposes of this analysis, "most significant" is defined as the categories in which a 60% market capture in the trade area would be sufficient to support at least one new business. There is no sales leakage in the categories of Drug Stores, Clothing, Limited Service Restaurants, Furniture, Jewelry and Florists. *Note: In categories showing little or no leakage, it does not necessarily mean that there is no opportunity, however, success would depend heavily on the ability to attract expenditures from non-resident market segments and/or overtake trade from existing competition within the trade area by offering more desirable products or services.*

- Close to 45,000 residents live within the 6-mile trade area (TA2); these residents spend over $502 million per year at retail stores and restaurants. Currently, more than $150 million (30%) is being spent outside of the trade area. A smaller potential market capture would be expected within this secondary trade area, however, depending on the uniqueness of the offering, there may be some opportunity for capturing expenditures especially for specialty retail or services.

Table 2. **Sales Leakage in Selected Categories (millions)**

	TA1	TA2
Other General Merchandise Stores-4529	$25.65	$43.68
Department Stores Ex Leased Depts-4521	$20.01	$18.25
Supermarkets, Groc. (Ex Conv)-44511	$13.28	$12.66
Beer, Wine and Liquor Stores-4453	$9.88	$19.13
Electronics and Appliance Stores-443	$5.49	$10.70
Sporting Goods, Hobby Stores-4511	$5.21	$9.83
Specialty Food Stores-4452	$4.26	$5.03
Hardware Stores-44413	$2.68	$4.46
Home Furnishing Stores-4422	$2.65	$1.79
Office Supplies and Stationery -45321	$2.58	$3.72
Full-Service Restaurants-7221	$2.49	$10.19
Other Miscellaneous Store Retailers-4539	$2.39	$5.82
Gift, Novelty and Souvenir Stores-45322	$1.97	$4.03
Drinking Places- Alcoholic Beverages-7224	$1.82	$0.81
Cosmetics, Beauty Supplies-44612	$1.40	$2.50
Shoe Stores-4482	$1.06	$2.10
Book, Periodical and Music Stores-4512	$0.96	$1.84
Convenience Stores-44512	$0.81	$1.21
Optical Goods Stores-44613	$0.51	$1.35
Used Merchandise Stores-4533	$0.43	$1.14
Paint and Wallpaper Stores-44412	$0.40	$0.78
Other Health/Personal Care Stores-44619	$0.01	-$1.32
Florists-4531	$0.00	$0.23
Jewelry Stores-44831	-$1.97	$2.35
Furniture Stores-4421	-$2.21	-$0.87
Limited-Service Eating Places-7222	-$3.63	-$1.90
Clothing Stores-4481	-$6.41	-$3.27
Pharmacies and Drug Stores-44611	-$26.91	-$35.15

The presence of sales leakage indicates a retail gap and a geographic advantage for new businesses within TA1 (as residents are currently traveling significant distances to acquire goods and services). However, some caveats should be noted as follows. 1) The potential for new businesses in downtown to capture this sales leakage would be dependent on their ability to offer comparable quality goods, services and shopping environment to change existing consumer patterns. 2) Some businesses (e.g., shoes/clothing/accessories) do well when they are clustered with related businesses that offer comparative and/or crossover options for consumers; therefore if there is no existing similar or related establishments already in the district to build on, there might be less potential to recruit these types of businesses. 3) Although, there may be leakage in certain categories, there might not be adequate footprint or infrastructure (e.g., parking) to support the type of store in the business district. This might include stores such as department stores, large electronic stores or supermarkets.

Sources: The Nielsen Company, U.S. Census, InfoUSA, American Community Survey, Social Explorer

B. Resident Market Segment (cont'd)

Sales Leakage Analysis – Eating and Drinking Places

- Restaurants are typical recruitment targets for downtown business districts and therefore worthy of special attention. Residents within 4 miles of downtown spend over $40 million per year at eating and drinking places while residents living within 6 miles spend over $76 million.

- The sales leakage estimates for full service restaurants, limited service restaurants and bars are provided in the Table 3. Category definitions are provided below. (However, it should be noted that the distinctions between categories are not always consistently applied.)

- There is at least $2.6 million of unmet demand for Full Service Restaurants in the 4-mile trade area and $10.2 million in the 6-mile trade area. As noted, there is no leakage in the Limited Service Category.

*Note: The projected expenditures used to analyze sales leakage do not account for potential demand from non-resident market segments such as employees or visitors and therefore underestimate the unmet demand, especially in categories such as restaurants.

Table 3. **Eating & Drinking Places Sales Leakage Analysis**	**Annual Resident Expenditures**		**Sales Leakage**	
	TA1	**TA2**	**TA1**	**TA2**
Total Eating & Drinking Places	$40,026,654	$76,148,288		
Full-Service Restaurants	$20,308,655	$38,660,245	$2,485,141	$10,188,702
Limited-Service Eating Places	$17,893,081	$34,021,300	-$3,627,905	-$1,897,619
Drinking Places	$1,824,918	$3,466,742	$1,824,918	$810,380

Definitions

Full Service Restaurant: **T**his 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. Establishments that provide these types of food services to patrons with any combination of other services, such as takeout services, are classified in this industry.

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 cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery.

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

A summary of trade area demographic characteristics and consumer patterns follows..

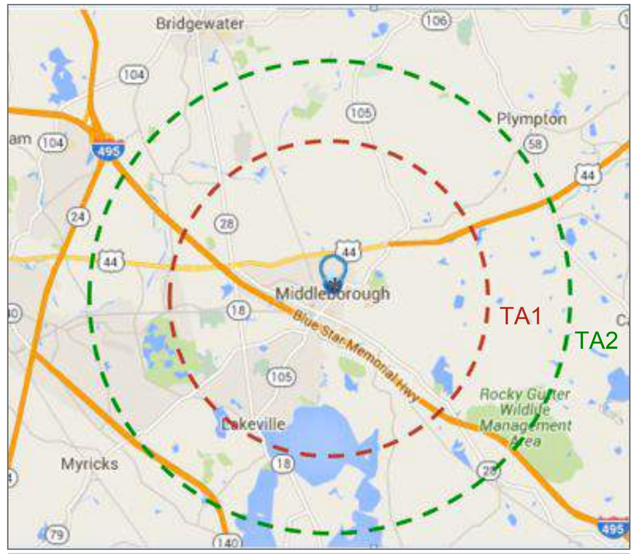
Sources: The Nielsen Company, U.S. Census, InfoUSA, American Community Survey, Social Explorer

B. Resident Market Segment (cont'd)

Figure 6:
Summary of Trade Area Demographics, Expenditures & Sales Leakage

Residents living in the surrounding area represent the major market opportunity for the business district. After discussing consumers patterns with local business owners and residents, and reviewing the location of existing commercial facilities and circulation routes, it was determined that a 4- mile radius and 6-mile radius represent the market areas most accessible for businesses located in downtown Middleborough.

The following presents an analysis of the market population living within two trade areas:
Primary Market Area - Trade Area 1 (TA1): 4-Mile Radius
Secondary Market Area -Trade Area 2 (TA2): 6-Mile Radius



4-Mile Radius (TA1) 6-Mile Radius (TA2)

Retail & Restaurant Opportunity

GROWING MARKET

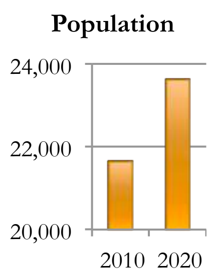
Trade Area 1 (TA1) = 4 Mile Radius

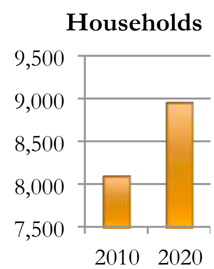
Residents spend
262 million
per year at stores & restaurants*

Opportunity:
Over **$94 Million** being spent outside TA1

Million spent at non-store retailers

2015 Population	2015 Households	2015 Household Income Median	Average
22,601	8,506	$71,541	$85,039





During 2010-2020, the population is expected to grow by 9% and the number of households by 11%, higher than the statewide projection of close to 7% for both.

Source: Nielsen Company

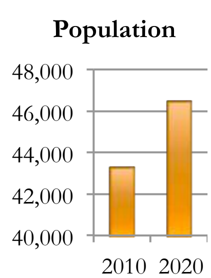
Trade Area 2 (TA2) = 6 Mile Radius

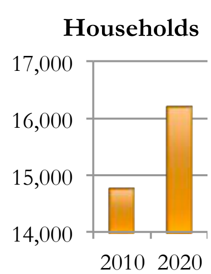
Residents spend
502 million
per year at stores & restaurants*

Opportunity:
Over **$150 Million** being spent outside TA2

Million spent at non-store retailers

2015 Population	2015 Households	2015 Household Income Median	Average
44,761	15,459	$78,597	$91,752





During 2010-2020, the population is expected to grow by 7% and the number of households by 10%, compared to the statewide projection of close to 7% for both.

Source: Nielsen Company

** Excludes motor vehicle and gas station purchases. ** All data is 2015 estimates unless noted.*

Figure 6 (cont'd):

Summary of Demographics, Expenditures & Sales Leakage

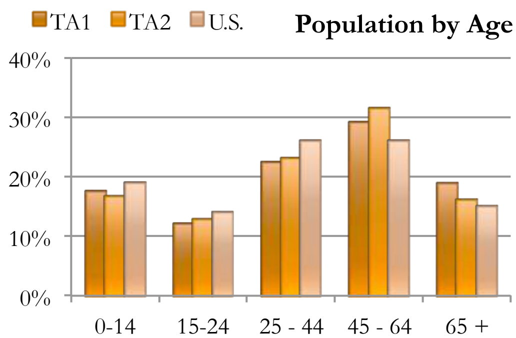
Residents

Median age is **43.3** in TA1 and **42.9** in TA2 compared to 39.7 statewide and 37.9 in U.S.

71% Families TA1

66% in U.S.

34% of households in TA1 and **36%** in TA2 contain children compared to 31% statewide and 33% U.S.



