Welcome

Gloucester, 2021 LRRP Data Analysis and Discussion
Local Rapid Recovery Plan Initiative (LRRP)

Funded through the Massachusetts Downtown initiative (DHCD)

About LRRP

• State-wide recovery effort.
• Fast-paced planning to facilitate COVID-19 recovery (6 month).
• Data driven.
• Working with a plan facilitator and access to subject matter experts.
• Develop set of 12 actionable, well developed projects as part of the final report.
Timeline

Phase I: Diagnostic
- Data Analysis (Today)
- Focus Groups
- Stakeholder Interviews

Phase II: Project Recommendations

Phase III: Plan Documents

Technical Subject Matter Experts
Several industry specific focus groups (via Zoom) are scheduled this month as part of the data collection.

For more information on the Rapid Recovery Planning program visit the website https://www.mass.gov/info-details/rapid-recovery-plan-rrp-program

**Retail**

- June 9 at 9am
  - Contact Elizabeth Carey at ecarey@discovergloucester.com to register

**Restaurants**

- June 10 at 2:30pm
  - Contact Elizabeth Carey at ecarey@discovergloucester.com to register

**Arts and Attractions**

- June 15 at 9am
  - Contact Elizabeth Carey at ecarey@discovergloucester.com to register

**Property Owners**

- June 15 at 2:30pm
  - Contact Shelly Ciolino at sciolino@gloucester-ma.gov to register
Customer Base
Residents Living in Downtown (3,100 +/-281)

Age Compared to the City as a Whole

<table>
<thead>
<tr>
<th>Under 5 years</th>
<th>5 to 9 years</th>
<th>10 to 14 years</th>
<th>15 to 19 years</th>
<th>20 to 24 years</th>
<th>25 to 34 years</th>
<th>35 to 44 years</th>
<th>45 to 54 years</th>
<th>55 to 59 years</th>
<th>60 to 64 years</th>
<th>65 to 74 years</th>
<th>75 to 84 years</th>
<th>85 years and over</th>
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<tbody>
<tr>
<td>Downtown - Tract 2215</td>
<td>City of Gloucester</td>
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Source: U.S. Census Bureau American Community Survey 2015-2019 5-year estimates (Table DP05)

Housing Units

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<tr>
<th>Gloucester</th>
<th>Downtown - Tract 2215</th>
<th>% of all Housing Located in Downtown</th>
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</thead>
<tbody>
<tr>
<td>Housing Units</td>
<td>Margin of Error</td>
<td>Housing Units</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau American Community Survey 2015-2019 5-year estimates (Table S1701) † Margin of error is at least 10 percent of the total value.
Impact of Covid-19 on Foot Traffic to Downtown

SURVEY RESULTS

Less Foot Traffic in Commercial Area
82% of businesses had less on-site customers in January and February of 2021 than before COVID. 64% of businesses reported a reduction in on-site customers of 25% or more.

On-site Customers 2021 (Jan - Feb) vs. Pre-COVID

Source: LRRP Survey Responses (22 responses, 73% of which are retail or food and accommodation businesses)

Source:

Stage Fort Park Visitor's Center

Cruise Passenger Numbers

Source: Port Data
Business Environment
Spread of Parcels by Use

Legend
- Manufacturing
- Transportation and Warehousing
- Professional Office
- Administrative Services
- Services
- Accommodation and Food Services
- Retail Trade
- Arts, Entertainment and Recreation
- Vacant
- Not a Business

Source: LRRP Site Visit and Permits
Businesses by Type in Downtown

- Manufacturing - mining, construction, utilities, ag, manufacturing, transportation and warehousing
- Retail - wholesale trade, retail trade, arts and entertainment
- Office - info., finance and insurance, real estate and leasing, professional scientific and tech services, administrative & support & waste management, educational & health care and social, public admin
- Restaurants and Hotels - accommodations and food services

Source: ESRI Business Analyst

Businesses by Category*

- Retail and Services 36%
- Restaurants and Hotels 13%
- Manufacturing and Construction 15%
- Office 36%

* Manufacturing - mining, construction, utilities, ag, manufacturing, transportation and warehousing
Retail - wholesale trade, retail trade, arts and entertainment
Office - info. finance and insurance, real estate and leasing, professional scientific and tech services, administrative & support & waste management, educational & health care and social, public admin
Restaurants and Hotels - accommodations and food services

