

Welcome

Gloucester, 2021 LRRP Data Analysis and Discussion



Local Rapid Recovery Plan Initiative (LRRP)

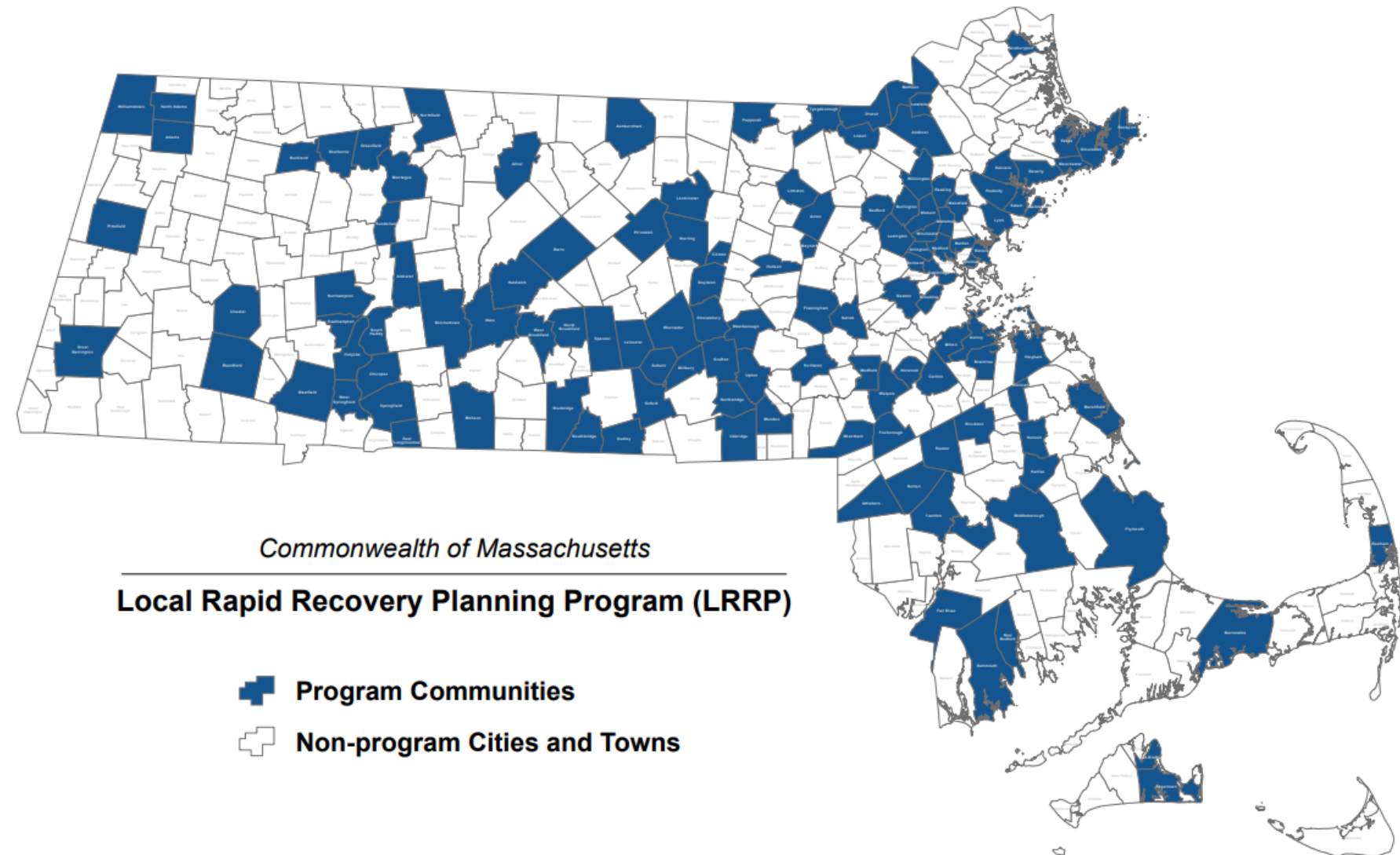
Funded through the Massachusetts Downtown initiative (DHCD)

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.



LRRP Communities



Timeline

Phase I: Diagnostic

- Data Analysis (Today)
- Focus Groups
- Stakeholder Interviews

Phase II: Project
Recommendations

Phase III: Plan Documents

Technical Subject
Matter Experts

Focus Groups

- 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

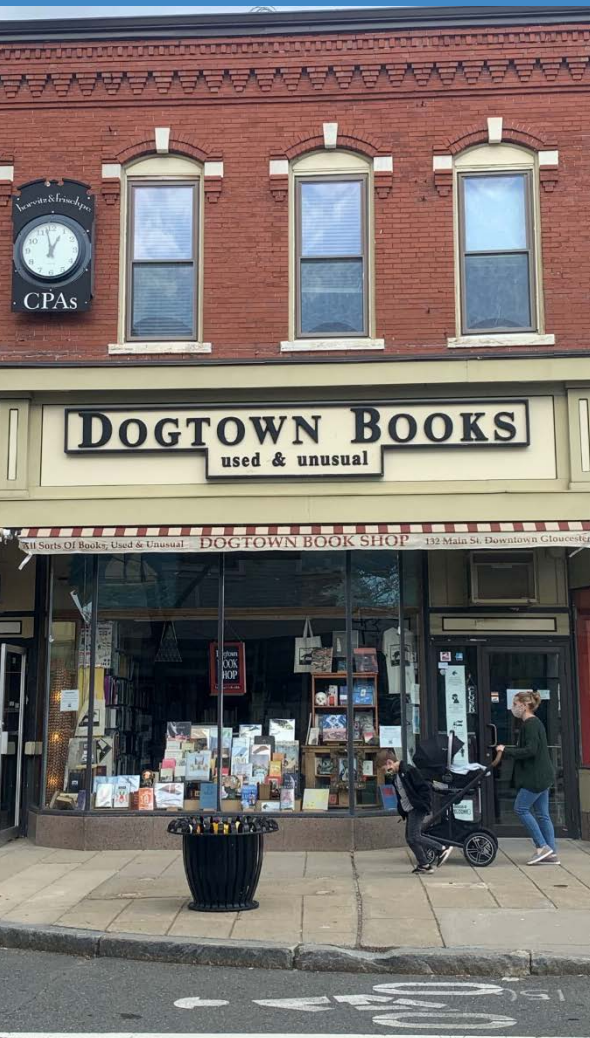


June 15 at 2:30pm

Contact Shelly Ciolino at sciolino@gloucester-ma.gov to register



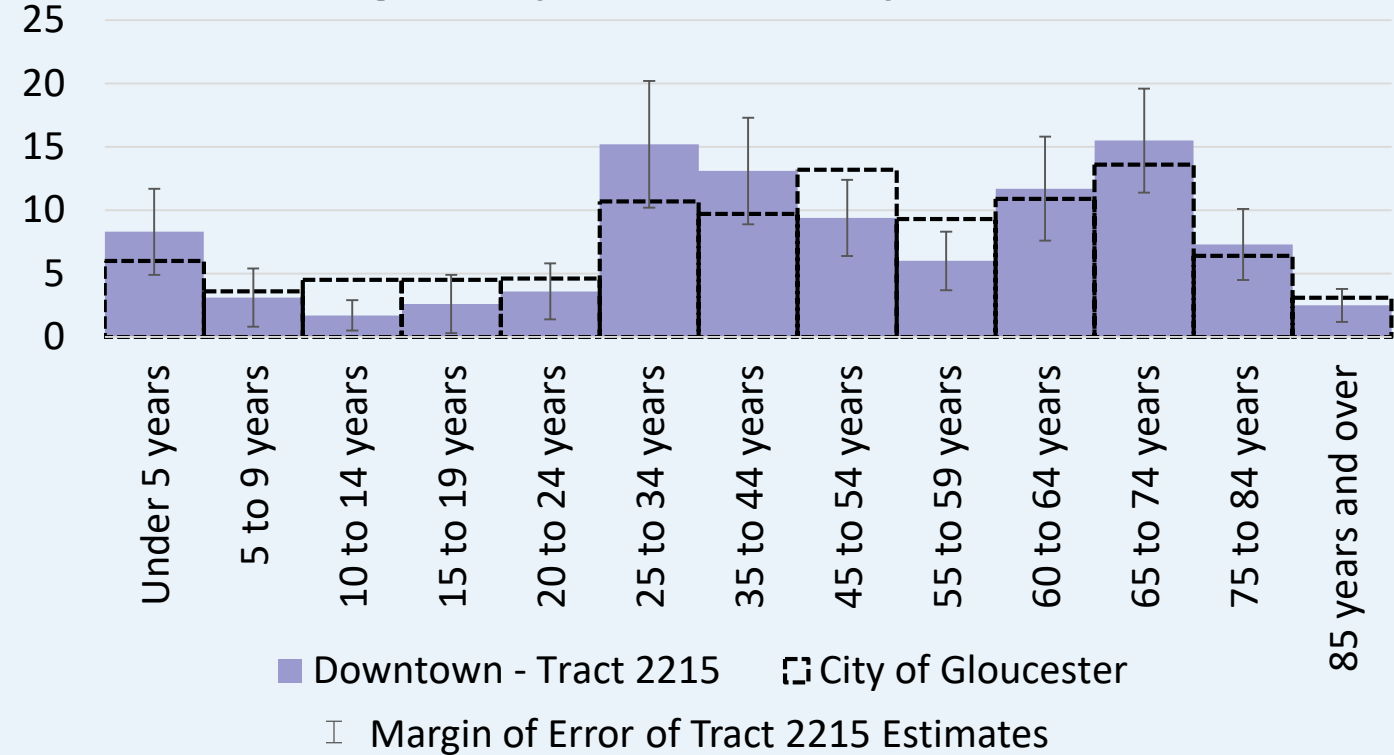
**CUSTOMER
BASE**



Customer Base

Residents Living in Downtown (3,100 +/-281)