CULTURAL MIX

Race & Ethnicity	TA1	TA2	MA
White Alone	95%	94%	79%
Black/African American	1%	3%	7%
Asian	1%	1%	6%
Other/More than 1 Race	3%	3%	8%
Latino/Hispanic	2%	3%	11%

Cultural Concentration/Ancestry	TA1	TA2	US
Irish	21%	20%	7%
Italian	15%	13%	4%
English	11%	10%	5%
Portuguese	6%	7%	,1%

6% of TA1 and 7% of TA2 residents speak a language besides English at home

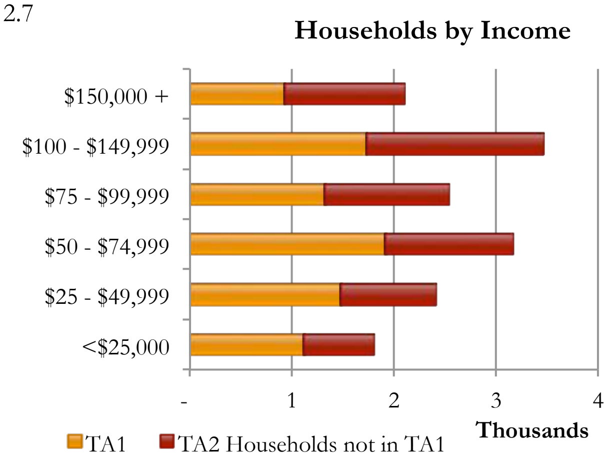
Asian/Pacific Island Language: 1%, Indo/European Language: 4%, Spanish: 1 - 2%, Other: <1%

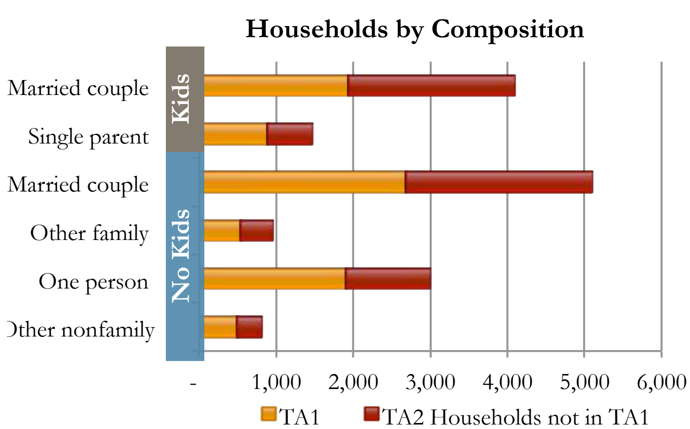
Lifestyle

2.6 Persons per Household in TA1 and 2.7 in TA2 compared to 2.5 statewide

76% Homeowners in TA1, **82%** in TA2, 62% in MA

Foot Traffic . . **4% car-free** households in TA1 and **3%** in TA2 -- these residents are likely to shop close to home





3,988 households in TA1 have income > $75,000; Median household income is $71,541 and $78,597 in TA1 & TA2; $67,928 statewide, $53,706 in U.S.

35% of TA1 and 38% of TA2 residents have Associates Degree or higher; 47% statewide, 37% in the U.S.

Figure 6 (cont'd):

Summary of Demographics, Expenditures & Sales Leakage

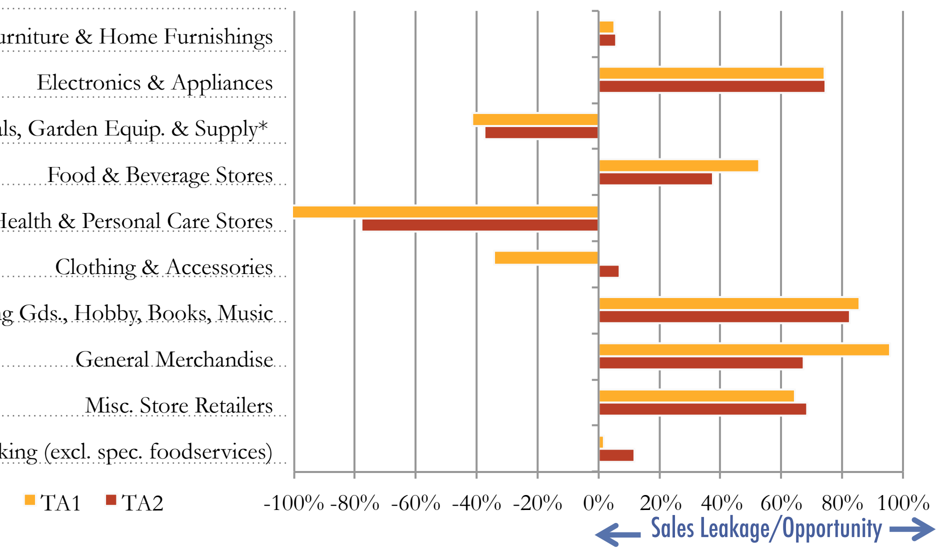
Spending Power

Expenditures

TA1	TA2	
$8.2	$16.0	Furniture & Home Furnishings
$7.4	$14.3	Electronics & Appliances
$44.5	$86.7	Bldg. Materials, Garden Equip. & Supply*
$53.6	$101.2	Food & Beverage Stores
$22.3	$42.0	Health & Personal Care Stores
$19.2	$37.9	Clothing & Accessories
$7.2	$14.1	Sporting Gds., Hobby, Books, Music
$47.8	$91.8	General Merchandise
$11.4	$21.8	Misc. Store Retailers
$40.0	$76.1	Food Service & Drinking (excl. spec. foodservices)

$ millions

Local Demand Compared to Local Business Sales



The most significant TA1 sales leakage is in the following categories: Specialty Food Stores, Beer/Wine/Liquor, Sporting Goods/Hobby, Gifts/Novelty, Other Miscellaneous Stores and Electronics.

Opportunity Gap (Sales Leakage)
The retail categories with high sales leakage may suggest opportunity for local businesses (existing and/or new businesses). To determine the feasibility of capturing the leakage, it is necessary to evaluate the strength of the competing businesses outside of the trade area that are currently attracting resident expenditures.

In categories showing little or no leakage, it does not necessarily mean that there is no opportunity. There might be opportunity depending on the ability of local businesses to attract expenditures from non-resident market segments (i.e., employees and visitors) and/or overtake trade from existing competition by offering more desirable products or services.

Negative Sales Leakage (Surplus)
Categories with negative sales leakage indicate that businesses are currently meeting more than just local demand. Businesses in these categories are generating sales from customers that live outside of the identified trade area which may include employees of nearby businesses or visitors travelling into the district from beyond the immediate area because of attractions or destination businesses.

*Note: Sales leakage calculations include all businesses in the trade area, not just the business in the commercial district.

$ millions

Est. Sales Leakage - Select Categories	TA1	TA2
Furniture Stores-4421	($2.21)	($0.87)
Home Furnishing Stores-4422	$2.65	$1.79
Electronics and Appliance Stores-443	$5.49	$10.70
Paint and Wallpaper Stores-44412	$0.40	$0.78
Hardware Stores-44413	$2.68	$4.46
Supermarkets, Groc. (Ex Conv)-44511	$13.28	$12.66
Convenience Stores-44512	$0.81	$1.21
Specialty Food Stores-4452	$4.26	$5.03
Beer, Wine and Liquor Stores-4453	$9.88	$19.13
Pharmacies and Drug Stores-44611	($26.91)	($35.15)
Cosmetics, Beauty Supplies-44612	$1.40	$2.50
Optical Goods Stores-44613	$0.51	$1.35
Other Health/Personal Care Stores-44619	$0.01	($1.32)
Clothing Stores-4481	($6.41)	($3.27)
Shoe Stores-4482	$1.06	$2.10
Jewelry Stores-44831	($1.97)	$2.35
Sporting Goods, Hobby Stores-4511	$5.21	$9.83
Book, Periodical and Music Stores-4512	$0.96	$1.84
Department Stores Ex Leased Depts-4521	$20.01	$18.25
Other General Merchandise Stores-4529	$25.65	$43.68
Florists-4531	($0.00)	$0.23
Office Supplies and Stationery -45321	$2.58	$3.72
Gift, Novelty and Souvenir Stores-45322	$1.97	$4.03
Used Merchandise Stores-4533	$0.43	$1.14
Other Miscellaneous Store Retailers-4539	$2.39	$5.82
Full-Service Restaurants-7221	$2.49	$10.19
Limited-Service Eating Places-7222	($3.63)	($1.90)
Drinking Places- Alcoholic Beverages-7224	$1.82	$0.81

Table 4. Additional Demographics Data

Est. Population by Age	TA1		TA2		MA	U.S.
	22,601	%	44,761	%	%	%
Age 0 - 4	1,197	5	2,190	5	5	6
Age 5 - 9	1,317	6	2,407	5	6	6
Age 10 - 14	1,444	6	2,828	6	6	6
Age 15 - 17	944	4	1,907	4	4	4
Age 18 - 20	815	4	1,685	4	5	4
Age 21 - 24	990	4	2,144	5	6	6
Age 25 - 34	2,340	10	4,833	11	13	13
Age 35 - 44	2,723	12	5,531	12	12	13
Age 45 - 54	3,530	16	7,601	17	15	14
Age 55 - 64	3,050	13	6,457	14	13	13
Age 65 - 74	2,641	12	4,603	10	9	8
Age 75 - 84	1,120	5	1,809	4	4	4
Age 85 and over	489	2	766	2	2	2

Est. Households by Size	TA1		TA2		MA	U.S.
	8,506	%	15,459	%	%	%
1-persons	1,911	22	2,986	19	29	27
2-persons	2,946	35	5,191	34	32	32
3-persons	1,536	18	2,904	19	16	16
4-persons	1,256	15	2,614	17	14	13
5-persons	570	7	1,191	8	6	6
6 or more	286	3	574	4	3	5

Est. Households by Income	TA1		TA2	%	MA %	U.S.%
< $15,000	647	8	996	6	12	13
$15,000 - $24,999	474	6	803	5	9	11
$25,000 - $34,999	576	7	915	6	8	10
$35,000 - $49,999	905	11	1,491	10	11	14
$50,000 - $74,999	1,916	23	3,160	20	16	18
$75,000 - $99,999	1,327	16	2,531	16	13	12
$100,000 - $124,999	981	12	1,963	13	10	8
$125,000 - $149,999	750	9	1,499	10	7	5
$150,000 - $199,999	576	7	1,311	8	8	5
$200,000 - $249,999	176	2	403	3	3	2
$250,000 - $499,999	157	2	341	2	4	2
$500,000+	21	0	46	0	2	1
Med. Household Income	71,541		78,597		67,928	53,706

Avg. Length of Residence (Years)	TA1	TA2	MA	US
Homeowners	17	17	19	17
Renters	8	8	9	8

Est. Population 16+ by Employment Status	TA1-%	TA2-%	MA %	US %
In Labor Force	70	97	67	64
Employed	63	61	61	58
Self-employed	9	10	9	10
Unemployed	7	6	6	6

Est. Population 16+ by Occupation	TA1-%	TA2-%	MA %	US %
Architect/Engineer	1	1	2	2
Arts/Entertain/Sports	1	2	2	2
Building Grounds Maint	3	3	3	4
Business/Financial Ops	6	6	6	5
Community/Soc Svcs	1	1	2	2
Computer/Math	3	3	4	3
Construction/Extract	6	6	4	5
Edu/Training/Library	6	6	7	6
Farm/Fish/Forestry	0	0	0	1
Food Prep/Serving	7	6	5	6
Health Practitioner/Tec	7	7	7	6
Healthcare Support	2	3	3	3
Maintenance Repair	4	4	3	3
Legal	0	1	1	1
Life/Phys/Soc Science	1	1	2	1
Management	9	10	11	10
Office/Admin Support	13	13	13	14
Production	6	5	4	6
Protective Svcs	4	3	2	2
Sales/Related	10	10	10	11
Personal Care/Svc	3	4	4	4
Transportation/Moving	7	6	4	6

