Bellingham Economic Development Study

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Prepared for:
Town of Bellingham
Massachusetts

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Table of Contents

I. Executive Summary

The Town of Bellingham will produce multiple unique vibrant business districts that provide shopping and service options for Bellingham and nearby communities, create a strong employment base provide jobs for local residents, and will seek appropriate commercial and industrial development that expands and diversifies our tax base. Furthermore, planned commercial and residential development will reflect our commitment to conservation and our goal of building safe, functional connections for all users.

- Town of Bellingham Economic Development Vision

A. Introduction

The Town of Bellingham, a community of 16,833 residents, provides an excellent quality of life with attractive residential neighborhoods, natural amenities, three unique and active business corridors, and a wealth of commercial and industrial businesses. It is surrounded by seven Massachusetts towns and Woonsocket, Rhode Island. The Town has a mix of industry, major distribution centers, small businesses as well as nearly 1,000,000 sq. ft. of retail which is located off of Interstate 495. Due to both retail and industrial development Bellingham has one of the lowest residential tax rates of the region. About 28 percent of town revenues are generated from commercial enterprises, which, compared to neighboring communities[1], means that Bellingham utilizes more of its commercial tax base than residential sources to meet town needs.

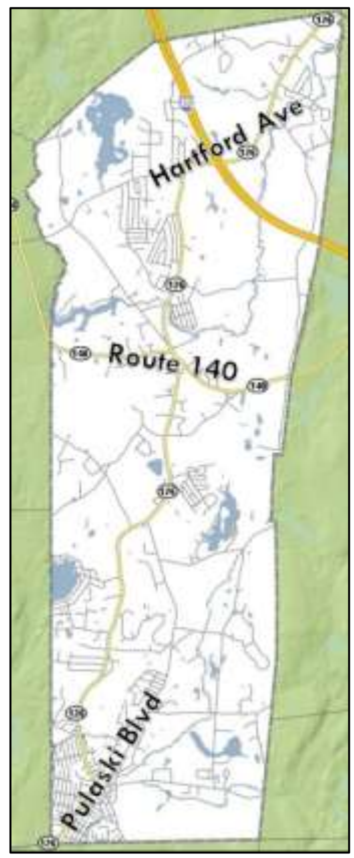


Figure 1 - Major corridors in Bellingham

Its location presents significant challenges to attracting new business activity and customers needed to increase its economic base. At eight miles long, but only two miles wide, the town generally splits into three distinct areas from north to south. The northern third is closest to Interstate 495, with exit 18 being located in this area. Hartford Avenue[2] is considered the main east-west arterial road. The middle third coalesces near the approximate geographic center of town, contains most town facilities and the common, and is the closest connection to the Franklin Commuter Rail Line via Route 140. The last third is more densely populated, contains many smaller businesses along the Pulaski Boulevard[3] corridor serving vehicular traffic, and is closest to the larger Rhode Island city of Woonsocket. However, these location also presents some unique opportunities and challenges.

[1] Compared to Franklin, Foxborough, Hopkinton, Sharon, and Wrentham.
[2] Referred to as "Hartford Ave" throughout the report.
[3] Referred to as "Pulaski Blvd" throughout the report.

The purpose of this Economic Development Study is to identify demographic and economic trends within Bellingham and the region so that the Town can set a strategic course to grow its economic base to improve fiscal stability while building on and respecting the existing strengths and character of the community.

B. Existing Conditions

The first sections of the study look at various conditions as they currently exist within the community including previous planning, demographic and socioeconomic conditions, economic and business characteristics, housing and commercial development potential, existing land use and zoning, as well as economic development resources available to the community. Information within this section will be used to identify potential economic development opportunities within the community – retail, commercial and industrial.

C. Public Outreach

Town staff and MAPC held four community and business engagement events, distributed two surveys, and conducted numerous interviews in an effort to gather input from residents, business owners, developers, and other interested stakeholders in Bellingham.

Economic Development Survey

From October 23, 2017 to January 22, 2018, Bellingham and MAPC conducted an online survey of Bellingham residents to gather data to inform the Economic Development Advisory Committee's strategic planning, better understand what was and wasn't working for Bellingham's existing businesses, and establish a baseline of community economic development perspectives. The survey included resident and local business feedback from a total of 20 demographic and socioeconomic questions. 207 responses were received. Key findings included:

- The majority of respondents (54 percent) showed support for institutional development, such as hospitals and/or educational facilities, with hospitals and the health care industry cluster in general garnering support throughout the survey.
- Top preferences for new types of businesses included cafés, restaurants, and bakeries, specialty shops, and pubs/wine bars.
- Two-thirds of respondents found business variety and quality to be good in Hartford Ave, with the other areas scoring lower.
- 83 percent rated Bellingham as a good place to do business, including two-thirds of business owners.

A Vision for Bellingham's Commercial Areas Open House

The Public Open House meeting, which was held on Thursday, January 18, 2018, attracted residents and business owners from all around Bellingham. The purpose of the meeting was to gather information about what residents would change to stimulate Bellingham's economy, including their insights into how to create jobs, support businesses, and strengthen the community as a whole. At the meeting, participants engaged in several activities where they:

- stated what they felt were the greatest economic opportunities and constraints in each economic corridor as well as throughout town;
- prioritized preliminary economic goals, challenges, and strategies;
- shaped an economic development vision for Bellingham;
- created industry type preferences for economic opportunity areas; and

- provided additional suggestions through an open-ended comment form.

The key takeaways from the evening were that there was widespread support for concentrating development in the existing economic corridors, including higher density and infill redevelopment, and to address traffic concerns, particularly to make the town more pedestrian friendly and the commute more seamless. Additionally, a small group of participants advocated for more development along Hartford Ave.

Business and Developer Roundtables and Survey

On February 5, 2018, Town staff and MAPC held the business and developer roundtables at the conclusion of business survey collection process. Comments from participants included:

- Bellingham is more affordable compared to other areas nearby and the Town is known to be fiscally responsible.
- The town is centered close to the Boston, Worcester, and Providence markets, making it accessible to consumers and workers.
- Seeking coordination between town boards, particularly zoning and planning boards, to assist businesses to set up shop in town would be beneficial.
- Staff at town hall have institutional knowledge on how to operate in Bellingham and that and it would be helpful if there was a handbook or guide for businesses as well as for those seeking to open a business.

Figure 2 - The Flyer for the Bellingham Business Event

II. Planning Context

A. Previous Planning

There were a couple of planning activities completed over the last decade that included elements relating to economic development in Bellingham. At the outset of this project, these studies were identified and reviewed to provide the planning team with a background and understanding of current economic conditions as well as strategies that had already been proposed to increase Bellingham's economic prosperity. Below is a summary of previous planning activities.

Town of Bellingham Master Plan

The Economic Development element of the 2010 Bellingham Master Plan included numerous recommendations to enhance economic growth in Bellingham. In addition to the goal of increasing opportunities for large and moderate sized commercial and industrial centers, the plan specifically recommended the following:

- Establish a mechanism to drive economic development to replace the defunct Industrial Development Commission.
- Encouraging a balance between warehousing, manufacturing, retail, and other allowed commercial and industrial uses.
- Target efforts, including design and sign guidelines, to help local small businesses, especially in contrast to the success of national chains and franchises.
- Explore opportunities to use creative incentives such as Tax Increment Financing (TIF) and Business Improvement Districts (BIDs) to encourage new business development or relocation.
- Explore creation of a "Village District," for various corridors within town, including Route 140 and Pulaski Blvd.
- Reexamine the Zoning Map to remove from business or industrial zoning those areas for which those uses are clearly ill-suited.
- Bring business and industrial zoning up-to-date to reflect more modern regulations.

The Bellingham Housing Production Plan

Completed in 2015, Bellingham's Housing Production Plan consisted of data collection, community outreach, visioning and implementations, and a final report document. The plan comprised of sections dedicated to housing stock, supply and demand, housing needs, a vision, and goals and objectives. Findings from the study include:

- Bellingham's housing stock is overwhelmingly composed of single-family homes,
- MAPC projected that those aged 35-64 will increase by the year 2030, while the school-age population will decrease significantly.
- The demand for housing for older residents is expected to increase significantly in the next 20 years.
- The need for walkable, village-like areas in town.
- Alternatives to single family housing will provide opportunities not currently available to individuals living alone, single-parent households, empty-nesters and younger couples with children.

Recommendations from the process focused on identifying zoning alternatives and incentives for residential development with the goal of encouraging the creation of low, moderate, and middle-income housing in multi-family developments and residential subdivisions; create a Municipal Affordable Housing Trust Fund to establish a group of committed local people to lead the housing program; preserving existing housing by pursing funding programs and working in collaboration with neighboring communities on housing rehabilitations programs; and produce affordable housing in key locations, where village-style housing could support local small businesses.

Priority Development Fund/District Local Technical Assistance Project

In 2015, Town of Bellingham contracted with MAPC to conduct an analysis of potential future land use alternatives for the New England Country Club (NECC) site and surrounding area. The Town of Bellingham was approached by the owners of the NECC, a 323 acre property, including an 18 hole golf course located in the southern part of the community, adjacent to the Rhode Island state line. The owners were interested in developing the property, and the town was interested in exploring whether it might be retained a golf course and open space, while also providing housing opportunities.

After preparing build-out analyses for the site, MAPC recommended three options that would enable significant amounts of housing to be constructed, while maintaining the golf course/open space. At their June 1, 2015 meeting, the Bellingham Board of Selectmen voted to establish a study committee to further pursue MAPC's recommendations. The location, near Pulaski Blvd, could provide more shoppers to local businesses along the corridor. In 2017, the annual Town Meeting passed an overlay district to provide large scale 55 and over active adult use district, which included 50 percent open space.

District Local Technical Assistance Project

The Bellingham Town Meeting approved revisions to the parking section of the Bellingham Zoning Bylaw at their May 23, 2012 Town Meeting. Key revisions included:

- Updating the existing parking bylaw by adding new definitions, a "Purpose" section and regulations for alternative types of vehicles.
- Revising parking requirements, in many cases decreasing the amount of parking required
- Providing more flexibility with shared parking and flexible parking options
- Bellingham has a community compact district to improve its infrastructure.

The impetus for reviewing the existing parking regulations was to determine if the required amount of parking was excessive. If this was correct, the Town wished to reduce the requirements in order to generate additional economic development opportunities in Bellingham, and to augment the tax base. Bellingham's planners concluded that parking could be reduced in some cases, and this conclusion was endorsed as Town Meeting adopted the revised regulations.

B. What we heard

The economic development and community engagement team, along with town staff, engaged numerous stakeholders including business owners, residents, real estate brokers and developers, and economic development and business organizations to better understand the local business environment. Those interviewed were asked to identify the strengths, weaknesses and opportunities as related to economic development in Bellingham, both town wide, and within the town's existing economic corridors. Highlights of these comments are as follows:

Strengths	Weaknesses	Opportunities
TOWN WIDE		
• High quality of life with well-established residential neighborhoods, good schools and many recreational amenities. • Whereas many New England towns have declined, Bellingham is growing. • Affordable properties - in housing, commercial, and industrial - compared to the greater region. • Mix of industry, distribution centers, service and retail. • Larger share of commercial to residential tax rate when compared to neighboring towns. • Location between major metropolitan areas. • Water infrastructure is generally abundant, well-connected and below capacity. • High traffic adds to curb appeal for economic corridors. • Low unemployment as workers are generally well-connected to jobs within the region. • Regarded as a family-friendly community. • Schools viewed very favorably by community. • Median housing costs are lower than the state median.	• Bellingham's largest industry, retail, has shown little growth within the last ten years and has been moving away from brick-and-mortar locations industrywide. • Bellingham's long and narrow geography and distinct areas makes community engagement difficult. • Many industrial areas abut residences, causing contention. • State assistance is needed for capital improvement projects, however, priority is generally given to the inner core. • Traffic congestion is regarded as a major source of concern among residents, creating apprehension in attracting new businesses. • The Greater Attleboro Taunton Regional Transit Authority (GATRA) has limited service in Bellingham. • Bellingham lacks walkable areas and sidewalks. • Less variety in restaurants than towns of similar size. • Although the relationship between developers and the public are not as contentious as in other neighboring communities, some residents are resistant to development. • Brick and mortar retail centers are experiencing hardships in light of growing online competition. • Approximately one-quarter of Bellingham's population is served by two sewer systems. The remaining population uses individual on-site disposal systems.	• Utilize town resources, such as town hall or the library, for community outreach. • An Economic Development Advisory Committee with a goal of working with both residents and businesses/developers to further econ dev goals has been formed. • Alternatives to single family are needed for seniors looking to downsize. Additionally, smaller housing units, such as efficiencies and 1- and 2-bedrooms, for smaller households can be utilized. • Potential for apartments and condominiums near the economic corridors, especially Route 140, for young adults and families. • Build relationships with neighboring towns in Massachusetts and Rhode Island to attract development and address concerns. • In order to assist small, independently owned businesses, pursue signage and guidelines. • Create a "How to do business in Bellingham" pamphlet. • In order to maintain a low residential tax rate, the town would need to expand its commercial/industrial tax base. Fortunately various sites throughout town are available. • The Health Care & Social Assistance, Professional Services, and the Scientific & Technical Services industries all ranked high within the Industry Types activity. This industries show opportunity for diversification in a town where the Retail Trade is the largest employer.

Strengths	Weaknesses	Opportunities
North Bellingham/Hartford Avenue		
• Location to I-495. • North Bellingham has the largest number of vacant land zoned for industrial and commercial uses. • Largest employers are located within this area.	• High number of trucks travel through Hartford Ave, which can be disruptive to neighboring residential areas. • The area is dominated by big box retailers and not many smaller locally-owned businesses.	• Review zoning to improve the compatible uses off of Hartford Ave, including exchanging industrial and residentially zoned areas. • Improvements to Exit 18 can allow greater access to commercial areas located on Hartford Ave. • The Hartford Avenue Adaptive Use Overlay District and Mill Reuse Overlay District are currently zoned for sustainable mixed-used development.

Strengths	Weaknesses	Opportunities
Downtown Bellingham/Route 140		
• Vacant land zoned for industrial and commercial uses. • The Campanelli Business Park of Bellingham, a 427,500 sq. ft. industrial warehouse space, will begin leasing to logistics and distribution companies in the summer of 2018. • The Common is well-used and enjoyed by residents. • Mixed-use buildings were ranked highly amongst survey and Open House respondents and can be an opportunity to bring in new residents to the area.	• Lacks Town Center feel. • Rush hour traffic is confined on Route 140 and snarls as commuters head to and from Forge Park station in Franklin. • Little connectivity around Town Center and to MBTA station through non-vehicle means. • Concerns regarding development on Maple Street adding to traffic.	• Add to Town Center feel with façade improvements, shops, cafés, and services. • Creating a Village District would be beneficial for this area. • Bring in more events to the Town Common and build upon others, such as Picnic Stories and Concerts on the Grass. • Explore opportunities in having a farmer's market located within town. • Develop a wayfinding plan to guide motorists (but also bicyclists and pedestrians) to town center services and amenities. • Zoning changes to promote mixed-use development could bolster the corridor's village center feel.

Strengths	Weaknesses	Opportunities
South Bellingham/Pulaski Boulevard		
• Is a major thoroughfare for north-south traffic entering from Rhode Island. • Has the largest variety of small businesses compared to other districts. • Survey respondents, along with Open House participants, stated a desire for mixed-use buildings within the area, however this would require a change to current zoning laws.	• Congested, haphazard development predates zoning. • Overabundance of tattoo shops and nail salons. • Parts of South Bellingham lacks public sewer access. • Mixed-use zoning initiatives have so far been voted down in Town Meeting.	• There are key advantages of creating an overlay district on Pulaski Blvd. Previous attempts to rezone the area narrowly failed. • Other options include designating Pulaski Blvd as a Business Improvement District. Although it gives property owners a second option for future redevelopment, it does not change existing zoning. • Proximity to Woonsocket provides opportunity for local shops to cater to cross-state consumers.

III. Current Conditions

Throughout this section of the document, demographic and economic conditions within Bellingham will be compared to a subset of neighboring communities with a comparable population, economy, or labor force. These communities – Franklin, Hopkinton, Foxborough, Sharon, and Wrentham – will be compared to Bellingham for reference throughout the document and will hereafter be referred to as the "region".

A. Bellingham's Economy

Compared to the region, Bellingham has the lowest fiscal reliance on residential taxpayers, which account for 71.7 percent of all tax receipts. 2017 revenues from commercial, industrial, and personal property accounted for 28.3 percent of revenues. Additionally, Bellingham has the highest commercial and industrial property tax rate in the region, with $20.72 per thousand dollar value. Growing the commercial tax base would benefit the town, and is one charge of this plan. Therefore, to identify potential economic growth opportunities, including sources of revenue beyond property taxes, we must first look at the current economic factors, and key industries that make up the existing economy.

Table 1 - Largest Employers in Bellingham

Company Name	Address	Number of Employees	NAICS Description
Market Basket	274 Hartford Ave	250-499	Supermarkets/Other Grocery Stores
Walmart	250 Hartford Ave	100-249	Department Stores
Home Depot	229 Hartford Ave	100-249	Home Centers
Whole Foods Market	255 Hartford Ave	100-249	Supermarkets/Other Grocery Stores
Algonquin Industries	139 Farm St	100-249	Machine Shops
Asphalt Engineering	190 S Maple St	100-249	Highway Street & Bridge Construction
Blue Linx	419 Maple St	100-249	Lumber, Plywood, Millwork/Wood Panel Wholesale
Van Lumber Co	27 S Maple St	100-249	Other Building Material Dealers
Super Stop & Shop	70 Pulaski Blvd	100-249	Supermarkets/Other Grocery Stores
Bellingham Memorial Middle	130 Blackstone St	100-249	Elementary & Secondary Schools
Antron Engineering & Machine	170 Mechanic St	50-99	Machine Shops
Uno Pizzeria & Grill	205 Hartford Ave	50-99	Full-Service Restaurants

Source: Infogroup 2016

The largest employers in Bellingham are generally located in Hartford Ave, with retailers representing the thirteen biggest private employers in town. It is important to note that employment figures can include part-time as well as full-time employees. Grocery store chains like Market Basket, Whole Foods, Stop & Shop, and to some extent, Walmart, represent Bellingham's $17,000,000 grocery store sector, and along with Algonquin Industries, Asphalt Engineering, and Van Millwork's headquarters. Bellingham is known as a shopping destination for people in the surrounding towns and nearby Rhode Island.

Bellingham Industry Profile

Townwide Industry Structure

An industry profile looks at the characteristics of employment - types of jobs and wages - that are located within a community. Bellingham has a relatively small economy, with fewer jobs per capita than most communities in the surrounding region (Sharon being the only exception) and fewer jobs total than any of the five comparison communities. In 2016, there were 497 businesses in Bellingham employing a total of 6,330 workers. Its 2016 ratio of 0.63 jobs per member of the labor force is low for the region, and most likely reflects the relatively small size and number of businesses.

Table 2 - Jobs to Labor Force Ratio (2016)

Geography	Labor Force	Jobs	Jobs: Labor Force Ratio
Foxborough	14,572	9,803	1.49
Franklin	16,542	17,713	0.93
Hopkinton	11,452	8,349	1.37
Sharon	3,712	9,843	0.38
Wrentham	7,038	6,615	1.06
Bellingham	**10,078**	**6,330**	**0.63**

Source: EOWLD 2016

Of jobs that are located in Bellingham, the most prominent industry sectors (as defined by the North American Industry Classification System - NAICS) are Retail Trade (36 percent of all jobs); Accommodation & Food Services (14 percent); and Wholesale Trade (13 percent). The higher concentration of jobs in accommodation and food services and retail is consistent with communities whose economies are in large part dependent upon vehicle commuter traffic; however, retail makes up a larger segment of the local economy than generally found in Norfolk County. This may reflect its historic development as a primarily residential community located within the I-495 beltway and major north-south and east-west corridors.

The highest paying industries are Management of Companies & Enterprises ($93,438), Transportation & Warehousing ($70,094), and Professional, Scientific, & Technical Services ($59,280). The highest paid jobs held by residents of Bellingham, by median earnings, are Architecture & Engineering ($108,250); Computer & Mathematical ($102,004); and Management ($93,966).

Table 3 - Employment and Average Weekly Wage by Industry (2016)

Industry *Red text denotes sectors in Bellingham with a higher percentage of jobs than Norfolk County.*	Bellingham				Norfolk County	
	Firms	# of Empl.	% Empl.	Avg. Weekly Wage	% Empl.	Avg. Weekly Wage
Construction	75	405	8%	$1,220	7%	$1,472
Manufacturing	32	507	9%	$1,092	7%	$1,543
Utilities	3	41	1%	$2,731	0%	$2,627
Wholesale Trade	32	725	13%	$1,369	6%	$1,758
Retail Trade	90	1,947	36%	$505	14%	$651
Transportation & Warehousing	11	64	1%	$642	2%	$920
Information	9	76	1%	$686	3%	$1,688
Finance & Insurance	13	62	1%	$1,072	7%	$1,903
Professional & Technical Services	31	124	2%	$1,653	7%	$2,208
Administrative & Waste Services	36	208	4%	$716	6%	$957
Educational Services	8	25	0%	$335	3%	$1,020
Health Care & Social Assistance	55	195	4%	$665	17%	$1,017
Arts, Entertainment & Recreation	7	61	1%	$375	3%	$925
Accommodation & Food Services	52	731	14%	$334	9%	$415
Other Services	53	213	4%	$496	4%	$720
Total/Average	507	5,384		$794		$1,199

Source: MA Executive Office of Labor and Workforce Development (EOLWD)

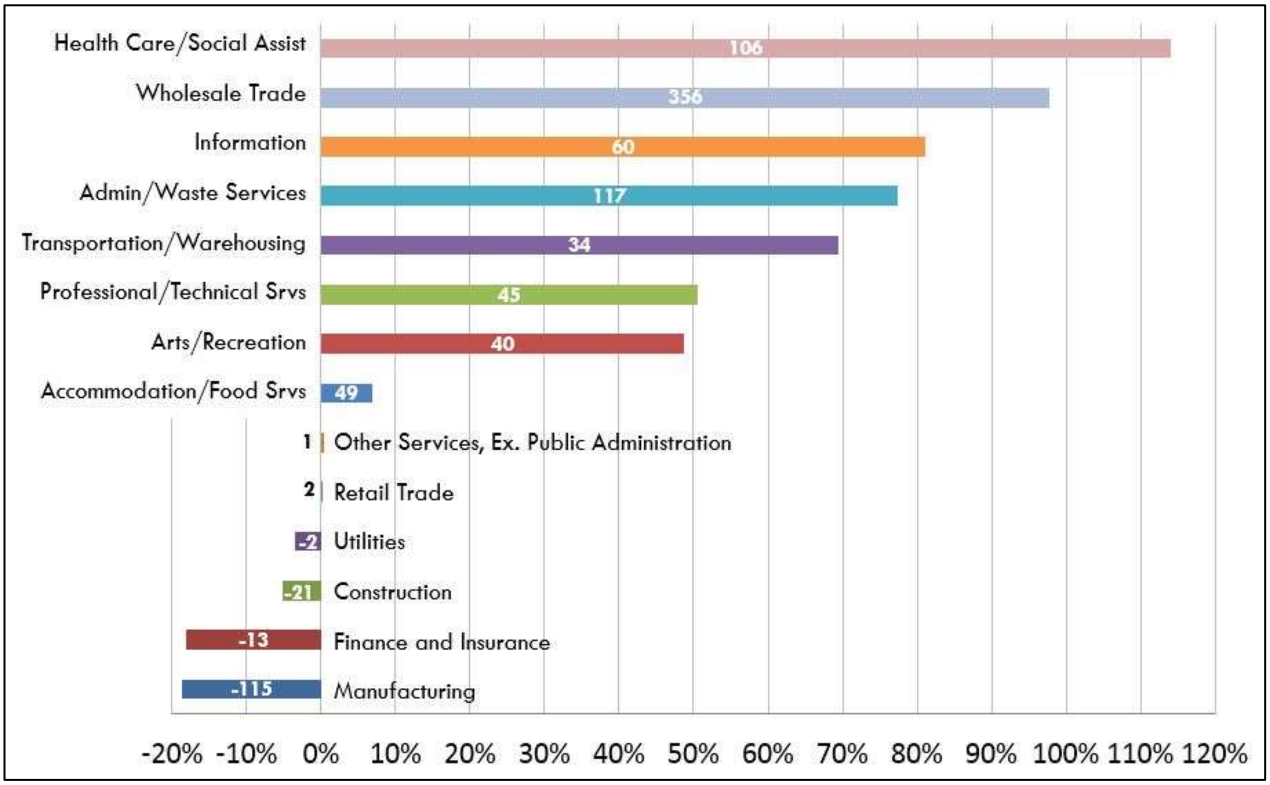


Figure 3 - Number & Percent Change in Employment by Industries in Bellingham (2005-2015)

Using the Employment and Wages (ES-202) annual report from the Executive Office of Labor and Workforce Development for 2005 to 2015, Bellingham experienced, on average, a growth of 810 positions within ten industries. Conversely, within the same time period, the town saw a decrease of an average of 151 positions in four industries[4].

Within the ten year period between 2005 and 2015, the Healthcare & Social Assistance industry saw a 113 percent increase in Bellingham, increasing 106 positions by 2015. This displays the healthcare industry's growing impact as a hiring force in Bellingham. Wholesale Trade businesses hired the most new employees, with 357, almost doubling its total number of jobs (which is likely to continue as Campanelli Park opens in Summer 2018). Administrative & Support and Waste Management & Remediation Services, which ranges from landscaping services to carpet cleaning services to travel agents, grew by 117 positions, whereas the Information industry grew by 60 jobs.

Conversely, manufacturing lost the most jobs within the ten year period, shuttering 115 positions, or 18 percent. Only three other industries, Finance & Insurance, Construction, and Utilities, saw a decline of positions within the ten year period, which, along with Manufacturing, saw a loss of 151 jobs. However, growth in Retail Trade and Accommodation & Food Services was slow within their respective industries. Retail, Bellingham's largest industry, saw an increase of only two jobs within the ten year period.

[4] The Official Website of the Executive Office of Labor and Workforce Development (EOLWD) Labor Market Information: http://lmi2.detma.org/lmi/lmi_es_a.asp

Economic Corridor Industry Structure

The economic corridor in Bellingham with the most number of jobs continues to be Hartford Ave. Hartford Ave is dominated by the Retail Industry, especially along its intersection with I-495, with 31 Retail businesses in Hartford Ave. employing around 1,341 people (both part and full time). Ten Accommodation & Food Services businesses employ 321 people within the Hartford Ave corridor.

Other Services, such as dry cleaners and machinery/auto repair shops had the second largest number of businesses with 13, but with only 50 employees. All other businesses, which include Professional Services, Real Estate, and Wholesale Trade, totaled 17 firms and 58 employees.

Route 140, on the other hand, had greater divergence in industry types than Hartford Ave, albeit with a smaller workforce. About 167 employees, or 20 percent of the Route 140 corridor workforce, were in Accommodation & Food Service industry, the largest employer, which tied with Other Services as the industry with the greatest number of firms, with 20 each. And although retailers had 17 businesses on Route 140, this industry only employed 54 people.

A majority of Pulaski Blvd's businesses and employees are within the Retail and Service industries. Pulaski, along with Route 126, is known as a north-south connector and is lined with small to medium sized businesses. Almost half of employees are in the Retail industry, with Stop & Shop having the largest share.

Over a hundred workers are employed in the Accommodation & Food Service and its eleven firms. Other Services contain the second largest number of businesses with 15, but its number of employees is considerably lower than Retail and Food Services, with only 41 employees. Other Services consist of beauty salons, barber shops and other personal services.

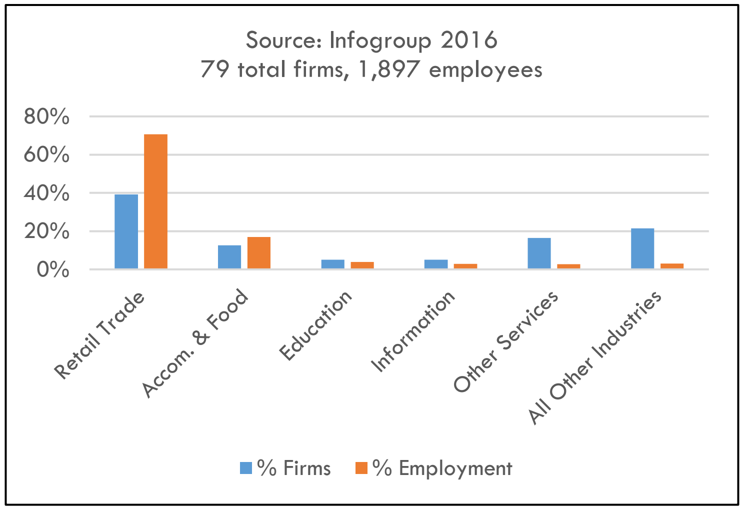


Figure 4 - Hartford Avenue Corridor Businesses

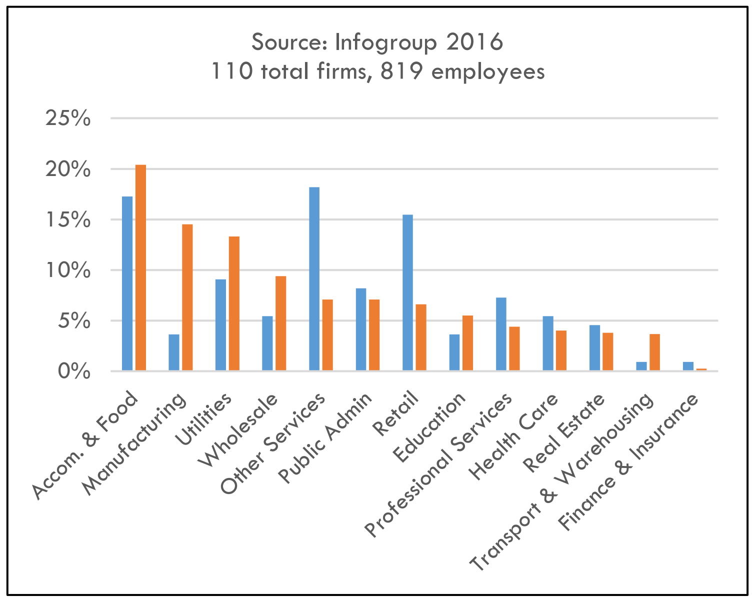


Figure 5 – Route 140 Corridor Businesses

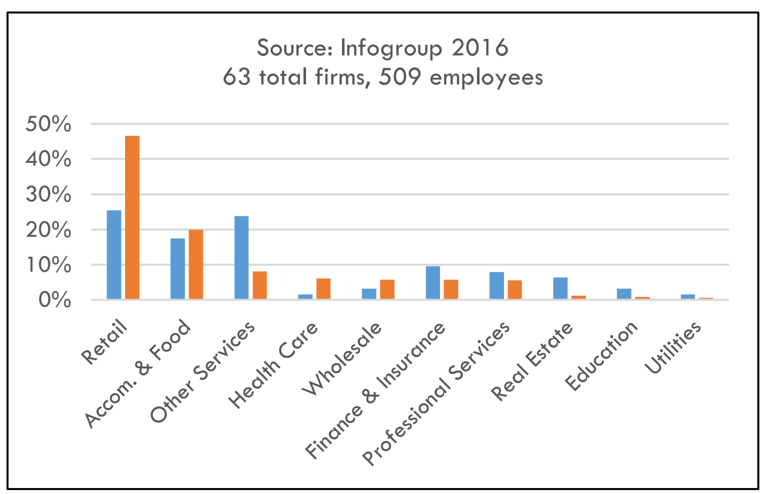


Figure 6 - Pulaski Blvd Corridor Businesses

Wages

Wages for jobs in Bellingham are generally lower than they are in the region and state. More specifically, wages in Information, Finance & Insurance, and Educational Services are considerably lower than similar jobs found in the county. Only within the Utilities industry (power plants at the junction of power lines and gas pipelines) does Bellingham have higher wages. Higher wages typically denote a level of specialization of businesses and their employees (e.g. manufacturing, real estate), and may indicate room for growth.