Age Compared to the City as a Whole

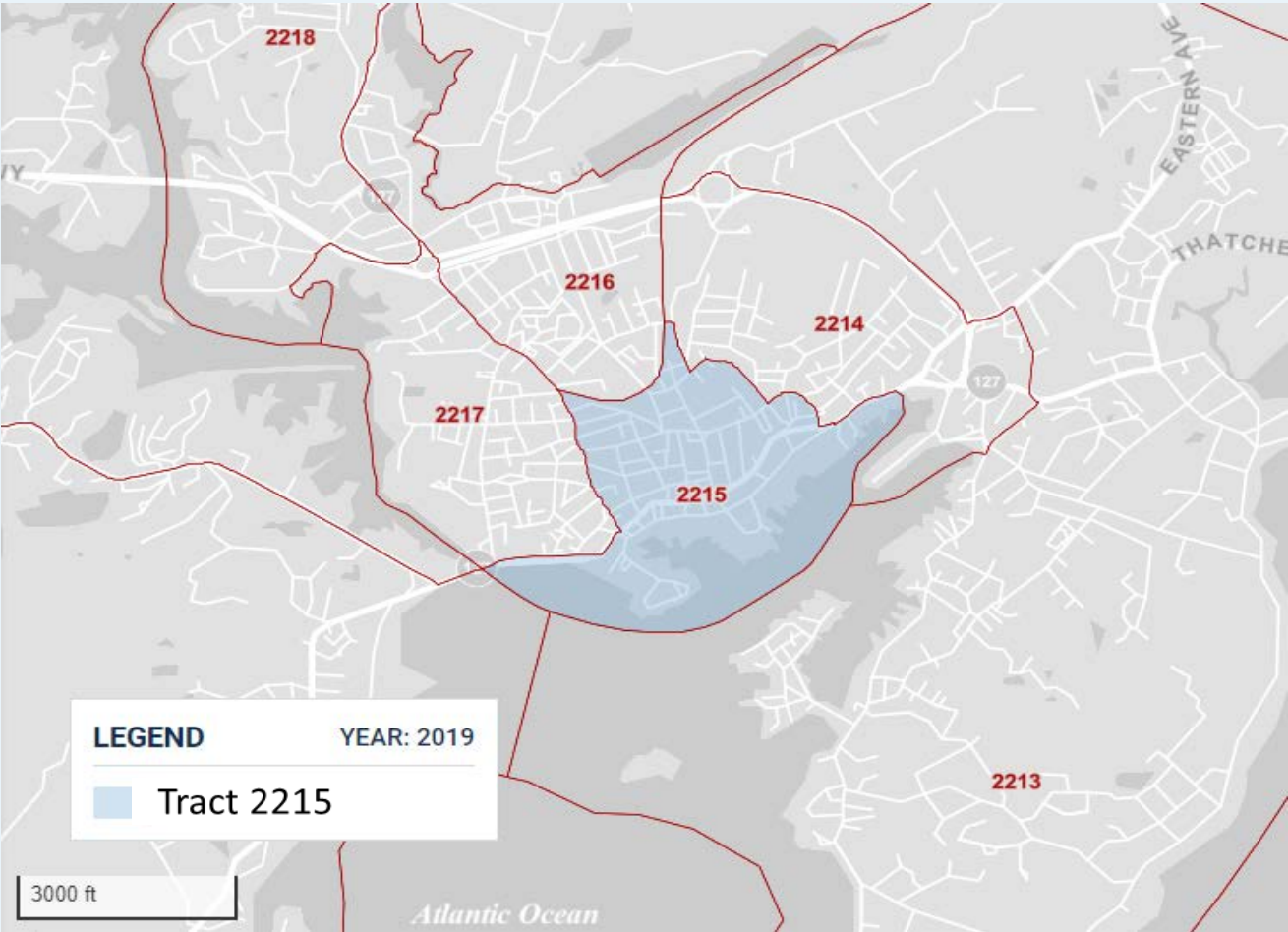


Source: U.S. Census Bureau American Community Survey 2015-2019 5-year estimates (Table DP05)

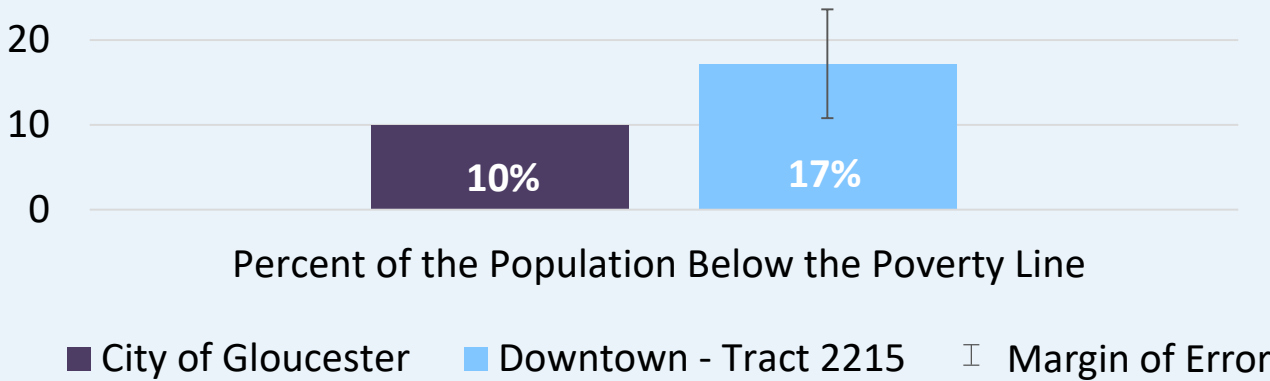
Housing Units

Gloucester		Downtown - Tract 2215		% of all Housing Located in Downtown
Housing Units	Margin of Error	Housing Units	Margin of Error	
14,878	324	1,781	49	12%

Source: U.S. Census Bureau American Community Survey 2015-2019 5-year estimates (Table



Percent Below the Poverty Line



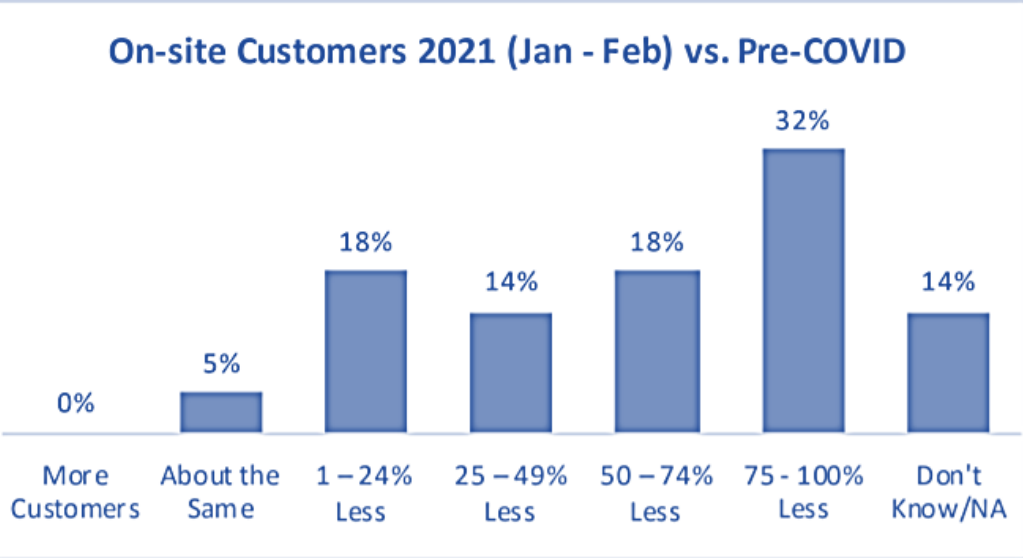
Source: U.S. Census Bureau American Community Survey 2015-2019 5-year estimates (Table S1701) [†] Margin of error is at least 10 percent of the total value.

Impact of Covid-19 on Foot Traffic to Downtown

SURVEY RESULTS

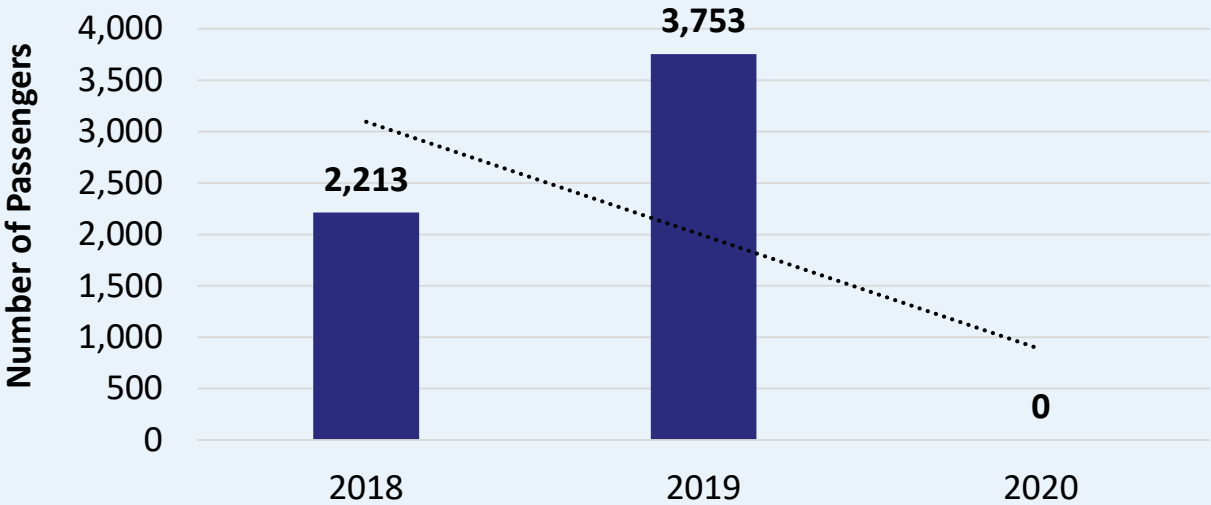
Less Foot Traffic in Commercial Area

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.