Est. Population Age 25+ by Education	TA1-%	TA2-%	MA %	US %
Less than 9th grade	3	3	5	6
Some High School	5	6	6	8
High School Grad/GE)	36	34	26	28
Some College, no degree	21	20	17	21
Associate Degree	10	10	8	8
Bachelor's Degree	17	19	22	18
Master's Degree	6	7	12	8
Professional School Degree	1	1	3	2
Doctorate Degree	0	1	2	1

Table 4. (cont'd) Additional Demographics Data

Est. Hispanic Population by Origin	TA1		TA2		MA	U.S.
	22,601	%	44,761	%	%	%
Not Hispanic or Latino	22,151	98	43,571	97	89	82
Hispanic or Latino:	450	2	1,190	3	11	18
Mexican	72	16	140	12	6	63
Puerto Rican	204	45	424	36	42	9
Cuban	28	6	44	4	2	3
Other	146	32	583	49	50	25

Est. Population-Asian Alone by Category	TA1		TA2		MA	U.S.
	22,601	%	44,761	%	%	%
Not Asian Alone	22,383	99	44,330	99	94	95
Asian Alone	218	1	431	1	6	5
Chinese, except Taiwanese	14	6	52	12	35	22
Filipino	142	65	147	34	3	17
Japanese	1	1	3	1	2	5
Asian Indian	28	13	57	13	21	19
Korean	3	2	37	9	7	10
Vietnamese	17	8	28	7	13	11
Cambodian	2	1	57	13	8	2
Hmong	2	1	3	1	0	2
Laotian	0	0	1	0	1	1
Thai	1	1	3	1	1	1
Other	8	4	44	10	9	10

Est. Population by Ancestry	TA1		TA2		MA	U.S.
	22,601	%	44,761	%	%	%
Arab	115	0.5	319	0.7	0.9	0.5
Czech	0	0.0	11	0.0	0.1	0.3
Danish	0	0.0	8	0.0	0.1	0.2
Dutch	32	0.1	143	0.3	0.3	0.8
English	2,544	11.3	4,593	10.3	6.3	5.5
French (exc. Basque)	1,067	4.7	2,089	4.7	4.7	1.6
French Canadian	813	3.6	1,449	3.2	2.8	0.5
German	1,094	4.8	1,982	4.4	3.3	10.4
Greek	57	0.3	164	0.4	1.0	0.3
Hungarian	11	0.0	11	0.0	0.2	0.3
Irish	4,758	21.1	9,118	20.4	16.1	6.8
Italian	3,290	14.6	5,918	13.2	10.1	4.2
Lithuanian	150	0.7	268	0.6	0.5	0.1
U.S./American	1,112	4.9	2,118	4.7	3.8	6.7
Norwegian	53	0.2	116	0.3	0.3	0.9
Polish	756	3.3	1,358	3.0	3.2	2.0
Portuguese	1,314	5.8	3,090	6.9	3.7	0.3
Russian	170	0.8	344	0.8	1.3	0.6
Scottish	419	1.9	839	1.9	1.3	1.1
Scotch-Irish	69	0.3	322	0.7	0.5	0.8
Slovak	0	0.0	0	0.0	0.1	0.1
Subsaharan African	208	0.9	377	0.8	1.7	0.9
Swedish	352	1.6	778	1.7	1.0	0.8
Swiss	41	0.2	85	0.2	0.1	0.2
Ukrainian	0	0.0	7	0.0	0.3	0.2
Welsh	0	0.0	5	0.0	0.2	0.3
West Indian (exc Hisp groups)	52	0.2	283	0.6	1.7	0.8
Other ancestries	2,214	9.8	5,205	11.6	26.3	40.7

= Cultural Concentrations

C. Sub-segments and Non-Resident Market Segments

The Downtown has several other potential market segments that offer opportunities for downtown businesses. The working group collaborated with FinePoint to obtain information about these segments and discuss potential opportunities.

1. Employees of Area Businesses

In addition to the residential customer base, there is a daytime population of employees who work in close proximity to the business district. This segment represents an opportunity for meal and snack purchases as well as other convenience goods and services purchased before and after work. This segment might be interested in goods and services such as dry cleaning, tailoring, hair and nail services, dental services, banking services, coffee, snacks, breakfast, lunch, prepared foods, cards & gifts, etc.

We estimate there are over 500 employees working in the downtown area. Some of the larger employers include: High Point Treatment Center, the Town (government, police, library, etc.) and Massasoit Community College. It should be noted that High Point has an internal cafeteria which may compete for meal and snack purchases.

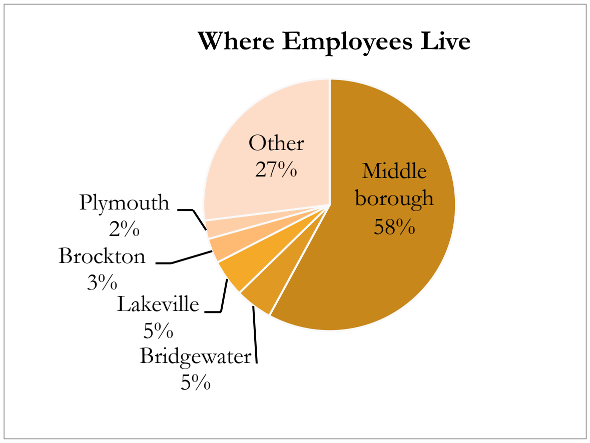
We surveyed downtown employees and received 126 responses. The results are summarized in the following charts. A few highlights are included below.

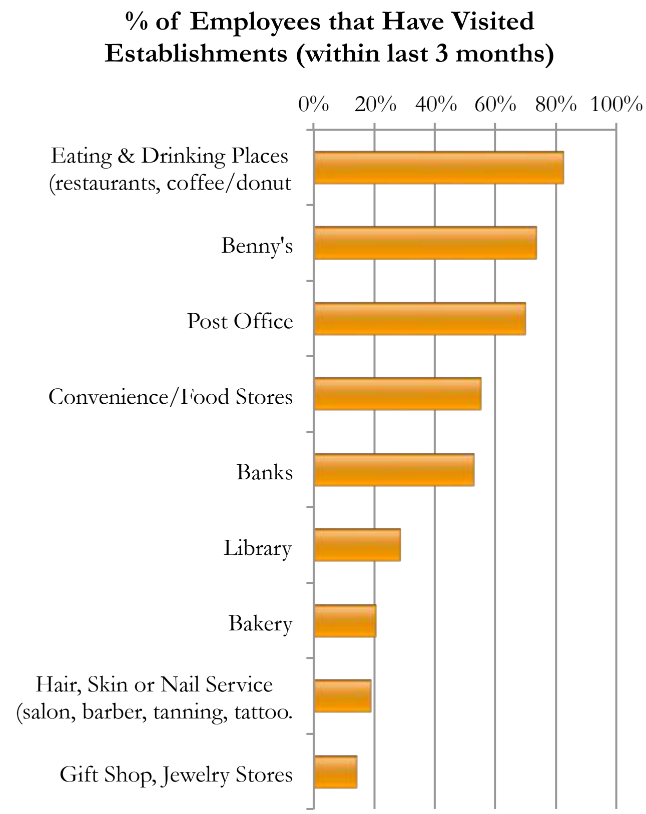
- 40% of employees go to Downtown establishments several times per week. 28% go once per week and 28% go less than once per week. The most frequently visited establishments include restaurants, Benny's and the Post Office.
- The respondents were least satisfied with the physical appearance of Downtown and the goods and services available.
- Respondents offered up a long list of establishments they would like to see in Downtown. The most frequent response, by far, were restaurants, followed by gift/card shops, entertainment & recreation establishments (movie theater, bowling, yoga, arcade, live music, fitness), bookstores (books, comics), clothing & accessories stores and more. Respondents that cited restaurants often indicated they were looking for more variety in dining options. They most frequently mentioned "sit-down", "nice" restaurants, and also often cited fast casual restaurants (soup, sandwich, salad), Asian restaurants (Chinese, Thai), coffee shops and pub style establishments.
- Based upon survey responses concerning consumer behavior, it appears that employees in the downtown area may be spending over $1.5 million per year on coffee and meal purchases, during and after their work day. However, they are currently making the vast majority of these purchases elsewhere (not at downtown establishments) which could represent a potential market opportunity. Plus, employees might increase their meal purchasing if more options were available.

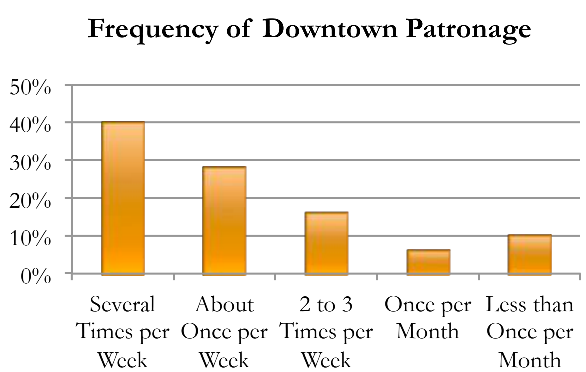
Table 5. Estimated Employee Work Day Food Purchases and Market Opportunity (Based on Survey Results)

Estimated Employee Spending at Restaurants and Carryout Places Before, During or After Work		Opportunity	
	Current Annual Estimated Work Day Expenditures by Downtown Area Employees (assuming 500 employees)	**Estimated % Being Spent Elsewhere (Not at Downtown Businesses)**	**Estimated $ Being Spent Elsewhere (Not at Downtown Businesses)**
Breakfast/Coffee	$311,760	69%	$215,114
Lunch	$446,457.50	74%	$330,379
Dinner	$750,476.25	83%	$622,895
Total	$1,508,694	77%	$1,168,388

Figure 7. **Downtown Employee Survey Results (Residency, Patronage & Satisfaction)** Survey Conducted July 2016