Table 4 - Weekly Wage Growth by Year

	2006 All Industries	2016 All Industries	Percent Change
Foxborough	$1,224	$1,315	7%
Franklin	$1,012	$1,303	29%
Hopkinton	$1,326	$2,692	103%
Sharon	$847	$994	17%
Wrentham	$608	$700	15%
Bellingham	**$594**	**$794**	**34%**

Source: EOWLD 2016

Compared to individual towns, wages in Bellingham in 2016 were significantly lower than most regional towns, with Wrentham being the only exception. In 2006, weekly wages for Bellingham were $594, the lowest in the region. Within the decade, wages grew by $200, on average. And although wages are lower compared to most of the region, wage growth in Bellingham has been steady within the last decade. While not as rapid as Hopkinton, a town that has experienced rapid growth since 2006, Bellingham has seen 34 percent growth in weekly wages. This is also higher than the average county and state wage growth, which have been 18 percent and 29 percent, respectively.

Employment Age Projections of Bellingham Residents

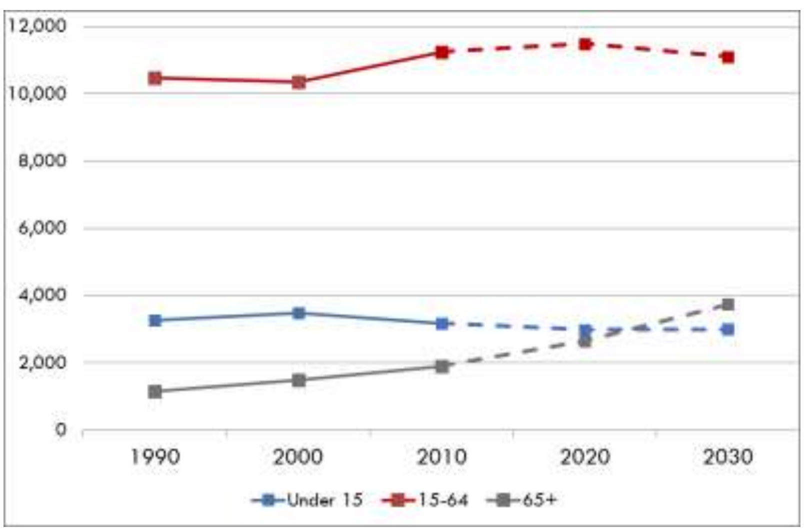


Figure 7 - Employment Age Projection

The median age in Bellingham is 41.2 years old – comparable to the median age in Norfolk County (41) and to nearby towns, with Wrentham having the highest median age at 43.8, and Franklin the lowest, at 40.6. Bellingham is 1.8 years older than the state median and 5.4 years older than the nation.

According to MAPC's projections, the employment age population is projected to increase by about 240 people between 2010 and 2020, then decline by 387 people in 2030.[5]

In 1990, over 70 percent of Bellingham residents were within the working age population. It is projected that by 2030, their percentage of the population will drop to 62 percent.

Those over the age of 65 will be the only age cohort to grow during this period, mirroring state trends, increasing by approximately 2,593 individuals between 1990 and 2030. Those under the age of 15 will

[5] Metropolitan Area Planning Council, Stronger Region Scenario.

decline as well. The number of seniors has grown significantly over the past two decades, and is projected to accelerate.

Meanwhile, the number of school age children is projected to decline, as is the number of adults between 35 and 64, the age at which people are most likely to be in the workforce. Although 18-34 year olds are expected to increase slightly, national and regional trends indicate this age group is attracted to and moving into more urban or urban-like settings. Given these trends and locational preferences, businesses in Bellingham may find it difficult to find employees. Bellingham would benefit from more walkable, mixed-use environments to attract both young and older workers.

Commercial Space Trends

Currently, Bellingham has more than 2,000,000 square feet of commercial space for sale, both in existing spaces and developable land.

Developable land in Bellingham is generally zoned for industrial uses, and accounts for more than half of total space, whereas most leasable land in Bellingham is through retail and warehousing space. Other properties for sale include office space in Central Bellingham and on Hartford Ave. in Northern Bellingham. Direct highway access is a key factor attractive to commercial developers.

Table 5 - Commercial Property for Sale

Address	Type of Property	Price	Class
1114 S Main St	Land	$ 1,300,000	N/A
Maple St & I-495	Land	$ 1,295,000	N/A
75 Mechanic St	Auto Body Building	$ 895,000	C
101 Mechanic St	Land	$ 750,000	N/A
334 Hartford Ave	Office Building	$ 699,900	B
106 Mendon St	Office Building	$ 549,000	B
300 Hartford	Industrial	$ 525,000	N/A
187 Farm Rd	Land	$ 450,000	
103 Salisbury St	Auto Body Building	$ 350,000	C
340 S Main St	Land	$ 300,000	N/A
325 Lakeshore Dr	Retail	$ 250,000	C
28 Williams Way	Industrial	Not Disclosed	B

Source: Loopnet.com (April 2018 listings)

B. Bellingham's Workforce

Labor Force & Employment Status

Unemployment rates have traditionally been similar in Bellingham compared to Massachusetts, the exception being Bellingham's 9.7 percent unemployment rate, compared to 8.1 percent for the state rate, in 2009. At 3.5 percent, Bellingham has the highest unemployment rate in the region and for Norfolk County. Sharon had the lowest unemployment rate in the region at 2.9 percent.

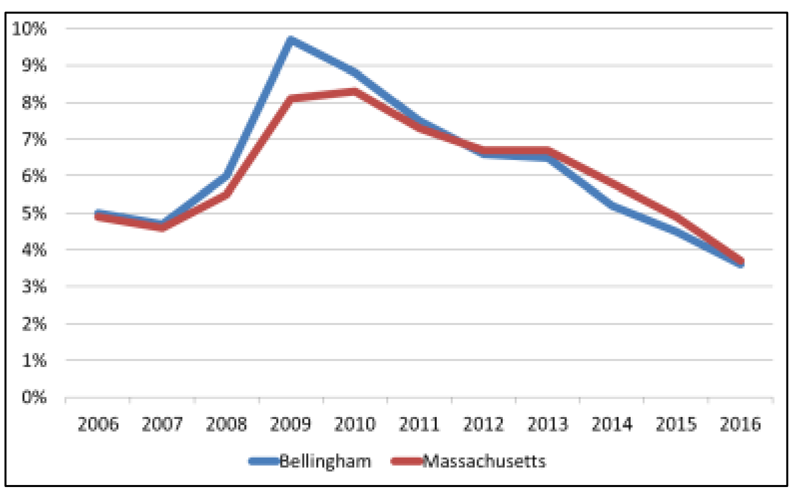


Figure 8 - Annual Unemployment Rate (not seasonally adjusted)

However, Bellingham's rate is lower than the average state rate. In real numbers, an average of 362 people were unemployed each month between April 2017 and March 2018. This rate is lower than its peak in 2009-2010, and is trending downward below pre-recession levels.

Employment by Industry & Occupation

Bellingham residents work in a wide range of occupations and industries. About two-thirds of the town's workforce is employed in "white collar" professions including management, business, science, & arts occupations (36.5 percent) and sales & office occupations (29 percent). Approximately 14 percent work in service industries and approximately 21 percent work in "blue collar" occupations such as construction, maintenance & natural resources (9.5 percent), and production, transportation & material moving (11 percent). No neighboring communities have a higher share of residents working in "blue collar" occupations, although Wrentham is close at 17 percent.

Table 6 - Occupation of Residents in the Region, 2016

	Bellingham	Fox-borough	Franklin	Hopkinton	Sharon	Wrentham	State
Civilian Labor Force	**9,937**	8,988	17,239	8,350	9,349	5,986	3,468,864
Business, science, management, & arts	**36.5%**	47.2%	51.1%	64.5%	69.1%	49.4%	44.7%
Service	**14.3%**	14.3%	12.8%	8.0%	6.1%	10.3%	17.7%
Sales & office	**28.8%**	23.9%	24.7%	20.5%	19.0%	23.2%	22.2%
Natural resources, construction, & maintenance	**9.5%**	7.8%	6.2%	3.9%	3.3%	9.2%	6.8%
Production, transport, & material moving	**10.9%**	6.7%	5.3%	3.2%	2.5%	7.9%	8.7%

Source: ACS 2012-2016

Given the small number of jobs in town and Bellingham's status as an attractive bedroom community at the crossroads of multiple metropolitan areas, the vast majority of residents commute out of town for work to areas as far away as Marlborough and Boston.[6] Nearly 92 percent work in communities outside of Bellingham and approximately 88 percent of Bellingham workers live outside of town. This leads to long commute times for many Bellingham residents. Given these commutes, work-at-home situations or satellite office locations may be in high demand and growth opportunities for Bellingham.

Table 7 - Median Household Income, 2015

	Median Household Income
Hopkinton	$138,551
Sharon	$124,444
Franklin	$108,272
Wrentham	$102,659
Foxborough	$88,766
Bellingham	$88,460

Source: ACS 2011-2015

Figure 9 - Inflow & Outflow of Workers (2015)

[6] See Home/Work Municipal Destination Report in Appendix C.

Income

Bellingham's 2015 median household income of $88,460 is higher than the state median ($68,563) and is comparable than that for Norfolk County ($88,262), but is lower than its neighboring communities. Importantly, Bellingham wages have grown since 2010 with the household income increasing by 13 percent. Only Franklin and Hopkinton saw a faster growth in incomes, with 21 percent and 15 percent respectively. Incomes in Foxborough declined by 5 percent.

Educational Attainment

Bellingham educational levels tell two different stories. Bellingham's high school completion rates are comparable to the region at about 95 percent, and are higher than Massachusetts (90 percent) and the United States (87 percent). Over 28 percent of Bellingham residents have completed a bachelor's degree or higher. That is lower than the region, with Sharon having the highest percentage of college graduates at 73 percent. Bellingham's rate of college grads is also lower than the state (41 percent) and the nation (29 percent). Additionally, the percentage of Bellingham residents with a graduate or professional degree (11 percent) is lower than the region, state, and country.

C. Market Analysis

Understanding what the market can and can't support is essential to identify the right sets of strategies and actions to achieve economic growth. A market analysis performed for this study identified market trends and the segments with potential for growth in Bellingham. In order to estimate the amount of additional retail that the study area can support, it is important to first identify a trade area.

In Bellingham, a town with three distinct corridors and a geography that is almost four times longer than it is wide, the primary trade area was identified as a five mile radius from Town Hall. This geography is displayed in Figure 10 in red and includes the entire local market as well as portions of Blackstone, Mendon, Hopedale, Milford, Holliston, Medway, Franklin and Wrentham. This is known as the catchment area for Bellingham and contains all or part of the compared towns in the region.

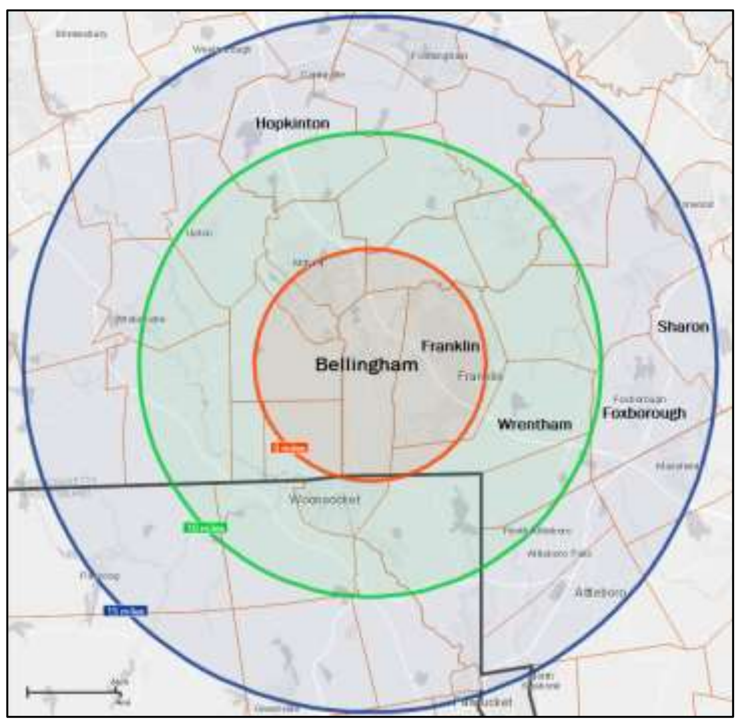
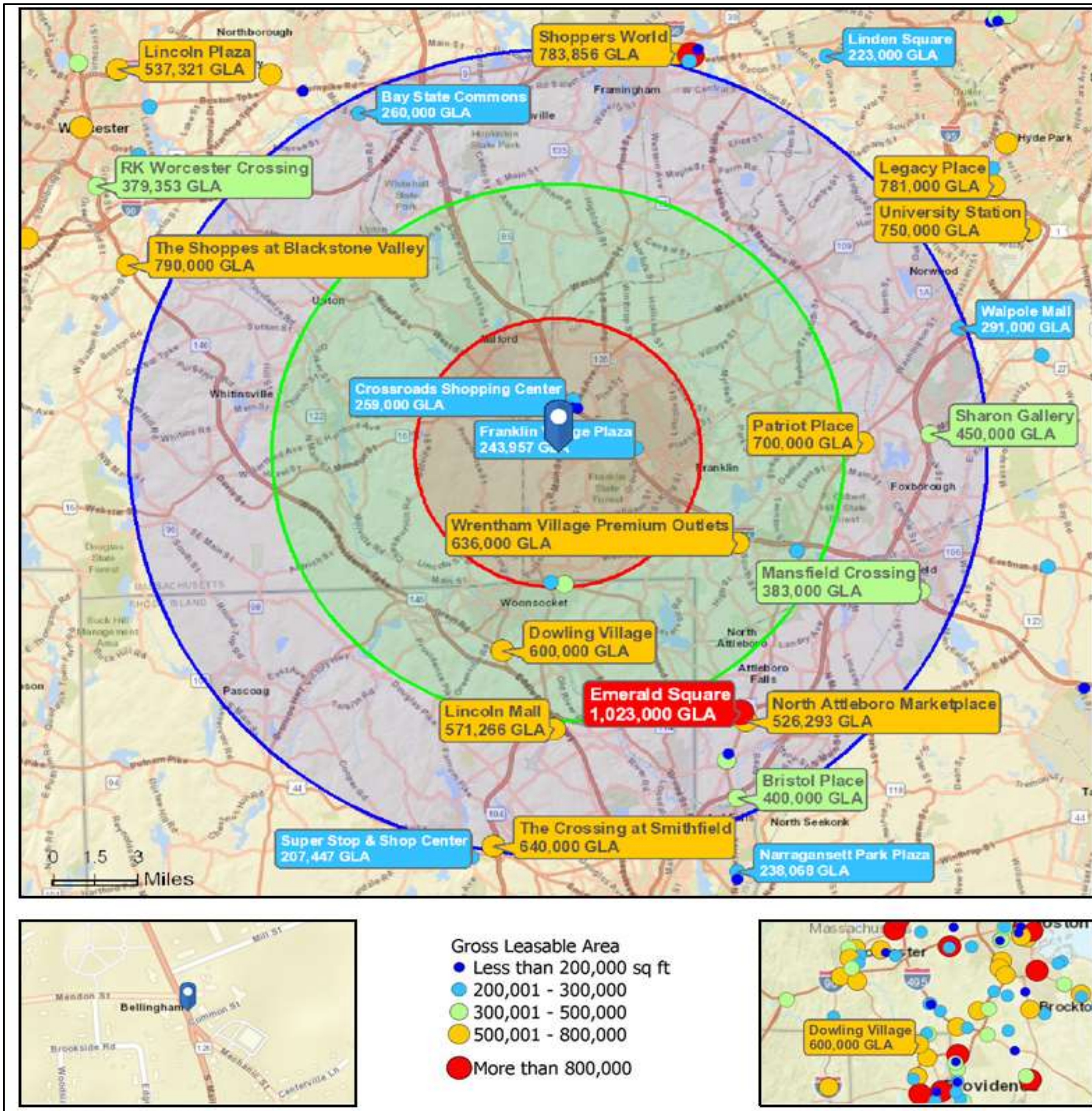


Figure 10 - Five, Ten, & Fifteen Mile Radii from Town Center

This area was determined as the primary retail trade area because if Bellingham can integrate the right mix of retail and restaurants there is a high potential that it could draw customers in from beyond just the local base. Restaurants in particular tend to draw a regional customer base and tend to do better when located in close proximity to one another. They can be marketed collectively as a dining destination and patrons travelling to the area know that they will have several dining options. The ten mile radius is outlined in green. The blue line indicates a 15 mile radius in order to provide a frame of reference. Key conclusions from the analysis are located in the Retail Gap Analysis and include opportunities for smaller-scale retail in home furnishings, clothing, and specialty foods.

Although retail is the largest industry within Bellingham, growth has been limited. Additionally, the surrounding area boasts a large number of retail centers, especially along I-495. Emerald Square, a three story shopping mall with over a million square feet in gross leasable area, has begun to convert parts of its third story into



Source: Directory of Major Malls, Inc.

Figure 11 - Major Shopping Centers (by Gross Leasable Area) within a 15 mile radius of Bellingham

office space, removing 75,000 square feet from its retail footprint. At the time of this writing, Wrentham Village Premium Outlets is selling its Toys 'R' Us property, less than a year after its opening.

Retail Opportunity Gap Analysis

A Retail Gap Analysis was performed to explore if the potential for growth exists. A gap analysis is essentially a supply and demand study. When goods and services must be purchased outside a given trade area, this is referred to as *leakage*, where estimated purchases by area residents exceed estimated sales. A *surplus* occurs where estimated sales in a trade area exceeds expenditures by residents, indicating that customers come from elsewhere to make purchases in the area. Leakages may point to the retail categories that have the greatest potential for growth, whereas surpluses may indicate where certain types of stores are most attractive. It should be noted that the gap analysis does not include competition from online retail sales.

Table 8 - Retail Gap Analysis for Bellingham and Local Trade Areas

Industry Summary	LOCAL TRADE AREA	Firms	PRIMARY TRADE AREA	Firms	SECONDARY TRADE AREA	Firms
	Town Limits		5 mile radius		10 mile radius	
Total Retail Trade and Food & Drink	($136,804,503)	147	($12,772,142)	688	$1,683,676,606	1,925
Total Retail	($129,731,715)	97	($9,487,537)	478	$1,513,128,716	1,368
Total Food & Drink	($7,072,788)	50	($3,284,605)	209	$170,547,890	557
Mixed-Used Oriented Industry Groups						
Motor Vehicle & Parts Dealers	$43,240,875	9	$82,529,740	58	$504,719,150	156
Furniture & Home Furnishings Stores	($630,537)	2	$746,473	26	$80,241,672	67
Electronics & Appliance Stores	$9,480,204	2	($48,989,255)	26	$30,344,441	60
Bldg Materials, Garden Equip. & Supply Stores	($56,794,065)	17	($46,365,930)	52	$38,808,617	146
Food & Beverage Stores	($13,585,626)	18	($28,889,453)	75	$208,987,636	201
Health & Personal Care Stores	($99,976,781)	4	($97,603,601)	39	($64,519,896)	106
Clothing & Clothing Accessories Stores	$5,132,292	5	$48,869,592	41	$122,078,741	144
Sporting Goods, Hobby, Book & Music Stores	($6,700,310)	9	$9,406,931	39	$95,588,499	83
General Merchandise Stores	($17,129,493)	4	($19,994,026)	20	$288,352,697	48
Miscellaneous Store Retailers	($6,269,329)	20	($2,663,208)	70	($26,103,254)	249
Nonstore Retailers	$9,131,866	1	$46,034,294	6	$70,883,220	26
Special Food Services	$888,648	1	$3,424,339	6	$11,049,060	21
Drinking Places - Alcoholic Beverages	$1,646,870	-	$6,402,086	7	$20,265,542	21
Restaurants/Other Eating Places	($9,608,306)	49	($13,111,030)	197	$139,233,288	515

Source: Infogroup USA

As highlighted in the bullets below and in Table 8, Bellingham's experiences leakages (green figures in the table) and surpluses (red) in the following:

- **The town is strongest in health and personal care stores as well as building materials, garden equipment, and supply stores.** Local health store demands are met mostly by the location of CVS and Walgreen's in town. In fact, the high number of "corner pharmacies" saw the shuttering of a Walgreen's recently. Additionally, Bellingham boasts up to 14 supply stores that specialize in anything from lumber to concrete and from doors to mulch. These stores generate a surplus of more than $56 million annually. However, there is potential for specialty supply stores within a ten-mile radius, where a leakage of approximately $38 million is estimated.

- **Bellingham is underserved in clothing stores and nonstore retailers, with clothing and shoe stores having the highest amount of leakage.** Although clothing and shoe stores generate a leakage of $7.4 million within the local market, jewelry stores produce a surplus of $2.2 million. Nonstore retailers establishments engage in the direct sale (i.e., nonstore) of products, such as party plan sales, home delivery sales, and home heating oil dealers. There is a $9.9 million leakage within town for these retailers, and over $70 million within a ten mile radius.

- **Although Bellingham is underserved in motor vehicle & parts dealers, this is mostly within the auto dealership subsector.** Bellingham currently experiences a surplus of auto parts stores, which are more likely to be found within mixed-use developments.

- **The town has the most potential in total retail and food & drink when it comes to the larger Secondary Trade Area.** This would be within the ten mile radius, where certain parts of Bellingham can be driven to within 15 minutes during non-peak or low traffic hours (Hartford Ave from points east and Pulaski Blvd from points south, for example). Given that Bellingham already has many different types of commuters passing by, Bellingham may be able to catch consumers if they are given a reason to stop by.

- **Within the Primary Trade Area, there are fewer opportunities, outside of sporting goods and home furnishings.** The local building supply store market is sufficient to cater to local and regional needs. However, bringing in a sporting goods, hobby, or musical instrument store can cater to a regional market.

- **Within the Local Trade Area, home furnishings, specialty food stores/restaurants, clothing and shoe stores will have a better chance to do well, especially if they cater to the local market.** And even though there is a $4,425,035 surplus in furniture stores within the Local Trade Area, there is a $1,179,328 surplus in home furnishings.

Given the importance of retail to Bellingham's current economy, there may be opportunities for additional retail and services growth. However, because of the Town's geography there are a number of commercial areas nearby that are direct competitors. This will be a limiting factor that will influence how much retail the market in Bellingham will be able to support.

Retail Sales

In addition to performing the gap analysis, sales at existing Bellingham establishments were analyzed using 2012 Economic Census (latest available data). The key finding shows that total retail sales per capita in Bellingham are above average for the region - $25,646 per capita compared to $47,426 for Wrentham and $3,103 for Franklin.

In fact, with the exception of Wrentham, retail sales per capita were also above all other towns. The Wrentham Premium Outlet Mall, which has an MAPC-wide draw, is likely the reason why Wrentham makes the most sales.

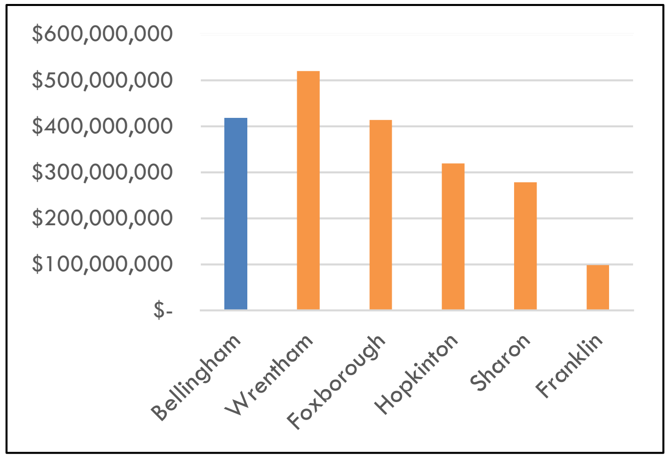


Figure 12 - Total Retail Sales for Region (2012)

Growth Opportunities

Retail

The potential exists for approximately 238,000 square feet of additional retail space in Bellingham. Retail opportunities exist in specialty and convenience retail, and food service establishments, which would appeal both to residents and passersby alike. Specific categories that appear to be underserved include limited service restaurants (cafes, bakeries, casual dining), specialty foods, gastropubs, clothing stores and home furnishings. Restaurants in particular would help drive economic growth within a fifteen minute drive time from the economic corridors, particularly on Pulaski Blvd. Retail and services catering both to neighboring commuters and residents also hold opportunity.

Given its heavily semi-truck trafficked residential roads, and other retail offerings in the region (e.g. Franklin Village Plaza, Wrentham Village Premium Outlets, Dowling Village, Emerald Square, and others), Bellingham is unlikely to attract many more large, national retailers or big-box outlets. Additionally, traditional retailers, without their own brands, or without a focus on e-commerce or a dedication to specialty products that are not carried by online retailers, have been seeing a significant decline nationwide[7]. These uses also typically require large tracts of land and locations proximate to major highways that provide direct regional access, with few options, outside of the site of the former Toys R Us, available. Large grocery stores are also unlikely given the presence of multiple establishments in town. Some potential may exist for smaller national and regional chain retailers under 25,000 square feet in size, particularly in the Hartford Ave area; however, additional residential densities, along with transportation infrastructure improvements, would be required to support these establishments.

Food Service

Food establishments and small retail are essential drivers of a localized industry. High quality retail and dining such as specialty stores and fine dining can draw, and keep, regional visitors. These establishments

[7] *How Retailers Can Avoid Becoming the Next Toys R Us*, Wharton, University of Pennsylvania: http://knowledge.wharton.upenn.edu/article/lessons-retail-bankruptcies/

stand to have the most economic benefit from Bellingham's geographic position. Moreover, the Town has recently increased revenue through the adoption of a local options meals taxes. In 2017, neighboring Franklin received more than $239,000 in meals tax receipts, an increase of 23 percent since the tax went into effect in 2009. Furthermore, despite having adopted the local rooms tax in 2012, Bellingham has not had any notable receipts through this revenue stream due to the lack of local accommodations. This is a missed opportunity.

Of course, the market will largely determine if stores and restaurants will locate in the area. But the town can influence this by changing zoning to establish mixed-use zones, improving infrastructure to promote walkability, establishing collaboration with businesses to run events to bring more people to the smaller walkable villages. The Mill Reuse Overlay District is a leading example of encouraging sustainable mixed-use development through its permitted uses.

Healthcare

As noted previously, healthcare jobs in Bellingham are important to the local economy, and have increased substantially between 2005 and 2015. Of these 200+ jobs, the majority are found in smaller medical practices, many of which are dentists and personal care physicians. Several of these offices are located in and around Route 140, which is a short drive to Milford Regional Medical Center in nearby Milford.

Survey respondents have prioritized institutional development (such as hospitals and educational facilities) for future economic growth and healthcare was specifically identified as among the key sectors targeted for growth, particularly given the aging of the community and recent growth of assisted living facilities in Bellingham. Growing existing practices, and/or attracting more medical and healthcare jobs would not only address local healthcare needs of an aging population, it would add additional commercial development in town, and provide more local jobs to potentially attract more younger households – who increasingly wish to live close to work – that are needed to support Bellingham's tax base and local retail.

Office Uses

Bellingham had a total of 6,214 jobs in 2015 with about 794 people employed in jobs that are office-based. Vacancy rates are consistently low throughout Bellingham for small office users like medical workers, professional services (lawyers, accountants, etc.), or small satellite offices. Additional small office space could likely be supported in each of the existing economic corridors, with the greatest potential near Route 140 and Pulaski Blvd. More and more office workers want to be located in mixed use environments that offer amenities such as retail stores that offer convenience for shopping and running errands and multiple restaurants that offer different options for lunch. Housing nearby to house potential workers would also make for a more convenient commute for many prospective employees. The town should use the findings from the market analysis as a resource to help facilitate the creation of a thriving mixed-use Downtown.

Job growth in office-based industries has grown by about two-thirds between 2005 and 2015, with Administrative & Waste Services seeing an increase of 117 jobs. Additionally, as previously mentioned, many Health Care & Social Assistance businesses in Bellingham are physicians and dentists, which utilize office space within town, and has more than doubled the number of jobs within the ten year period. The sector is already a significant employer in Bellingham, and has the opportunity to further grow.

Professional & Technical Services jobs grew by half and wages in this industry were the highest for the office-based industries, with an average weekly wage of $1,240. This was an increase of 77 percent in the ten year period. Information industry jobs grew from 74 to 134 jobs in the same period. In addition, jobs in this industry provide solid wages - $951 for the average weekly wage. Further, the average wage for these jobs within Bellingham increased 242 percent over the same timeframe. As of 2015, Bellingham had no jobs or businesses within Management of Companies & Enterprises industry and only a few jobs within the Real Estate Industry and Educational Services Industry (outside of the public sector).

Wholesale Trade, Warehousing, & Light Manufacturing

The Industrial sector is currently a mixed bag for Bellingham. Like many other communities, Bellingham has lost some of its manufacturing employment. Furthermore, between 2010 and 2017, the Town of Bellingham has only issued one building permit to an industrial/manufacturing company. That being said, part of Bellingham's need to experience economic growth in the coming years requires diversification of its economy. Bellingham's economy was once focused on traditional manufacturing, which, as it declined statewide, is now overrepresented by retail.