Source: ESRI Business Analyst
Downtown Storefront Use

**Storefront Uses by NAICS Code**

- Retail Trade: 31%
- Accommodation and Food Services: 16%
- Vacant: 15%
- Other Services: 12%
- Finance and Insurance: 7%
- Transportation and Warehousing: 4%
- Arts, Entertainment, and Recreation: 4%
- Health Care and Social Assistance: 3%
- Professional and Technical Services: 2%
- Real Estate and Rental and Leasing: 2%
- Public Administration: 2%
- Information: 2%
- Construction: 1%
- Manufacturing: 1%
- Management of Companies: 1%

**Percent of Storefronts**

- 0% 10% 20% 30% 40%

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**Storefront Use by Category**

- Restaurants and Hotels, 16%
- Retail and Services, 46%
- Vacant, 15%
- Office, 18%
- Manufacturing and Construction, 5%

**Source:** LRRP Site Visit

*Manufacturing - mining, construction, utilities, ag, manufacturing, transportation and warehousing
Retail - wholesale trade, retail trade, arts and entertainment
Office - info, finance and insurance, real estate and leasing, professional scientific and tech services, administrative & support & waste management, educational health care and social, public admin
Restaurants and Hotels - accommodations and food services*

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**Source:** LRRP Site Visit
Spread of Vacancies

Legend
- Study Area
- Parcel Boundaries
- Vacant storefront
- Vacant Parcel or Facility

Percent of Storefronts Vacant

Source: LRRP Site Visit
Impact of COVID-19 on Revenues

SURVEY RESULTS

Decline in Business Revenue
65% of businesses generated less revenue in 2020 than they did in 2019. For 42% of businesses, revenue declined by 25% or more.

Revenue in 2020 Compared to 2019

- 9% increased
- 9% stayed the same
- 23% decreased 1-24%
- 5% decreased 25-49%
- 5% decreased 50-74%
- 32% decreased 75-100%
- 18% don’t know/NA

Source: LRRP Survey Responses (22 responses, 73% of which are retail or food and accommodation businesses)

Room Tax Revenues for Gloucester

Source: State Treasurers Office for City of Gloucester

Meals Tax Revenues for Gloucester

Source: State Treasurers Office for City of Gloucester
SURVEY RESULTS

Operating Status
At the time of the survey, 81% of businesses reported they were operating at reduced hours/capacity or closed.

Current Operating Status of Businesses (March/April 2021)

- Operating at Full Capacity: 19%
- Reduced Hours/Capacity due to COVID: 67%
- Temporarily Closed due to COVID: 10%
- Permanently Closed due to COVID: 5%

Source: LRRP Survey Responses (22 responses, 73% of which are retail or food and accommodation businesses)

Reported Impacts
95% of businesses reported being impacted by COVID.

COVID Impacts Reported by Businesses

- Decline in revenue: 73%
- Employee layoff: 45%
- Reduced operating hours/capacity: 77%
- Business closure (temporary or permanent): 68%
- Stopped/defer red rent or mortgage payments: 23%
- Incurred expense to implement safety measures: 64%
- Established alternative mode to sell and deliver products: 50%
- None of the Above: 5%

Source: LRRP Survey Responses (22 responses, 73% of which are retail or food and accommodation businesses)
Outdoor Seating Areas

Established Outdoor Seating Area:
The restaurant has established outdoor seating that is located outside of a pedestrian or parking area.
*Note: restaurants with less than four outdoor seats located in a sidewalk are considered to have NO outdoor seating area.

Permitted Temporary Outdoor Seating Area:
The restaurant received a permit in 2020 or 2021 to create temporary outdoor seating in pedestrian or parking zones.