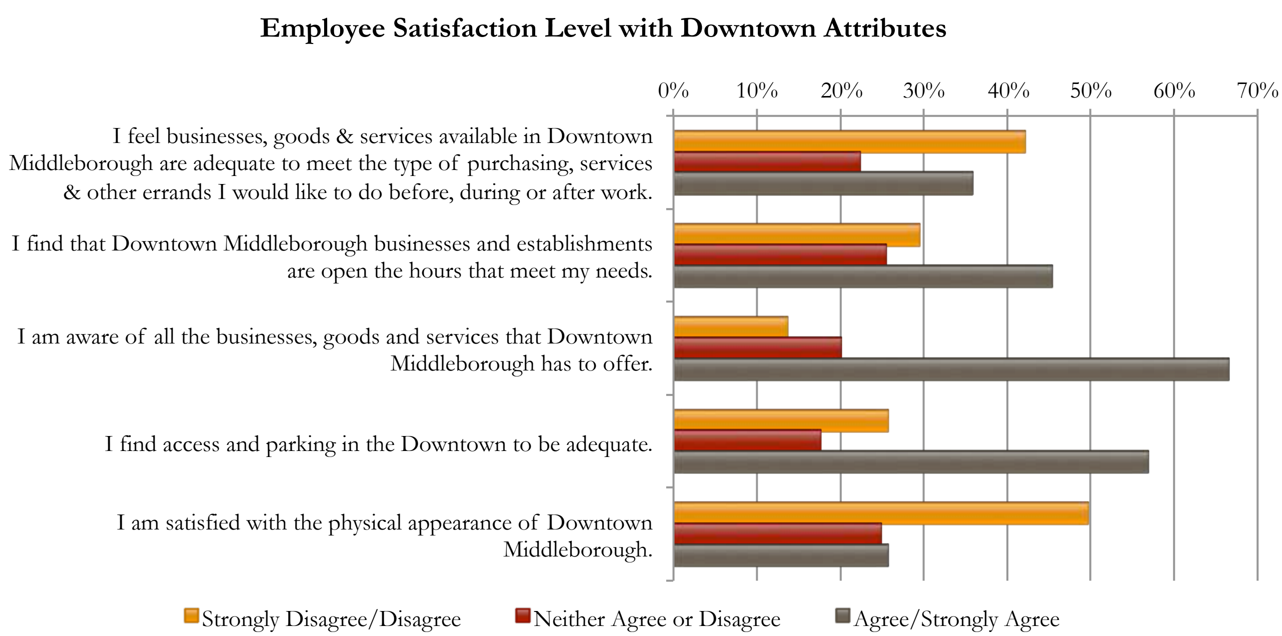
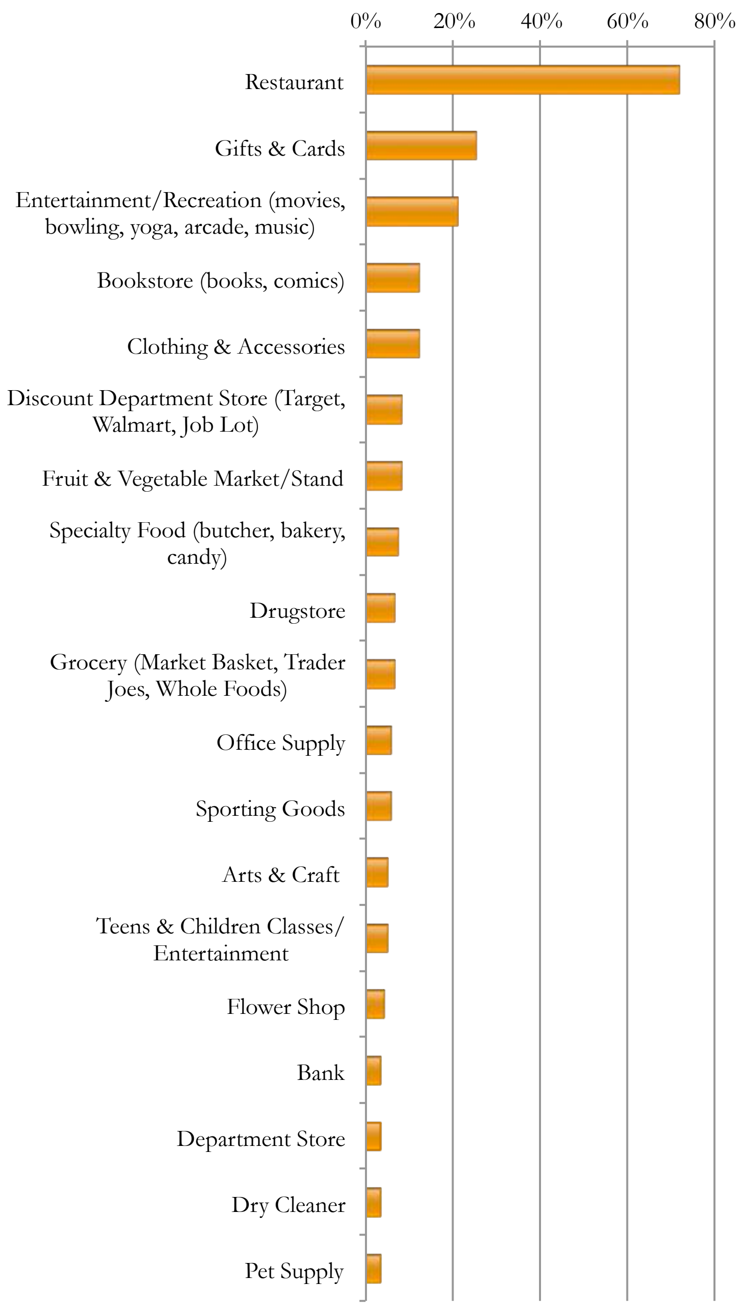
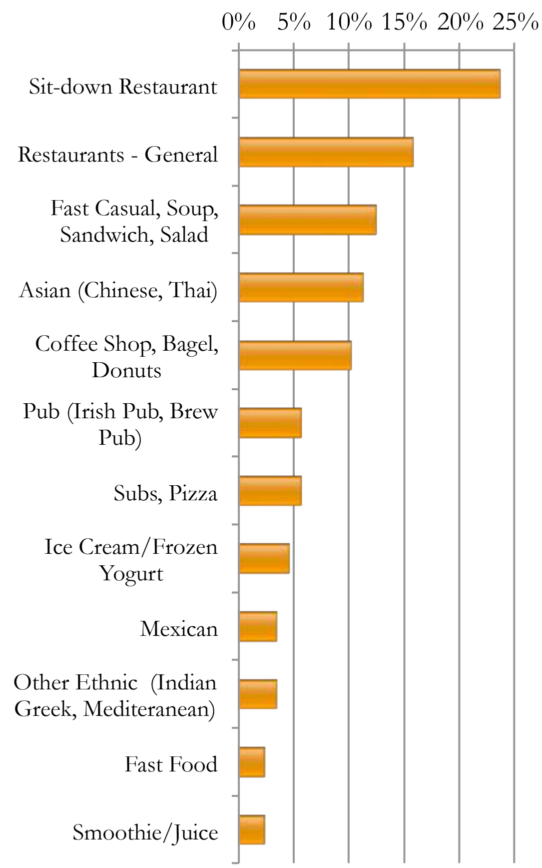


Figure 8. Downtown Employee Survey Results (Desired Businesses) Survey Conducted July 2016

Businesses that Employees would Like to See in Downtown – Most Frequent Responses
(open-ended question)



Desired Restaurants Cited by Employees – Most Frequent Responses
(open-ended question)



Specific Restaurants Mentioned: Panera Bread, Dunkin Donuts, P.F. Chang's, Mary Lou's Coffee, Extreme Pita, Cosi, Sub Galley (Abington), Maria's (Scituate), Mamma Mia's, Marcello's, Venus Café, KFC, Wendy's, Taco Bell, Cheesecake Factory, and Emma's.

C. Sub-segments and Non-Resident Market Segments (cont'd)

2. Massasoit Community College Students

Massasoit Community College (MCC) has 500 students with enrollment growing each semester. Daytime students comprise the largest group with classes from 9am until 2pm., mostly 18 – 22 year olds. Evening students attend classes from 5:50pm until 10 pm. This group is mostly adult learners who work full time with a small portion of daytime students taking an occasional evening class. Most drive, but there are a few who walk, bike or take the Gatra bus. According to MCC representatives, this population likes cheap and fast food, because they do not have a lot of expendable income, and are very busy.

Goods/services of potential interest if available Downtown:

- Place to buy books for classes and Massasoit swag such as t-shirts, etc. (Massasoit Brockton uses Barnes & Noble.)
- Local *affordable*, *quality* sandwich/sub shop
- Entertainment (bowling, Dave & Buster-type)
- Downtown Food Court with 3-4 options and free wifi
- Food Truck Rotation in the Town Hall Parking Lot

Ideas to capture more of the College Student market segment include:

- Massasoit Student Incentive Program – Students receive discounts or special student coupons for their patronage when they present their Massasoit ID
- Market Saturday Farmer's Market to Massasoit Saturday students.
- Distinctive environment, more social gathering spots/atmosphere.
- Direct marketing efforts

3. Visitors/Users/Attendees of Nearby Attractions and Events

People are drawn to events and attractions that bring them in or within very close proximity to downtown. This creates potential opportunities for downtown restaurants, retailers and service providers. Market segments are described below.

Attendees of Performances at the Alley Theater

Two local theater companies perform at the Alley Theater along with comedy and musical acts, fundraisers and student productions. Nemasket River Productions puts on 3 shows per year (7 performances) and Theater One Productions also puts on 3 shows per year (2 weekends each). A representative from Theater One indicated that 40% of the audience comes from out of town and most attendees go out to dinner before or after the show (not necessarily in Middleborough) and close to 100% of the actors and crew go out after each show (often at Central Café or The Hideaway).

Visitors to the Robbins Museum of Archeology and the Middleborough Historical Museum

The Robbins Museum is open Wednesdays and Saturdays (in addition to events) and hosted close to 1,000 visitors last year with an estimated 80% from outside of Middleborough. The Middleborough Historical Museum is open seasonally from July to September (Wednesdays and Saturdays) and had 245 visitors last year, about 35% were from out of town.

Users of the Downtown Athletic Field/Pierce Playground

The Middleborough Cobras, a semi-pro football team, play about 7 games per year at Battis Field, typically at 7:30 on Saturday evenings. The athletic fields and playgrounds are also actively used by 10-20,000 children and parents each year during daytime and some evening hours throughout the week. Attendees of the football games as well as the young families might be potential customers for Downtown eating and drinking establishments.

C. Sub-segments and Non-Resident Market Segments (cont'd)

Ideas to capture more of the Visitor/Attendee market segment include:

- More eating establishments
- Restaurant guide/marketing material
- Better way-finding signage for parking and directory of businesses
- Improve the lighting so the downtown looks more vital and safer during evening (stores with lights on)
- Advertise with the Parks department
- Promotion (Yankee magazine, AAA newsletter)

4. Resident Sub-segment - Oak Point Residents

The residents of Oak Point comprise a sub-segment worth noting because this "Over 55" community contains a somewhat homogeneous concentrated population of about 1,400 residents, (about one-half are in their 70s and one-quarter are in their 60s). Many residents moved from other communities as they approached or entered retirement and may still have consumer patterns associated with their previous location. Representatives of this population indicate this group shows a preference for name-brand restaurants (e.g., Applebees, Olive Garden, Dunkin Donuts, McDonalds) and it takes referrals from friends and neighbors to get new residents to try local spots. The residents currently patronize some downtown businesses such as the Post Office, Benny's, The Hideaway, Egger's Furniture and hair salons. Many were loyal customers of Maria's gift shop and miss that type of store now that it has closed. This customer group would like to see a wider variety in the businesses in downtown in order to give them more options.