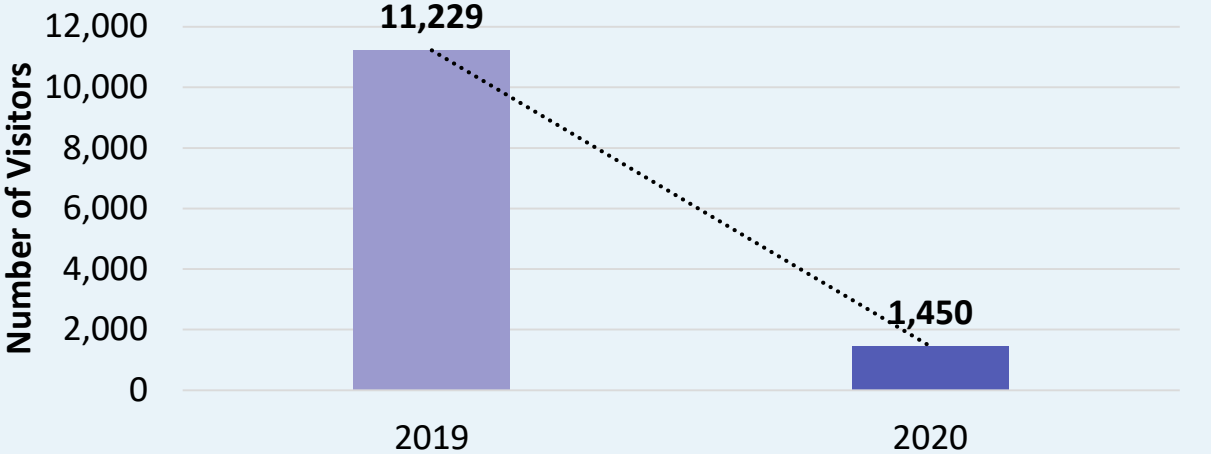
Source: LRRP Survey Responses (22 responses, 73% of which are retail or food and accommodation businesses)