Source: LRRP Site Visit and Permits
Outdoor Seating

Legend

- Restaurants with Established Outdoor Seating Area
- Restaurants that Permitted Expanded Outdoor Seating Area
- Restaurants with New Permitted Outdoor Seating Area
- Restaurants that Did Not Participate

Source: LRRP Site Visit and Permits
Municipal and Street Parking Utilization
July 2013 – 12PM Peak

Parking Utilization

50% 70% 80% 85% 100%
Over Capacity

Source: 2013 Parking Study
Non-Municipal Parking Utilization
July 2013 – 12PM Peak

Source: 2013 Parking Study
Physical Environment
Gloucester – Private Realm

Guiding Principles

- **Windows** – transparency
- **Outdoor Display /Dining** – spill over activity
- **Signage** – ID at a distance, visual brand, tenants to attract new customers
- **Awnings** – design, condition, comfort
- **Facade** – materials, maintenance
- **Lighting** – Interior

**Rogers St.**
Overall Grade: C

**Waterfront / Industrial**
Overall Grade: N/A

**Main St.**
Overall Grade: B
Gloucester – Public Realm

Guiding Principles

- Seating Areas
- Stages/Performance Areas
- Events
- Sidewalks – condition, continuity
- Trash Cans
- Benches
- Street Trees – shade / landscaping
- Community Art
- Cleanliness and Safety
- Access – crossings, streetlight poles, curbs, transit stops, cruise and boats docks, signage, lighting and entrances
- Visibility – wayfinding, lighting, signage
- Brand Marketing – pole banners, decals, district branding

Rogers St.
Overall Grade: C

Waterfront / Industrial
Overall Grade: N/A

Main St.
Overall Grade: B - C
Public Realm: What’s Working

• Shared streets improvements – Parsons St. access, crosswalks
• Access to waterfront
• Outdoor dining
• Main St. environment
• City sponsored seasonal programming - Culture Splash
Public Realm: Room for Improvement

- Wayfinding signage
- District-wide branding
- Inconsistent streetscape amenities
- Inconsistent sidewalk condition
- Waterfront to Main St. connection for visitors
- Activating Rogers St. traffic transition
- Utilization of parking
- HarborWalk
- Gateways
Private Realm: What’s Working

• Attractive storefronts/ historic buildings on Main St.
• Café tables and outdoor seating areas
• Interesting retail and window merchandising
• Fishing industry related activities
• Visitor destinations
Private Realm: Room for Improvement

- Vacant storefronts (Filling vacancies and possible temporary uses)
- Opportunities for bringing commerce and dining outside
- Retail mix
- Opportunities to enhance night-time lighting
- Opportunities for Rogers St. transition
Emerging Focus Areas for Project Development

- **Placemaking** (e.g. streetscape improvements, arts and cultural elements, wayfinding, signage)
- **Parking** (e.g. utilization of existing/new parking lots, signage, marketing, management)
- **Public and private space activation** (e.g. events, pop-ups)
- **District marketing and branding**
- **Business attraction & tenant mix**
- **Technical assistance** (e.g. social media training, digital sales)
- Maximization of **visitor customer base**
- **District management**
Next Steps

- Focus groups (June)
- Refining project ideas (June)
- Consult with subject matter experts (June/July)
- Finalizing list of projects (June-July)
- Update committees on projects (July)
- Draft final plan (August)
Data Sources

- LRRP Survey of Downtown Businesses - 22 Responses
- Site Visit - Data Collected During an April 21, 2021 Site Visit
- U.S. Census American Community Survey 5-Year Estimates (2015 to 2019)
- ESRI Business Analyst
- 2013 Gloucester Parking Study
- Other: MassGIS, Permits, Stage Fort Park Visitor's Center
Emerging Focus Areas for Project Development – Ideas

1. Parking utilization of existing assets / management
2. Marketing /district branding
3. Expansion of Outdoor dining / commercial program
4. Tenant recruitment / tenant mix
5. Creation of a “backbone” district management entity
6. Retail merchandizing – adapting retailers to changing customer consumption patterns – Use of social media, digital hybrid
7. Streetscape design to increase outdoor dining, programming, commerce, events, art and culture – Main St.
8. Connecting tourists to Main St. - wayfinding, lighting , pedestrian etc. - expansion of shared streets
9. Piloting Main St. ( partial ) pedestrian /dining closure
10. Pilot reversal of Main St. traffic flow, wayfinding and improvements
11. Creating gateways/ destination
12. Rogers St. property initiative to activate Rogers St. orientation of buildings
13. Rogers St. streetscape improvement – traffic calming , outdoor dining/commerce, visitor connection, pedestrian