Ideas to capture more of this market segment include:

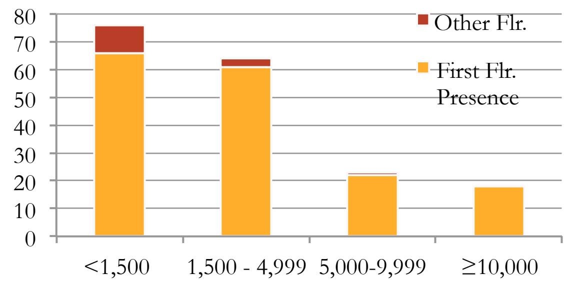
- Driving at night is an issue so early bird dining specials may be appealing to this group
- Product demonstrations, classes, and pop-up sale events held at Oak Point to acquaint potential customers to businesses (For example, a workshop on "Tips for Home Decorating" put on by The Custom Decorator or Egger's Furniture, a pop-up sale booth featuring gifts by Dymond Treasures or demonstration by downtown hair salon.)
- Sponsorship or providing food for Oak Point events (e.g., charity events organized by residents, social events)
- Providing additional services such as delivery and direct marketing for special in-store sales/events

Part II. Analysis of Business District Conditions and Commercial Mix

A. Real Estate Overview

- In total, downtown Middleborough contains close to 738,000 s.f. of commercial space "under roof". To put this in perspective, this is more space than Wareham Crossing and about 28% less than Silver City Galleria in Taunton. Approximately three-quarters of the commercial space is located on the first floor.
- There are 181 commercial units within the district; 167 have a first floor presence and 14 are located entirely on other floors. Median unit size is around 1,700 s.f.
- At the time of the inventory (July, 2016), approximately 19% of the square footage and about 19% of the units were vacant, including 31 units that contain first floor space and 4 units with no first floor presence. *(Vacancy rates fluctuate and can change quickly.)* This includes 1 prime retail space at the intersection of Main Street and Center Street which is not available for lease but is not actively occupied. For many years, a gift and card shop was operated at this location; since then it was leased with plans for opening a children's consignment shop, however, after many months, the business has not opened.
- We contacted Commercial Realtors and property owners to get an understanding of the leasing environment. It appears that commercial lease rates in Downtown are around \$7 – 8 per square foot for most spaces and \$10 per square foot for newly renovated space. Owners appear to be willing to be somewhat flexible in order to get tenants in.
- When we asked about the obstacles to leasing space, we heard the following:
  - A large impediment to leasing space in Downtown is the number of vacancies and how empty it currently looks.
  - The Town is not perceived as business friendly. We heard complaints about the time it takes to get all of the necessary approvals (e.g., up to 6 months) and about the lack of a "welcoming, how can we help you make this work" attitude. One property owner said that, over the past few months, at least six potential tenants have been discouraged and lost interest after they approached Middleborough Town Departments, and he does not have this experience when leasing property in Bridgewater which he perceives to be much more business friendly.

Figure 9. Establishments by Size (s.f.)



Vacant Properties on Center Street

- One Realtor indicated that lately there has been interest from a few restaurants, specialty food, catering, nail salons and a brewery. She leased space to a flower shop that will open in October and is currently working with a potential pub restaurant tenant. And, on the bright side, this is the first time in 7 years that 48 Center Street, a multi-tenant building in the heart of the district has been fully leased.
- The tax rate for commercial property in Middleborough is $16.94 per $1,000 in valuation which ranks close to the middle among the cities and towns in Massachusetts. Compared to the surrounding communities, Middleborough's tax rate is somewhat higher than most, except for Taunton.
- The District can be viewed as comprised of three subareas – the Downtown Core Area, Western Section and Eastern Section as illustrated by the Downtown Sub Area Map. The Downtown Core Area has the largest amount of commercial units. It is the most compact, walkable node with the highest commercial density. The Western Section contains about one-third as many commercial units as the Core Area, more sparsely located and mixed in with residential units and churches. The Eastern Section also contains about one-third as many units as the Core and the uses tend to be more production or office spaces with less walk-in trade businesses along Wareham Street and athletic fields and school facilities on Jackson Street and North Main.

Figure 10. Commercial Tax Rate Analysis

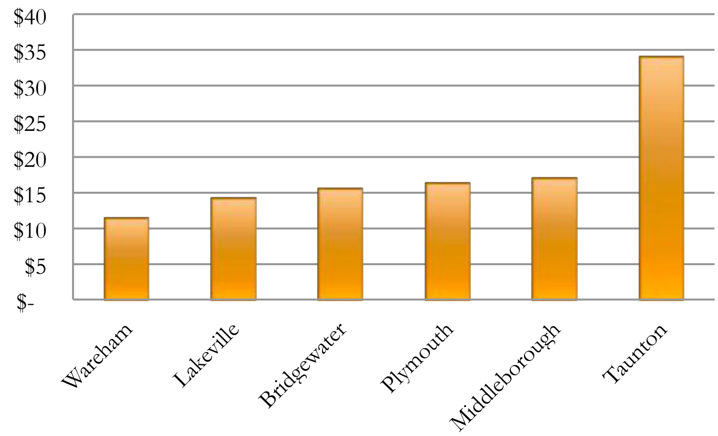
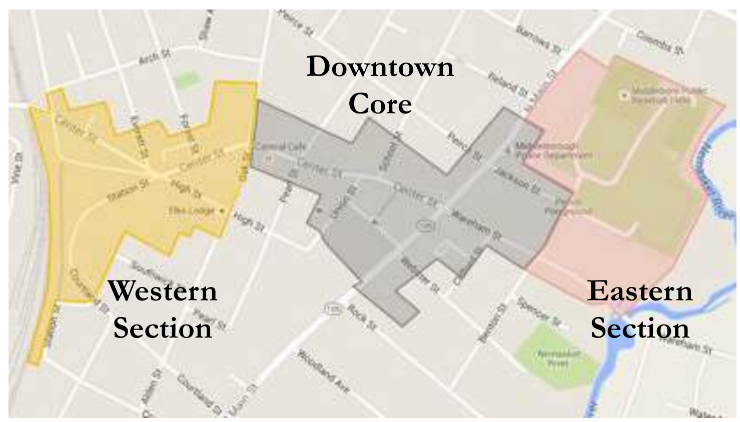


Figure 9. Downtown Sub Areas



Leased but Inactive Storefront on Center Street

Table 6. Units & Establishments by Sub Area

	Commercial Units				Estabs
	#	Avg. sf	Median sf	Vacant	#
Core	111	3,757	1,765	19	92
Western	36	4,994	1,807	10	26
Eastern	34	4,144	1,600	6	28
All	**181**	**4,076**	**1,700**	**35**	**146**

Notes: 1.) Square footage is estimated gross leasable area (GLA).
2.) Inventory results may be less complete for commercial space and businesses not located on the first floor due to difficulty obtaining data

B. Establishment Characteristics

- Downtown Middleborough is home to approximately 146 establishments including retail, restaurants, services, contractors, public and non profit entities. For the purposes of this study, we define "establishment" as any non residential entity. Some of the more well-known and high customer-count establishments include: Massasoit Community College, Benny's, Central Café, Hideaway Restaurant, Burt Wood School for the Performing Arts & Alley Theater, the Library, Post Office and Rockland Trust.

- A few businesses are active in e-commerce. In fact at least 2 businesses appear to sell exclusively online (e.g., All Things Dutch, Jessa-Loop Designs).

- Most of the establishments (64%) are independently-owned, single location businesses. Chains and franchises comprise about 10% of the establishment mix including national multi-location businesses (e.g., Rockland Trust, Santander Bank), regional chains (e.g., Benny's, Gas Depot), local chains (e.g., Coffee Milano, Savas Liquor) and franchises (e.g., Honey Dew Donuts). About one-quarter of the establishments are public entities and nonprofits.

- There is not much consistency in operating hours among the establishments. Closing times vary substantially. Slightly over one-quarter are open after 6 PM (one or more nights per week). Many are closed on Sundays as well as one or more weekdays (e.g., Monday/Tuesday). There are a few businesses which appear to be operating on a part-time basis and/or are open by appointment only (e.g., tattoo business, leather goods shop).

Figure 12. Ownership Characteristics

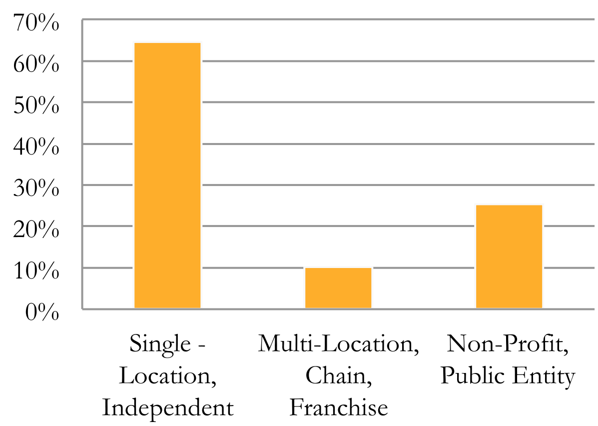
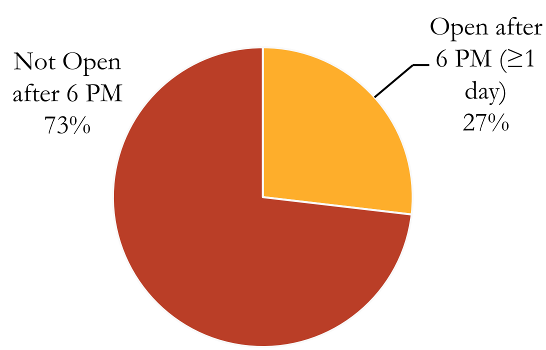


Figure 13. Operating Hours



- Most of the establishments are small with the median size at around 1,600 s.f., however, downtown also contains several large medical, financial and community institutions.

Over 20,000 s.f.
High Point Treatment Center
Middleborough Early Childhood Center
Middleborough Public Library

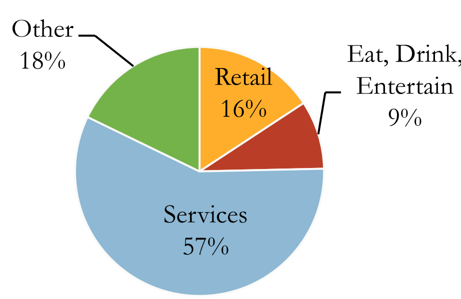
15,000 – 19,999 s.f.
Town Hall
Rockland Trust
Church of Our Saviour Episcopal
Massasoit Community College
Town Hall Annex

10,000 – 14,999 s.f.
Elks Lodge
Robbins Museum of Archaeology
Meeting House Baptist Church
Enterprise Design
Eggers Furniture
Fire Dept.
R.E.A.D.S. Academy
United Methodist Church

Table 7.

