Welcome
Presentation Overview

1. What We Heard from You
2. Future Opportunities
3. Realizing the Opportunities
   - Market Study: Understanding the potential
   - Built Environment
     - Public Improvements: Knitting it all together
     - Development Opportunities: Setting the stage
4. Questions and Answers
Site Orientation
Reimagining Railroad
Strengthening Connections Downtown
Reimagining Railroad
Strengthening Connections Downtown
What we heard from you:

1. The area should first and foremost **serve the residents**

2. The area should be **walkable** and provide **safe**, walkable connections to the downtown and residential areas

3. The area **complements** the downtown retail area but is also distinct

4. There is an opportunity to make the area **feel** like a **distinctive place** through public improvements and private development

5. Providing a **variety** of housing types and keeping housing **affordable** is important
Future Direction
Reimagining Railroad
Strengthening Connections Downtown
Market Study
What is a **market study**?

A market study analyzes existing and projected demographic and economic conditions within a designated trade area (e.g. Downtown Gloucester) to identify the potential demand for additional investment.

- Can more **office** be supported? What kind and how much?
- What types of **retail** and how much square footage can be supported?
- How much and what kind of **housing** can be supported?

**Important Note:**

A market study is not a prediction of what will happen. It is a projection of what is possible given market conditions.
What we heard from you:

1. More restaurants and eateries to serve commuters and surrounding neighborhoods
2. Housing that is affordable to younger people, retirees and families in Gloucester
3. More clothing and specialty retail
4. Child care facilities
5. Bicycle rental shop
6. Other small businesses serving the community’s needs
Housing Demand

- Demographic shifts and change in housing preferences will drive housing demand in Downtown Gloucester.
  - Population is aging
  - Young adults remain single longer
  - Young families having fewer children
- Household growth projected
  - Primarily senior households

Emerging Market

- Urban-inclined households
  - Empty nesters, retirees and younger singles and couples
  - Many prefer smaller units, often in multi-family, amenity rich buildings and neighborhoods
Housing Preferences
Limited supply of unit types (multi-family, townhouse) preferred by urban-inclined households in downtown.

- Less than 10% of units are in buildings with 10 or more units.
- Housing stock is old, and likely lack amenities (elevators, gyms, finishes, common spaces) preferred by potential household segments.

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Study Area</th>
<th>Gloucester</th>
<th>Essex County</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family</td>
<td>28%</td>
<td>56%</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Two Family</td>
<td>31%</td>
<td>19%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>3-4 Units</td>
<td>28%</td>
<td>14%</td>
<td>11%</td>
<td>1%</td>
</tr>
<tr>
<td>5-9 Units</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>10-19 Units</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>20 or more Units</td>
<td>7%</td>
<td>5%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Other (mobile homes, etc.)</td>
<td>&lt;1%</td>
<td>&lt;1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
**Housing Market**

- Housing market in recovery
  - Number of sales above pre-recession levels
  - Housing prices on the rise
  - Rental market strong in areas
    - Main Street: $2K+ for 2BR
- Brokers and developers indicate market can support more residential.
  - Multi-family units between train and harbor desired
    - Empty nesters, young professionals
  - Single-family, two-family and row houses attractive to young families

**Market Study**

*Median Sales Prices: 1987-2013*
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Housing Market Analysis Finding:
Significant potential for additional housing

- Potential for 250 – 550 units downtown
  - Multi-family apartment and condos
  - Townhomes, infill housing
  - Adaptive reuse, live/work
  - Affordable units

### Emerging Markets - Capture

<table>
<thead>
<tr>
<th>Age of Head of Household</th>
<th># of housing units</th>
<th>% Moving Over Next 5 Years</th>
<th>Total Moving Next 5 Years</th>
<th>Capture</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young Households</td>
<td>20-29</td>
<td>7,612</td>
<td>55.4%</td>
<td>4,217</td>
<td>2% 4%</td>
</tr>
<tr>
<td>Empty Nesters</td>
<td>55-64</td>
<td>23,803</td>
<td>23.5%</td>
<td>5,594</td>
<td>2% 4%</td>
</tr>
<tr>
<td>Retirees</td>
<td>65-84</td>
<td>25,646</td>
<td>13.7%</td>
<td>3,513</td>
<td>2% 4%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>57,061</td>
<td>13,324</td>
<td></td>
<td>266</td>
<td>533</td>
</tr>
</tbody>
</table>
Retail Market Potential

- How much additional retail can Downtown Gloucester potentially support?