Since 2005, Manufacturing lost 115 positions in Bellingham, the most of any industry, with furniture and related product manufacturers losing 44 jobs. This is in comparison to machinery & fabricated metal product manufacturers, both that saw double-digit growth in jobs within the ten year period. Additionally, machinery manufacturers saw average wages grow from $758 to $1,186 per week within the ten year period, the largest jump in wages within the Manufacturing Industry. Other Industrial sector-related trades, like, Transportation & Warehousing, but most importantly, Wholesale Trade, saw substantial growth in Bellingham. Wholesale trade almost doubled the number of jobs, from 364 to 720, and wages grew 36 percent, from $981 to $1,337. The town has identified several sites - including the former Pearl Street Mill parcel and land along Route 140 as potential for this industry, keeping in mind the traffic constraints.

D. Economic Development Opportunity Areas

The Market Analysis identified the existing economic corridors – Hartford Ave, Route 140, and Pulaski Blvd - as holding potential for additional economic development. All three areas have potential to offer, although land availability, environmental, and access constraints can play a factor in growth. A summary of the opportunities and constraints for different areas are provided in the table below.

Table 9 - Market Opportunities and Constraints by Area

Area	Opportunities	Constraints
Hartford Ave	• Access road along RT 495 from Exit 18. • Opportunity to direct potential customers to existing economic corridors areas nearby (Route 140 and Pulaski Blvd) through improved wayfinding signage along Hartford Ave. • Mixed-use redevelopment of underutilized parcels in Hartford Ave overlay district could include residential with limited ground floor retail, or a small inn with function facilities and/or food service establishment. • Support for the Life Sciences industry is greatest here, especially due to the area's proximity (30 min drive) to the GE Healthcare Life Sciences Corridor.	• Overloaded traffic from Maple Street to Hopedale town line. • Lack of sidewalks from North Main Street to Maple Street.

Area	Opportunities	Constraints
Route 140	• Holds greatest potential for growth given proximity to MBTA Franklin Stop and vacant land located on highly traveled Route 140. • Additional retail and mixed-use development concentrated near the Town Hall, with higher density multifamily residential development on the periphery. • Potential for more neighborhood- and commuter-oriented convenience retail along eastern Route 140. • Additional recreation and mixed-use opportunities could be established along the intersection of 140 and 126, particularly at the intersection of Mendon and Main. • Support for Health Care & Social Assistance is highest along Route 126 between Potter Drive and Heritage Way. • Parcels within the northeastern side of Route 140 are prime for development in Warehousing, Wholesaling & Transportation and have received support from Open House.	• Area is expansive with no clear center. • Rezoning is needed to create a village center. • Improved signage is needed to attract visitors. • Considerable areas along Route 140 are protected open space or have environmental constraints.
Area	**Opportunities**	**Constraints**
Pulaski Blvd	• More restaurants and expansion of cultural offerings to attract year-round visitors. • Redevelopment of underutilized properties with a more intensive mix of uses including ground floor retail with residential and/or office space on upper floors. • Neighborhood-oriented retail to serve residents and commuters. • Utilize pass-through traffic to support local businesses.	• Due to a lack of public sewer, there is a limited opportunity for additional growth (commercial or residential) in areas in South Bellingham near Pulaski Blvd.

IV. Land Use & Development Considerations

A. Zoning

Zoning is tied directly to a town's economic development strategy because it provides the legal framework for what can and cannot be developed on every parcel of land within a community. This includes the uses that are allowed within a development, the massing and siting of structures, as well as design, environmental and open space considerations. It is the mechanism for directing desired growth.

Table 10 - Bellingham Zoning Districts

Base Districts	Acreage	Percent of Town
Residential	644.19	12.8%
Suburban	874.18	17.4%
Business 1	353.91	7.1%
Business 2	114.29	2.3%
Industrial	1,584.92	31.6%
Agriculture	1,418.64	28.3%
Multi	26.18	0.5%

Special Districts
Mill Reuse Overlay District
Hartford Ave Active Use Overlay District
Former Macy School-Wethersfield Overlay District
New England Country Club Overlay District
Floodplain District
Water Resource District
Adult Use District

The Bellingham Zoning Bylaw includes seven base districts and four overlay districts that allow for different types of development. Over 30 percent of all land in Bellingham is zoned for industrial uses, more than the other districts. This analysis focused more on business and overlay districts that would allow for uses identified in the Market Analysis for potential growth.

Business and Industrial Districts

About 41 percent of total land area in Bellingham is zoned for allowable business or commercial uses. Residential and suburban zones do not allow for commercial or industrial development, although some institutional uses (such as municipal, religious, and educational uses) are allowed.

Table 11 – Allowable uses within Bellingham Commercial Zoning Districts

	Business 1	Business 2	Industrial
Business or professional offices	Allowed	Allowed	Allowed
Medical clinic	Allowed	Allowed	Allowed
Bank, financial office	Allowed*	Allowed*	Allowed*
Restaurant and Retail	Allowed*	Allowed*	Allowed*
Wholesaling without storage	Allowed	Allowed	Allowed
Major business complex	Not Allowed	Planning Board Approval	Planning Board Approval
Manufacturing for on-site sales	Allowed	Allowed	Allowed
Other manufacturing, research	Not Allowed	Not Allowed	Allowed
Bulk storage	Not Allowed	Not Allowed	Planning Board Approval
Transportation terminal	Not Allowed	Not Allowed	Allowed
Warehouse	Not Allowed	Not Allowed	Allowed
Electrical generating facility	Not Allowed	Not Allowed	Allowed (w/limits)
Solar Photovoltaic	Not Allowed	Not Allowed	Allowed

*Drive-thrus need Planning Board Approval

Business 1 zoning uses range from offices, restaurants, retail, limited wholesaling, and most institutional uses. Business 1 districts are generally mapped along Route 140, Pulaski Blvd, far northern Hartford Ave, and near Route 126 in South Bellingham. In most cases it has been used to provide neighborhood-oriented retail, service and office development to serve the corridors within Bellingham. A range of residential uses, from single- to multifamily structures is also allowed, and townhouses, assisted elderly housing, and major residential developments are allowed given planning board approval.

The minimum lot usage is 80,000 square feet for two-family dwellings and 40,000 square feet for all other uses. The maximum building height for Business 1 developments is 35 feet.

Business 2 zoning uses allow all the same developments as Business 1, however, major business complexes (both commercial an industrial) are allowable with approval from the Planning Board. Additionally, the maximum building height for Business 2 buildings are 45 feet instead of 35 feet. Minimum front and side yard requirements are higher than Business 1 districts as well. Business 2 districts are located along northern Pulaski Blvd, Hartford Ave, by Lakeview Pond and near the intersection of Routes 140 and 126.

The ***Industrial*** district, located in and around Route 140, with most parcels located near I-495, allows for a varied mix of business and industrial uses that include freestanding facilities with an emphasis on light industrial and/or manufacturing activities, including printing, material testing, assembly of data processing equipment, and/or the conversion of raw materials or parts into finished products and may also contain warehouse, office, and research functions.

Uses allowed in the Business Districts such as retail establishments and professional offices are also allowed here. Residential uses are not allowed except for single-family dwellings for personnel required to reside on the premises for the safe operation of a permitted use and for existing multifamily/boarding dwellings to be reformatted, with approval from the Board of Appeals.

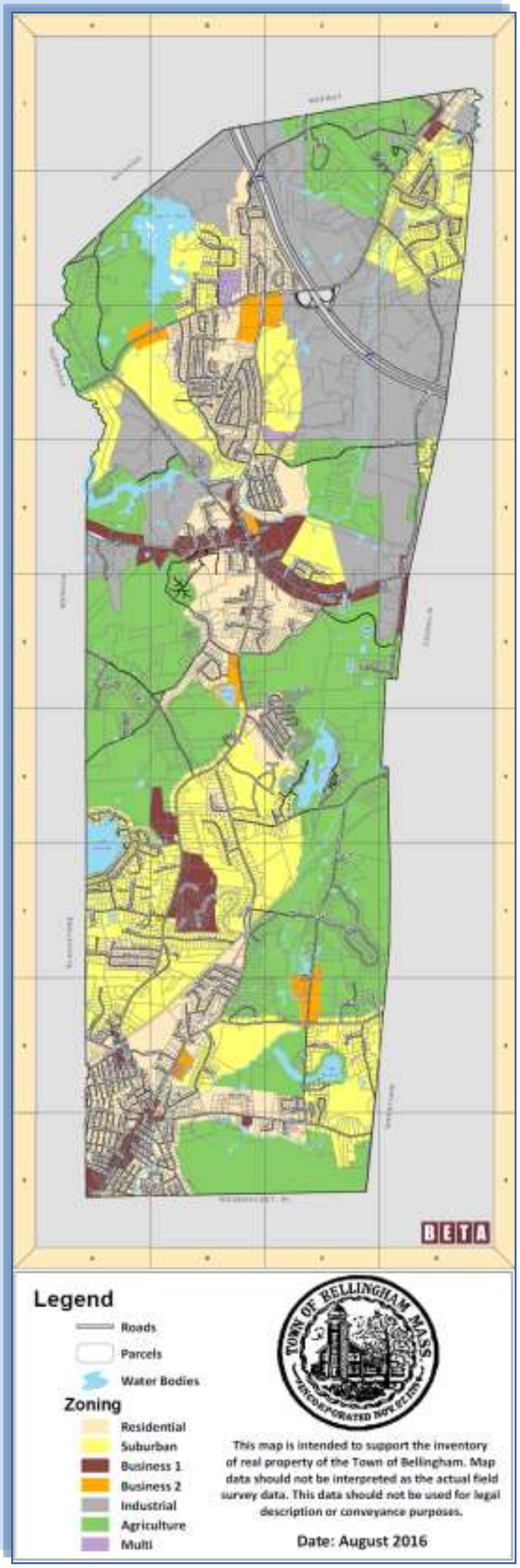


Figure 13 - Zoning Map of Bellingham

The minimum lot usage for industrial is 60,000 square feet and the maximum building height is 45 feet.

Bellingham Overlay Districts

The ***Mill Reuse Overlay District*** (MROD), located on the northeast corner of Bellingham, bordering Medway and Franklin. This district was created to reuse the historic mill buildings to promote housing choices and mixed-use development. Permitted uses include multifamily dwellings, assisted elderly housing, and adult day cares. Medical offices are also allowed through the special permitting process.

Figure 14 - Bellingham Overlay Districts

The ***Hartford Avenue Adaptive Use Overlay District*** (AUOD) provides for and encourages development that promotes a higher density business and cultural center in the Hartford Ave Area. Located just west of I-495 on Hartford Ave, it is served by public parking, is pedestrian accessible, and allows business development that benefits and contributes to the wellbeing of its active waterfront. A range of residential uses, from single-family to multifamily structures is also allowed, but 10,000 square feet of land is required for each unit. Permitted uses for this district include:

- To provide for limited business uses within certain portions of residential districts subject to standards designed to preserve community character.
- To encourage the reuse of residential buildings by providing economic uses for buildings that may no longer function well as single-family residences.
- To implement certain goals of the Master Plan, including encouraging economic development, protecting small town character, and updating zoning to maintain consistency.
- To provide compatible use opportunity in residential areas in which the residential component has been overshadowed or impacted by adjacent nonresidential uses.

Uses allowed within the AUOD include professional/medical offices, artist studios, retail sales for handcraft merchandise, and personal care services.

The ***Wethersfield Overlay District*** (WOD) is located at the site of the former Macy School site and was created to "allow for a context-sensitive design that integrates the existing neighborhood character in to redevelopment. Its permitted uses are for single-family dwellings and a public park.

The ***New England Country Club Overlay District***, (NECC) also called the ***55+ Active Adult Overlay District*** is located in South Bellingham on the Rhode Island border. This district was created to support a residential 55+ adult community that would take into consideration the existing landscape, scenic vistas, passive and active recreational opportunities and conservation of open spaces.

B. Development Opportunities and Constraints

Development Opportunity

Zoning should be examined along the economic corridors, particularly Hartford Ave, to ensure that commercial and industrial uses are not conflicting with residential uses. The town is currently in the process of aligning zoning districts with the infrastructure. Given that some roadways are heavily trafficked by industrial transport, commuters, and residents, the town is reexamining the residential, suburban and business zoning to reduce conflicts between housing and business districts and to promote opportunities for mixed-use or other flexible zoning alternatives. Therefore, areas like Hartford Ave and Depot Street would be of better use if rezoned as industrial instead of residential, as it would reflect the use of the area since freight traffic that connects to local warehouses are connected to it (for example Best Buy's distribution center and Dunkin Donuts). Reciprocally, the current area around Maple Street to Pine Street is zoned for industrial, but should be zoned for residential. It is recommended that these districts exchange zoning uses.

Given historical development patterns in Bellingham, commercial activity has been concentrated in the economic corridors – Hartford Ave, Route 140, and Pulaski Blvd. These areas, along with activity around Route 126, continue to provide the best opportunity for development within town. Although they comprise only a small percent of total land area in Bellingham, they are zoned for commercial and mixed-use development and include enough land potentially available for development or redevelopment. However, some minor adjustments to the boundaries of the current overlay districts and other existing districts could provide additional opportunities to best encourage and achieve desired development types and patterns. For example, in Hartford Ave, several parcels near I-495 that hold promise for mixed-use development are not currently included in the Hartford Ave Overlay District.

Potential Village Center Business Overlay District

The purpose of the Village Business Overlay[8] is to provide for higher density mixed use and multifamily housing in village areas to increase the production of housing affordable to low and moderate income households; to encourage alternative modes of transportation including public transit, bicycling and walking; and to promote additional opportunities for local, small-scale businesses. Essentially, a Village Overlay District encourages a mix of uses to create more pedestrian-friendly, live-work-play environments that are increasingly growing in popularity in urban as well as suburban locations.

With an improving economy, and more mixed-use projects throughout the region receiving financing, its design requirements may be accepted by developers. Therefore, while some elements may require minor amendments within the village overlay zoning text, other factors that may deter investment should be considered including whether the overlays are mapped in the best location, or if inadequate infrastructure is the impediment to development. For example, without sewer service in some areas, increased development is unlikely despite the overlay. However, the historic Town Center of Bellingham could be well suited for such a district.

[8] The Village Center Overlay District Model Bylaw
http://www.mass.gov/envir/smart_growth_toolkit/bylaws/TND_INC-Bylaw.pdf

Developable Land

Natural resources, such as wetlands, surface water, and endangered species habitats may be considered constraints on development. The presence of wetlands or endangered species habitat on a parcel may render that portion of the property unbuildable, or may require mitigation measures. In Bellingham, over half of the town has been developed, with permanently protected open space locate near the Charles River, the Blackstone River, and Lakeview Pond.

Wetlands and Floodplains

One of the most distinguishing characteristics of Bellingham's natural environment is its location between the watersheds of two rivers: the Charles and the Blackstone. Land in the flood zone along the Charles River, which flows through the northern half of Town, is protected by the U.S. Army Corps of Engineers, under the Natural Valley Storage program, and construction in the permanently protected flood zone would not be permitted.

Bellingham contains 1,627 acres of wetlands. Wetlands are important because they provide floodwater retention, groundwater recharge and wildlife habitat. Many of the wetlands resources are located within the Charles/Blackstone Rivers floodplains. The wetlands are considered an absolute constraint on future development because they cannot be included in minimum lot area calculations.

Rare and Endangered Species Habitats

Estimated Habitats for Rare Wildlife are regulated under the Massachusetts Wetlands Protection Act, and any development within the Habitat must be reviewed under the State's Natural Heritage and Endangered Species Program. There are scattered sites within Bellingham, mostly along the Charles River, that would fall under this program.

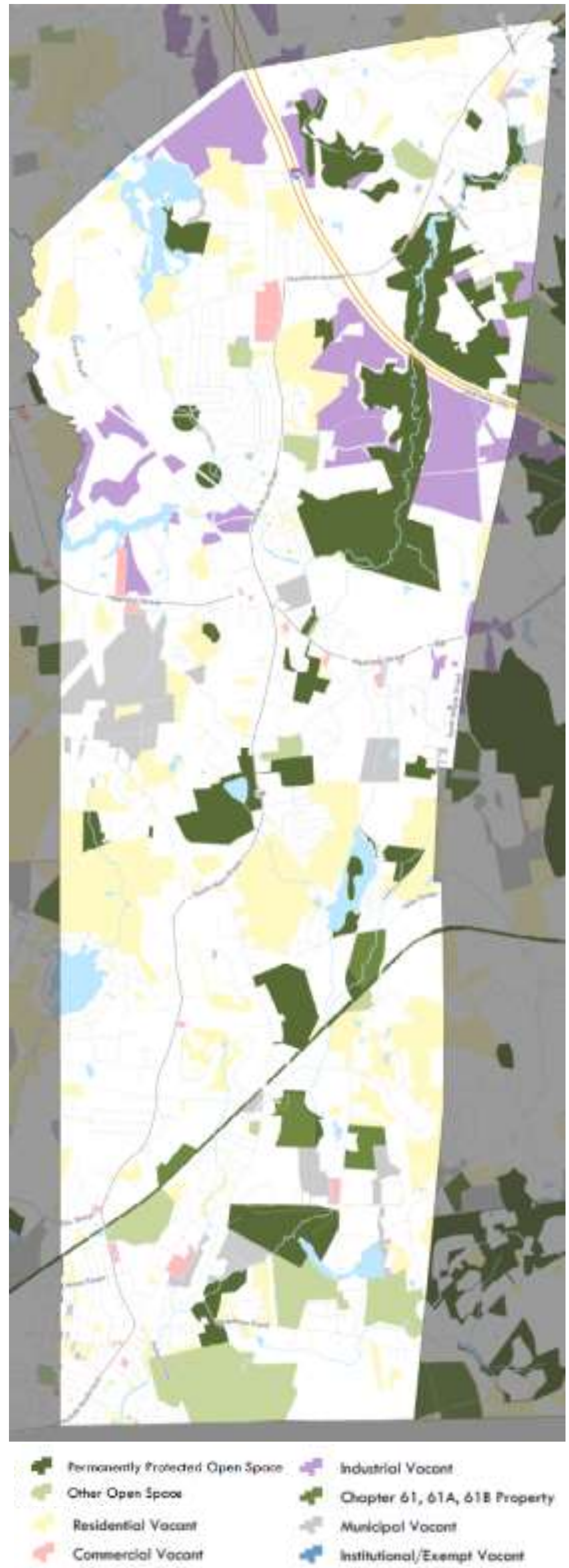


Figure 15 - Development Opportunities & Constraints

Municipal Infrastructure

Water

Bellingham is fortunate to have ample access to water. Water is drawn from both the Blackstone River and the Charles River aquifers. The Town's drinking water supply system includes seventeen groundwater wells, nine pumping stations, three storage tanks, and approximately ninety miles of water main. Thirteen wells, which are controlled by five pumping stations, are located in the South Bellingham. These draw water from the Blackstone River basin underground aquifer. Four wells, each operated by its own pumping station, are located in the northern part of Town and they draw water from the Charles River basin underground aquifer.

Water Resource District

Bellingham's zoning bylaw includes the Water Resource District. This overlay zone includes the Charles River and the tributaries to the Blackstone River. Development, including reconstruction or expansion of existing buildings that will render more than 30 percent of any lot or parcel requires a Special Permit. Some activities, such uses that generate or dispose of hazardous waste, and junkyards are prohibited within the designated Water Resource District. This is not an absolute constraint on development, but if a project requires a Water Resource District special permit, a system for groundwater recharge must be provided that does not degrade groundwater quality.

Wastewater Management

Sewer service is critical for higher density, mixed-use development. The Town of Bellingham has been striving to upgrade its infrastructure, particularly South Bellingham's water and sewer systems. All three corridors generally have access to public sewer, however, areas of Route 126 rely on private septic systems. Additional funds would be needed for Route 126 to connect to the public sewer system in Bellingham.

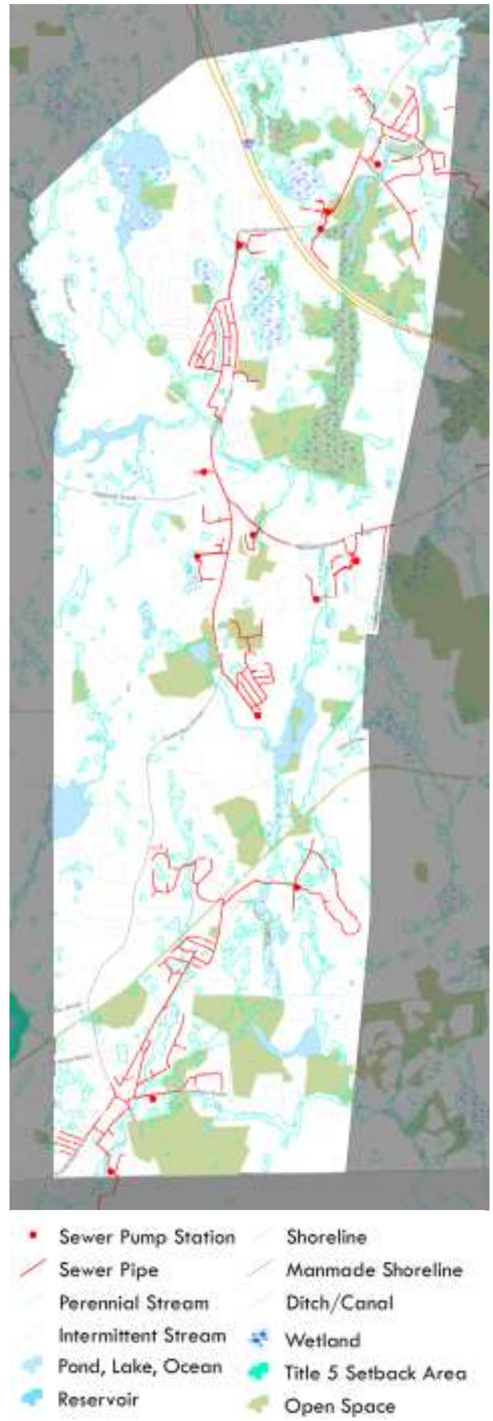


Figure 16 - Sewer Connectivity & Surface Water

Just as Bellingham obtains its water from two different sources, public sewer services are provided by two different entities depending on topography: The Charles River Pollution Control District (CRPCD) in Medway operates a regional sewage treatment plant that serves the northern portion of Bellingham. The Woonsocket Regional Wastewater Commission serves the southern part of Bellingham. The portion of Bellingham north of Blackstone Street, served by the CRPCD, is within the Charles River Basin. The Charles River Pollution Control district, also servicing parts of Franklin, Medway and Millis, allows Bellingham to send 300,000 gallons per day to the treatment plant.

V. Town Open House

A. Public Meeting Overview

Town of Bellingham staff and the Metropolitan Area Planning Council (MAPC) held an Open House public meeting on Thursday, January 18, 2018 to engage the community and receive input for this study. Numerous residents and business owners attended the meeting, where the following goals were presented:

- Present to the community the economic development strategy process thus far.
- Develop an economic development community vision.
- Identify and map strategic areas for redevelopment, both townwide and within the individual economic corridors.
- Prioritization of town economic development issues.

Participants at the event were actively engaged in the process - many staying up to two hours - and remained to discuss the plan with other attendees, board members, and MAPC staff.

A summary of the open house is provided below, however, the big takeaways from the evening were that there was widespread support for concentrating development in the existing economic corridors, including higher density and redevelopment. There was also significant support to addressing traffic concerns in Bellingham, and around additional recreational options and programming (festivals, special events, etc). Additionally, a small group of participants advocated for solar farms in town.

The meeting attracted participants from all areas of Bellingham, with four living outside of town. While many worked in town as well, particularly along Route 140, Boston was the next most common work location, and four reported that they were retired or worked from home.

Figure 17 - Board displaying where Open House participants live (left) & where they work (right)

B. Opportunities & Constraints

Participants identified what they felt were Bellingham's greatest economic opportunities and constraints. Highlights included:

Opportunities

- Office parks with easy highway access that makes it easy for commuters (see Constitution Boulevard in Franklin as an example)

- Hartford Ave.
    - Access road along I-495 from Exit 18 to 16
    - Recreational access to the Charles River
    - Infill redevelopment
    - Add train from Milford to Franklin with a stop on Depot St.
- Route 140:
    - Recreational access to the Charles River
    - Solar farm
    - Infill redevelopment
    - Bike lanes; sidewalks

- Pulaski Blvd:
    - Infill redevelopment
    - Indoor sports complex in Granite City Electrical Building
    - Franklin end is undeveloped mostly
    - Traffic light at Mann St./S. Main St. intersection
    - Sidewalk from Center St. to Arcand Park
    - Sidewalk on Lake St. from Arcand Park to Cross St.
    - Reuse of the old Primavera Building
    - A "We will validate for shoppers" program for commuters.
    - Removing abandoned buildings to leave clear land to make it more appealing for investors.

Constraints

- The need for better access to open/green spaces (sidewalks/bike trails to town parks)
- Hartford Ave:
    - Traffic – there should be simple exits from shopping areas
    - Traffic – everything seems to empty onto Hartford Ave. – if developing in this area, the Town need access roads that don't put them on Hartford.
    - Industrial traffic (dumptrucks, semis) thru residential/scenic roads
    - Traffic is bad on Hartford Ave. between N. Main St. and Maple St.
    - Traffic is bad on Hartford Ave. west bound to Hopedale Line
    - Agree: traffic is way overloaded
    - North soccer fields need help

  - Need better sidewalks from N. Main St. to Maple St./North fields
  - Way too much warehousing and the heavy traffic it brings. Also eye sore.
- Route 140:
  - Dangerous for cyclists. Take life in your hands trying to cycle to commuter rail.
  - Heavy industry highly visible as first impression of would-be residents considering Bellingham home purchase
  - Sidewalks need to be required on all large projects
  - Put utility (power phone) lines underground in town center
  - Traffic
  - Sidewalks on Blackstone St. and North St.
- Pulaski Blvd:
  - Safety
  - Need 2 lanes each way and a divider
  - Serious target for revitalization
  - Proximity to Woonsocket is viewed as a negative
  - Southern section of Pulaski needs sidewalk improvements
  - Traffic
  - Walkability on Route 126 and Pulaski
  - Businesses need more parking

C: Priorities

Participants at the open house reviewed and prioritized a set of draft of fourteen priorities for the town. Top strategies included:

- Focus on alleviating the traffic congestions throughout town, making it a high priority issue amongst fourteen of the participants. Ten participants wanted this issue addressed in the immediate term (within five years).
- Increase pedestrian connectivity and circulation throughout town. Ten participants rated this a medium- to high priority, with three participants wanting this issue to be addressed within the next five years, and two within the next ten years.
- Expanding and protecting public open space, which eight participants found to be a medium to high priority.
- Preservation of townwide historic structures, also with medium to high priority amongst eight participants.
- Providing affordable retail space for small businesses. Four found it to be a medium to high priority, though two participants ranked it lower.
- Tax revenue contributions are neither a high priority nor an immediate concern, with five participants ranking it a low priority.
- Promote the use of green building materials received high priority from three individuals, although two did not find it to be a priority at all.
- Support for scale, density, and design consistent with the surrounding districts also received high priority from five individuals.

Other strategies with support included affordable housing, active ground floor uses, and incentives for utilizing public transportation.

D. Industrial Preference Exercise

Individuals participated in an industrial preference activity for each of the economic opportunity areas as well as for the entire town. For the corridor-specific activity, participants were asked to place a corresponding dot to where they did or didn't want development to occur. Green dots represented support for development, whereas red dots represented opposition.

For the townwide activity, participants could place images depicting twelve different industries on a map. These industries are Agriculture, Manufacturing, Retail, Warehousing & Wholesalers, Information, Finance & Insurance, Professional Offices, Scientific & Technical Services, Education, Health Care & Social Assistance, Arts & Entertainment, and Food Services. They selected images that they felt represented desired businesses that they wished to see in each area. They were also encouraged to place the images they thought should be located townwide.

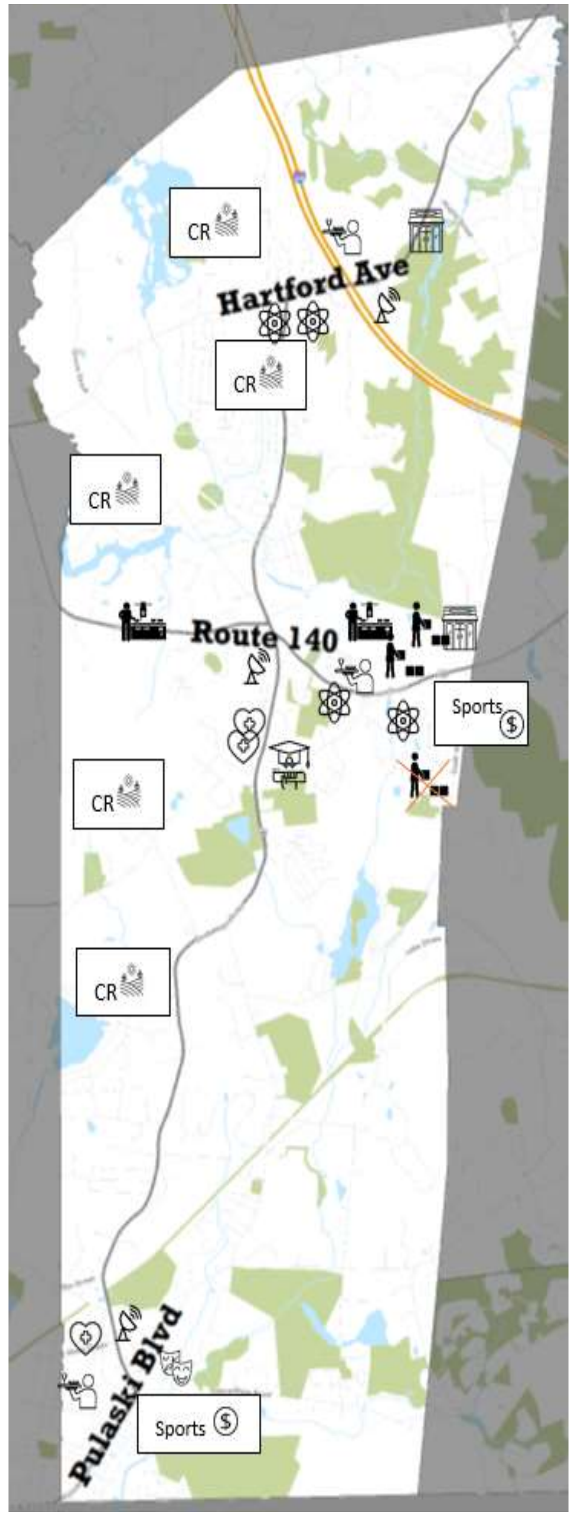


Figure 18 - Industry Preference Results

Hartford Ave

There was support for development around the current retail area and on the southwest corner of the I-495 interchange, namely, Scientific & Technical Services, Food Service, Retail shops, and Information sector businesses.