Cruise Passenger Numbers



Source: Port Data

Stage Fort Park Visitor's Center



Source: Stage Fort Park Visitor's Center



**BUSINESS
ENVIRONMENT**

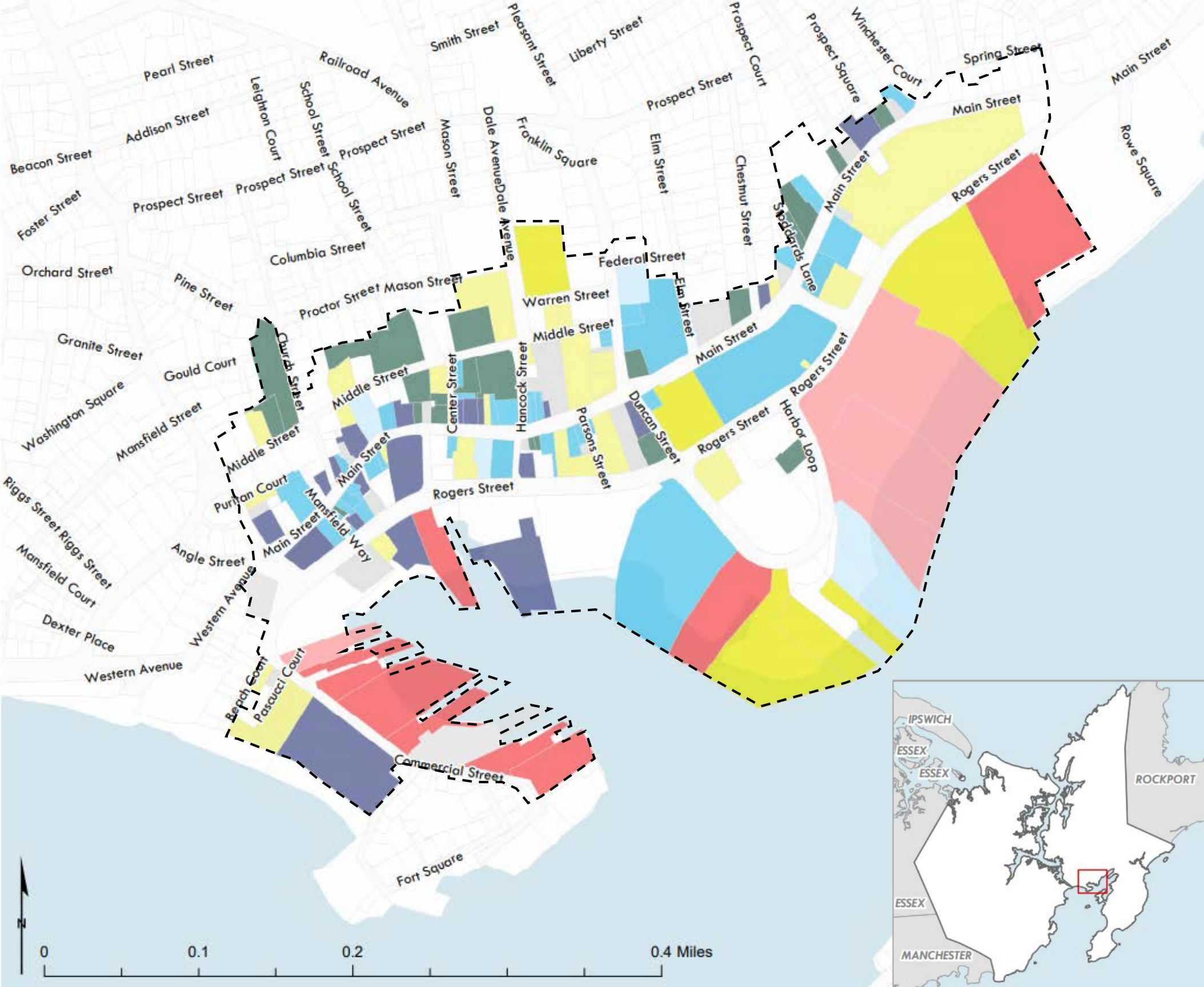


Business Environment

Spread of Parcels by Use

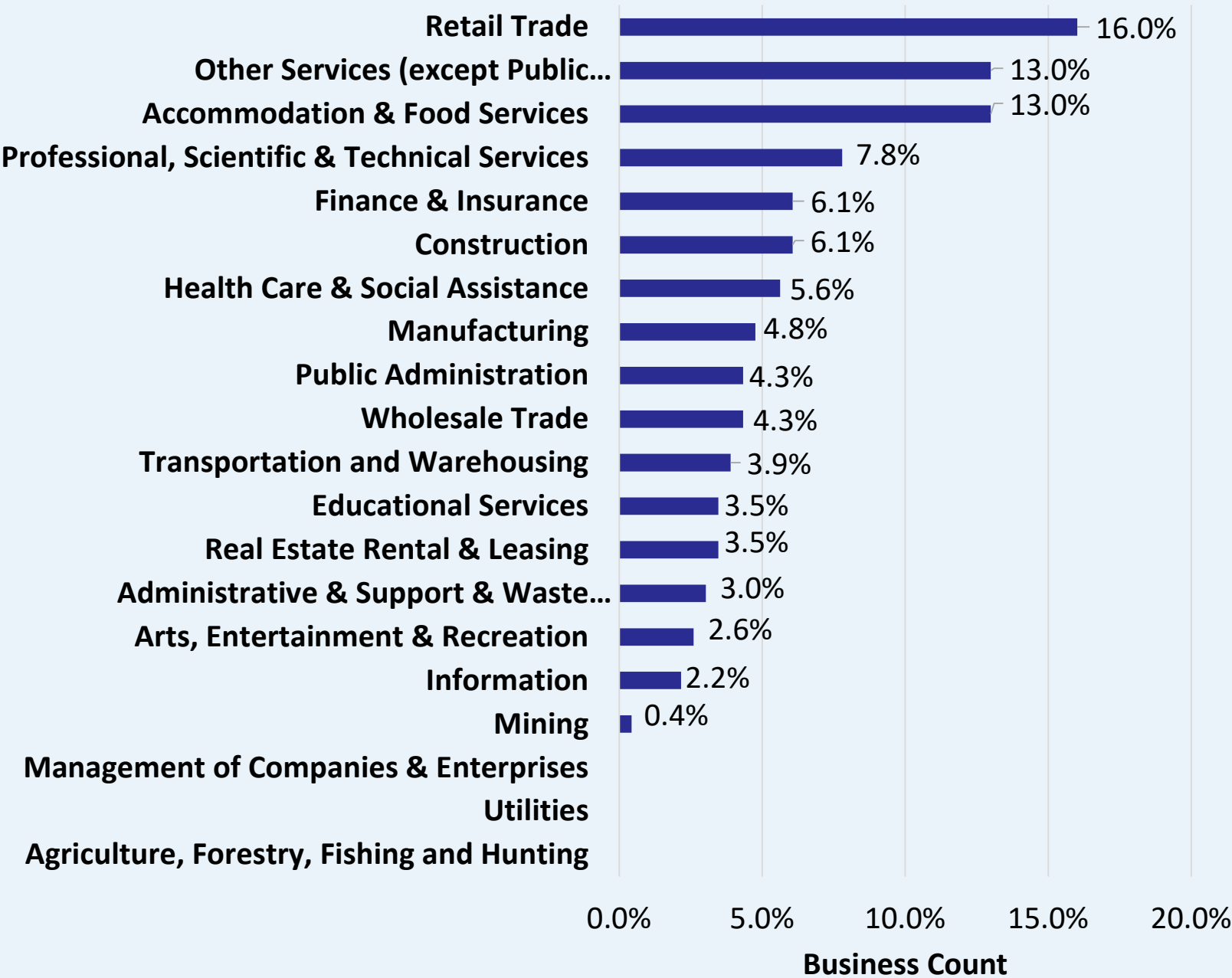
Legend

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



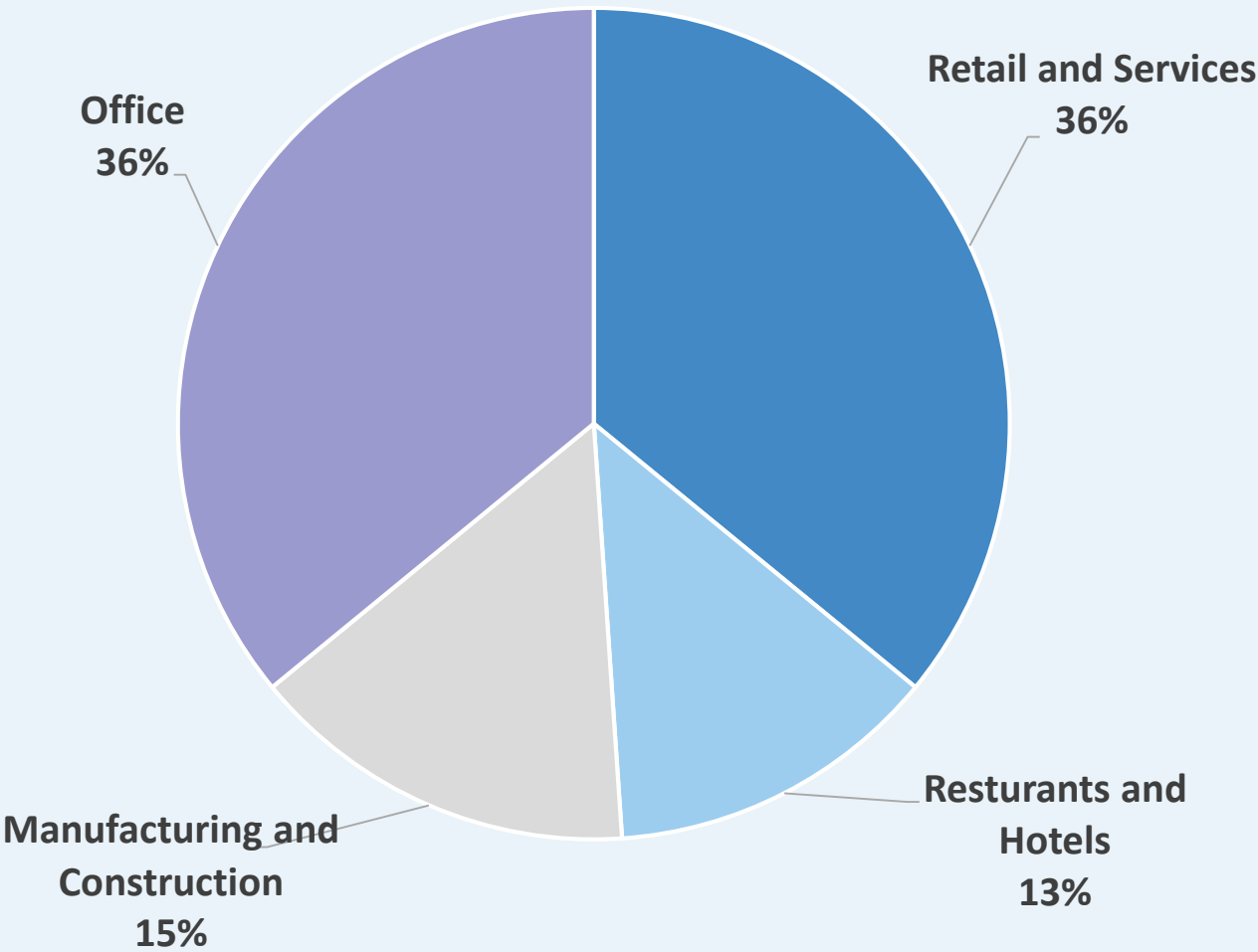
Businesses by Type in Downtown

Businesses by NAICS Code



Source: ESRI Business Analyst