Establishment Type	#	S.F.
Retail	**23**	**49,500**
Motor Vehicle & Parts	1	1,626
Furniture & Furnishings	3	12,421
Electronics & Appliances	0	-
Building Mat. & Garden Equip	1	2,000
Food & Beverage Stores	3	5,186
Health & Personal Care Stores	0	-
Gasoline Stations	3	5,150
Clothing and Accessories	2	3,692
Sporting Goods, Hobby, Books	0	-
General Merchandise Stores	1	5,611
Misc. Retail Stores	9	13,814
Eating, Drinking & Lodging	**13**	**38,876**
Arts, Entertainment & Recreation	4	22,653
Accommodation	0	-
Eating and Drinking Places	9	16,223
Services	**84**	**368,258**
Finance & Insurance	5	26,790
Real Estate and Rental/Leasing	7	11,114
Professional, Scientific & Tech.	8	13,013
Educational Services	9	90,863
Health Care & Social Assist.	8	80,456
Repair & Maintenance	6	9,595
Personal Care & Laundry	21	24,725
Relig., Grant, Civic, Prof. Orgs.	20	111,702
Other	**26**	**139,092**
Agric., Forest, Fishing, Mining	1	1,166
Util., Const., Mfg., Wholesale	14	37,603
Transport, Postal & Warehouse	2	11,900
Information	3	30,017
Admin./Sup. & Waste Mgmt	1	1,600
Public Administration	5	56,806
Total	**146**	**595,726**

Figure 14. Composition of Uses (# of establishments)



C. Business District Composition Assessment

- More than one-half of the establishments (57%) in downtown are services, 16% are retailers, 9% are restaurants and 18% other.

- The most represented industry subsectors (based on the number of establishments include: 1)Personal Care, 2)Religious, Grant, Civic & Professional Organizations, and 3)Utilities, Construction, Manufacturing & Wholesale.

Creative Economy Cluster

There is a substantial cluster of arts and culture related industries and facilities located in the downtown.

Historic Sites/Museums

- Middleborough Historical Society Museum
- Robbins Museum of Archaeology

Performing Arts Theaters, Arts Instruction, Theater Companies, Art Gallery, Artists

- Burt Wood School for the Performing Arts & Alley Theater
- Town Hall Theater/Event Space
- Rachel Park Dance Studio
- Theater One (performs at Alley Theater)
- Nemasket River Productions (performs at Alley Theater)
- True Grit Art Gallery
- Otto's Underground (band & rehearsal studio)
- Blue Anchor Studios (artist shows work at True Grit Art Gallery & hosts paint party nights)
- Jennifer Prisco Photography
- Captured Memories (photographer)

Artisan/Craft Businesses

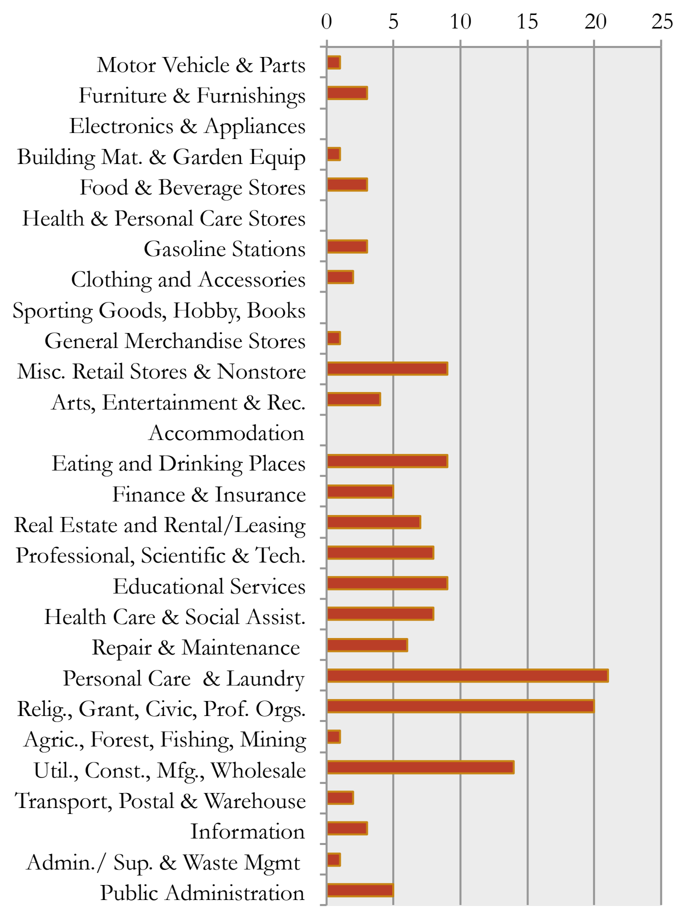
- Jessa-Loop Designs
- Monstor Kolor Studio

Table 8.

Top Ten Most Frequently Found Establishments

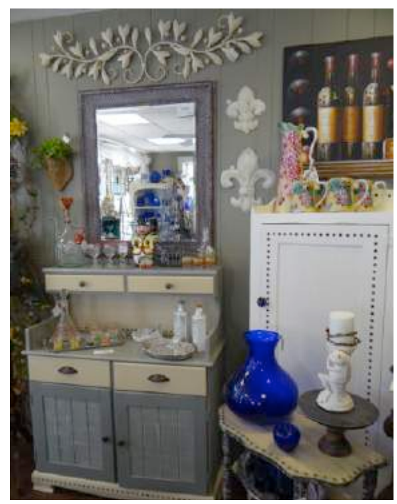
Rank	Industry Subsector	No.
1	Personal Care & Laundry	21
2	Religious, Grant, Civic & Prof. Organizations	20
3	Utilities, Construction, Mfg., Wholesale	14
4	Misc. Retail	9
5	Eating and Drinking Places	9
6	Educational Services (incl. arts education)	9
7	Professional, Scientific & Tech.	8
8	Health Care & Social Assist.	8
9	Real Estate and Rental/Leasing	7
10	Repair & Maintenance	6

Figure 15. **Commercial District Business Mix**



Retail Establishments

- The Downtown is home to 23 retail establishments.
- Benny's is a well known regional chain general store offering home & garden products, automotive supplies, hardware, toys and more.
- There are 3 furnishings stores including the long time Downtown retailer, Egger;s Furniture, a window treatment store and a fairly recent addition of a store that sells new, used and refurbished home accessories (Dymond Treasures). There is also an auction house that handles furnishings, as well as collectibles and other items. (During auction events, bids are received from onsite customers as well as online and telephone bidders.)
- The district hosts 2 specialty food stores (a seafood store and a bakery) along with a liquor store and convenience store. The bakery serves coffee and tea in a café atmosphere, in addition to offering custom baked goods, and is planning an expansion and move to a new site on Wareham Street.



- The True Grit Art Gallery showcases original artwork.
- There are no clothing stores. There is a jewelry store (Gregory Scot Jewelers) and a leatherworks store open part time that has some custom products and also specializes in repair.
- The downtown has a small cluster of thrift and second time around shops.
- Monster Kolor sells screen printed t-shirts and other apparel for businesses, teams, schools, etc.
- There are two gift retailers which sell only online.

Restaurants, Entertainment & Recreation

- There are 9 eating and drinking places in the district, ranging from pizza and coffee shops to full service dining plus Battistini's which serves as a bakery and café. Except for a few pizza places, there is no ethnic cuisine.

- There are only 2 "full service" restaurants where customers can enjoy a meal with table service. 5 of the eating places offer more casual dining options and fall into the category of "limited service", meaning that customers order and/or pay at a counter rather than at a table.

- There are 3 establishments that serve alcohol, one that is primarily a bar and 2 restaurants where customers have the option to get a meal with a glass of wine or cocktail.

Table 9.

Eating & Drinking Establishment Type	#
Full Service Restaurants	2
Limited Service Restaurants	5
Snack & Non-Alcoholic Beverage Bars	1
Bars (Alcoholic)	1
Establishments that Serve Alcohols	3

- The Alley Theater associated with the (Burt Wood School of Performing Arts) hosts many events (student performances, comedy nights, fundraisers, etc.) and shows performed by two Theatre companies (i.e., Theater One and Nemasket River Productions).

- In addition, at least one restaurant occasionally offers live music and entertainment (e.g., Central Cafe).

- With regard to recreation, there is a performing arts school, dance school and 2 martial arts studios (categorized under educational services) as well as Town recreational facilities and Parks Department programming. The downtown has no fitness centers.

Service Establishments

- There are 84 service establishments in the business district including a large array of personal services. In all, there are 19 businesses that offer hair, skin, massage and nail services along with a laundry and tailor shop.
- There are 9 gas and auto service businesses.
- There is also a very strong compliment of professional services including 2 major banks, 2 insurance agencies, 7 real estate companies, 3 legal firms, 2 accounting/billing firms and 3 others (photography, web design).
- 8 establishments offer healthcare services (e.g., dentist, acupuncture) and social assistance (e.g., autism services, counseling, senior home care) plus the High Point Treatment Center, an in-patient facility for the treatment of substance abuse.
- Downtown features a host of educational services including Massasoit Community College, Middleborough Early Childhood Center, and READS Academy. Other educational services include tutoring, performing arts, dance, martial arts, and driving.

Community Institutions and Other Establishments

- Downtown is home to several community institutions and government offices including the Town Hall, Town Hall Annex, Library, Post Office and several churches.
- There are many non-traditional uses in downtown including 14 manufacturing enterprises, contractors or wholesalers, 3 information related establishments, 2 transportation enterprises, 1 administration support and 1 agriculture enterprise.