- Three analyses:
  - Retail opportunity gap analysis (existing residents)
  - Potential new residents analysis
  - Visitors analysis
# Gap Analysis: Downtown-Oriented Sectors

## Downtown-Oriented Retail Potential: Current Residents within 5-minute Drive Time

<table>
<thead>
<tr>
<th>Industry</th>
<th>Avg Sales PSF</th>
<th>5-Minute Drive Time Retail Opportunity Gap</th>
<th>Median Store Size (Approx)</th>
<th># of stores 25% - 50% Capture*</th>
<th>Supportable Retail SF (25% to 50% capture)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Furniture/Home Furnish Stores</td>
<td>225</td>
<td>4,045,527</td>
<td>4,000-5,000</td>
<td>1-2</td>
<td>4,500 - 9,500</td>
</tr>
<tr>
<td>Electronics and Appliance Stores</td>
<td>225</td>
<td>3,223,454</td>
<td>5,500</td>
<td>1-2</td>
<td>3,500 - 7,200</td>
</tr>
<tr>
<td>Clothing and Accessories Stores</td>
<td>190</td>
<td>7,636,594</td>
<td>4,000</td>
<td>1-3</td>
<td>5,000 - 10,100</td>
</tr>
<tr>
<td>Sporting, Hobby, Book, Music</td>
<td>190</td>
<td>2,521,309</td>
<td>5,000-8,500</td>
<td>1-2</td>
<td>3,900 - 7,900</td>
</tr>
<tr>
<td>Miscellaneous Store Retailers</td>
<td>220</td>
<td>5,446,198</td>
<td>2,000-4,000</td>
<td>4-6</td>
<td>8,400 - 16,800</td>
</tr>
<tr>
<td>Foodservice and Drinking Places</td>
<td>320</td>
<td>-7,732,224</td>
<td>2,000-3,000</td>
<td>2-3</td>
<td>5,500</td>
</tr>
<tr>
<td>Full-Svc Restaurants</td>
<td>350</td>
<td>-9,616,873</td>
<td>3000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Limited-Svc Eating Places</td>
<td>280</td>
<td>289,889</td>
<td>2000</td>
<td>0.5</td>
<td>1,000</td>
</tr>
<tr>
<td>Special Foodservices</td>
<td>280</td>
<td>101,782</td>
<td>2000</td>
<td>0</td>
<td>350</td>
</tr>
<tr>
<td>Drinking Places</td>
<td>360</td>
<td>1,492,979</td>
<td>2000</td>
<td>2</td>
<td>4,150</td>
</tr>
<tr>
<td><strong>TOTAL DOWNTOWN</strong></td>
<td></td>
<td></td>
<td></td>
<td>10 - 18</td>
<td>30,000 – 55,000</td>
</tr>
</tbody>
</table>
Retail Opportunity from Future Residents

- New households bring additional retail spending with them
  - Some of that spending will be captured locally in Downtown
  - Some will be captured at existing retail establishments
  - Remainder will be spent in other retail areas outside of Downtown Gloucester

<table>
<thead>
<tr>
<th></th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential New Households</td>
<td>400</td>
</tr>
<tr>
<td>Supportable Retail SF/HH</td>
<td>75</td>
</tr>
<tr>
<td><strong>Subtotal: Total Supportable Retail</strong></td>
<td><strong>30,000sf</strong></td>
</tr>
<tr>
<td>Downtown Capture</td>
<td>50%</td>
</tr>
<tr>
<td><strong>TOTAL: Total Supportable Retail in Downtown</strong></td>
<td><strong>15,000sf</strong></td>
</tr>
</tbody>
</table>
Visitor Retail Analysis

- Visitors are important to Gloucester’s economy
  - Spending supports lodging, dining and retail establishments
  - Visitors would bring more spending
  - Supportable Retail Estimate:
    - 25,000 more visitors
    - $2.5 Million in spending (avg $25/pp on food/retail)
    - Supportable Retail: 5,000 sf
## Total Retail Market Potential

<table>
<thead>
<tr>
<th>Analysis</th>
<th>Potential Retail (sf)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Opportunity Gap Analysis</td>
<td>30,000-55,000 sf</td>
</tr>
<tr>
<td>Potential New Residents Analysis</td>
<td>10,000 – 15,000 sf</td>
</tr>
<tr>
<td>Visitor Analysis</td>
<td>5,000 sf</td>
</tr>
<tr>
<td><strong>TOTAL Potential Retail in Downtown</strong></td>
<td><strong>45,000 – 75,000 sf</strong></td>
</tr>
</tbody>
</table>

**Opportunities:** Retail that appeals to both residents and visitors.

- Clothing and shoe stores
- Limited service eating and drinking
- Home furnishings
- Stationary and Gift Stores
- Sporting goods or hobby
- Office Supply
Market Considerations

- Multi-family not encouraged in zoning
  - Requires a special permit throughout downtown
  - Not allowed, even by special permit near station

- Most parcels are small and may not have the capacity for larger developments (10-20 units)

- Untested multi-family rental/condo market
  - Initial projects need to be done right, or may hurt future potential
    - Good, contextual design a must
    - Amenities and quality finishes to attract emerging market
    - Strong connections to Main Street and train station (commuters)
Built Environment
Public Improvements

What we heard from you:

1. Sidewalk improvements, especially along Railroad Avenue
2. Crosswalk improvements
3. A safer way for pedestrians and cyclists to cross the buoy intersection
4. Streetscape improvements (lighting, trees, etc.) and greenspace
5. Wayfinding and signage
This isn’t working!
It’s not working for seniors either.....
During a walking audit and meetings with seniors....
What Can We Do About It?
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Public Improvements: Roadways

Railroad Avenue: Existing
Public Improvements: Roadways

- Sidewalk (Reconstructed): 6'-0"
- Travel Lane with Sharrows (south-bound): 11'-0"
- Travel Lane with Sharrows (north-bound): 11'-0"
- Sidewalk (Constructed): 5'-0"
- Parking Lot
- Buffer

Railroad Avenue: Future
The “Buoy Intersection”

You Told Us:
“Intersection seems to function OK for vehicles, but it feels very unsafe for pedestrians and cyclists.”
The “Buoy Intersection” – Short-Term Testing
The “Buoy Intersection” – Short-Term Testing
The “Buoy Intersection” – Short-Term Testing
The “Buoy Intersection” – Short-Term Testing
The “Buoy Intersection”
Short-Term Solution
The “Buoy Intersection” – Long-Term Solution
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Streetscape and Wayfinding

Where Do I Go From Here?
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Wayfinding/Signage
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IT'S NOT TOO FAR.

Walk [Your City] is an online tool to take offline action in your community.

Make directional signage for walking and biking in minutes with our Sign Builder, and help shape a more walkable city.

Make A Sign!
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Streetscape
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Neighborhood Greenspace

Opportunity?
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Neighborhood Greenspace
Do you think there is an opportunity to use this area for any of the following?

1. A neighborhood park or open space  
   13%

2. Assist with stormwater runoff/storage  
   6%

3. Act as a buffer between residential and commercial uses  
   19%

4. Yes, all of the above  
   63%

5. None of the above  
   0%
Development Opportunities

What we heard from you:

1. Mixed-use buildings at appropriate heights
2. Buildings that activate the street and sidewalks
3. Live/work space
4. Buildings that are well designed, and take the environment into consideration
Development Opportunities & Setting the Stage

How can the City use your ideas to improve and guide future development in the Railroad Avenue area?

Cities can:

- Regulate, permit, facilitate, communicate, and even incentivize
- Build and maintain public infrastructure, resources, and amenities
For Example
Regulations can be written to:

1. Provide for a mix of uses
2. Include design guidelines
3. Encourage “green” site and building design
4. Allow affordable and/or multi-family housing
5. Reduce setbacks from the street
6. Allow higher buildings
7. Calibrate parking requirements

It’s up to you!
Existing Zoning

Railroad Ave Area

Main Street

Harbor Area
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Building Height
Design Elements
Building Setback
Landscaping
Sidewalks

Gloucester Mill Development
## Zoning is the Guide

<table>
<thead>
<tr>
<th>Future Use?</th>
<th>EB/NB Zones</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>Most of the study area not currently allowed</td>
<td>Uses similar to Central Business?</td>
</tr>
<tr>
<td>Office</td>
<td>Offices &gt; 6,000 sf</td>
<td>Yes?</td>
</tr>
<tr>
<td>Retail</td>
<td>Motor vehicle sales or rental</td>
<td>Special Permit - Allow car sharing?</td>
</tr>
<tr>
<td>Mixed Use</td>
<td>Bulk storage/ Warehousing</td>
<td>No?</td>
</tr>
<tr>
<td></td>
<td>Contractor, with outdoor storage</td>
<td>No?</td>
</tr>
<tr>
<td></td>
<td>Contractor’s yard</td>
<td>No?</td>
</tr>
</tbody>
</table>

**Building Dimensions: Flexibility, similar to Central Business (CB)**
Bringing It All Together
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Strengthening Connections Downtown

Railroad Avenue
How important is it that any zoning changes limit industrial uses (warehousing, outdoor storage, automotive sales/repair, etc)?

1. Very important
   56%

2. Important
   28%

3. Somewhat Important
   17%

4. Not Important
   0%
How important is it that any zoning changes encourage a mix of retail, office, and housing in the study area?

1. Very important  
   88%

2. Important  
   13%

3. Somewhat Important  
   0%

4. Not Important  
   0%
How important is it that buildings are built close to the sidewalk?

1. Very important
   - 26%
2. Important
   - 37%
3. Somewhat Important
   - 21%
4. Not Important
   - 16%
<table>
<thead>
<tr>
<th>Importance Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>59%</td>
</tr>
<tr>
<td>Important</td>
<td>35%</td>
</tr>
<tr>
<td>Somewhat Important</td>
<td>6%</td>
</tr>
<tr>
<td>Not Important</td>
<td>0%</td>
</tr>
</tbody>
</table>
Thank You!

Questions?

For more information and project updates visit:

www.mapc.org/rr