Businesses by Category*

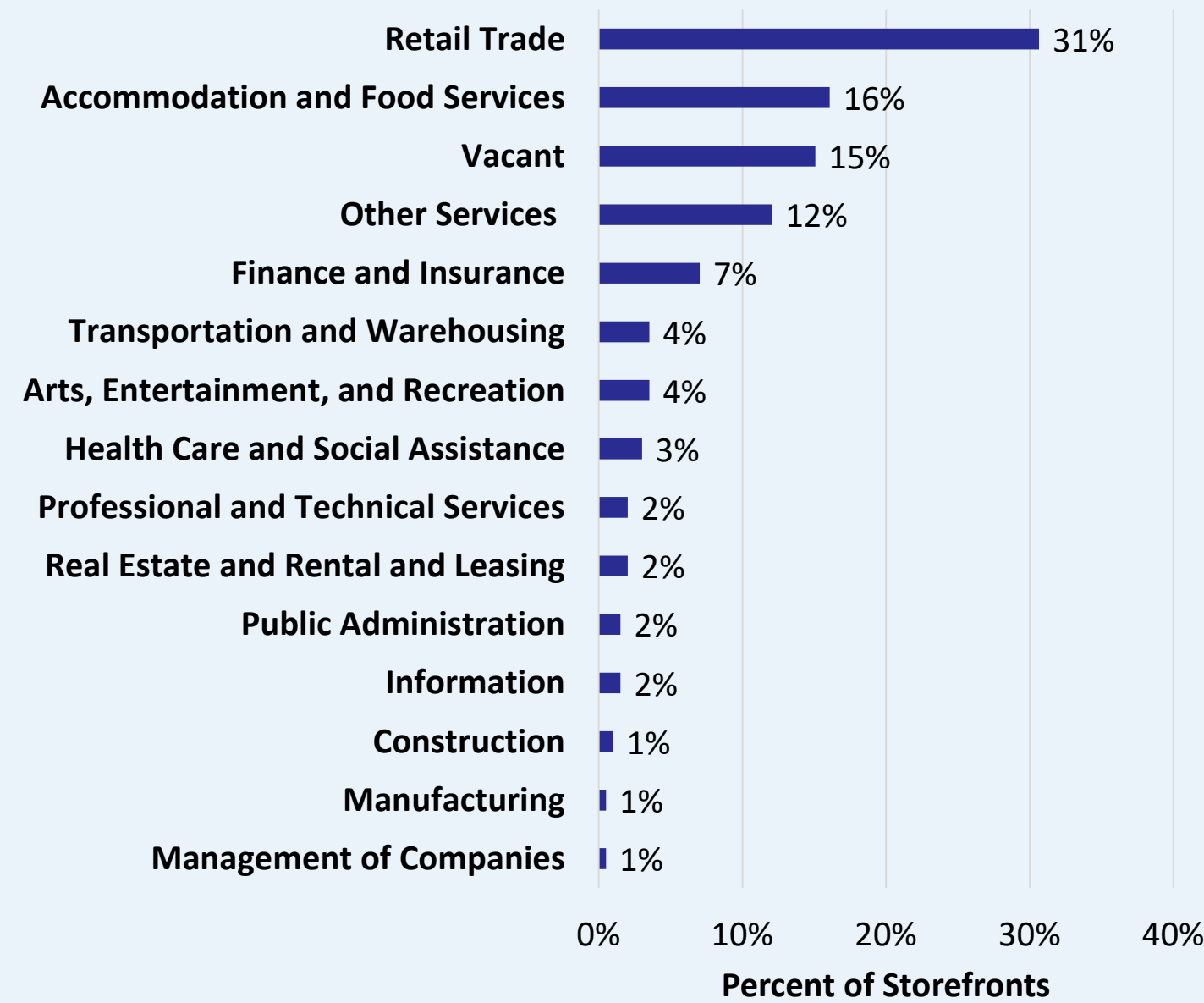


Source: ESRI Business Analyst

* 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

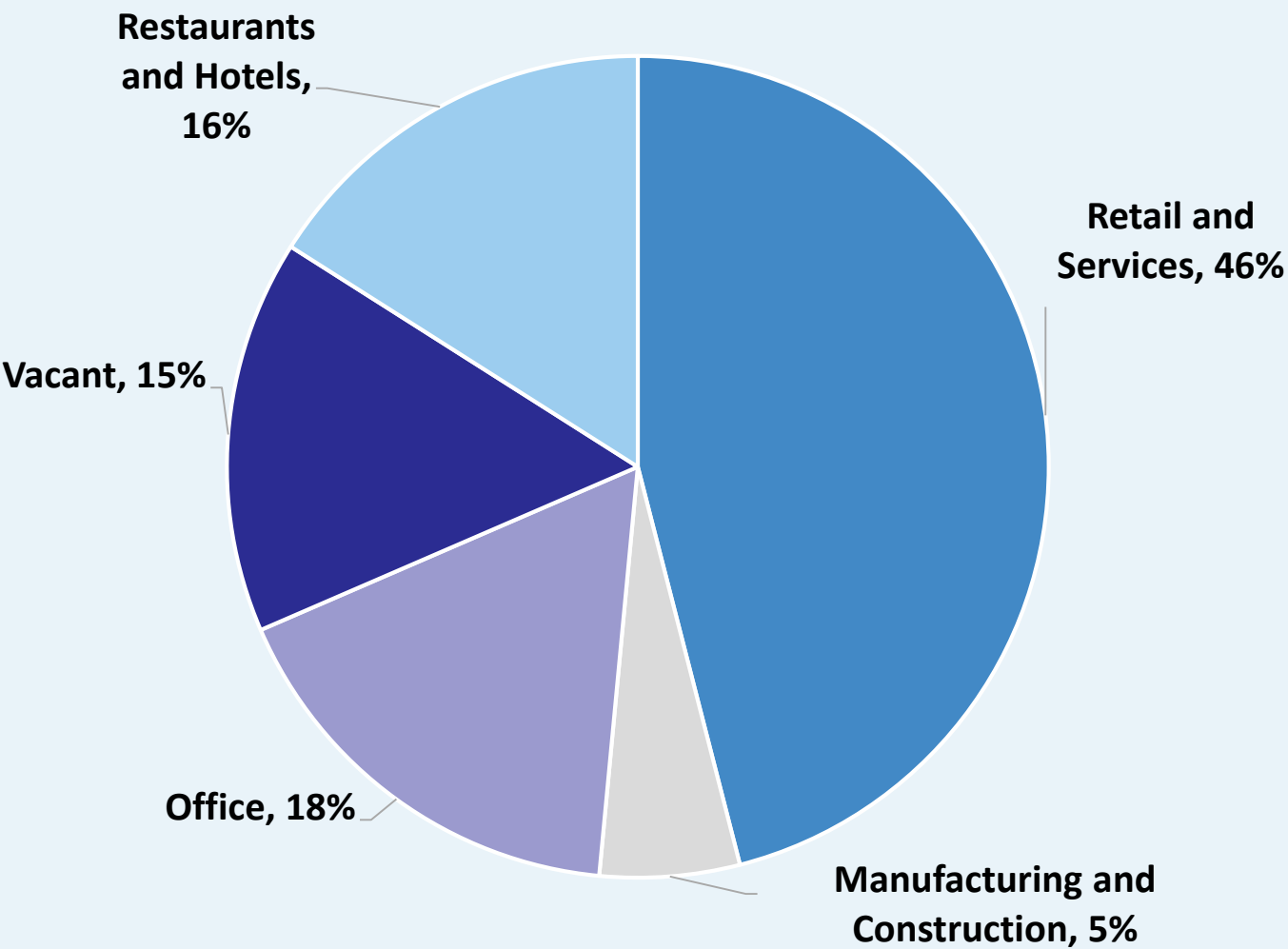
Downtown Storefront Use

Storefront Uses by NAICS Code



Source: LRRP Site Visit

Storefront Use by Category*



Source: LRRP Site Visit

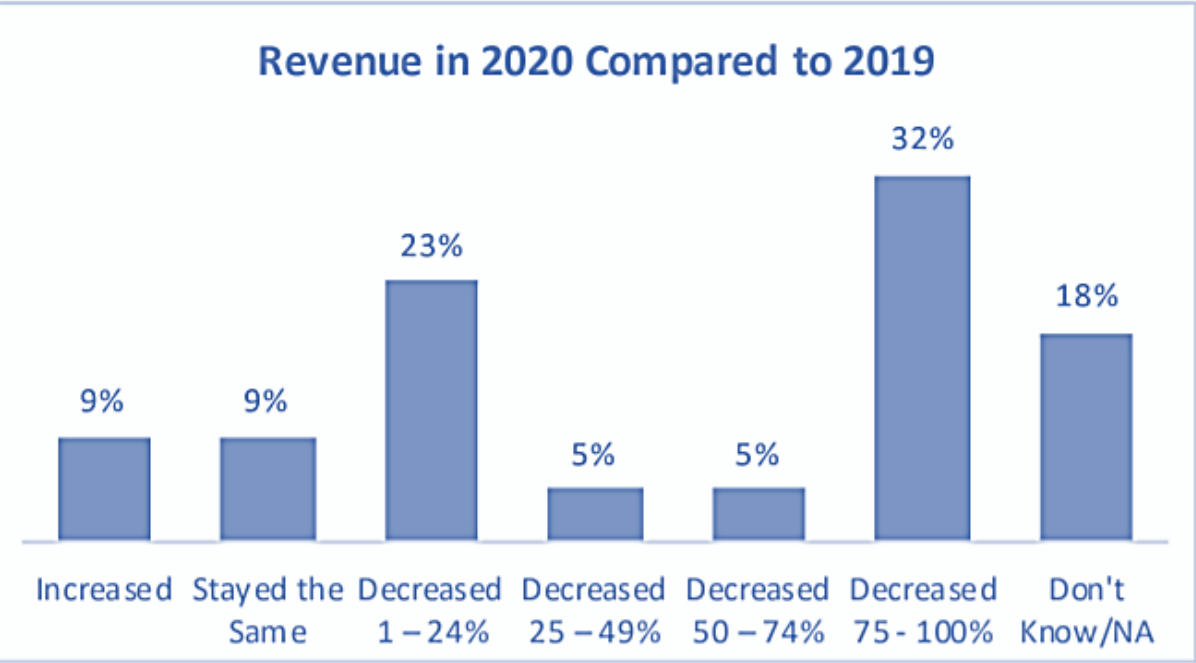
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Restaurants and Hotels - accommodations and food services