Business Listing by Category

Furnishings & Furniture
Eggers Furniture
Dymond Treasures
The Custom Decorator

Food & Beverage
Battistini's Bakery
Mike Carver's Sea Food
Savas Liquor

Gifts
All Things Dutch
Jessa-Loop Designs

Clothing, Jewelry & Shoes
Gregory Scot Jewelers
Jen's Leatherworks

General Merchandise, Used Goods & Other Retail
Benny's
Middleborough Smoke Shop
Monstor Kolor
Nearly New/Our Savior Thrift Shop
Sacred Heart Thrift Shop
True Grit Art Gallery
Twice As Nice
White's Auctions

Eating & Drinking Places
Crown Café
Central Café
Coffee Milano
Hideaway Restaurant
Honey Dew Donuts
Lindo's Pizza
Main Drag Café
Middleboro House of Pizza
Pizza Pirate

Banks, Mortgage & Other Credit
Rockland Trust
RMS Mortgages
Santander Bank

Insurance & Real Estate
Roger Keith & Sons Insurance
AEC Property Management
Carey Real Estate
Chace Real Estate
Fieldstone Property Management
P&S Preferred Properties
T.M. Ryder Insurance Agency
Uptown Realtors
Value Tech

Legal Services
Adam Bond Atty. At Law
Decas Murray & Decas Atty at Law
Stewart Dube Atty at Law

Accounting, Tax & Other Services
Balanced Books Bookkeeping
Bridgewood, Benoit & Co., CPA
Captured Memories
EV Event
Jennifer Prisco Photography
Shot Gun Flat Studio

Academic & Other Educational
Massasoit Community College
Middleborough Early Childhood Center
R.E.A.D.S. Academy
T&C Driving School
Tutoring

Arts & Recreation Educational
Burt Wood School for the Performing Arts & Alley Theater
Brazilian Jiu Jitsu
Rachel Park Dance Studio
Shaolin Martial Arts

Artists
Blue Anchor Studios
Otto's Underground

Museums
Middleborough Historical Society Museum
Robbins Museum of Archaeology

Healthcare Services
Brewster Ambulance
Family Acupuncture and Herbals
High Point Treatment Center
Peter Messier & Assoc., Dentistry

Hair, Skin & Nail Services
Anna & Company
Body Zonez massage
Center Street Tattoos
Corsini's Hair Salon
Crafty Cuts
Darkside Kustoms
David Alan Salon
Denny's Barber Shop
Head Quarters
Lucky Nails
Marra's
New Concepts Hair Salon
Old Ghosts Tattoos
Peaceful Escape
Pushin Ink Tattoo
Rachel's Hair
Salon Amour
Serenity Hair Salon
Sun-Sational Sun Tanning

Dry Cleaning, Laundry, Tailor
The Empty Hamper
Middleborough Alterations

Auto & Gas
AL Prime Gas
Gas Depot
Mattie Tire
Auto Glass Centre
Stop n Save
Willy's Auto Parts

Public/Government Institutions
Fire Dept.
Middleborough Public Library
Parks Dept./Town Pool
Police Station
Town Hall and Town Hall Annex
US. Post Office

5. Business Listing by Category

Civic/Community Organizations
American Legion
Church of Our Saviour Episcopal
Cranberry Country Chamber of Commerce
Elks Lodge
EMS Council
First Unitarian Universalist Church
Fr. Shea Community Center
Horizons for Homeless Children
Meeting House Baptist Church
Methodist Church Rectory
Middleborough VFW
Middleborough Youth Building
Nathan Hale Foundation
New Life Baptist Church
Our Savior Community Building
Sacred Heart Church
Sacred Heart Church Rectory

Social Assistance
Associated Home Care
Middleborough Counseling
Piece of Mind Counseling
Piecing The Puzzle

Other
Winnetuxet Cranberry Co.
Abair Plumbing
AEC-PEM Manufacturing
Atlantic Carpentry
Automotion
Brian's Auto
Budge It Drains
City Wide Auto Glass
DMI Marine
Egger Funeral Home
Enterprise Design
Eric Guertin
Middleborough Electric Light Station
Northern Pine Woodworkers
RHS Roofing Systems
Safer Places
Sage Renovations
Under Pressure
Under Pressure Hood Cleaning
Verizon
Willow Spring
Wood working & Re-wine it

D. Comparative Business Mix Analysis

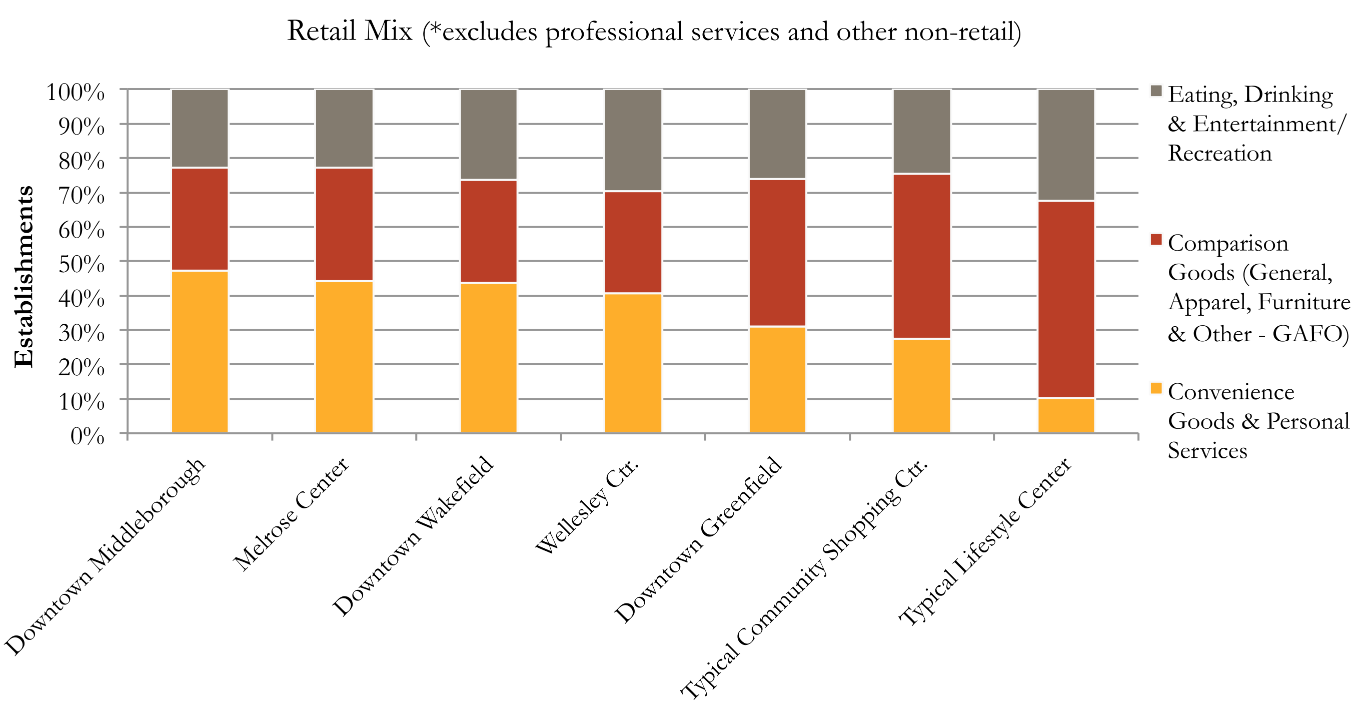
- A few downtown centers were used for comparison. When analyzing only the retail component (not including professional office and other), downtown Middleborough has a slightly larger proportion of convenience goods and personal services and a slightly smaller portion of comparison goods (such as apparel, furnishings, and electronics) and eating, drinking entertainment and recreation compared to most of the other downtown commercial centers.

- Compared to typical shopping centers, Downtown Middleborough has a much smaller portion of comparison goods stores, and compared to typical lifestyle centers, a much smaller proportion of comparison goods stores and eating places, entertainment and recreation.

- Figure 15 illustrates the number of establishments in selected categories among the downtowns selected for analysis. A few significant differences are apparent. In comparison, downtown Middleborough has less of the following:

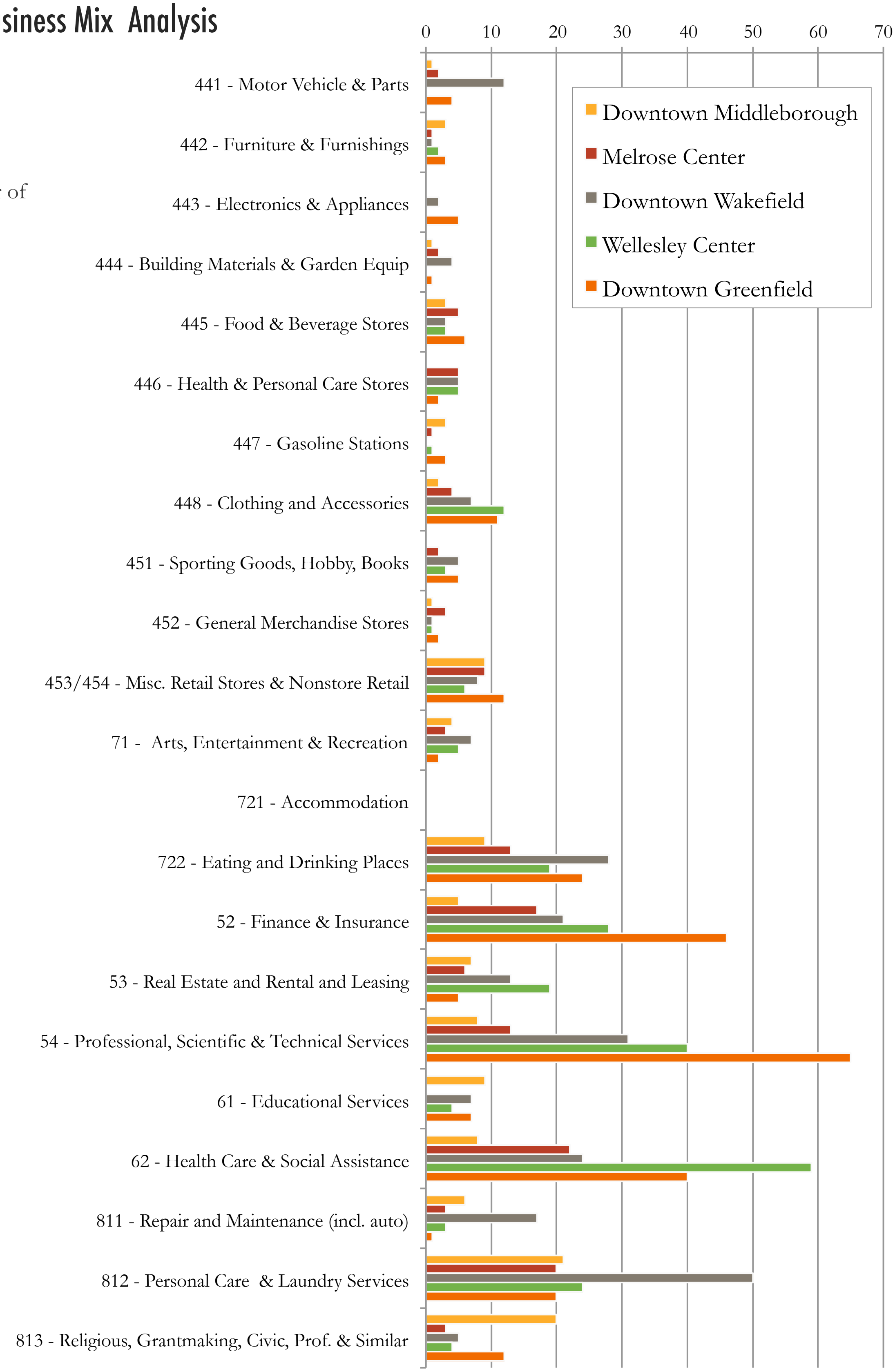
  - Health & Personal Care Stores
  - Clothing and Accessories
  - Sporting Goods, Hobby, Books
  - Eating and Drinking Places
  - Finance & Insurance
  - Professional, Scientific & Technical Services
  - Health Care

Figure 16.
Comparison with Shopping Centers and Commercial Districts (by number of establishments)



C. Comparative Business Mix Analysis

Figure 17.
Comparison with Other Commercial Centers (Selected Categories by Number of Establishments)



Part III. Recommendations for Consideration

Given the findings of the market analysis and business district assessment, we offer the following suggestions for consideration. These are recommendations from the consultant and have not been sanctioned by any authority.