There was also support for development within the Macy School-Wethersfield Overlay District Support for the retail trade, however, areas near I-495, by the Charles River open space, did not get support for development. Additionally, the area northwest of the interchange did not have support for development unless, as one comment stated, it was environmentally friendly.

Route 140

There was support for various forms of development within Route 140, with 24 green dots being placed on the map, with the northeastern side (by Maple Street) having the most support. Types of industries that were supported included Retail, Manufacturing, Warehousing/Wholesalers, and Food Service. On the southeast side of Route 140/Mechanic Street, there was a more limited support for development, with opposition stated to having manufacturing located near a residential/open space location. That being said, the Scientific & Technical Services industry received support from two participants.

Manufacturing also saw support for east Route 140/Mendon Street area. Furthermore, there was support for development along South Main Street on Route 126, particularly for the Information Industry, Educational Services, and for Health Care. One comment envisioned the area having “a mixed use town center that has a village style center”.

Pulaski Blvd

Pulaski Blvd, with its smaller parcels and generally built-out landscape, had support for development in and around South Main Street. Development was opposed near the Blackstone River. The most prevalent industries selected for the corridor were Health Care, Information, Arts, and Food Service. Sports related businesses and a pharmacy were also included as what could be placed on Pulaski Blvd.

Townwide

In addition to the three corridors, participants could also place what types of industries could be located townwide. The most predominant industries were Health Care & Social Assistance and Educational Services, garnering four votes each. Additionally, Professional Services had three votes followed by Agriculture, Science/Technical Services, Information, and Entertainment, all with two votes each. One vote was in opposition to Warehousing/Wholesaling.

Additional townwide responses included adding more Clean Renewable energy, signified by an “Agriculture” symbol coupled with a “CR”. Adding to that, one suggestion was for the town to have a solar farm for unbuildable lots. However, two comments added that trees should not get cut down at the expense of putting in solar. Sports and recreation were also mentioned as two townwide opportunities.

E. Summary

Input received during the open house was documented by the planning team to inform the goals, strategies and actions in the plan. Generally speaking, although those who participated felt that while Bellingham has many existing assets, particularly related to its location and open spaces, the Town would benefit from improved recreation and additional programming (arts, festivals, etc.) to make it more of tight-knit community. They also expressed interest in expanding healthcare-related businesses and research/education.

The majority of attendees expressed a preference for new investment including retail, offices and residential development to be focused within the existing economic corridors. Additional recreational and cultural amenities were recommended in the Town Center, whereas more extensive development or redevelopment Hartford Ave and Route 140 near Maple Street were suggested given that highway/commuter access and underutilized parcels hold more promise to create new active, mixed-use environments. However, many also expressed interest in developing some sections of Pulaski Blvd, where development potential may exist.

VI. Economic Development Survey

A. Bellingham Economic Development Survey Results

From October 23, 2017 to January 22, 2018 the Town of Bellingham, along with the Metropolitan Area Planning Council, conducted an economic development survey for the town in order to better create a shared economic development vision for Bellingham, by including resident and local business feedback from a total of 20 demographic and socioeconomic questions. A highlight of the some of the survey results are below.

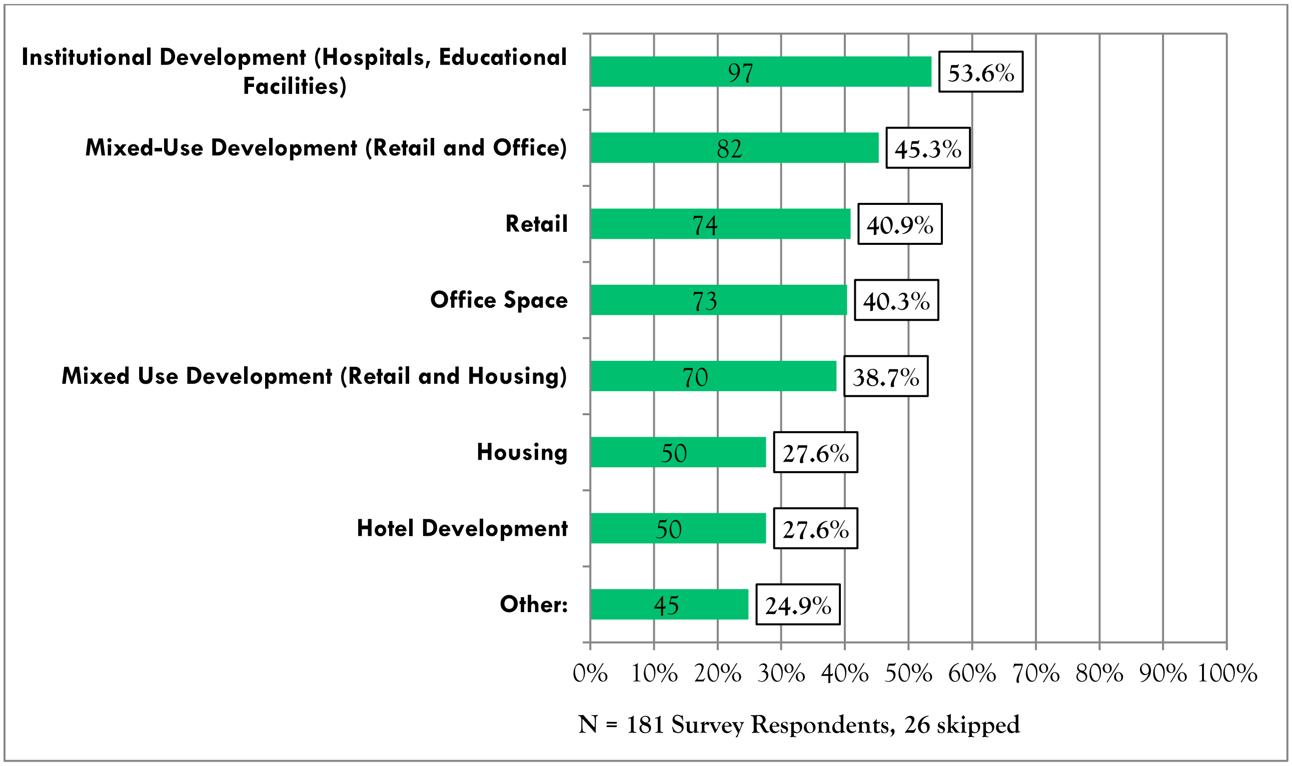


Figure 19 - Question 2: Which of the following types of development in Bellingham's commercial districts would you be supportive of?

Respondents were asked which type of development they would support in Bellingham's commercial districts, with respondents able to choose as many, or as little, of the choices displayed. Twenty-six out of 207 people (14.4 percent) skipped this question. Out of 181 respondents, a majority showed support for institutional development, such as hospitals and/or educational facilities, with hospitals and the health care industry in general garnering support throughout the survey. Development that included first-floor retail and upper-floor office space also did particularly well at 45 percent. Hotel development and housing alone scored lower, with 50 respondents supporting these types of development.

Forty-five respondents selected "Other". Of those, eight respondents distinctly state traffic concerns, with one opining "Anything that won't bring in more tractor trailers or retail traffic" with particular concerns within the Hartford Ave corridor. Others stated the need for renewable energy, in particular wind and solar farms, and STEM (Science, Technology, Engineering, and Mathematics) industries, with biotech and engineering specifically mentioned.

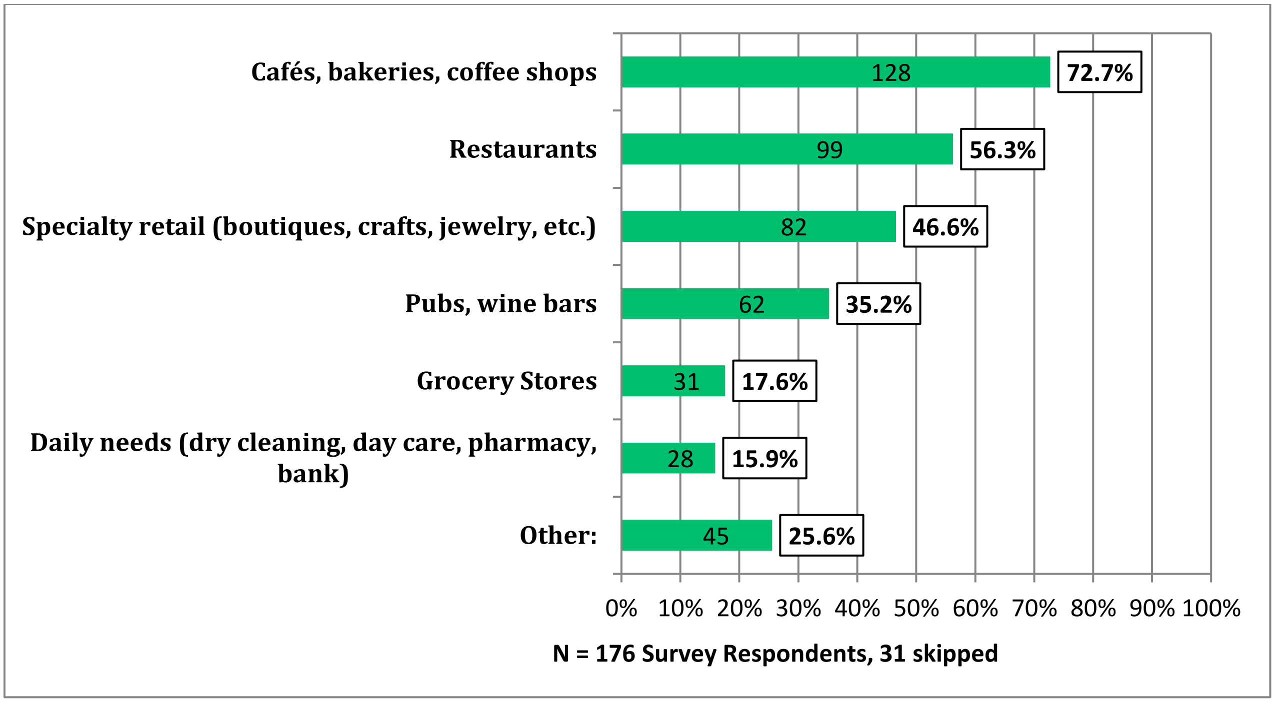


Figure 20 - Question 3: What kind of retail & service businesses would you like to see or see more of in Bellingham?

Similar in structure to Question 2, Question 3 had respondents choose which types of retail and service industry businesses they would like to see in town, with 176 people responding to this question. There was a distinct consensus on which types of retail and service industries respondents wanted, with more than two-thirds (73 percent) preferring coffee shops and bakeries and over half (56.3 percent) preferring restaurants. Contrariwise, grocery stores, dry cleaners, pharmacies, and banks did not gather as much support. The need for restaurant diversification as well as the desire for more small, independent restaurants and shops are mentioned throughout the survey. Many respondents indicated hesitation in opening stores that competed with the current grocers, others stated an oversaturation of the market and the amount of truck traffic it would create.

Forty-five respondents selected “Other”. Seven respondents specifically stated that they wanted none of these types of businesses in town, with three stating that the town had “enough [of these businesses] already”.

Eighty-seven people responded to question four, “Are there any particular industries that you would like to see more of in Bellingham? If so, which ones?” the top ranking industries being Arts, Entertainment and Recreation, with twenty votes. This varied from gyms, bowling, and walkable commercial areas to indoor and outdoor recreation facilities. This was followed with eighteen votes for Accommodation & Food Services, with restaurants getting twelve votes. Retail came in third, with seventeen votes. Specialty shops and sporting goods stores got the most votes within this industry.

Some respondents named multiple industries. Additionally, ten individuals answered “None” with another ten unsure of what type of industry to bring or unspecific. Of the fifteen responses labeled as “Other” three were related to the energy industry (clean energy, power plants) and three were for cannabis sales (although cannabis retail sales are prohibited in Bellingham).

Question seven asked respondents to state what economic development meant to them. The most frequent responses included making the town more business friendly by bringing in more higher-quality businesses and by updating the town landscape. Others stated that economic development could struggle if traffic congestion issues were not addressed. To one participant, economic development meant “meeting the needs of jobs, dining, education, shopping and recreation without adding to the already congested traffic patterns and bringing in businesses that would benefit Bellingham as much as themselves."

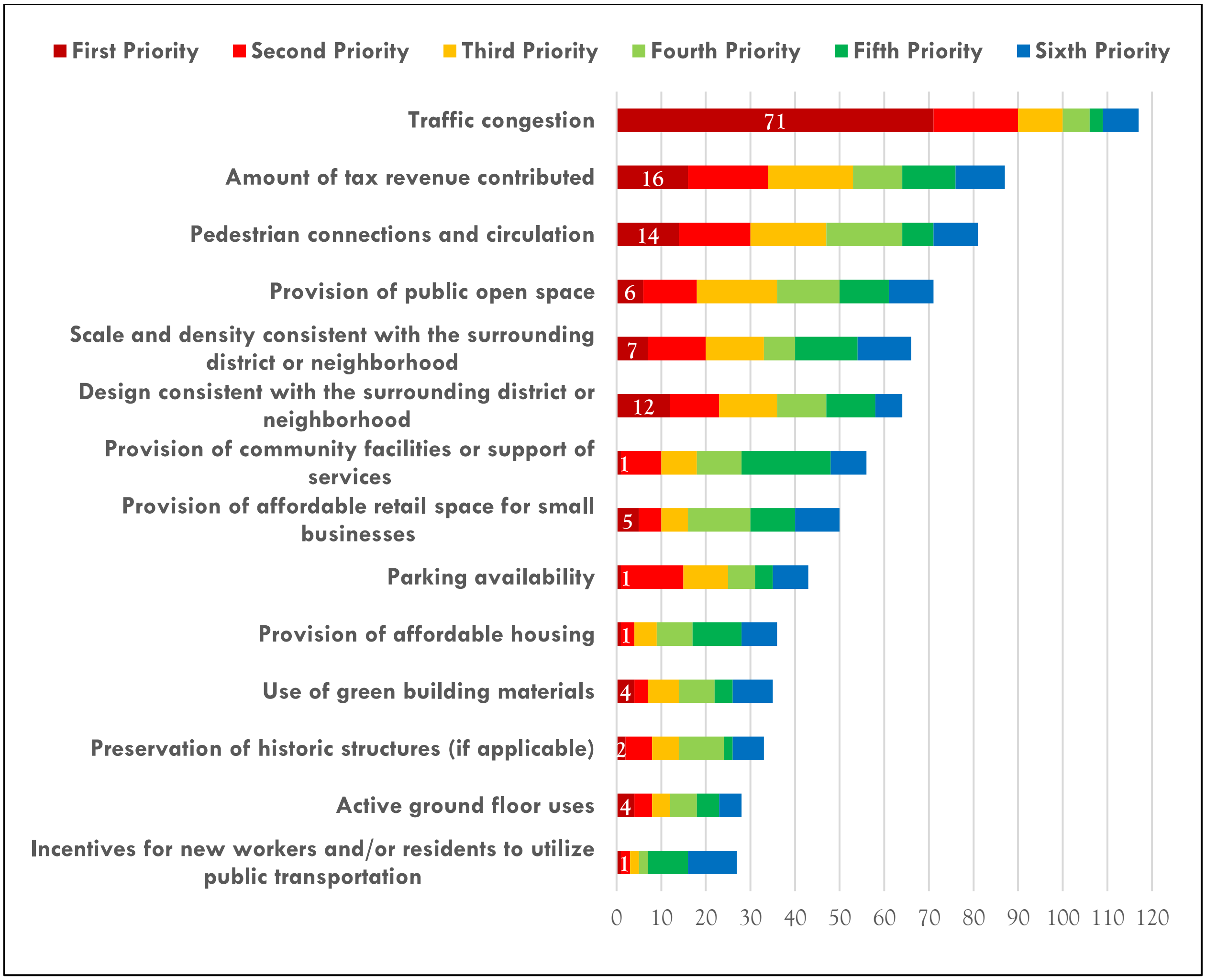


Figure 21 - Question 10: What issues do you think should be addressed through any new development proposals in Bellingham's economic corridors?

Similar to the Open House priority selection question, Question 10 asked each respondent to rank their top six issues that should be addressed within development proposals in the economic corridors. There were a total of 794 responses (ranked from 1 to 6) from the 156 respondents who answered this question. Some respondents chose less than six priorities. The total number of priorities per issue are displayed within each bar. Displayed in white (within or next to the dark red bar) are the number of respondents who considered each issue as the highest priority.

Three-fourths of all respondents considered traffic congestion to be a priority, with 46 percent of respondents stating it is their top priority. With regards to top priorities, this is far and beyond the other issues mentioned. Tax revenue and pedestrian issues also garnered a large number of responses, with 87 and 81 respondents considering them to be priorities, respectively. Most other issues varied in their level of priority, Incentives for new workers/residents to utilize public transportation garnered few responses, with only 27 respondents considering it a priority at all.

VII. Recommendations

Based on results from the market analysis and existing conditions review, along with input from the community, a set of recommended goals, strategies and actions were developed. Recommended goals, strategies and actions focus on marketing Bellingham's existing and potential future amenities to attract more visitors and business activity; concentrating development in the existing economic corridors of Hartford Avenue, Route 140, and Pulaski Boulevard; and growing industry sectors identified in the market study as holding the potential for growth – healthcare, specialized food establishments, mixed-use first-floor retail (particularly in clothing and home furnishings), small office uses, wholesale trade, and warehousing. A summary of the goals and strategies is provided below.

Goal 1: Improve marketing of Bellingham locally and regionally to attract more visitors and investment.

Strategy 1.A: Develop a comprehensive marketing strategy for the Town of Bellingham to attract new residents and businesses.

Strategy 1.B: Lead fiscally positive redevelopment of blighted or underutilized properties along the economic corridors.

Strategy 1.C: Improve wayfinding signage to better guide visitors to Bellingham's existing economic corridors and many amenities.

Strategy 1.D: Create a "How to Do Business in Bellingham" guide modeled after the Massachusetts APA-award winning guide from Dedham

Goal 2: Maximize benefits of Bellingham's geographic location both as a community located along major corridors in proximity to larger cities and as a town with established districts and public transportation access to Boston/Worcester/Providence to attract new economic investment.

Strategy 2.A: Focus on infill development – commercial, multifamily residential, mixed use – in existing village centers where market opportunities are strongest to capture new investment.

Strategy 2.B: Ensure infrastructure can support desired development types, especially regarding new opportunities in freight transportation.

Strategy 2.C: Advocate for improved public transit to and from Bellingham.

Strategy 2.D: Create additional non-auto transportation options and amenities within Bellingham.

Strategy 2.E: Study potential for additional development at vacant land near I-495, including complementary commercial uses, and ways such land will not overly impact surrounding areas.

Strategy 2.F: Identify strategic parcels along Route 140 with potential for commercial development to increase commercial tax revenues.

Strategy 2.G: Seek both technical assistance and grant opportunities to expand the town's public sewer system, especially within South Bellingham, in order to support future growth in housing and commercial development.

Goal 3: Market Bellingham as a destination with more amenities and programming year round.

Strategy 3.A: Provide additional programming in the economic corridor to attract more visitors to Bellingham throughout the year, for example, a farmer's market.

Strategy 3.B: Promote existing cultural, open space and recreation amenities and explore opportunities to create additional amenities to attract more visitors and their spending to Bellingham businesses.

Strategy 3.C: Make Bellingham a center for arts and culture.

Strategy 3.D: Advocate for weekend GATRA service to provide improved access to visitors and shoppers, especially in light of the new MBTA $10 weekend commuter rail pass.

Goal 4: Explore Bellingham's ability to become a health care cluster.

Strategy 4.A: Market Bellingham within the region as a center for health care.

Strategy 4.B: Identify locations for additional assisted care facilities.

Goal 5: Review zoning and make appropriate changes to ensure that desired land uses are allowed and feasible.

Strategy 5.A: Review zoning map and amend as required near I-495.

Strategy 5.B: Align zoning districts with the infrastructure in town. This includes realigning areas in town along Hartford Ave and Depot Street to be industrially zoned. Alternatively Maple Street to Pine Street could change zoning from industrial to residential.

Goal 6: Implement a complete streets program and a five-year prioritization plan.

Strategy 6.A: Apply for Community Transportation Technical Assistance program funding to create a complete streets study.

Strategy 6.B: Safety and operational improvements for pedestrian and bicyclist circulation.

Strategy 6.C: Work with neighboring communities (particularly Medway and Franklin), along with local property owners, to improve trail connectivity.

Strategy 6.D: Traffic calming measures, traffic signal evaluations, and intersection redesign for effective and safe traffic channeling.

Goal 7: Identify additional revenue sources to reduce Bellingham's reliance on its residential tax base.

Strategy 7.A: Explore incentives to promote mixed-used infill development through adaptive reuse or expansion of existing buildings, particularly first floor retail with housing/offices on higher floors.

Strategy 7.B: Adopt a local option rooms tax that is in line with neighboring communities' tax rate.

Goal 8: Build upon current relationships with businesses and developers.

Strategy 8.A: Advance business relationships through outreach, marketing, roundtable discussions, and events.

Strategy 8.B: Work with the business association to start a "Shop Local" program, and creates a downtown business map advertising local business.

Strategy 8.C: Create a business retention program where it visits and strategizes with local businesses.

Strategy 8.D: Create a "How to do Business in Bellingham" guide, with sections dedicated to permitting, business certificate acquisition, licensure, restaurant guidelines, and zoning and design requirements.

Goal 9: Attract industries outlined within market analysis that are also considered a "good fit" for Bellingham.

Strategy 9.A: Apparel, home furnishings, small-scale specialty food stores/restaurants, and gastropubs have the best opportunity to do well in Bellingham, especially if contained within a mixed-use development along Route 140 and Pulaski Blvd.

Strategy 9.B: Smaller scale offices, particularly those within the healthcare, information, and professional fields show potential in Bellingham. This can work well within a retail/office mixed-used development where store frontage is not as necessary compared to retail.

Strategy 9.C: Warehousing and wholesale trade show promise as manufacturing in Bellingham declines. Specific locations within the Route 140 and Route 126 and near I-495 would be considered optimal areas given that they are located outside of the main traffic corridors.

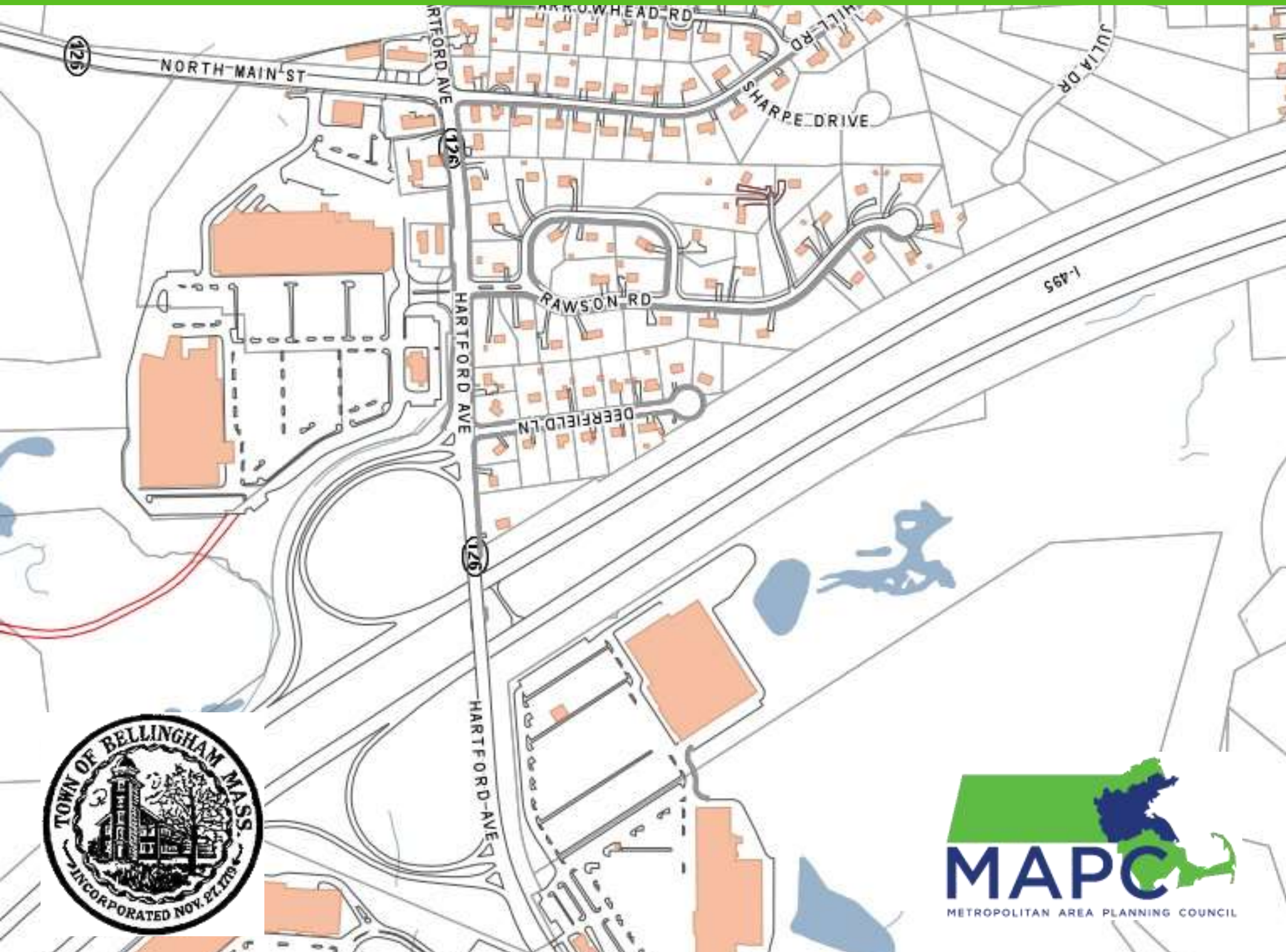
Goal 10: Adopt a Chapter 43D- Expedited Local Permitting program to promoted targeted economic and housing development.

Strategy 10.A: Identify sites for Chapter 43D designation and adopt best practices for streamlined local permitting to guarantee answers on permits within 180 days of receipt of applications.

Strategy 10.B: This program provides a transparent and efficient process for municipal permitting and increases visibility of target development sites, including online marketing and promotion of Bellingham's pro-business regulatory climate.

Strategy 10.C: Potential sites include the Pearl Street Mills and properties located on Route 140, Route 126, and Maple Street.