Impact of COVID-19 on Revenues

SURVEY RESULTS

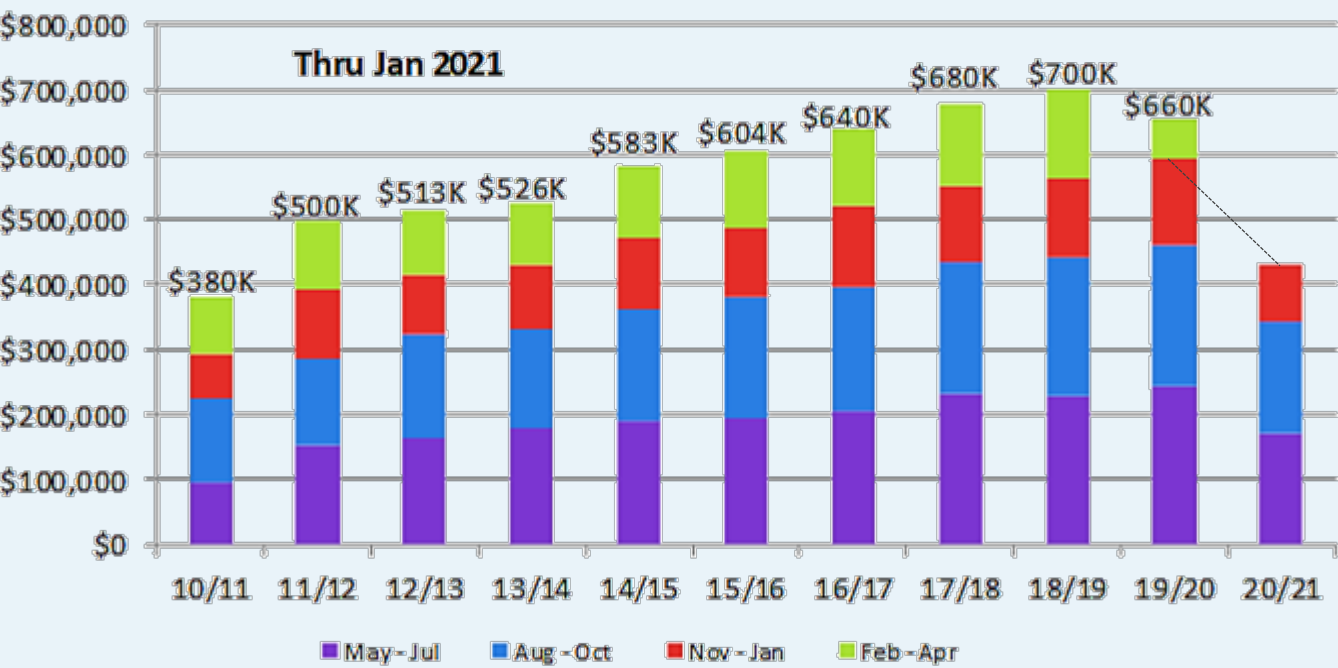
Decline in Business Revenue

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



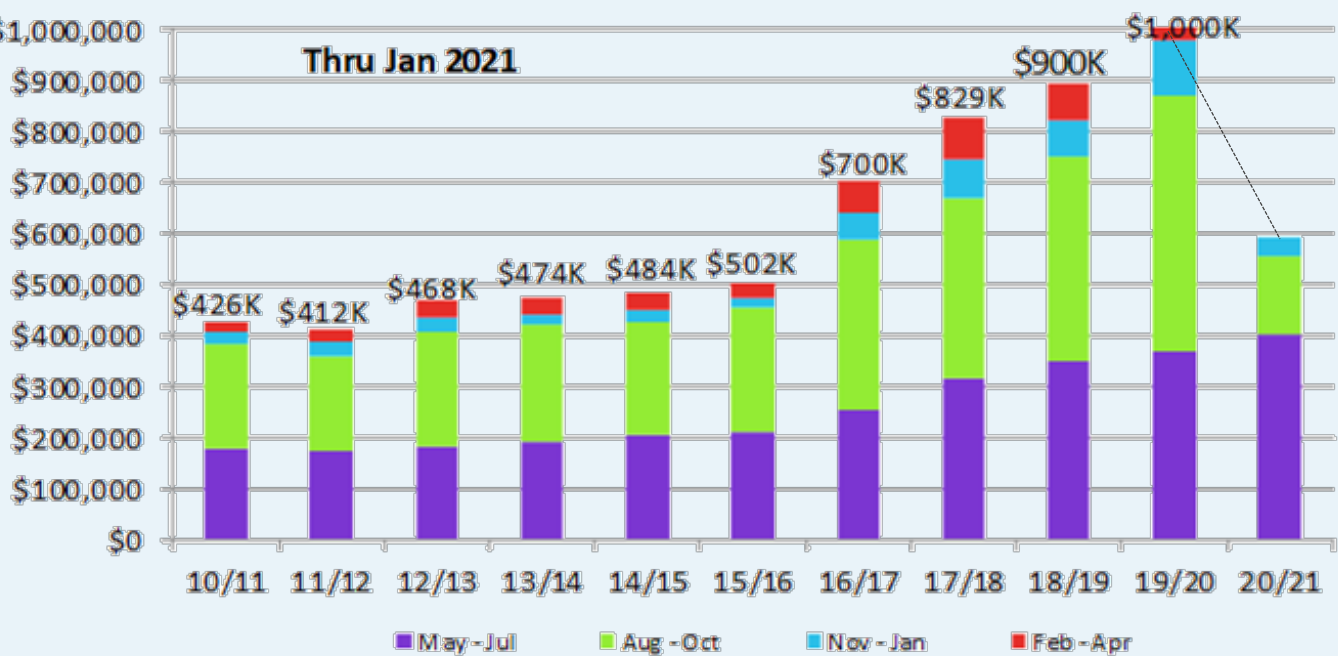
Source: LRRP Survey Responses (22 responses, 73% of which are retail or food and accommodation businesses)

Room Tax Revenues for Gloucester



Source: State Treasurers Office for City of Gloucester

Meals Tax Revenues for Gloucester



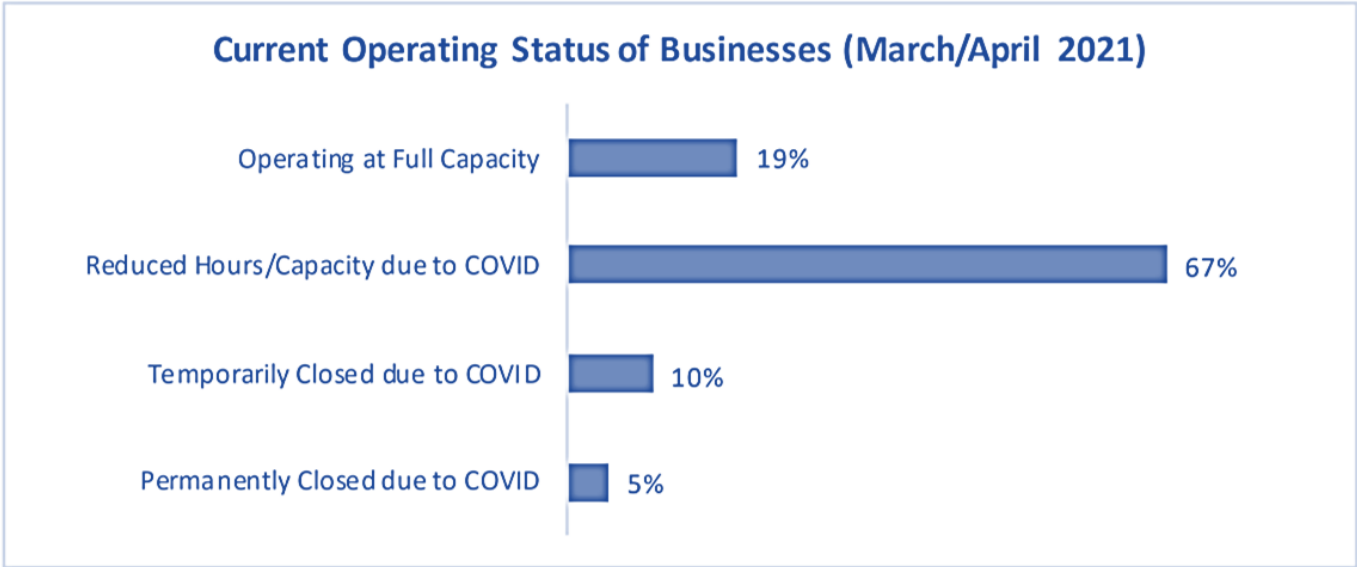
Source: State Treasurers Office for City of Gloucester

Effects of COVID-19 on Business Practices

SURVEY RESULTS

Operating Status

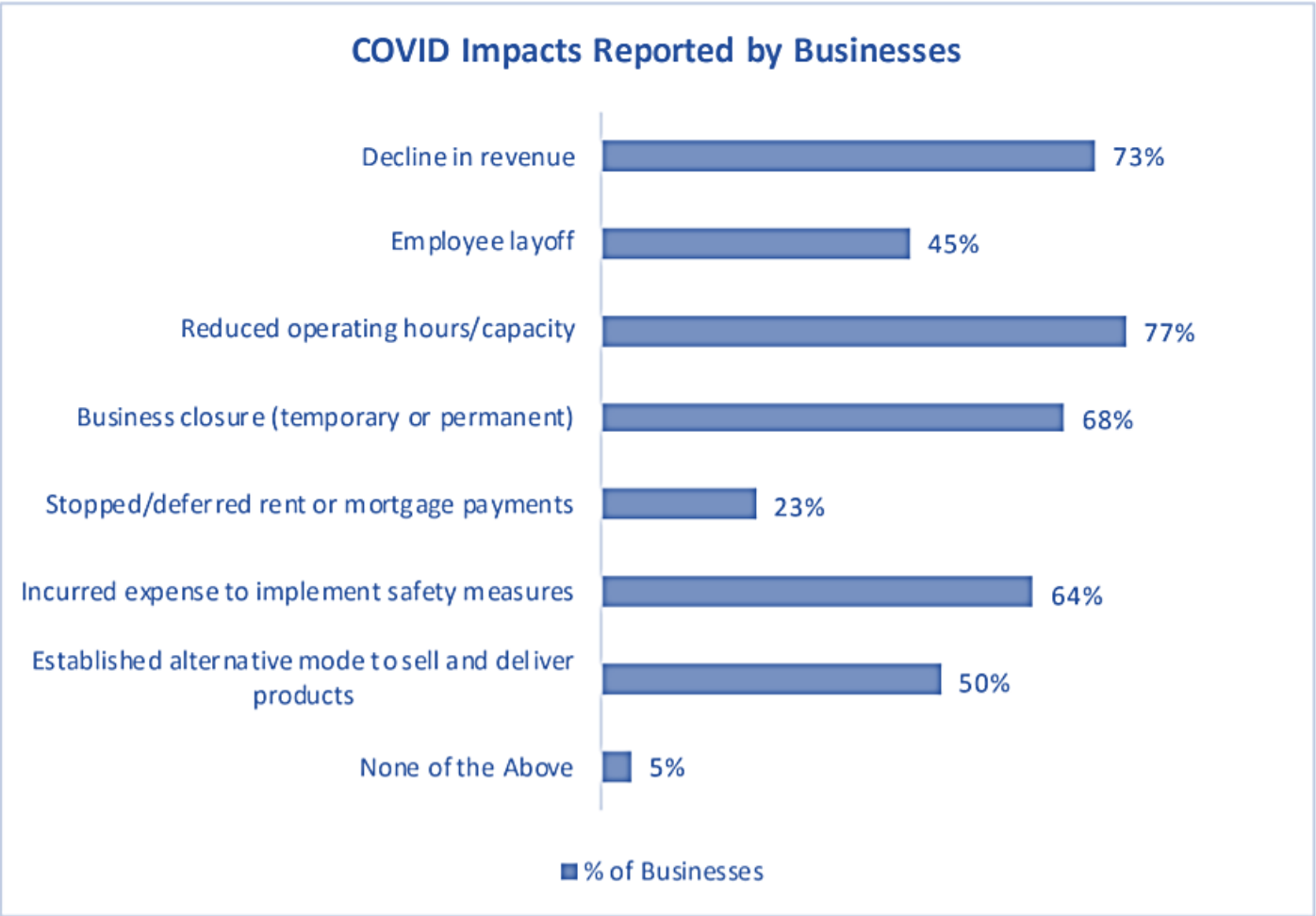
At the time of the survey, 81% of businesses reported they were operating at reduced hours/capacity or closed.



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.



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.