Overview

1. Designate/Establish an Entity to Focus on Revitalization of the Downtown with Dedicated Staff Assistance

2. Market the Downtown and Assist in Recruiting Businesses
   - Create a marketing campaign and materials that focus on the advantages of Downtown as a business location
   - Focus on expanding the existing creative economy cluster, restaurants, recreation/entertainment and other targeted niches.
   - Activate and improve the appearance of vacant properties in the short term with temporary uses.

3. Ensure that Middleborough is Business Friendly for Small and Large Businesses and Promote a Positive Image
   - Assess and improve municipal approvals and permitting process.
   - Create a "Middleborough Welcomes Business" or at least "For Businesses" page on the town website.
   - Cultivate a cooperative partnership with downtown property owners and real estate brokers.
   - Celebrate and promote the new quality tenants that landlords successfully sign.

4. Improve the Aesthetic Appeal of Downtown
   - Implement a storefront improvement financing program.
   - Develop incentive programs to promote redevelopment and renovation.

5. Increase Foot Traffic/Potential Customers in Downtown

6. Work with SRPEDD to Evaluate Potential Downtown Tools and Funding Sources

Recommendation #1: **Designate/establish an Entity to Focus on Revitalization of the Downtown with Dedicated Staff Assistance**

There are several organizations that are involved in Downtown revitalization activities in some way (e.g., Middleborough on the Move, Middleborough Friends, Cranberry Chamber of Commerce, Tourism Committee, Cultural Council, Middleborough Downtown Business Coalition, etc.), however, there does not appear to be one Downtown committee/task force/organization that serves as a lead entity and coordinating body focusing specifically on Downtown.

- Create/designate a single committee or task force with established leadership that can work to develop a Downtown strategy and coordinate its implementation. This entity could include representatives from key organizations, Massasoit Community College as well as business and property owners and should have a clear specific mission.

- Middleborough's Director of Community and Economic Development has recently left and the position has not yet been filled. When this position is filled, the Town should dedicate a portion of the Director's time specifically to Downtown activities and to providing staff assistance to staffing this entity.

Recommendation #2: Market the Downtown and Assist in Recruiting Businesses.

Create a marketing campaign and materials that focus on the advantages of Downtown as a business location. Simple marketing materials can be provided to property owners and Realtors. The following represents five locational advantages that could be promoted along with business recruitment goals, who to contact and other information.

Top 5 Reasons to Locate your Business in Downtown Middleborough

1. **Gain Access to a Growing Resident Market with Above Average Incomes.** 23,000 people live within a 4-mile trade area and the population is growing at a significantly higher rate than Massachusetts overall. Median household income is above the statewide level, in fact close to one-third of the households earn over $100,000 per year. Residents spend over $260 million per year at stores and restaurants.

2. **Capitalize on the Opportunity to Serve Other Market Segments – Nearby Employees, College Students & Visitors to Downtown Attractions.** Downtown Middleborough has an estimated 600 employees that represent potential market for meal and snack purchases as well as other shopping before, during and after work hours. Massasoit Community, located right in Downtown has 500 students with enrollment growing each semester. There are also several attractions in Downtown that attract visitors to the area including the Alley Theater with numerous musical, drama, comedy and student performances, two museums and an athletic field that hosts a semi-professional football league as well as student teams.

3. **Be Part of an Expanding Creative Economy Cluster.** Join the many performing artists, visual artists, art schools, musicians, craftsman and other creative professionals that have found a home in Downtown Middleborough. Creative synergy abounds with a performing arts school, two theater companies, two performance/event spaces, an art gallery, band rehearsal space, dance school, photographers, painter studio and other artisan businesses.

4. **Operate your Business in an Nationally Recognized Historic District.** The Downtown Area is home to many attractive historically significant structures and is listed on the National Register of Historic Places. Qualifying rehabilitation costs may be eligible for Federal Historic Tax Credits.

5. **Enjoy Lower Development and Utility Costs.** All of the Downtown properties are serviced by Town sewer and water eliminating the need for on-site waste water treatment. Municipally-owned gas and electric make for lower utility costs.

Focus on expanding the existing creative economy cluster, restaurants, recreation/entertainment and other targeted niches.

- Additional arts and culture establishments would help to build the cluster (e.g., art/artisan cooperative with locally made products, artisan work space, etc.)
- There appears to be some opportunity for additional eateries, illustrated by sales leakage within the resident market segment (for full service sit-down restaurants) as well as the employee segment. In addition, 72% of the Employee Survey respondents indicated they wanted to see more restaurants and a wider variety of dining options in Downtown.
- Other establishment categories which might make good business recruitment targets (because they appear under-represented compared to other commercial centers and/or show sales leakage) include: gifts, entertainment/recreation including fitness facilities (yoga, gym), specialty food, sporting goods/hobby, pet grooming/supplies, additional health care and additional professional office (professional, technical, financial services).
- Another potential opportunity uncovered during the market research was the need for a business that could take on the role of a bookstore for Massasoit Community College handling the selling of textbooks as well as college t-shirts and other items. At the Brockton Massasoit Campus, the local Barnes & Noble plays this role. Perhaps, a local artisan cooperative could be developed to sell local products as well as play this role for Massasoit.

Activate and improve the appearance of vacant properties in the short term with temporary uses. Businesses, especially restaurants, services and retailers, want to locate in a bustling Downtown. The large number of obvious vacancies in Downtown is impeding the attraction of new businesses. One Realtor called it the "ghost town" effect. Temporary uses could include exhibits, art displays, temporary pop-up retail businesses, anything that would bring some vitality. In Turners Falls and other communities, temporary downtown art galleries have been set up using empty store windows for displays of pottery, paintings and other creative exhibits. This could help build the brand for Downtown as an arts and cultural center. Plus, it would give local residents and visitors (attending events held at the Alley Theater or visiting museums) a reason to walk around downtown. Perhaps local art associations, Massasoit Community College, Middleborough Tourism Committee or other cultural groups might be willing to curate exhibits.

Develop a business directory, map and kiosk. A kiosk in the the downtown with a map showing attractions such as the two museums, Massasoit Community College, etc. and possibly including a business listing could help increase the image of Downtown as a destination and awareness of the goods and service available in Downtown.

Recommendation #3: Ensure that Middleborough is Business Friendly for Small and Large Businesses and Promote a Business Positive Image

Assess and improve municipal approvals and permitting process.
The amount of time and difficulty involved in receiving approvals needed to open a business in Middleborough was cited as one of the obstacles to leasing space in Downtown. In particular, small independent businesses and start-up enterprises like the kind that would be potential tenants for Downtown, are likely to need more assistance with navigating the approval process. They also need to be assured that the process will be speedy, with clear rules and the outcomes easily predicted. If business prospects are discouraged by initial encounters with Town regulatory entities or if the outcomes are very unpredictable, potential business owners may decide that pursuing the location is not worth the risk.

- Have a private sector panel review the approvals and permission process and make recommendations for improvement.
- Designate a staff person that can serve as a business ombudsmen that can help shepherd potential businesses through the process.
- Provide simple instructions regarding a list of permits and approvals that will be needed and information about where to go and what to do to get them. Summarize this information in a simple, easy to follow document.

Create a "Middleborough welcomes Business" or at least "For Businesses" page on the town website.
Currently, the only information for businesses is a link to the Cranberry Chamber of Commerce and under "Department Listing" there is a listing for Community Development but not Office of Economic and Community Development. Provide information about doing business in Middleborough (requirements, obtaining approvals, etc.), available business incentive and financing programs, relevant Town Departments, civic organizations, state agencies and designated Downtown revitalization committee/task force along with other other helpful information.

Cultivate a cooperative partnership with downtown property owners and real estate brokers.
Convene a meeting(s) with downtown landlords and real estate professionals. Seek participation and cooperation while reaching out to show that the Town is willing to help. Inquire about their goals and perceived obstacles in recruiting quality tenants that would be good for the whole Downtown. Identify ways that property owners and Middleborough's Office of Economic and Community Development might work together.

Celebrate and promote the new quality tenants that landlords successfully sign.
Send a press releases to Middleborough Gazette and Wicked Local Middleborough online newspaper to get publicity for new businesses and help to promote the Downtown to customers and prospective business tenants.

Recommendation #4: Improve the Aesthetic Appeal of Downtown.

Implement a storefront improvement financing program. Many of the storefronts and facades in the downtown appear tired looking or are in need of repair. Current conditions might be impeding the attraction of businesses and customers. A storefront/façade improvement program that provides a matching grant or forgivable loan could help entice property owners to make an investment that could benefit the entire area. This type of program might also serve as an enticement for new businesses considering locating in the district.

Develop incentive programs to promote redevelopment and renovation.
Consider creating a redevelopment district in downtown and offer incentives for projects that will have significant impact. Middleborough's commercial tax rate is somewhat higher than most of the surrounding communities with the exception for Taunton, tax incentives could help to motivate investment (e.g., stabilizing taxes for a period of time after renovation, partial tax abatement for a specified period). Contact local banks to explore the potential for their participation in creating special targeted financing programs to entice redevelopment. There appears to be interest among at least one business owner to expand their business and redevelop an eyesore property. CDBG funding could be explored to provide low interest loan in situations such as this.

Recommendation #5: Increase Foot Traffic/Potential Customers in Downtown.

Bringing more people into downtown helps existing businesses as well as increase the attractiveness of the area to new businesses. Strategies could include the following.

- Continue to promote residential development in and near Downtown. More residents nearby will create additional market potential for Downtown businesses.
- Continue to sponsor existing events (e.g., Krazy Days, Ghost Tour, Holiday Pop-Up) and increase the amount of events in the Downtown that attract customers for businesses and increase the awareness of goods and services available in Downtown.
- Develop a historic walking tour in and around Downtown that shows historic sites and properties with basic information and a map that could be reproduced in hard copy as well as posted online.

Recommendation #5: Work with SRPEDD to Evaluate Potential Downtown Tools and Funding Possibilities.

The Southeastern Regional Planning and Economic Development District (SRPEDD) has committed to provide technical assistance as a follow-up to this Market Analysis and Business District Assessment. It would be very helpful if one of the services provided by SRPEDD would be to provide a description and evaluation of various tools and funding programs that can be used to encourage reinvestment and attract businesses to downtowns, along with an evaluation of appropriateness (pros and cons) for Middleborough. These tools and financing source might include the following, as well as others:

- 40Q DIF (District Improvement Financing Tax Incentive)
- Pre-permitting properties
- 40R development
- 43D Expedited permitting
- Urban Renewal District
- Cultural District Designation
- Community Benefit District
- Zoning Bonuses
- Community Development Block Grant Funding