Appendix A: Detailed Market Analysis



TOWN OF BELLINGHAM MASS. INCORPORATED NOV. 27, 1719

MAPC
METROPOLITAN AREA PLANNING COUNCIL

Retail MarketPlace Profile for Local Trade Area

Bellingham town, MA
Bellingham town, MA (2502104930)
Geography: Town Limits

Prepared by MAPC using ESRI Business Analyst

Summary Demographics	
2017 Population	17,138
2017 Households	6,393
2017 Median Disposable Income	$62,850
2017 Per Capita Income	$38,600

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-	$288,635,469	$425,439,972	-$136,804,503	-19.2	147
Total Retail Trade	44-45	$259,498,268	$389,229,983	-$129,731,715	-20.0	97
Total Food & Drink	722	$29,137,201	$36,209,989	-$7,072,788	-10.8	50

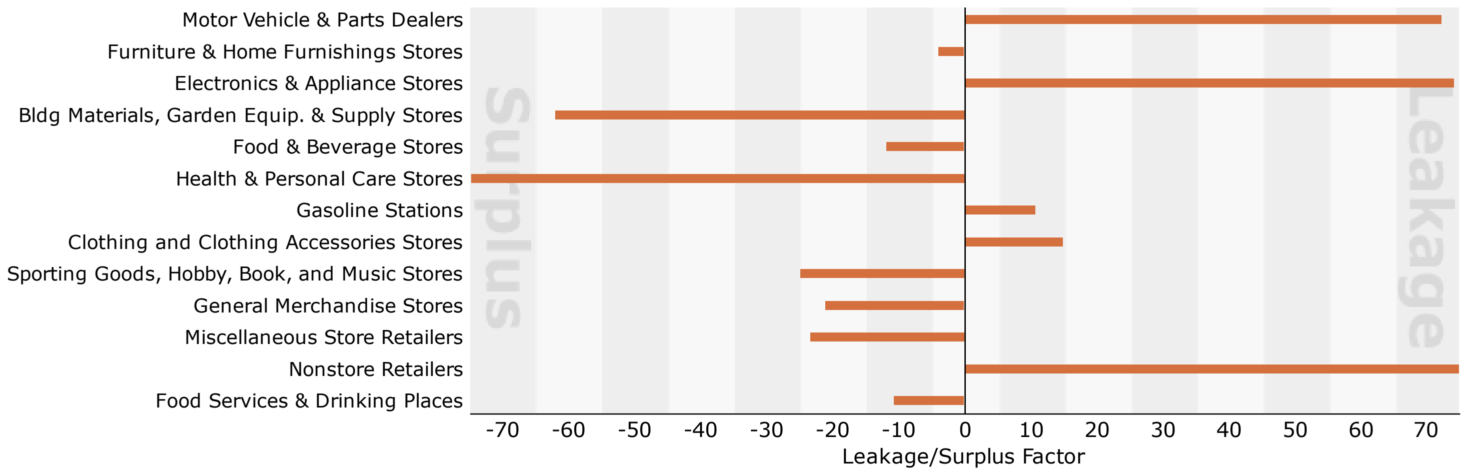
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$51,423,242	$8,182,367	$43,240,875	72.5	9
Automobile Dealers	4411	$42,936,483	$3,863,526	$39,072,957	83.5	2
Other Motor Vehicle Dealers	4412	$4,287,772	$1,117,249	$3,170,523	58.7	3
Auto Parts, Accessories & Tire Stores	4413	$4,198,987	$3,201,592	$997,395	13.5	4
Furniture & Home Furnishings Stores	442	$7,510,938	$8,141,475	-$630,537	-4.0	2
Furniture Stores	4421	$3,965,739	$8,141,475	-$4,175,736	-34.5	2
Home Furnishings Stores	4422	$3,545,199	$0	$3,545,199	100.0	0
Electronics & Appliance Stores	443	$11,116,569	$1,636,365	$9,480,204	74.3	2
Bldg Materials, Garden Equip. & Supply Stores	444	$17,311,160	$74,105,225	-$56,794,065	-62.1	17
Bldg Material & Supplies Dealers	4441	$15,958,246	$70,529,953	-$54,571,707	-63.1	12
Lawn & Garden Equip & Supply Stores	4442	$1,352,914	$3,575,272	-$2,222,358	-45.1	5
Food & Beverage Stores	445	$50,525,267	$64,110,893	-$13,585,626	-11.9	18
Grocery Stores	4451	$42,984,536	$57,971,905	-$14,987,369	-14.8	11
Specialty Food Stores	4452	$1,891,556	$298,727	$1,592,829	72.7	2
Beer, Wine & Liquor Stores	4453	$5,649,175	$5,840,261	-$191,086	-1.7	5
Health & Personal Care Stores	446,4461	$16,631,731	$116,608,512	-$99,976,781	-75.0	4
Gasoline Stations	447,4471	$22,463,495	$18,094,306	$4,369,189	10.8	6
Clothing & Clothing Accessories Stores	448	$19,583,291	$14,450,999	$5,132,292	15.1	5
Clothing Stores	4481	$13,717,379	$8,619,726	$5,097,653	22.8	3
Shoe Stores	4482	$2,303,333	$0	$2,303,333	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	$3,562,579	$5,831,273	-$2,268,694	-24.2	2
Sporting Goods, Hobby, Book & Music Stores	451	$10,102,670	$16,802,980	-$6,700,310	-24.9	9
Sporting Goods/Hobby/Musical Instr Stores	4511	$8,864,266	$11,053,161	-$2,188,895	-11.0	4
Book, Periodical & Music Stores	4512	$1,238,404	$5,749,819	-$4,511,415	-64.6	5
General Merchandise Stores	452	$31,973,853	$49,103,346	-$17,129,493	-21.1	4
Department Stores Excluding Leased Depts.	4521	$22,828,393	$45,739,000	-$22,910,607	-33.4	1
Other General Merchandise Stores	4529	$9,145,460	$3,364,346	$5,781,114	46.2	3
Miscellaneous Store Retailers	453	$10,211,518	$16,480,847	-$6,269,329	-23.5	20
Florists	4531	$928,497	$381,472	$547,025	41.8	2
Office Supplies, Stationery & Gift Stores	4532	$3,422,152	$8,481,458	-$5,059,306	-42.5	6
Used Merchandise Stores	4533	$832,437	$592,288	$240,149	16.9	3
Other Miscellaneous Store Retailers	4539	$5,028,432	$7,025,629	-$1,997,197	-16.6	9
Nonstore Retailers	454	$10,644,534	$1,512,668	$9,131,866	75.1	1
Electronic Shopping & Mail-Order Houses	4541	$8,846,186	$0	$8,846,186	100.0	0
Vending Machine Operators	4542	$134,490	$0	$134,490	100.0	0
Direct Selling Establishments	4543	$1,663,858	$1,512,668	$151,190	4.8	1
Food Services & Drinking Places	722	$29,137,201	$36,209,989	-$7,072,788	-10.8	50
Special Food Services	7223	$1,088,328	$199,680	$888,648	69.0	1
Drinking Places - Alcoholic Beverages	7224	$1,646,870	$0	$1,646,870	100.0	0
Restaurants/Other Eating Places	7225	$26,402,003	$36,010,309	-$9,608,306	-15.4	49

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

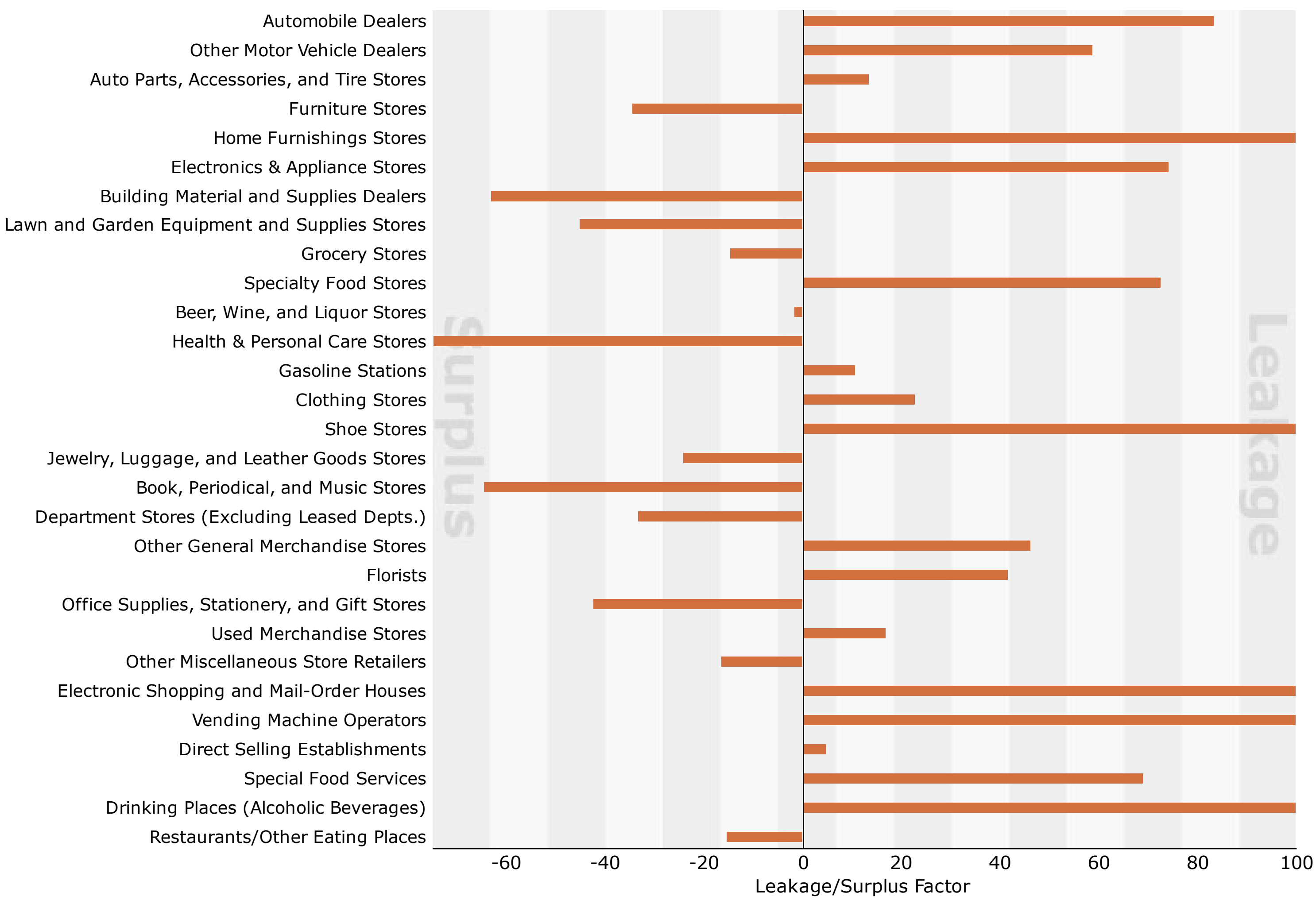
Bellingham town, MA
Bellingham town, MA (2502104930)
Geography: Town Limits

Prepared by MAPC using ESRI Business Analyst

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Retail MarketPlace Profile for Primary Trade Area

Bellingham, Massachusetts, 02019
Ring: 5 mile radius

Prepared by MAPC using ESRI Business Analyst
Latitude: 42.08693
Longitude: -71.47455

Summary Demographics						
2017 Population						81,480
2017 Households						29,429
2017 Median Disposable Income						$64,476
2017 Per Capita Income						$41,586

Industry Summary	**NAICS**	**Demand** (Retail Potential)	**Supply** (Retail Sales)	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink	44-	$1,506,788,377	$1,519,560,519	-$12,772,142	-0.4	688
Total Retail Trade	44-45	$1,354,022,912	$1,363,510,449	-$9,487,537	-0.3	478
Total Food & Drink	722	$152,765,465	$156,050,070	-$3,284,605	-1.1	209

Industry Group	**NAICS**	**Demand** (Retail Potential)	**Supply** (Retail Sales)	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers	441	$273,850,705	$191,320,965	$82,529,740	17.7	58
Automobile Dealers	4411	$229,112,923	$158,421,923	$70,691,000	18.2	22
Other Motor Vehicle Dealers	4412	$23,219,168	$8,541,784	$14,677,384	46.2	9
Auto Parts, Accessories & Tire Stores	4413	$21,518,614	$24,357,258	-$2,838,644	-6.2	26
Furniture & Home Furnishings Stores	442	$40,092,290	$39,345,817	$746,473	0.9	26
Furniture Stores	4421	$21,230,793	$15,812,158	$5,418,635	14.6	8
Home Furnishings Stores	4422	$18,861,497	$23,533,660	-$4,672,163	-11.0	18
Electronics & Appliance Stores	443	$57,610,750	$106,600,005	-$48,989,255	-29.8	26
Bldg Materials, Garden Equip. & Supply Stores	444	$90,359,386	$136,725,316	-$46,365,930	-20.4	52
Bldg Material & Supplies Dealers	4441	$83,393,321	$128,379,605	-$44,986,284	-21.2	38
Lawn & Garden Equip & Supply Stores	4442	$6,966,065	$8,345,711	-$1,379,646	-9.0	14
Food & Beverage Stores	445	$260,792,954	$289,682,407	-$28,889,453	-5.2	75
Grocery Stores	4451	$222,393,226	$266,117,864	-$43,724,638	-9.0	42
Specialty Food Stores	4452	$9,810,857	$3,813,264	$5,997,593	44.0	12
Beer, Wine & Liquor Stores	4453	$28,588,871	$19,751,280	$8,837,591	18.3	20
Health & Personal Care Stores	446,4461	$85,981,000	$183,584,601	-$97,603,601	-36.2	39
Gasoline Stations	447,4471	$117,251,678	$69,820,772	$47,430,906	25.4	26
Clothing & Clothing Accessories Stores	448	$100,778,609	$51,909,017	$48,869,592	32.0	41
Clothing Stores	4481	$70,957,025	$28,085,780	$42,871,245	43.3	24
Shoe Stores	4482	$12,241,504	$6,256,509	$5,984,995	32.4	6
Jewelry, Luggage & Leather Goods Stores	4483	$17,580,080	$17,566,728	$13,352	0.0	12
Sporting Goods, Hobby, Book & Music Stores	451	$53,298,874	$43,891,943	$9,406,931	9.7	39
Sporting Goods/Hobby/Musical Instr Stores	4511	$46,885,949	$36,217,631	$10,668,318	12.8	27
Book, Periodical & Music Stores	4512	$6,412,925	$7,674,312	-$1,261,387	-9.0	12
General Merchandise Stores	452	$166,772,210	$186,766,236	-$19,994,026	-5.7	20
Department Stores Excluding Leased Depts.	4521	$119,155,833	$113,738,642	$5,417,191	2.3	6
Other General Merchandise Stores	4529	$47,616,377	$73,027,593	-$25,411,216	-21.1	13
Miscellaneous Store Retailers	453	$53,363,022	$56,026,230	-$2,663,208	-2.4	70
Florists	4531	$4,559,742	$2,404,783	$2,154,959	30.9	8
Office Supplies, Stationery & Gift Stores	4532	$17,887,182	$21,254,642	-$3,367,460	-8.6	20
Used Merchandise Stores	4533	$4,262,669	$4,832,391	-$569,722	-6.3	10
Other Miscellaneous Store Retailers	4539	$26,653,430	$27,534,414	-$880,984	-1.6	32
Nonstore Retailers	454	$53,871,435	$7,837,141	$46,034,294	74.6	6
Electronic Shopping & Mail-Order Houses	4541	$46,228,294	$0	$46,228,294	100.0	0
Vending Machine Operators	4542	$693,241	$0	$693,241	100.0	0
Direct Selling Establishments	4543	$6,949,900	$7,837,141	-$887,241	-6.0	6
Food Services & Drinking Places	722	$152,765,465	$156,050,070	-$3,284,605	-1.1	209
Special Food Services	7223	$5,719,841	$2,295,502	$3,424,339	42.7	6
Drinking Places - Alcoholic Beverages	7224	$8,186,808	$1,784,722	$6,402,086	64.2	7
Restaurants/Other Eating Places	7225	$138,858,816	$151,969,846	-$13,111,030	-4.5	197

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

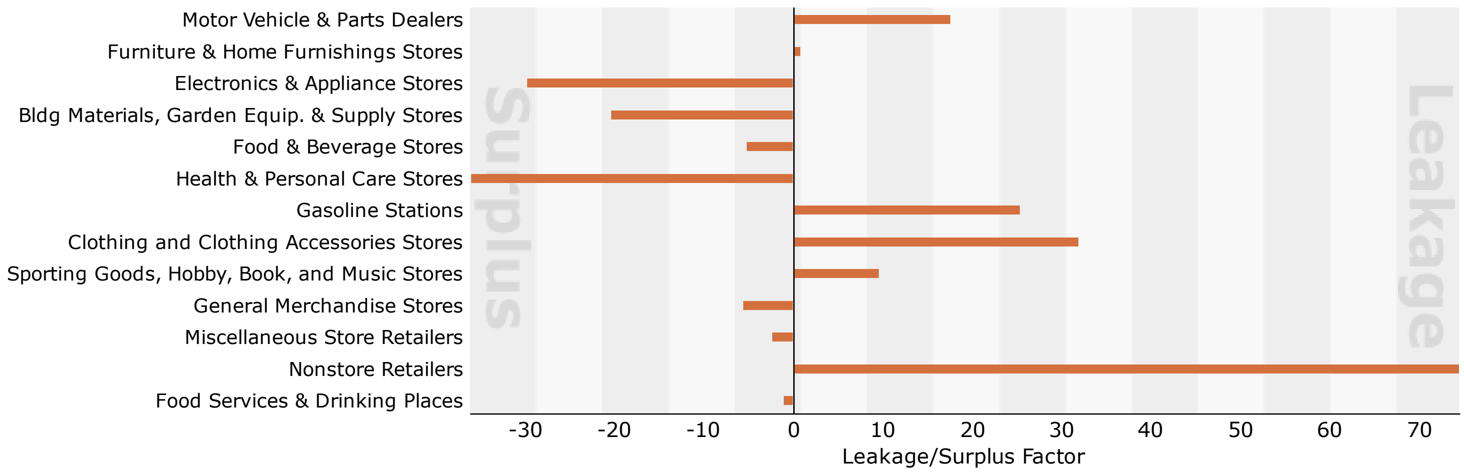
Source: Esri and Infogroup. Retail MarketPlace 2017.

Retail MarketPlace Profile for Primary Trade Area

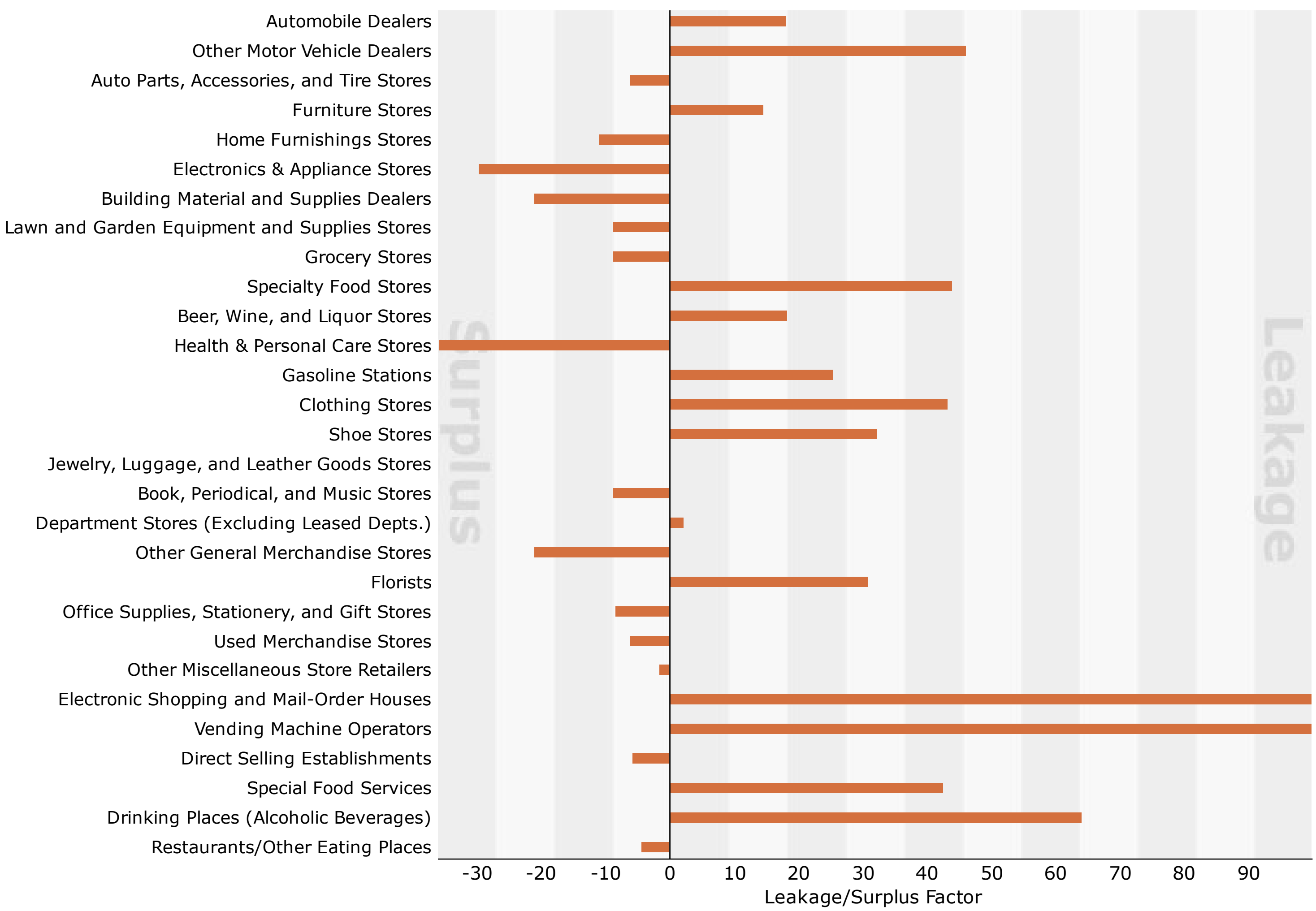
Bellingham, Massachusetts, 02019
Ring: 5 mile radius

Prepared by MAPC using ESRI Business Analyst
Latitude: 42.08693
Longitude: -71.47455

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Retail MarketPlace Profile for Secondary Trade Area

Bellingham, Massachusetts, 02019
Ring: 10 mile radius

Prepared by MAPC using ESRI Business Analyst
Latitude: 42.08693
Longitude: -71.47455

Summary Demographics						
2017 Population						293,324
2017 Households						108,216
2017 Median Disposable Income						$60,456
2017 Per Capita Income						$40,937

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-	$5,310,543,888	$3,626,867,282	$1,683,676,606	18.8	1,925
Total Retail Trade	44-45	$4,774,105,951	$3,260,977,235	$1,513,128,716	18.8	1,368
Total Food & Drink	722	$536,437,937	$365,890,047	$170,547,890	18.9	557

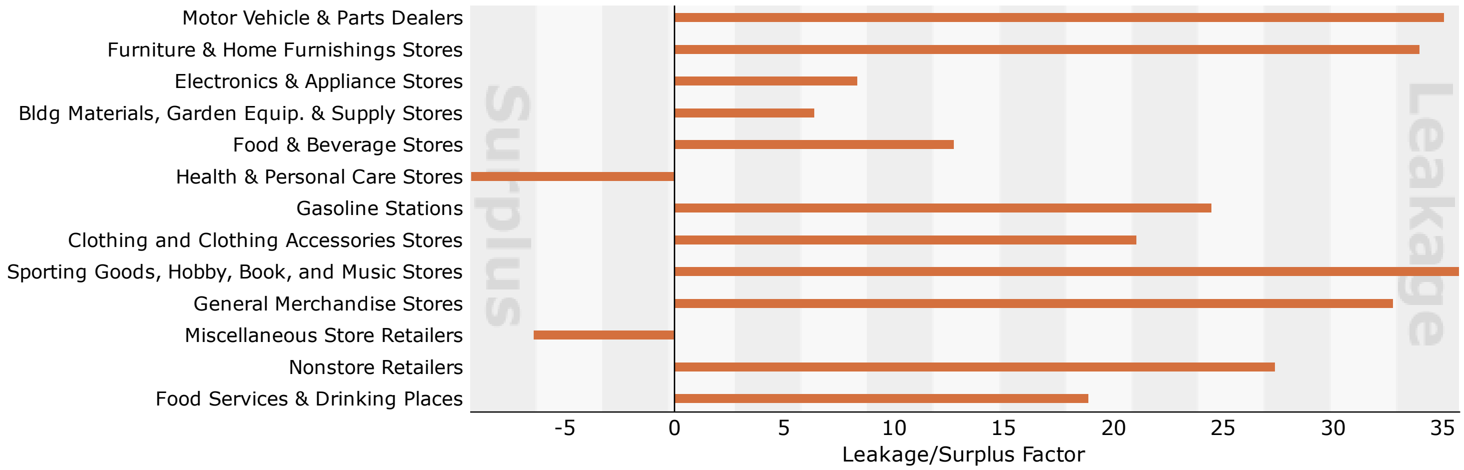
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$971,538,526	$466,819,376	$504,719,150	35.1	156
Automobile Dealers	4411	$814,173,881	$361,403,771	$452,770,110	38.5	71
Other Motor Vehicle Dealers	4412	$81,423,934	$50,772,392	$30,651,542	23.2	22
Auto Parts, Accessories & Tire Stores	4413	$75,940,710	$54,643,212	$21,297,498	16.3	63
Furniture & Home Furnishings Stores	442	$158,089,009	$77,847,337	$80,241,672	34.0	67
Furniture Stores	4421	$77,892,121	$32,108,678	$45,783,443	41.6	19
Home Furnishings Stores	4422	$80,196,888	$45,738,659	$34,458,229	27.4	47
Electronics & Appliance Stores	443	$195,764,369	$165,419,928	$30,344,441	8.4	60
Bldg Materials, Garden Equip. & Supply Stores	444	$322,846,544	$284,037,927	$38,808,617	6.4	146
Bldg Material & Supplies Dealers	4441	$297,709,094	$255,202,552	$42,506,542	7.7	105
Lawn & Garden Equip & Supply Stores	4442	$25,137,449	$28,835,376	-$3,697,927	-6.9	41
Food & Beverage Stores	445	$923,252,194	$714,264,558	$208,987,636	12.8	201
Grocery Stores	4451	$783,964,228	$614,790,208	$169,174,020	12.1	98
Specialty Food Stores	4452	$38,112,829	$20,301,026	$17,811,803	30.5	35
Beer, Wine & Liquor Stores	4453	$101,175,137	$79,173,324	$22,001,813	12.2	68
Health & Personal Care Stores	446,4461	$315,312,082	$379,831,978	-$64,519,896	-9.3	106
Gasoline Stations	447,4471	$416,329,364	$252,582,172	$163,747,192	24.5	80
Clothing & Clothing Accessories Stores	448	$350,377,873	$228,299,132	$122,078,741	21.1	144
Clothing Stores	4481	$248,370,489	$123,834,605	$124,535,884	33.5	83
Shoe Stores	4482	$42,260,772	$48,753,523	-$6,492,751	-7.1	26
Jewelry, Luggage & Leather Goods Stores	4483	$59,746,611	$55,711,005	$4,035,606	3.5	35
Sporting Goods, Hobby, Book & Music Stores	451	$181,119,177	$85,530,678	$95,588,499	35.8	83
Sporting Goods/Hobby/Musical Instr Stores	4511	$158,692,155	$75,783,956	$82,908,199	35.4	67
Book, Periodical & Music Stores	4512	$22,427,022	$9,746,721	$12,680,301	39.4	16
General Merchandise Stores	452	$584,010,858	$295,658,161	$288,352,697	32.8	48
Department Stores Excluding Leased Depts.	4521	$422,310,157	$206,443,884	$215,866,273	34.3	15
Other General Merchandise Stores	4529	$161,700,701	$89,214,277	$72,486,424	28.9	33
Miscellaneous Store Retailers	453	$190,638,108	$216,741,362	-$26,103,254	-6.4	249
Florists	4531	$15,160,555	$6,012,145	$9,148,410	43.2	28
Office Supplies, Stationery & Gift Stores	4532	$59,628,646	$30,246,454	$29,382,192	32.7	49
Used Merchandise Stores	4533	$18,495,376	$10,278,700	$8,216,676	28.6	44
Other Miscellaneous Store Retailers	4539	$97,353,532	$170,204,063	-$72,850,531	-27.2	129
Nonstore Retailers	454	$164,827,848	$93,944,628	$70,883,220	27.4	26
Electronic Shopping & Mail-Order Houses	4541	$139,030,707	$54,397,060	$84,633,647	43.8	4
Vending Machine Operators	4542	$2,278,357	$1,560,046	$718,311	18.7	3
Direct Selling Establishments	4543	$23,518,784	$37,987,522	-$14,468,738	-23.5	20
Food Services & Drinking Places	722	$536,437,937	$365,890,047	$170,547,890	18.9	557
Special Food Services	7223	$18,768,224	$7,719,164	$11,049,060	41.7	21
Drinking Places - Alcoholic Beverages	7224	$26,745,426	$6,479,884	$20,265,542	61.0	21
Restaurants/Other Eating Places	7225	$490,924,287	$351,690,999	$139,233,288	16.5	515

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

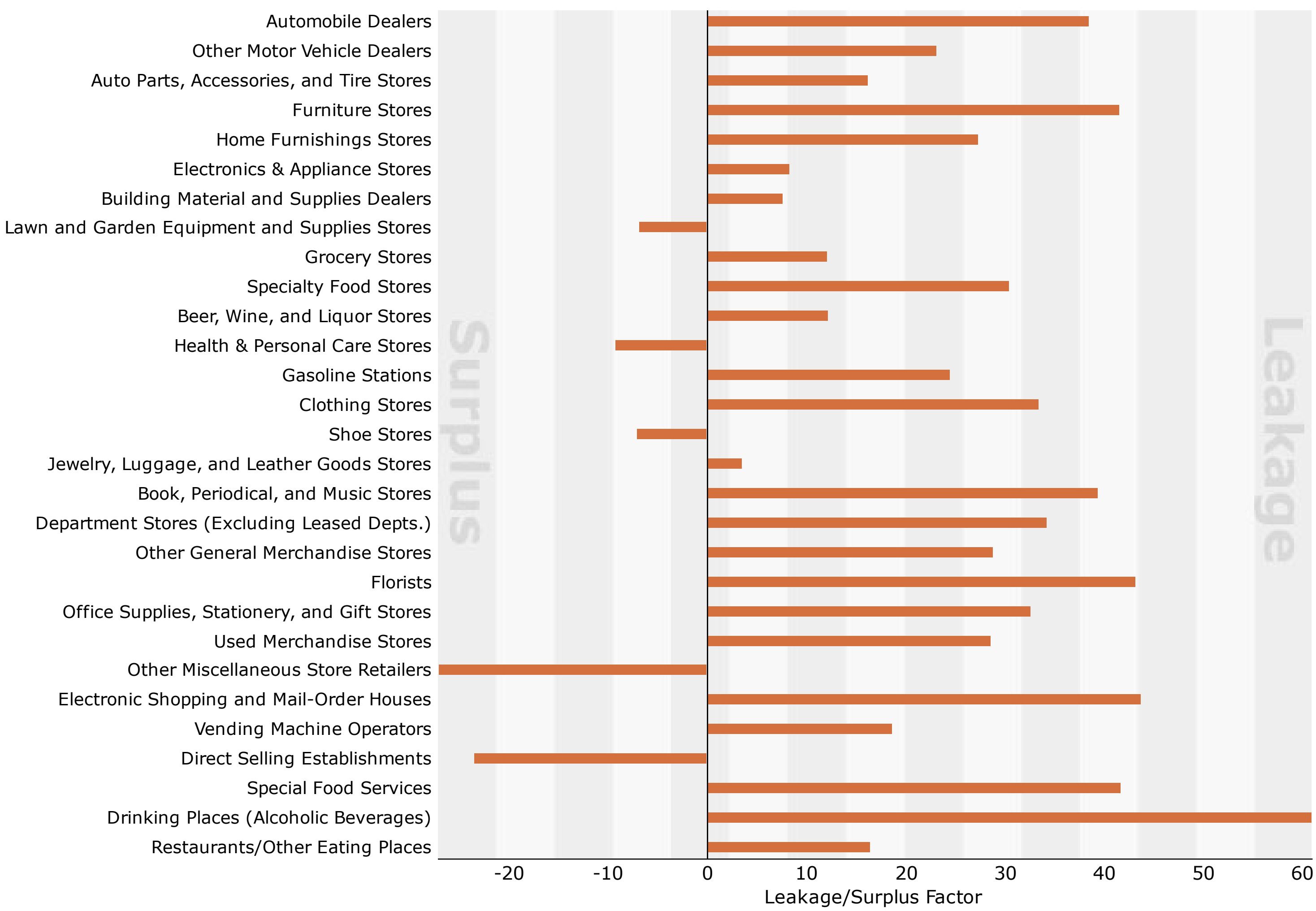
Bellingham, Massachusetts, 02019
Ring: 10 mile radius

Prepared by MAPC using ESRI Business Analyst
Latitude: 42.08693
Longitude: -71.47455

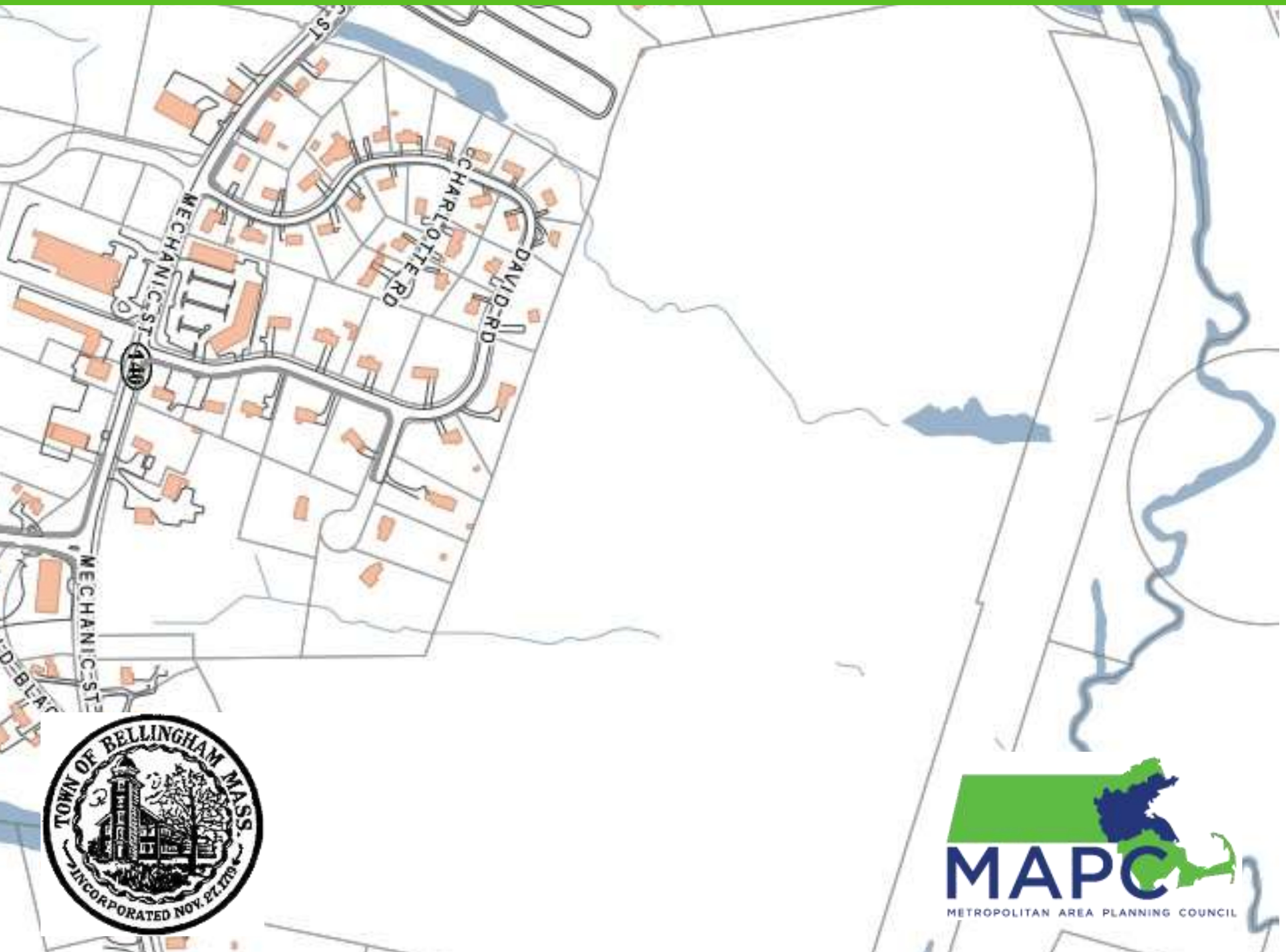
Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Appendix B: Survey & Open House Results



TOWN OF BELLINGHAM MASS. INCORPORATED NOV. 27, 1719

MAPC
METROPOLITAN AREA PLANNING COUNCIL

Bellingham Economic Development Survey Results

From October 23, 2017 to January 22, 2018 the Town of Bellingham, along with the Metropolitan Area Planning Council, conducted an economic development survey for the town. The survey in order to better create a shared economic development vision for Bellingham, by including resident and local business feedback from a total of 20 demographic and socioeconomic questions.