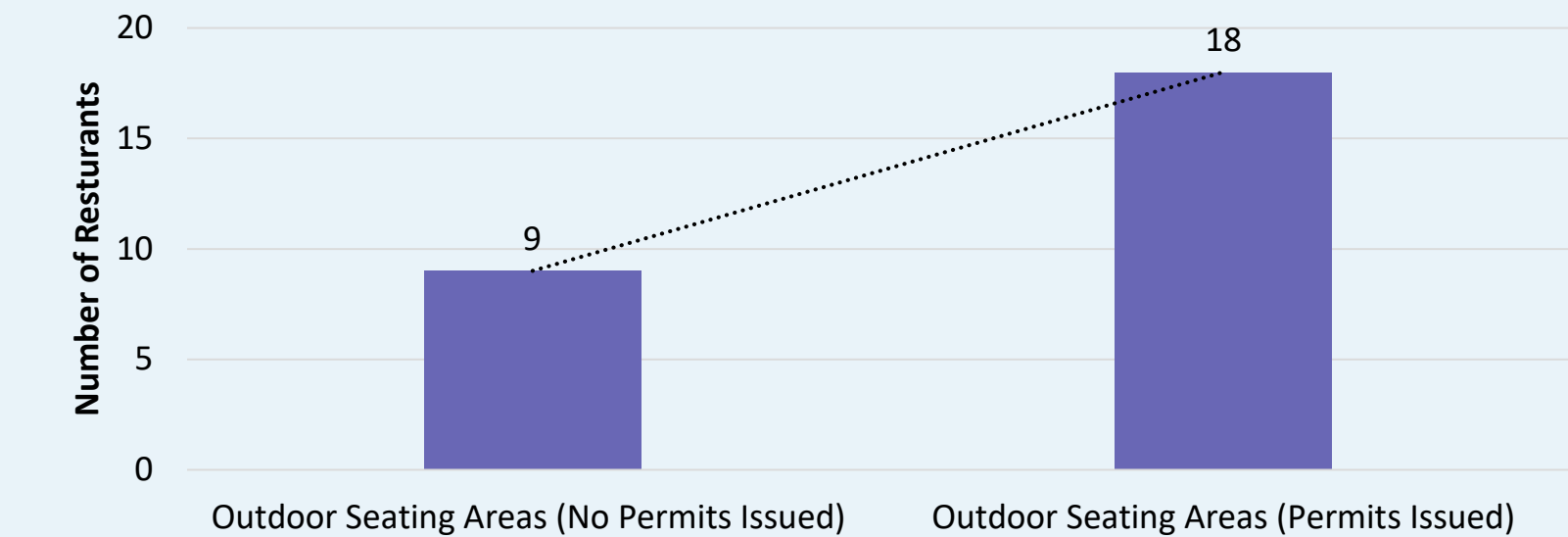


Permitted Temporary Outdoor Seating Area:

The restaurant received a permit in 2020 or 2021 to create temporary outdoor seating in pedestrian or parking zones.

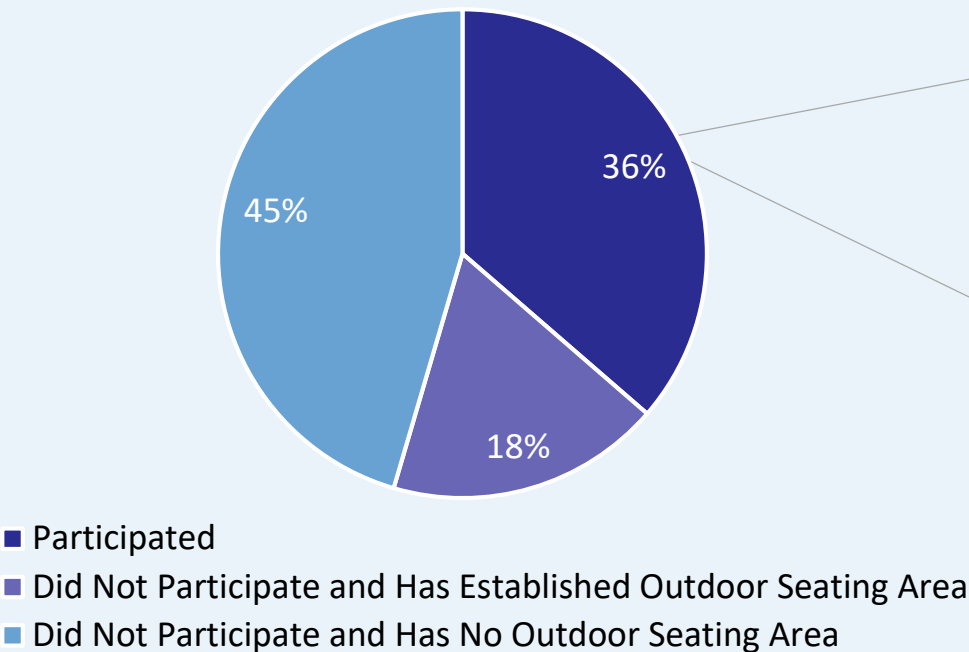


Gain in Resturants with Outdoor Seating Areas



Source: LRRP Site Visit and Permits

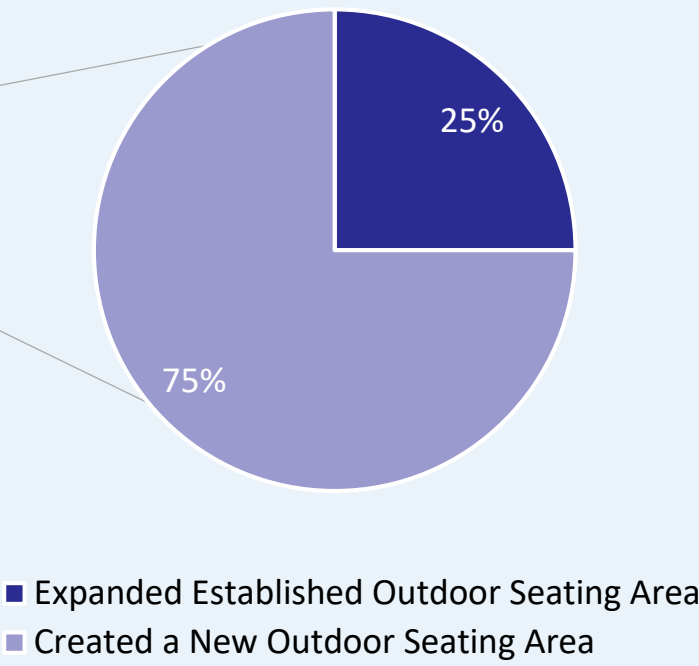
Participation in Permitted Temporary Outdoor Seating



- Participated
- Did Not Participate and Has Established Outdoor Seating Area
- Did Not Participate and Has No Outdoor Seating Area

Source: LRRP Site Visit and Permits

Type of Participant (12 Total)



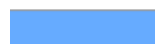



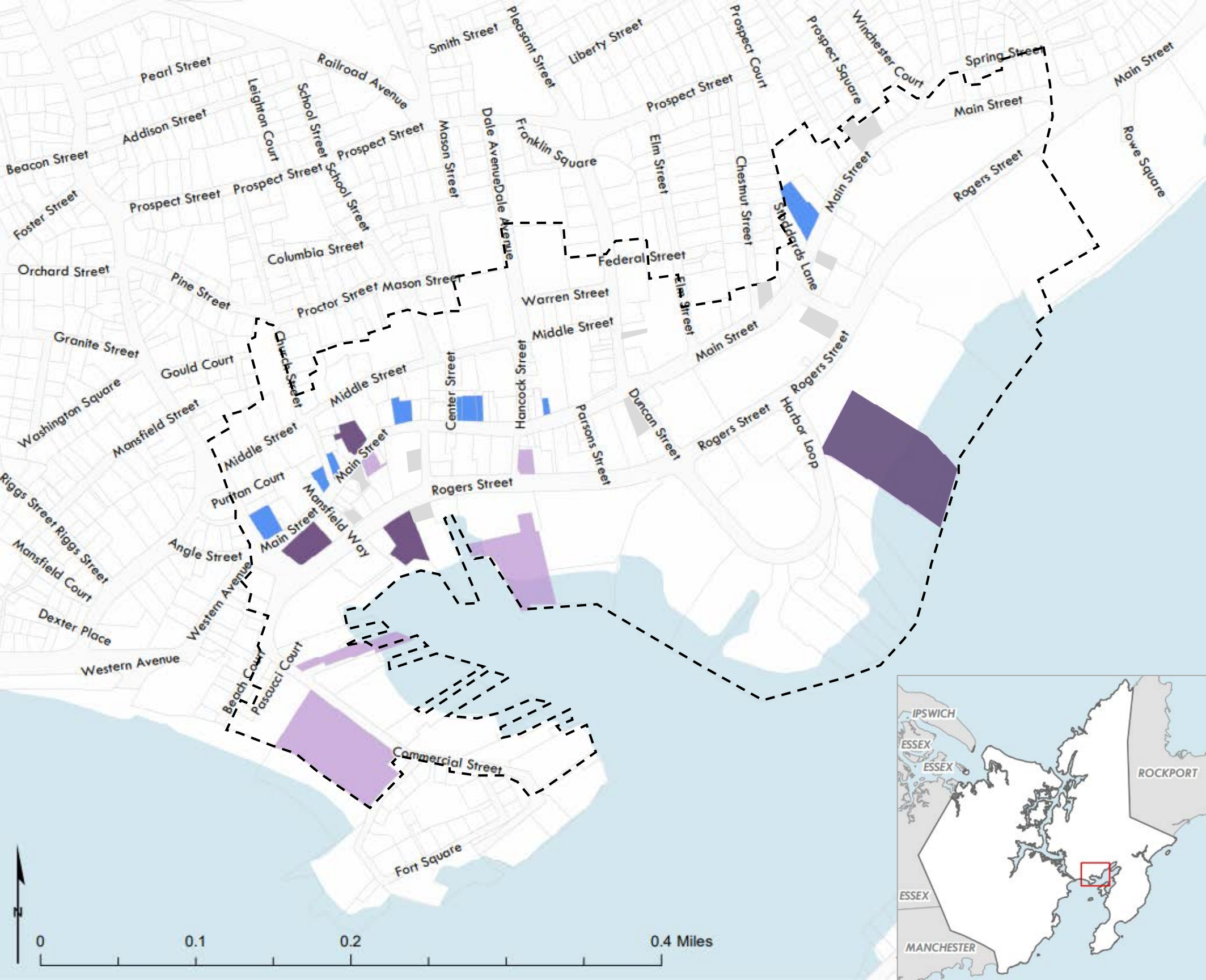
- Expanded Established Outdoor Seating Area
- Created a New Outdoor Seating Area