Question 1 - If you were writing a newspaper headline for your ideal Bellingham in 10 years what would it say?

"Bellingham Schools among Top 25% in the State!"

"Family Community with a Vibrant Downtown"

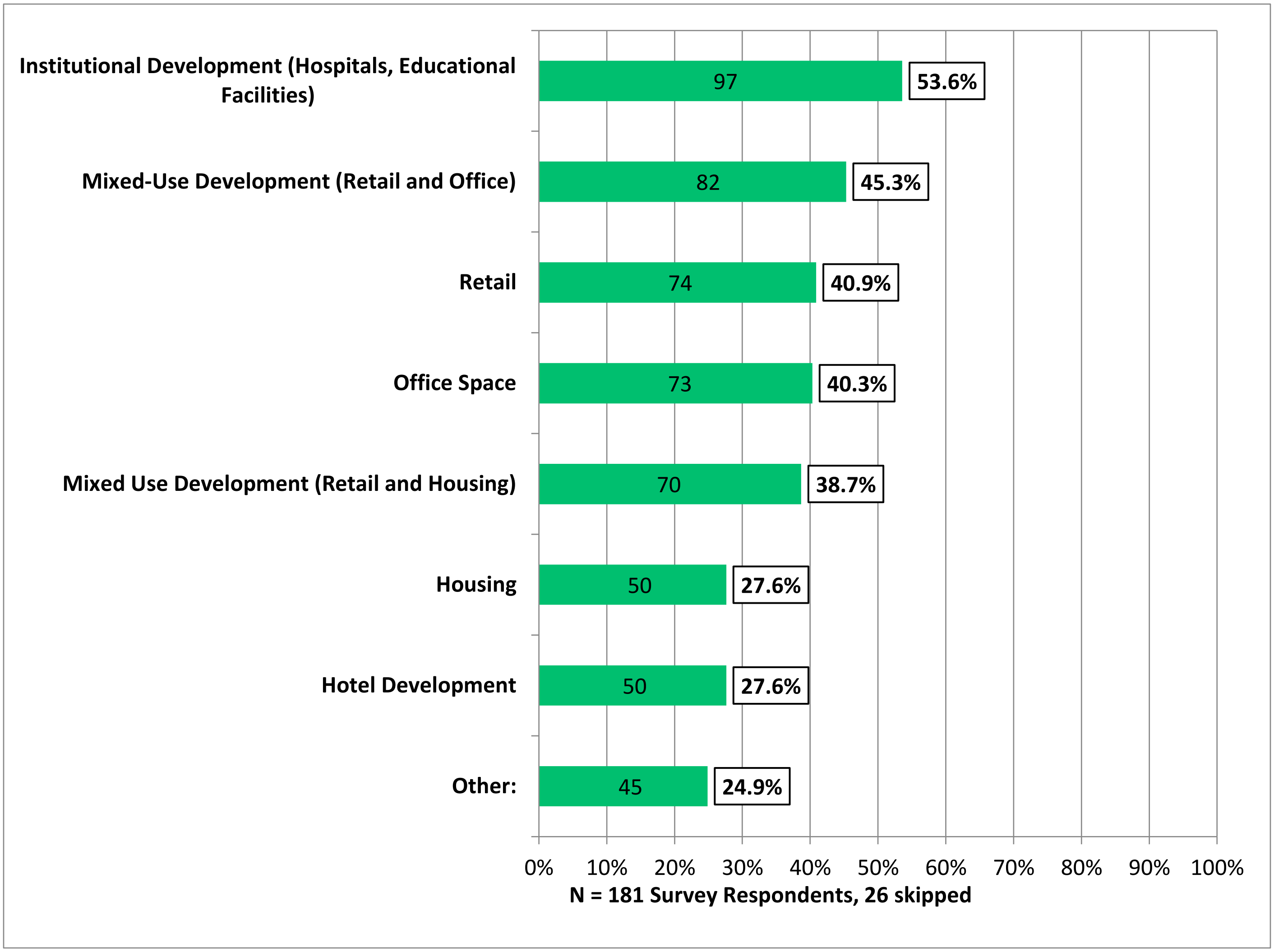
"Bellingham Traffic is reduced by 30 percent"

"Bellingham: A Thriving Economy that Maintains its Small Time Character!"

Aggregate of Most Frequently Used Words-

Rank	Word	Frequency		Rank	Word	Frequency		Rank	Word	Frequency
1	Bellingham	84		18	finally	9		35	people	4
2	town	56		19	business	8		36	rated	4
3	schools	26		20	low	8		37	home	4
4	great	22		21	years	7		38	need	4
5	live	21		22	roads	7		39	city	4
6	place	20		23	raise	7		40	rank	4
7	small	18		24	feel	7		41	one	4
8	community	17		25	new	7		42	tax	4
9	family	14		26	system	6		43	developments	3
10	best	14		27	area	6		44	recreation	3
11	top	14		28	big	6		45	businesses	3
12	traffic	12		29	development	5		46	education	3
13	state	11		30	public	5		47	residents	3
14	Massachusetts	10		31	beautiful	4		48	desirable	3
15	school	10		32	problems	4		49	thriving	3
16	taxes	10		33	better	4		50	expanded	3
17	friendly	9		34	appeal	4				

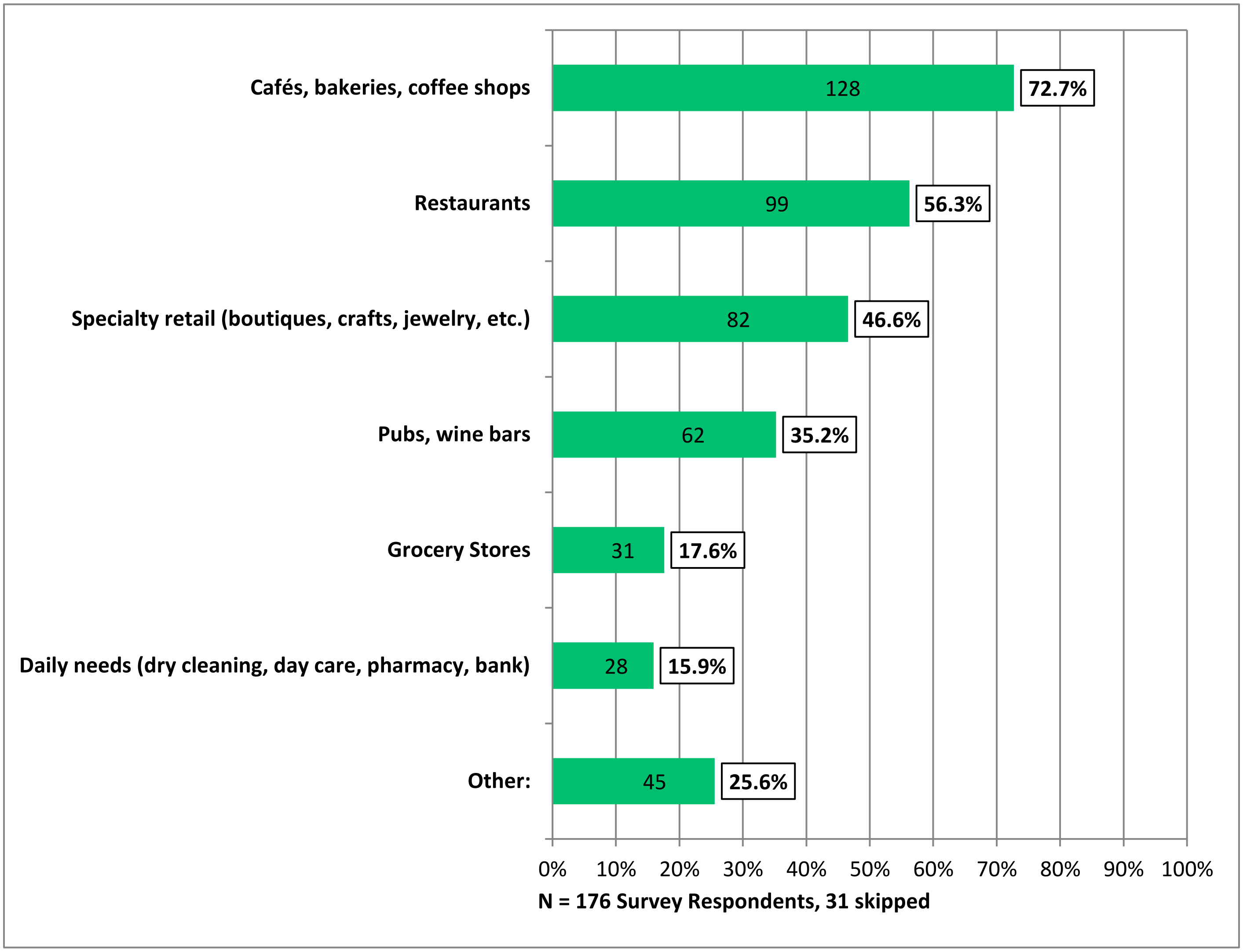
Question 2 - Which of the following types of development in Bellingham's commercial districts would you be supportive of?



Respondents were asked which type of development they would support in Bellingham's commercial districts, with respondents able to choose as many, or as little, of the choices displayed. Twenty-six out of 207 people (14.4%) skipped this question. Out of 181 respondents, a majority showed support for institutional development, such as hospitals and/or educational facilities, with hospitals and the health care industry in general garnering support throughout the survey. Development that included first-floor retail and upper-floor office space also did particularly well at 45%. Hotel development and housing alone scored lower, with 50 respondents supporting these types of development.

Forty-five respondents selected "Other". Of those, eight respondents distinctly state traffic concerns, with one opining "Anything that won't bring in more tractor trailers or retail traffic" with particular concerns within the Hartford Avenue corridor. Others stated the need for renewable energy, in particular wind and solar farms, and STEM (Science, Technology, Engineering, and Mathematics) industries, with biotech and engineering specifically mentioned.

Question 3 - What kind of retail and service businesses would you like to see or see more of in Bellingham?



Similar in structure to Question 2, Question 3 had respondents choose which types of retail and service industry businesses they would like to see in town, with 176 people responding to this question. There was a distinct consensus on which types of retail and service industries respondents wanted, with more than two-thirds (73%) preferring coffee shops and bakeries and over half (56.3%) preferring restaurants. Contrariwise, grocery stores, dry cleaners, pharmacies, and banks did not gather as much support. The need for restaurant diversification as well as the desire for more small, independent restaurants and shops are mentioned throughout the survey. Many respondents indicated hesitation in opening stores that competed with the current grocers, others stated an oversaturation of the market and the amount of truck traffic it would create.

Forty-five respondents selected "Other". Seven respondents specifically stated that they wanted none of these types of businesses in town, with three stating that the town had "enough [of these businesses] already".

Question 4 - Are there any particular industries that you would like to see more of in Bellingham? If so, which ones??

Eighty-seven people responded to this question, the top ranking industries are listed below. Please note that some respondents named multiple industries. Additionally, ten individuals answered “None” with another ten unsure of what type of industry to bring or unspecific. Of the fifteen responses labeled as “Other” three were related to the energy industry (clean energy, power plants) and three were for Cannabis sales.

Arts, Entertainment, Recreation	**Accommodation & Food Services**	**Retail**	**Manufacturing**
Arts, performances	Cafes, coffee shops	Christmas tree shops, Costco, Sam's Club, BJ's	Clean energy industries
Entertainment, animation studios	Coffee shop, Bakery	Food industry	Food industry
Entertainment, bowling, recreation	Family friendly restaurants	Higher end shops	Green Manufacturing
Entertainment, recreational	Fast food, independent bakeries, restaurants	Higher-end retail	High end manufacturing
Environmental tourism	Food delivery, restaurants	Independent stores	Low impact manufacturing
Family entertainment	Food industry	Organic food	Manufacturing
Family entertainment	Higher end restaurants, wine bar, coffee shops	Retail	Manufacturing
Family entertainment, recreation	Hotels	Retail	Manufacturing
Golf, bowling, swimming	Hotels	Retain current Market Basket	Manufacturing
Gym	Locally owned restaurants	Shopping center	Maple street-type industries
Gyms, child-geared places	Organic food	Small shops	Wind, solar
Indoor recreation	Pubs	Specialty shops	
Indoor recreation	Restaurants	Sporting goods	
Indoor recreation	Restaurants	Sporting goods store	
Kids recreation, gym	Restaurants	Trader Joe's, "community" shops	
Outdoor recreation	Small hometown eateries	Specialty shops	
Outdoor recreation	Small restaurants		
Recreation	Upscale restaurants		
Walkable commercial areas			

Professional Offices	**Scientific & Technical**	**Health Care**	**Agriculture**	**Transportation & Warehousing**
Higher paying office jobs	Good paying technology jobs	Health care	Agriculture	Distribution facility
Office	Innovation companies	Medical	Agriculture	Maple street-type industries
Office parks	Science & Tech jobs for college students	Medical	Farming	Transportation
Offices	Science, technology, engineering	Medical	Food industry	**Finance**
Privately owned entrepreneurial businesses	Scientific & Technical	Clinics	Organic farm stand	Insurance
Professional group practices	STEM	Medical office		**Education**
Professional offices	Technology	Medical offices		Education
Professional offices	Technology, innovation based	Urgent care		

Question 5 – Please rank the strengths of Bellingham's economic corridors below by using the following scale: 0=Unsure, 1=Very Poor, 2=Poor, 3=Fair, 4=Good, 5=Very Good.

Hartford Ave

	1 - Very Poor		2 - Poor		3 - Fair		4 - Good		5 - Very Good		0 - Not Applicable/ Unsure		Total
Walkability	52.80%	85	31.68%	51	9.94%	16	4.35%	7	0.00%	0	1.24%	2	161
Bike infrastructure	58.82%	90	30.07%	46	4.58%	7	1.31%	2	0.00%	0	5.23%	8	153
Parking availability	12.00%	18	12.00%	18	24.00%	36	36.67%	55	13.33%	20	2.00%	3	150
Proximity to amenities (job, schools, parks, etc.)	2.05%	3	4.11%	6	32.88%	48	41.78%	61	17.12%	25	2.05%	3	146
Sense of place and identity	16.31%	23	19.86%	28	32.62%	46	21.99%	31	4.26%	6	4.96%	7	141
Business variety	2.00%	3	4.00%	6	30.00%	45	46.67%	70	16.67%	25	0.67%	1	150
Business quality	0.70%	1	4.20%	6	22.38%	32	51.75%	74	20.28%	29	0.70%	1	143
Design/quality of streets and sidewalks	35.37%	52	28.57%	42	28.57%	42	5.44%	8	0.68%	1	1.36%	2	147
Historical character	34.48%	50	35.17%	51	20.00%	29	3.45%	5	0.00%	0	6.90%	10	145
Programming (festivals, events)	21.23%	31	24.66%	36	32.19%	47	9.59%	14	0.68%	1	11.64%	17	146
Housing options	9.79%	14	16.08%	23	35.66%	51	20.98%	30	4.20%	6	13.29%	19	143

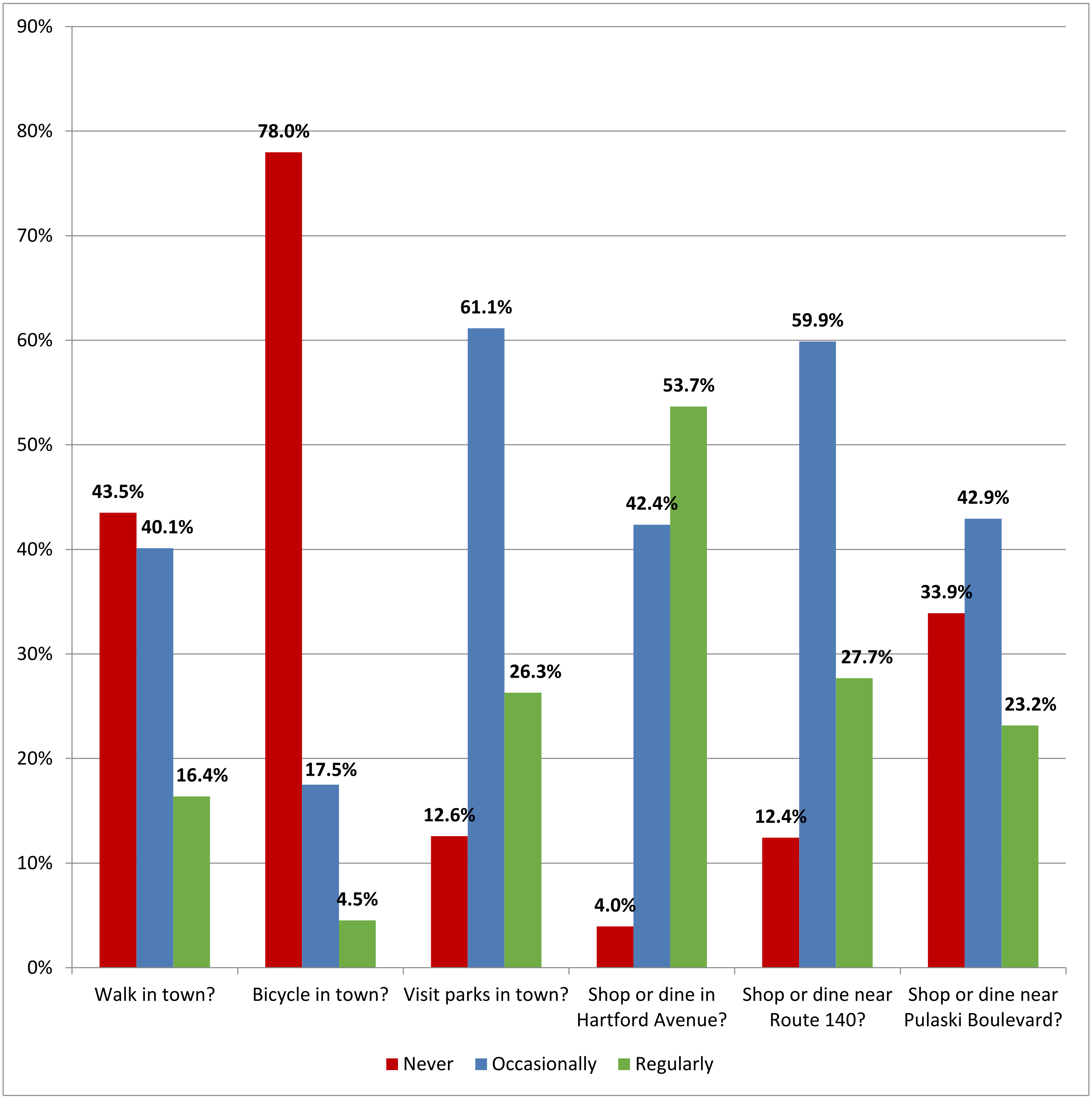
Route 140

	1 - Very Poor		2 - Poor		3 - Fair		4 - Good		5 - Very Good		0 - Not Applicable /Unsure		Total
Walkability	32.73%	36	23.64%	26	29.09%	32	11.82%	13	1.82%	2	0.91%	1	110
Bike infrastructure	45.63%	47	35.92%	37	7.77%	8	2.91%	3	0.97%	1	6.80%	7	103
Parking availability	9.00%	9	14.00%	14	22.00%	22	40.00%	40	11.00%	11	4.00%	4	100
Proximity to amenities (job, schools, parks, etc.)	1.03%	1	8.25%	8	29.90%	29	44.33%	43	15.46%	15	1.03%	1	97
Sense of place and identity	11.70%	11	15.96%	15	42.55%	40	22.34%	21	4.26%	4	3.19%	3	94
Business variety	4.04%	4	20.20%	20	42.42%	42	27.27%	27	6.06%	6	0.00%	0	99
Business quality	2.11%	2	14.74%	14	36.84%	35	38.95%	37	6.32%	6	1.05%	1	95
Design/quality of streets and sidewalks	25.00%	25	26.00%	26	35.00%	35	13.00%	13	1.00%	1	0.00%	0	100
Historical character	13.00%	13	26.00%	26	30.00%	30	19.00%	19	6.00%	6	6.00%	6	100
Programming (festivals, events)	12.12%	12	15.15%	15	25.25%	25	32.32%	32	6.06%	6	9.09%	9	99
Housing options	4.17%	4	10.42%	10	41.67%	40	27.08%	26	2.08%	2	14.58%	14	96

Pulaski Blvd

	1 - Very Poor		2 - Poor		3 - Fair		4 - Good		5 - Very Good		0 - Not Applicable/ Unsure		Total
Walkability	22.43%	24	21.50%	23	34.58%	37	16.82%	18	0.93%	1	3.74%	4	107
Bike infrastructure	38.38%	38	36.36%	36	11.11%	11	4.04%	4	1.01%	1	9.09%	9	99
Parking availability	11.22%	11	12.24%	12	25.51%	25	33.67%	33	8.16%	8	9.18%	9	98
Proximity to amenities (job, schools, parks, etc.)	3.19%	3	13.83%	13	31.91%	30	36.17%	34	8.51%	8	6.38%	6	94
Sense of place and identity	28.89%	26	24.44%	22	21.11%	19	14.44%	13	3.33%	3	7.78%	7	90
Business variety	10.42%	10	18.75%	18	29.17%	28	33.33%	32	6.25%	6	2.08%	2	96
Business quality	15.56%	14	21.11%	19	25.56%	23	30.00%	27	3.33%	3	4.44%	4	90
Design/quality of streets and sidewalks	21.05%	20	29.47%	28	30.53%	29	11.58%	11	1.05%	1	6.32%	6	95
Historical character	34.02%	33	35.05%	34	18.56%	18	3.09%	3	0.00%	0	9.28%	9	97
Programming (festivals, events)	35.05%	34	24.74%	24	14.43%	14	5.15%	5	0.00%	0	20.62%	20	97
Housing options	9.38%	9	21.88%	21	36.46%	35	14.58%	14	4.17%	4	13.54%	13	96

Question 6 - How often do you...



Question 7 - What does economic development in Bellingham mean to you?

"Tax rates unchanged. Centralized 'downtown' area with quality businesses. Updated town landscape."
"Meeting the needs of jobs, dining, education, shopping and recreation without adding to the already congested traffic patterns and bringing in businesses that would benefit Bellingham as much as themselves"
"Creating work, bringing in jobs and people in to the town to spend money and raise money. Advancing our economy to the next generation."

Aggregate of Most Frequently Used Words-

Rank	Word	Frequency		Rank	Word	Frequency		Rank	Word	Frequency
1	town	39		18	revenue	7		35	less	5
2	business	17		19	taxes	7		36	like	5
3	traffic	16		20	live	7		37	opportunity	4
4	tax	16		21	people	6		38	buildings	4
5	businesses	15		22	roads	6		39	community	4
6	means	15		23	small	6		40	improve	4
7	development	14		24	life	6		41	support	4
8	money	11		25	want	6		42	stores	4
9	Bellingham	10		26	opportunities	5		43	higher	4
10	residents	10		27	warehouses	5		44	right	4
11	better	10		28	increase	5		45	shops	4
12	residential	9		29	services	5		46	feel	4
13	economic	9		30	without	5		47	new	4
14	quality	9		31	balance	5		48	infrastructure	3
15	base	9		32	schools	5		49	convenience	3
16	bringing	8		33	space	5		50	commercial	3
17	growth	8		34	jobs	5				

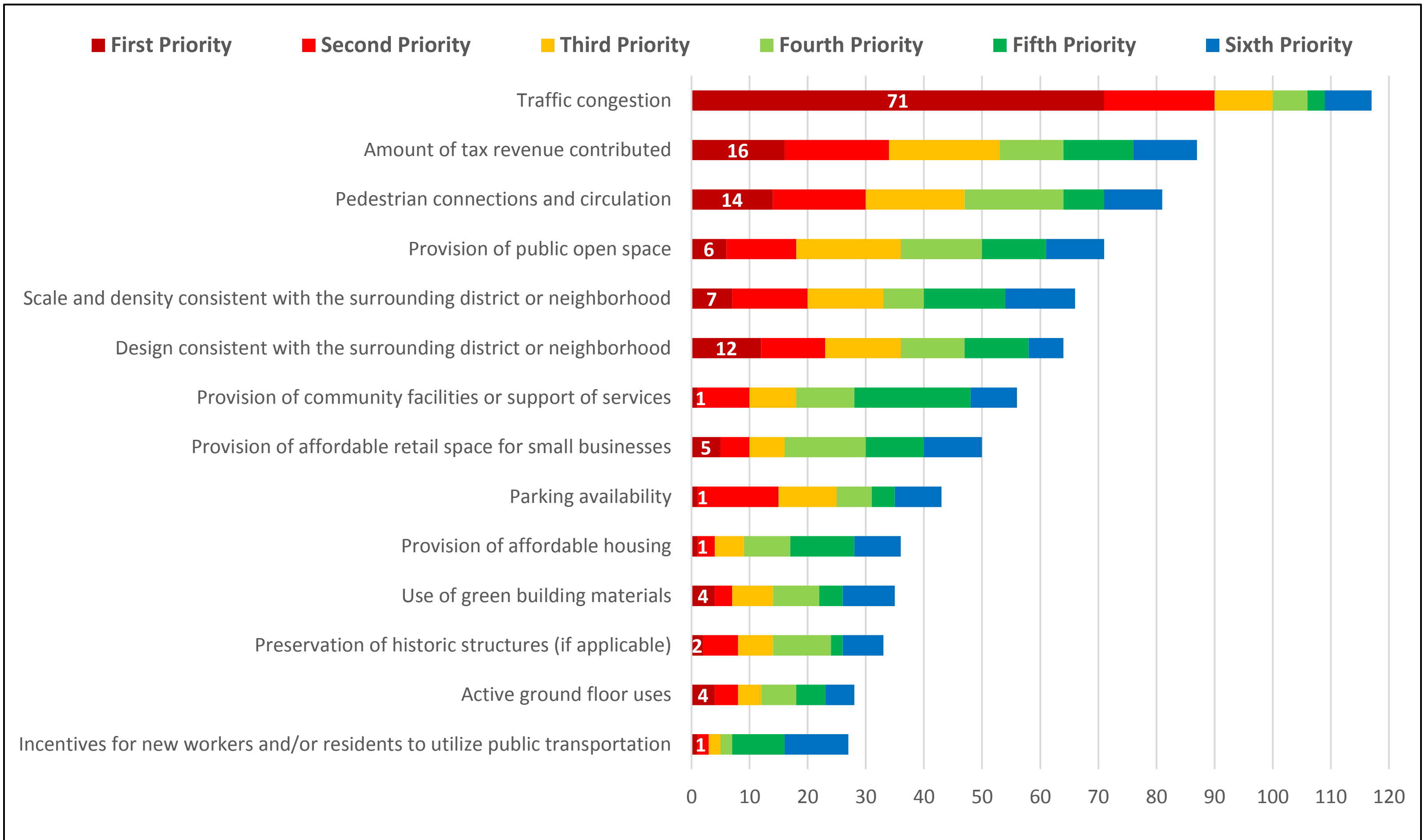
Question 8 - Do you feel like Bellingham is a good place to do business? Why or why not?

Answer Choices	Responses (Number)
Yes	78
No	21
Unsure/Mixed	25

Question 9 - Are you a business owner in Bellingham? If so, what type of business do you own?

Answer Choices	Responses (Number)
Yes	17
No	99
No Answer	4

Question 10 - What issues do you think should be addressed through any new development proposals in Bellingham's economic corridors?



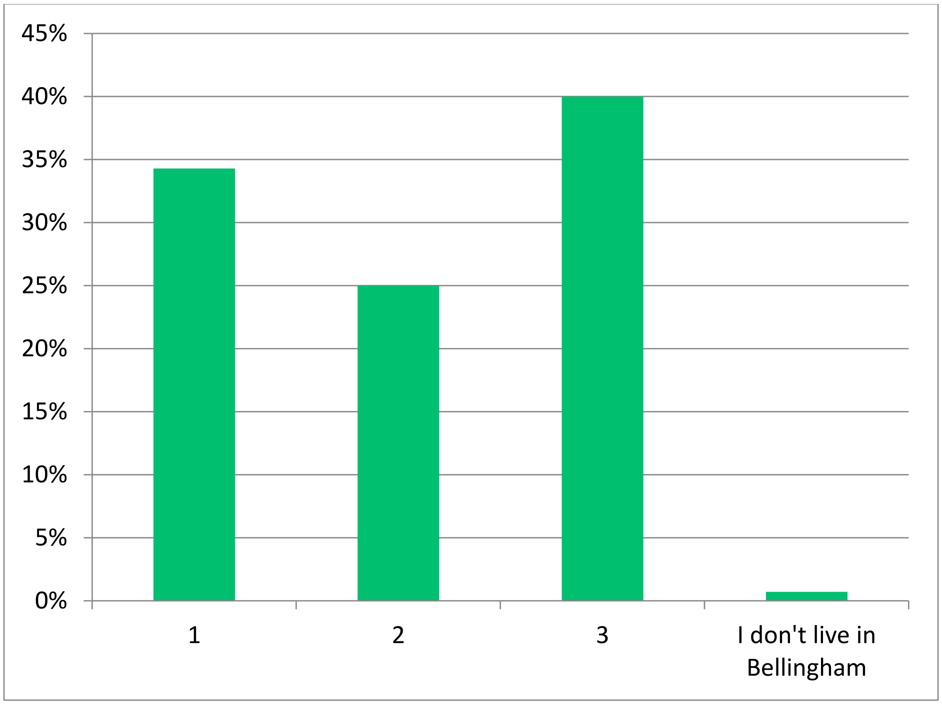
For Question 10, each respondent was asked to rank their top six issues that should be addressed within development proposals in the economic corridors. There were a total of 794 responses (ranked from 1 to 6) from the 156 respondents who answered this question. Some respondents chose less than six priorities. The total number of priorities per issue are displayed within each bar. Displayed in white (within or next to the dark red bar) are the number of respondents who considered each issue as the highest priority.

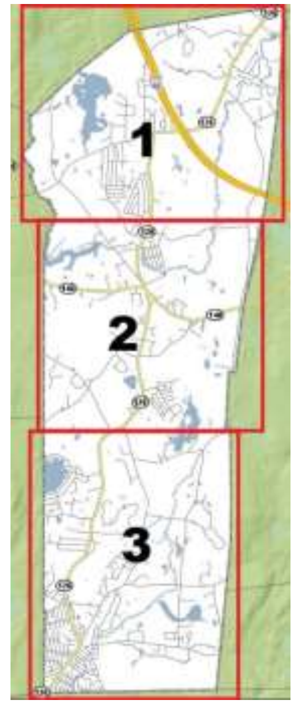
Three-fourths of all respondents considered traffic congestion to be a priority, with 46% of respondents stating it is their top priority. With regards to top priorities, this is far and beyond the other issues mentioned. Tax revenue and pedestrian issues also garnered a large number of responses, with 87 and 81 respondents considering them to be priorities, respectively. Most other issues varied in their level of priority, Incentives for new workers/residents to utilize public transportation garnered few responses, with only 27 respondents considering it a priority at all.

Question 11 - Do you live or work in Bellingham?

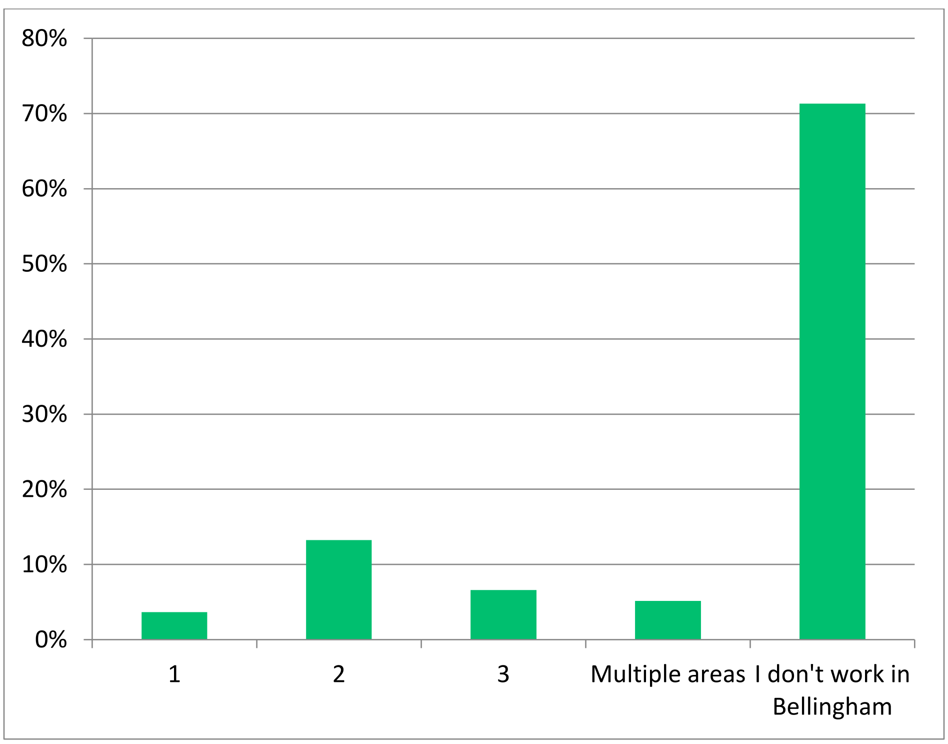
Answer Choices	Responses	
Live	74.84%	119
Work	1.26%	2
Both	23.27%	37
Neither live nor work in Bellingham	0.63%	1

Question 12 – What part of Bellingham do you live in?

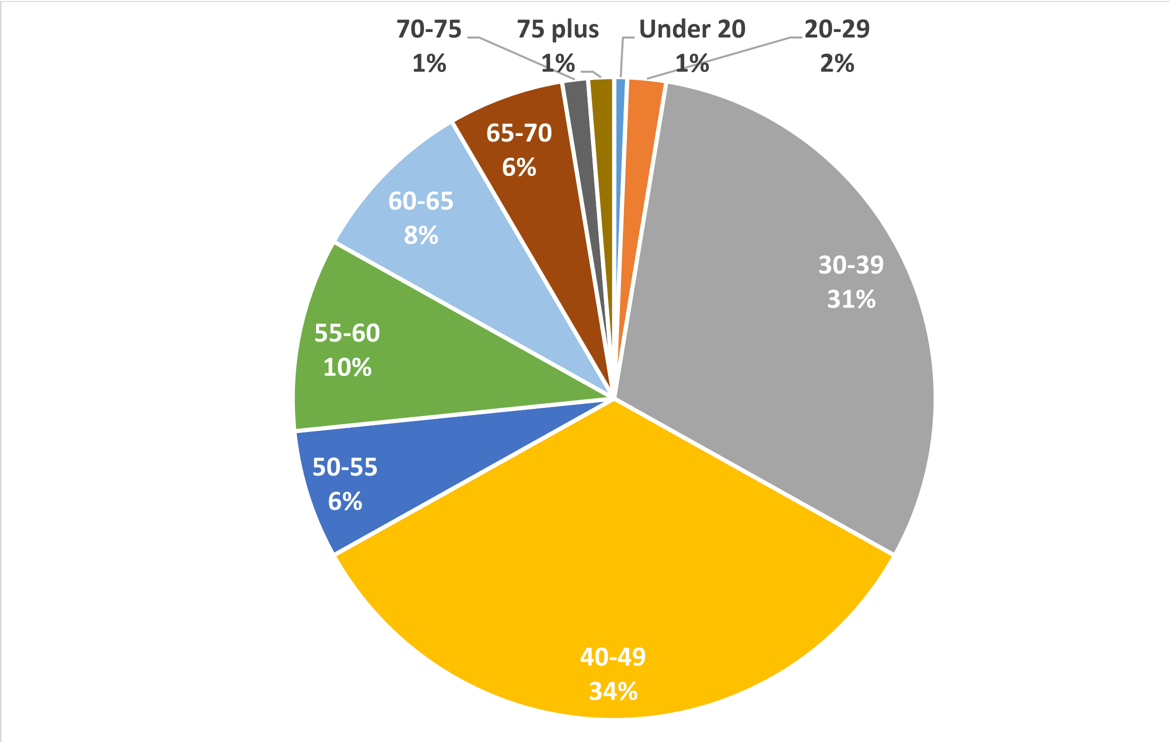




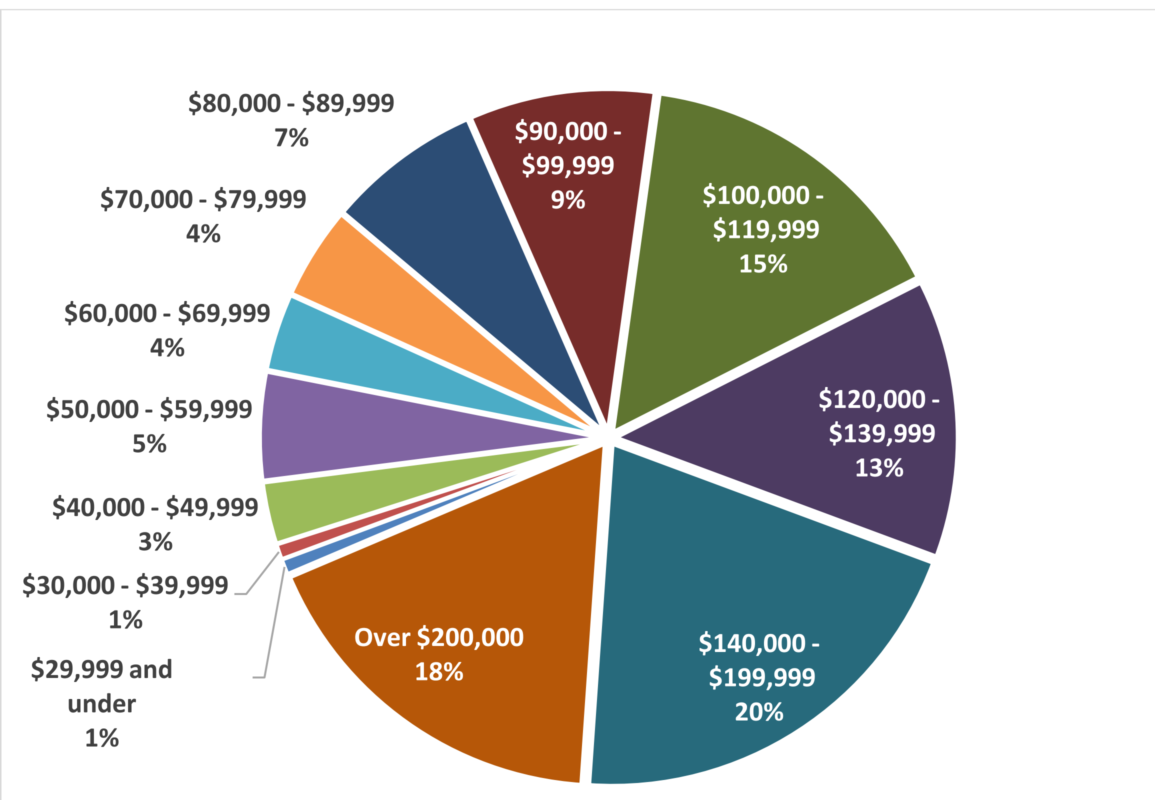
Question 13 – What part of Bellingham do you work in?



Question 14 - What is your age?



Question 15 - What is your annual household income?



Question 16 - How many people live in your household?

Answer Choices	Responses (%)
1	2.56%
2	28.21%
3	21.79%
4	27.56%
5	14.10%
More than 5	5.77%

Question 17 - How long have you lived in Bellingham?

Answer Choices	Responses (%)
1 to 5 years	16.46%
6 to 10 years	15.19%
11 to 20 years	33.54%
More than 20 years	34.18%
I don't live in Bellingham	0.63%

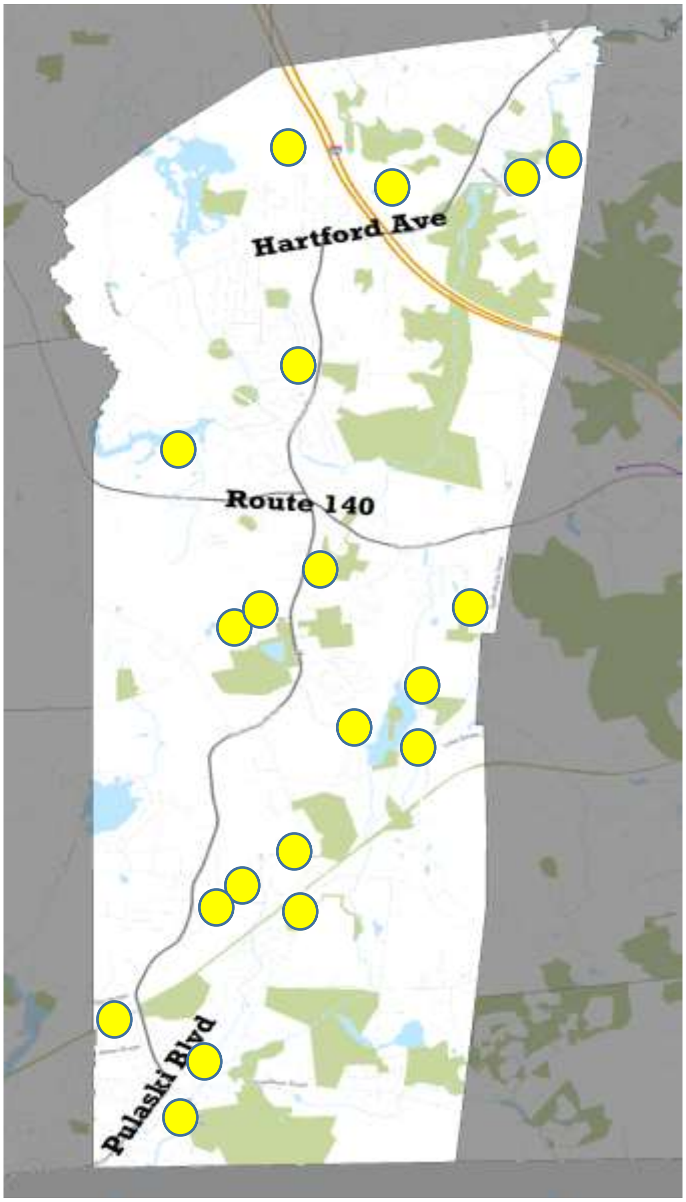
Question 18 - How do you normally get information about what is going on in Town?

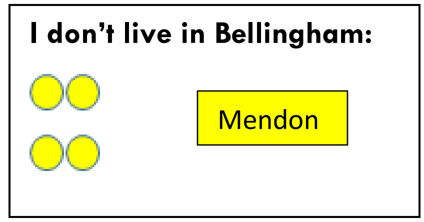
Answer Choices	Responses (Number)
Facebook	49
Bellingham Bulletin	43
Town email/newsletter	27
Word of mouth	25
Town website	20
Newspapers	14
Other responses	69

Question 19 – General comments.

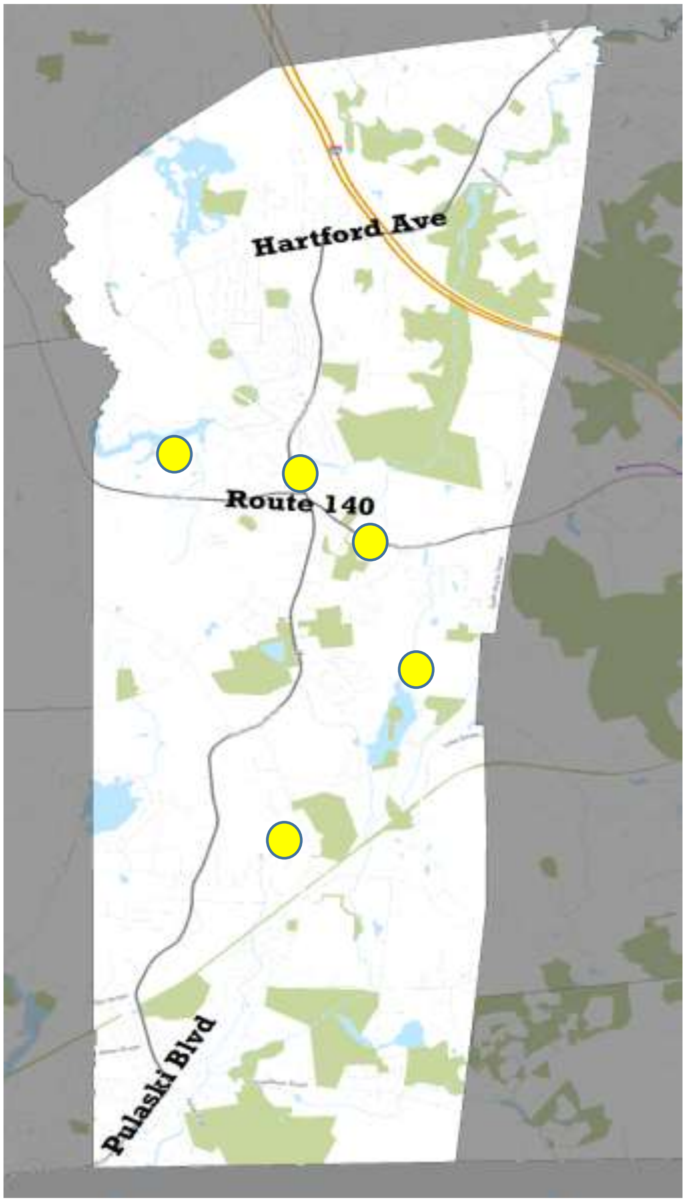
(This is an open-ended question)

What part of Bellingham do you live in?





What part of Bellingham do you work in?



I don't work in Bellingham:

Southboro; Boston; Franklin; Medway; Smithfield, RI; work from home – good infrastructure internet connection

I'm retired / student / currently not employed:

Retired; Retired; Disabled

I work in multiple areas:

Boston

How have you been involved?

Online Survey	Attending town meetings	Talking with town staff	Other	This is my first time participating
			Oct. Town Mtg.	

Help us identify how to better communicate with you

Facebook Groups	Other Online Platforms (listservs, blogs, etc.)	Traditional Media (Newspapers, magazines, radio, TV)	Other

How did you hear about this event?

Email (which one?)	Facebook	Newspaper (which one?)	Town Website	Other (please describe)
Biz Assoc.	Bellingham Buzz			Town Hall
Town Announcement				Town Employees
Conservation Commission				MAPC Email
				Flyer

Help us create an economic development vision statement for Bellingham!

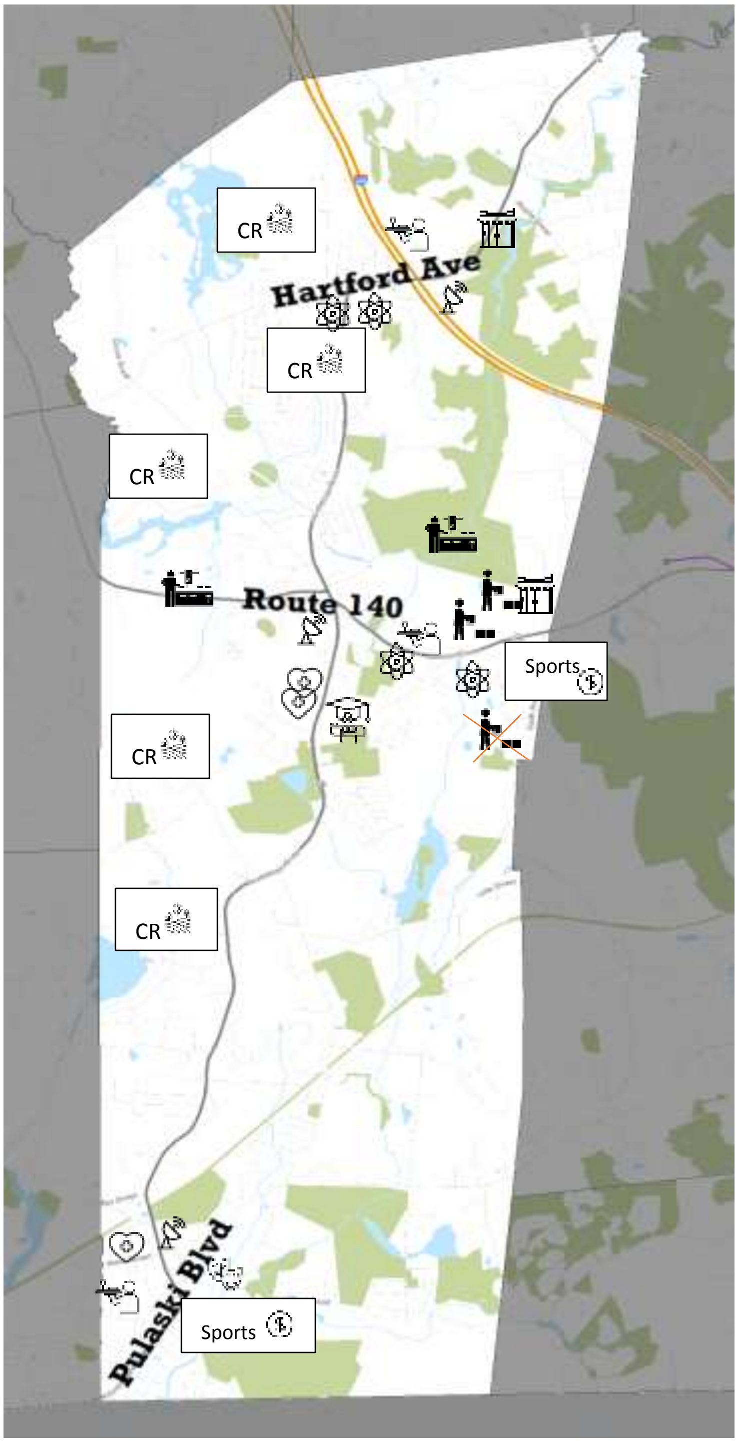
➢ A strong employment base providing jobs for local residents.	➢ Vibrant business districts providing shopping and service options for Bellingham and nearby communities.	➢ Safe and attractive neighborhoods with a diversity of housing stock and rental apartments.
➢ A historic New England character that is clear and apparent in our downtown district.	➢ Streets, parks, signage, sidewalks and public gathering spaces that attract businesses, customers, and new residents.	➢ Planned commercial and residential development that reflects our commitment to conservation.
➢ Create incentives to attract local, independent businesses.	➢ Civic participation that positions Bellingham as family-friendly.	➢ Appropriate commercial and industrial development that expands our tax base.
➢ Create zoning that builds mixed-use commercial space with a regulated variety of square footage for smaller to mid-size to large office and small business entities.	➢ Plan, then build, safe functional bicycle and pedestrian connections between residential and commercial.	➢ Others:

What issues should the town prioritize?

What issues do you think should be addressed through any new development proposals in Bellingham's economic corridors? Place a colored dot on the corresponding issue.

Issue	**Priority Dots** Green: High Yellow: Medium Red: Low Blue: Not a priority	**Timeframe Dots** Green: Immediate (1-5 years) Yellow: Mid Term (5-10 years) Red: Long Term (10+ years) Blue: No Timeframe
➢ Traffic congestion		
➢ Parking availability		
➢ Amount of tax revenue contributed		
➢ Pedestrian connections and circulation		
➢ Affordable housing		
➢ Affordable retail space for small businesses		
➢ Public open space		
➢ Preservation of historic structures		
➢ Provision of community facilities or support of services		
➢ Incentives for new workers and/or residents to utilize public transportation		
➢ Use of green building materials		
➢ Scale and density consistent with the surrounding district or neighborhood		
➢ Design consistent with the surrounding district or neighborhood		
➢ Active ground floor uses		

What industry types do you want in town?



Town-wide:

No more gas stations – visual appeal and number in use

~~Ware house~~

Solar farm for unbuildable lots

~~Used car lots~~

~~Solar: don't cut down trees for this~~

Increased disabled access ramps on streets with business use

Sidewalks to town parks and trails; sidewalks on major roads; fix damaged sidewalks

Community college satellite campus

- Great idea add +1

Sports & recreation (like John Smith Sports in Milford)

Green space CR

- Recreation based
- Corp campus if done well
- Senior assisted living

A mixed use town center that has a village style center

Stop cutting trees to put up solar heat generating electrical panels

Bike paths; connections; walkability; great infrastructure; keeping Bellingham healthy, happy, and outdoors

Opportunities

- Office parks with easy highway access that makes it easy for commuters (see Constitution Boulevard in Franklin)

Challenges

- Need better access to open/green spaces (sidewalks/bike trails to town parks)

Hartford Ave.

Opportunities

- Access road along RT 495 from Exit 18 to 16
- Recreational access to Charles River
- Infill redevelopment
- Add train from Milford to Franklin with a stop on Depot St.

Challenges

- Traffic – simple exits from shopping areas
- Traffic – everything seems to empty onto Hartford Ave. – if developing in this area, need access roads that don't put you on Hartford.
- Industrial traffic (dumptrucks, semis) thru residential/scenic roads
- Traffic is bad on Hartford Ave. between N. Main St. and Maple St.
- Traffic is bad on Hartford Ave. west bound to Hopedale Line
    - Agree: traffic is way overloaded
- North soccer fields need help
- Need better sidewalks from N. Main St. to Maple St./North fields
- Way too much warehousing and the heavy traffic it brings. Also eye sore.

Route 140

Opportunities

- Recreational access to Charles River

- Solar farm
- Infill redevelopment
- Bike lanes; sidewalks

Challenges

- Dangerous for cyclists. Take life in your hands trying to cycle to commuter rail.
- Heavy industry highly visible as first impression of would-be residents considering Bellingham home purchase
- Sidewalks need to be required on all large projects!
- Put utility (power phone) lines underground in town center
- Traffic
- Sidewalks on Blackstone St. and North St.

Pulaski Boulevard

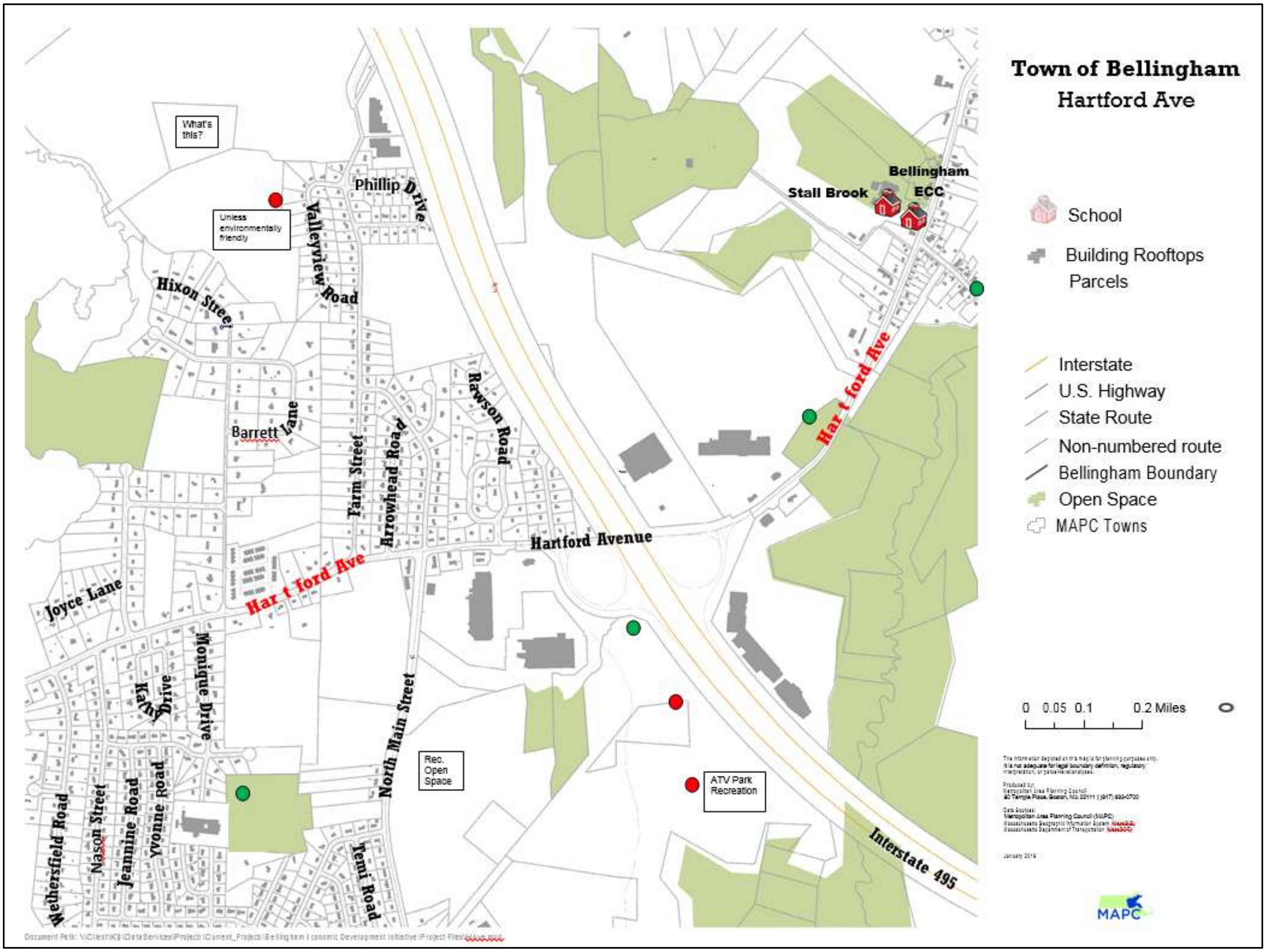
Opportunities

- Infill redevelopment
- Connection to Snett (?)
- Indoor sports complex in Granite City Electrical Building
- Franklin end is undeveloped mostly
- Tolls from R.I. on 126?
- Traffic light at Mann St./S. Main St. intersection
- Sidewalk from Center St. to Arcand Park
- Sidewalk on Lake St. from Arcand Park to Cross St.
- What's going to happen with old Primavera Building?
- We will validate for shoppers
- Remove abandoned buildings to leave clear land to make it more appealing for investors.

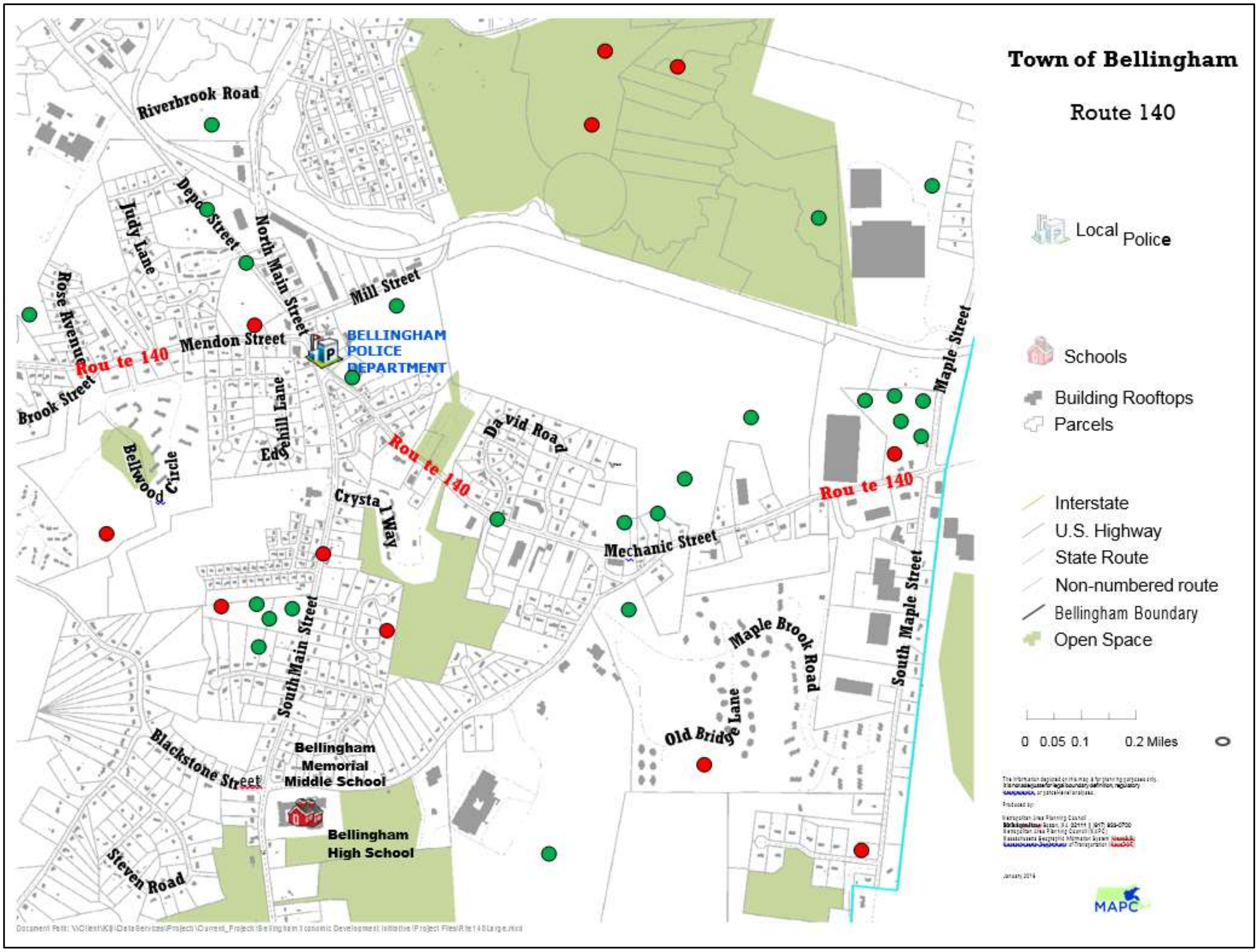
Challenges

- Safety
- Need 2 lanes each way and a divider
- Old looking; run down; serious target for revitalization; proximity to Woonsocket (a (-))
- Southern section of Pulaski needs sidewalk improvements
- Traffic!
- Walkability on Rte 126 + Pulaski
- Businesses need more parking

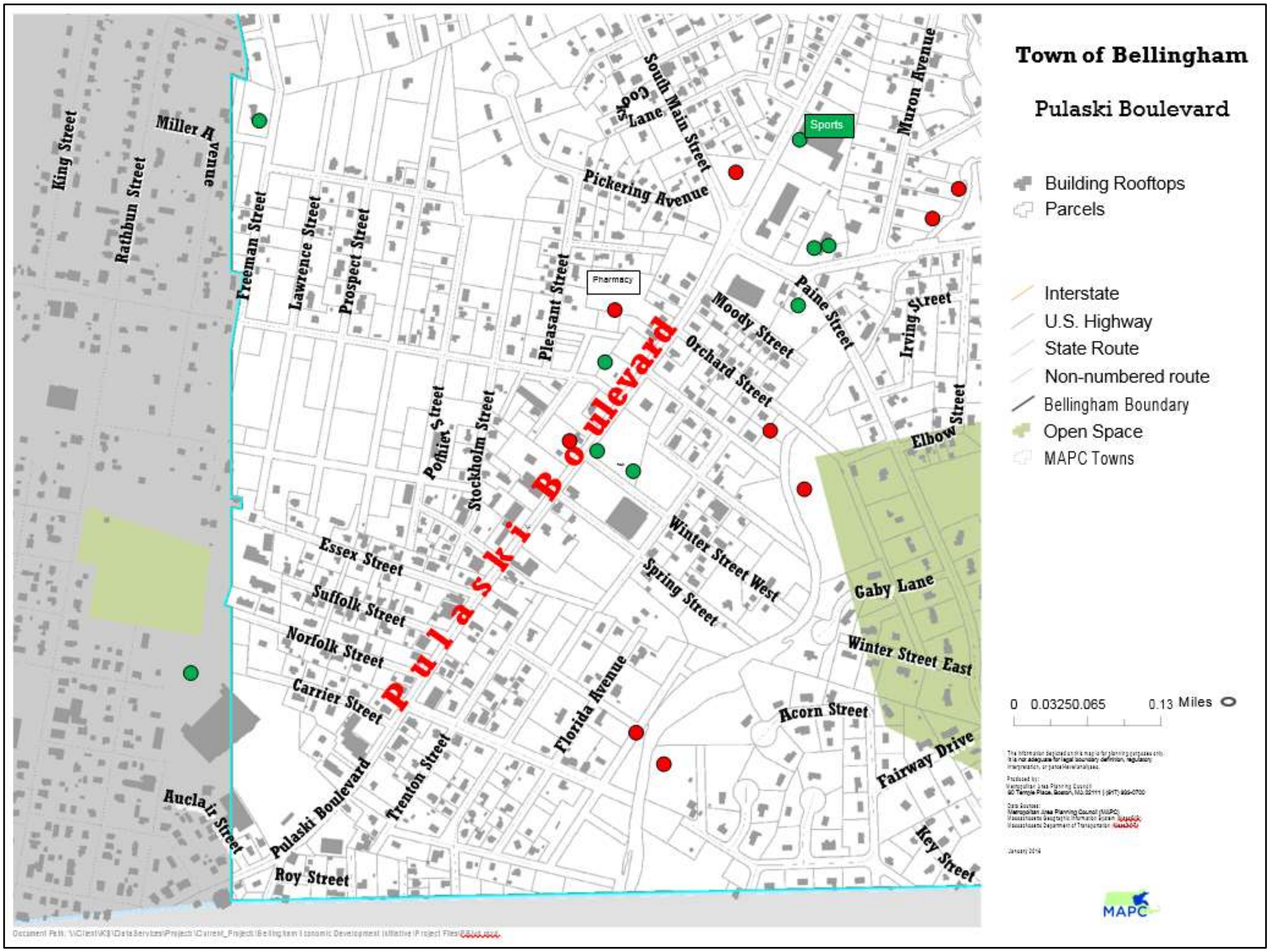
Please place a green dot on areas where you would like to see development and a red dot where you do not want to see development.



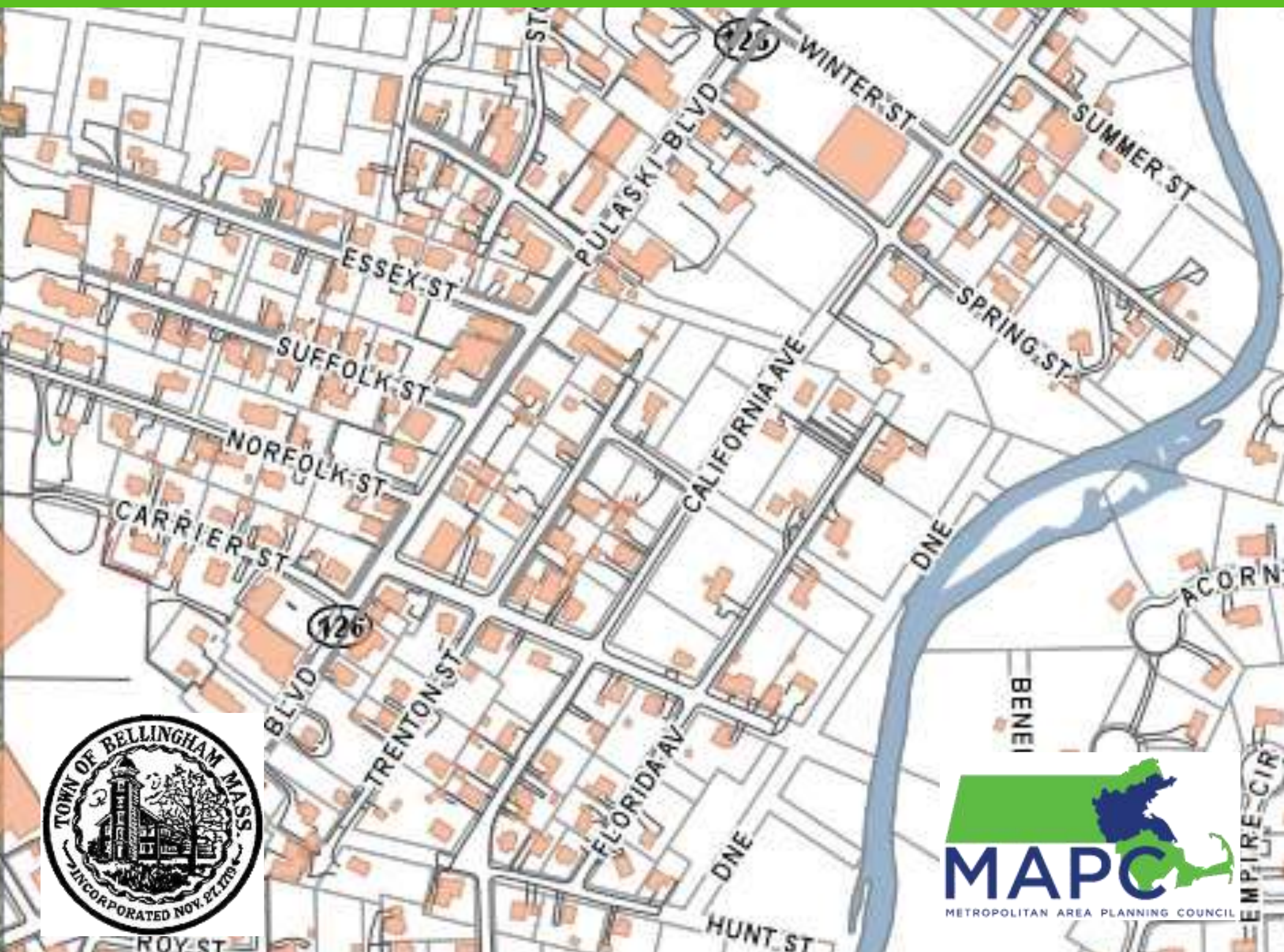
Please place a green dot on areas where you would like to see development and a red dot where you do not want to see development.



Please place a green dot on areas where you would like to see development and a red dot where you do not want to see development.



Appendix C:
Home/Work Destination Report



TOWN OF BELLINGHAM MASS.
INCORPORATED NOV. 27, 1719

MAPC
METROPOLITAN AREA PLANNING COUNCIL

OnTheMap

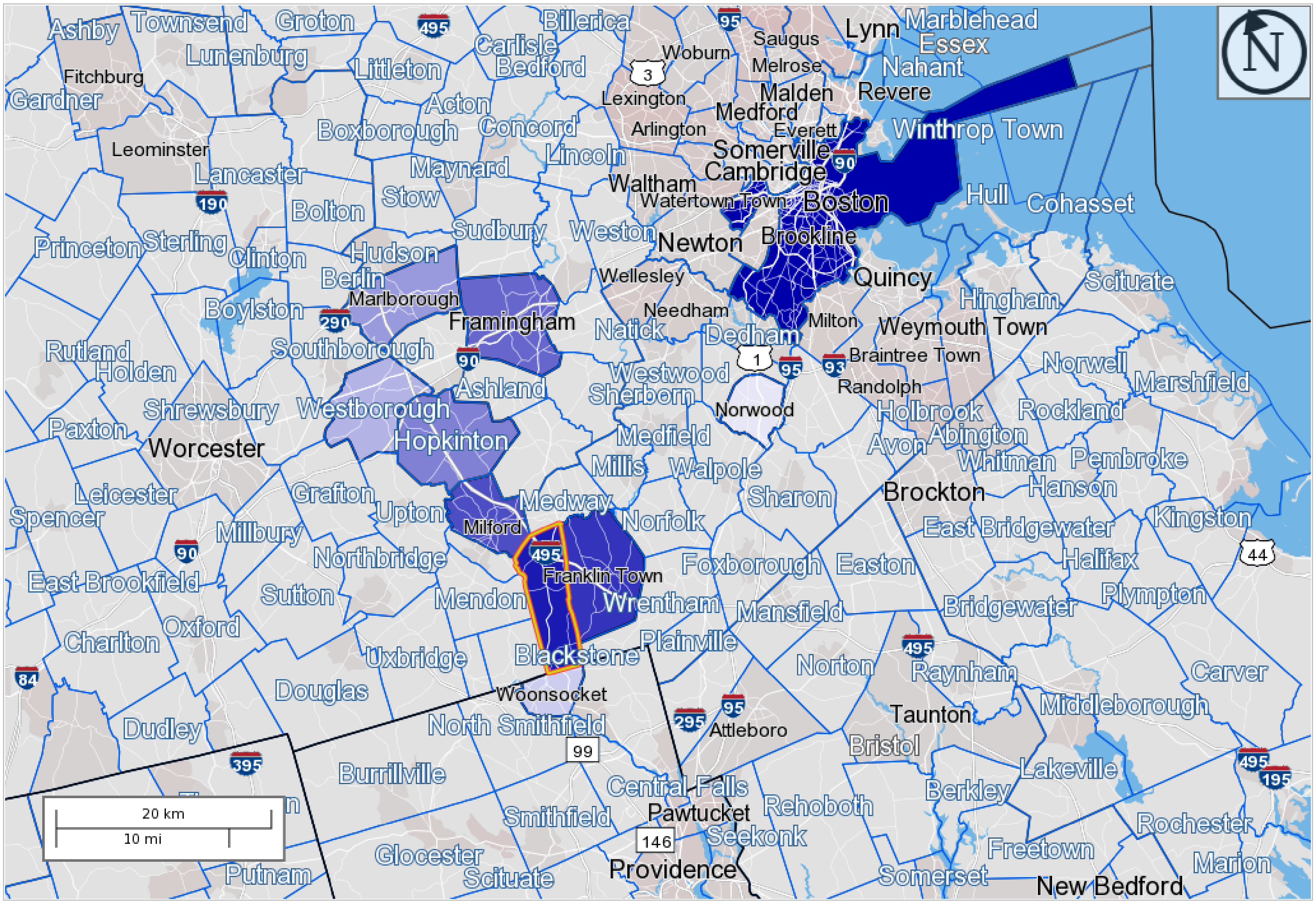
Work Destination Report - Home Selection Area (Bellingham) to Work County Subdivisions (Municipalities)

Primary Jobs for All Workers in 2015

Created by the U.S. Census Bureau's OnTheMap `http://onthemap.ces.census.gov` on 07/16/2018

Counts of Primary Jobs from Home Selection Area to Work County Subdivisions in 2015

All Workers



Map Legend

Job Count

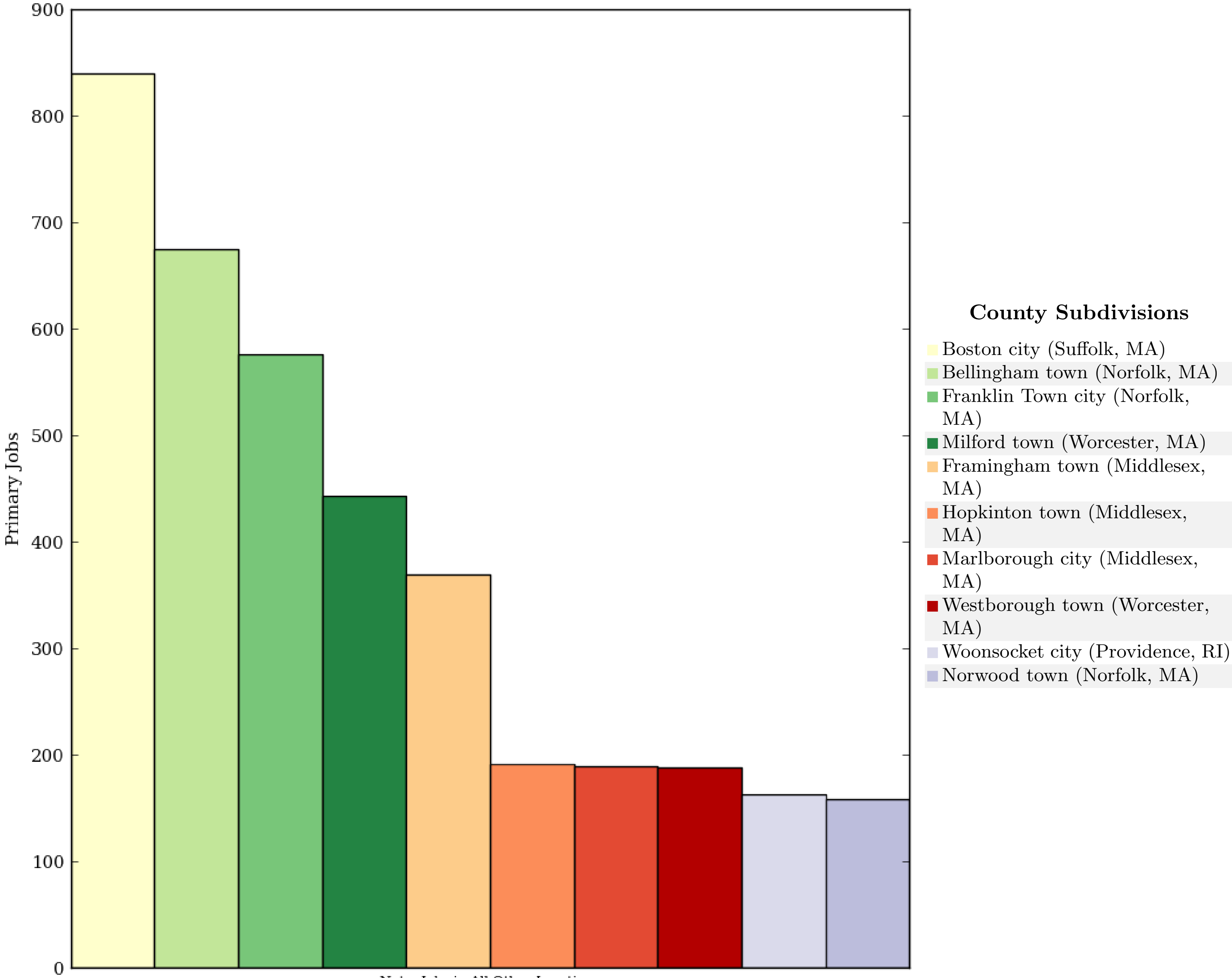
- 839
- 674
- 575
- 442
- 369
- 191
- 189
- 188
- 162
- 158

Selection Areas

- Analysis Selection

Primary Jobs from Home Selection Area to Work County Subdivisions in 2015

All Workers



Note: Jobs in All Other Locations (4,914) are not shown in chart.

Primary Jobs from Home Selection Area to Work County Subdivisions in 2015

All Workers

County Subdivisions as Work Destination Area	2015 Count	2015 Share
All County Subdivisions	8,701	100.0
Boston city (Suffolk, MA)	839	9.6
Bellingham town (Norfolk, MA)	674	7.7
Franklin Town city (Norfolk, MA)	575	6.6
Milford town (Worcester, MA)	442	5.1
Framingham town (Middlesex, MA)	369	4.2
Hopkinton town (Middlesex, MA)	191	2.2
Marlborough city (Middlesex, MA)	189	2.2
Westborough town (Worcester, MA)	188	2.2
Woonsocket city (Providence, RI)	162	1.9
Norwood town (Norfolk, MA)	158	1.8
All Other Locations	4,914	56.5

OnTheMap

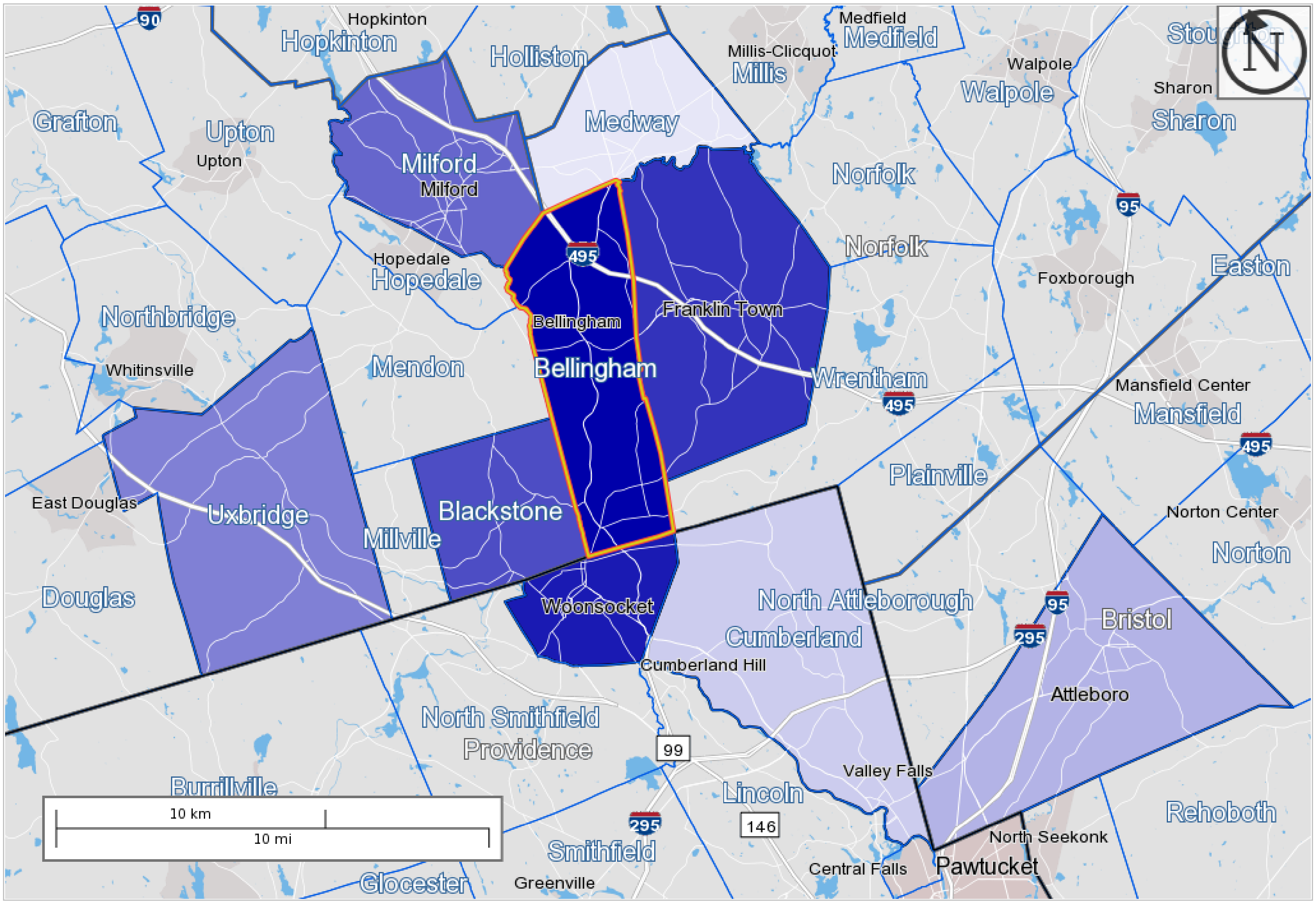
Home Destination Report - Work Selection Area (Bellingham) to Home County Subdivisions (Municipalities)

Primary Jobs for All Workers in 2015

Created by the U.S. Census Bureau's OnTheMap http://onthemap.ces.census.gov on 07/16/2018

Counts of Primary Jobs from Work Selection Area to Home County Subdivisions in 2015

All Workers



Map Legend

Job Count

- 674
- 383
- 205
- 185
- 183
- 111
- 92
- 91
- 86
- 84

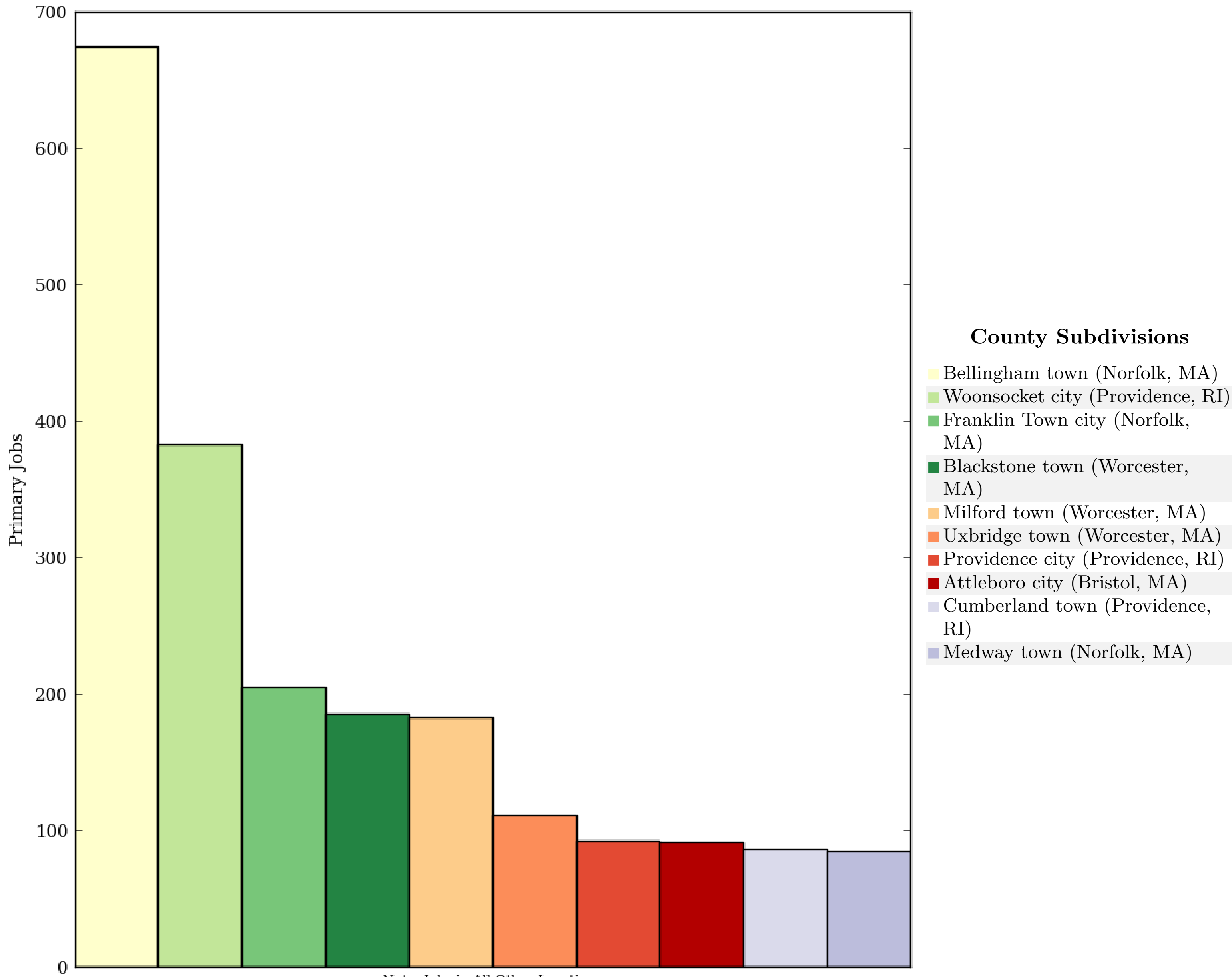
Selection Areas

- Analysis Selection

United States Census Bureau

Primary Jobs from Work Selection Area to Home County Subdivisions in 2015

All Workers



Note: Jobs in All Other Locations (3,321) are not shown in chart.

Primary Jobs from Work Selection Area to Home County Subdivisions in 2015

All Workers

County Subdivisions as Home Destination Area	2015 Count	2015 Share
All County Subdivisions	5,415	100.0
Bellingham town (Norfolk, MA)	674	12.4
Woonsocket city (Providence, RI)	383	7.1
Franklin Town city (Norfolk, MA)	205	3.8
Blackstone town (Worcester, MA)	185	3.4
Milford town (Worcester, MA)	183	3.4
Uxbridge town (Worcester, MA)	111	2.0
Providence city (Providence, RI)	92	1.7
Attleboro city (Bristol, MA)	91	1.7
Cumberland town (Providence, RI)	86	1.6
Medway town (Norfolk, MA)	84	1.6
All Other Locations	3,321	61.3

Additional Information

Analysis Settings

Analysis Type	Destination
Destination Type	County Subdivisions
Selection area as	Home/Work
Year(s)	2015
Job Type	Primary Jobs
Selection Area	Bellingham town (Norfolk, MA) from County Subdivisions
Selected Census Blocks	351
Analysis Generation Date	07/16/2018 12:25 - OnTheMap 6.5
Code Revision	d6ec994dcb416ba9b4b1b8cb2b4d690f01609fc9
LODES Data Version	20160219

Data Sources

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2015).

Notes

1. Race, Ethnicity, Educational Attainment, and Sex statistics are beta release results and are not available before 2009.
2. Educational Attainment is only produced for workers aged 30 and over.
3. Firm Age and Firm Size statistics are beta release results for All Private jobs and are not available before 2011.