Source: LRRP Site Visit and Permits

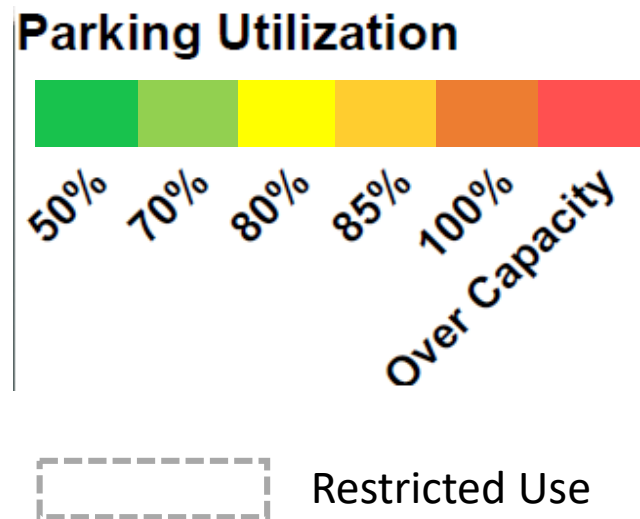
Outdoor Seating

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



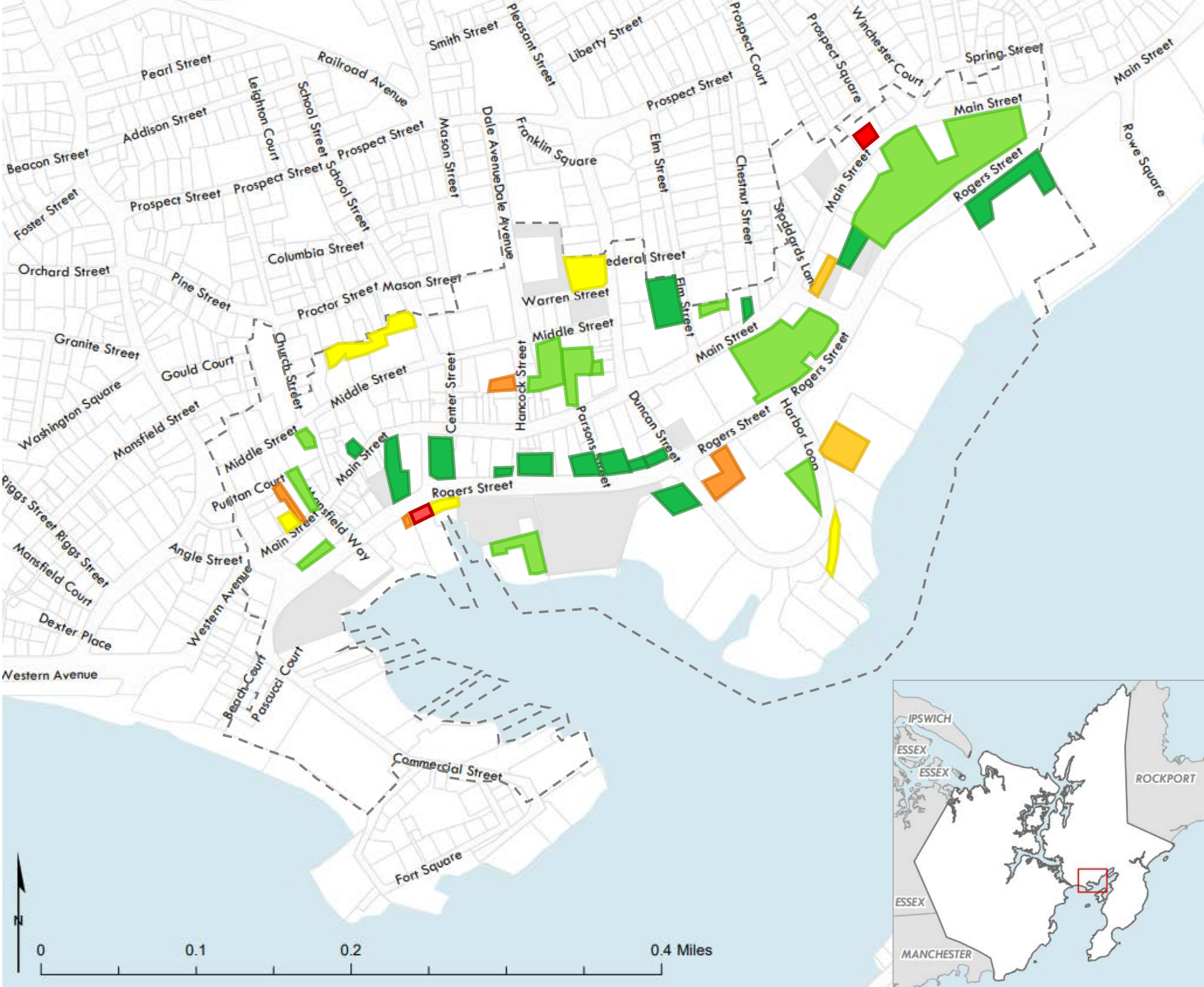
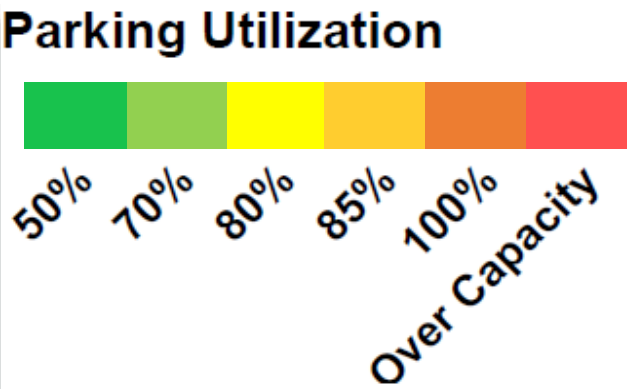
Municipal and Street Parking Utilization July 2013 – 12PM Peak



Source: 2013 Parking Study

Non-Municipal Parking Utilization July 2013 – 12PM Peak

 Municipal Lot





PHYSICAL
ENVIRONMEN
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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
- **Façade** – materials, maintenance
- **Lighting** – Interior

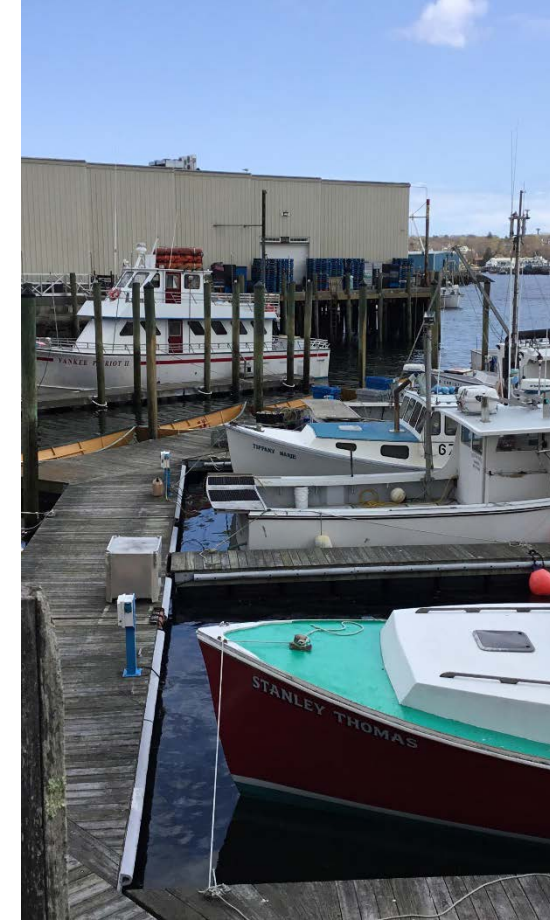
Rogers St.

Overall Grade: C



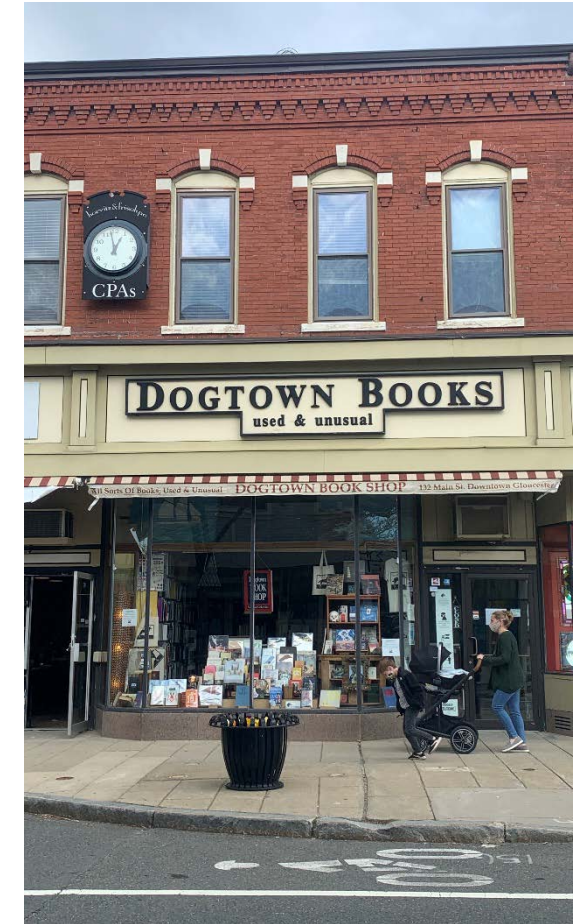
Waterfront / Industrial

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

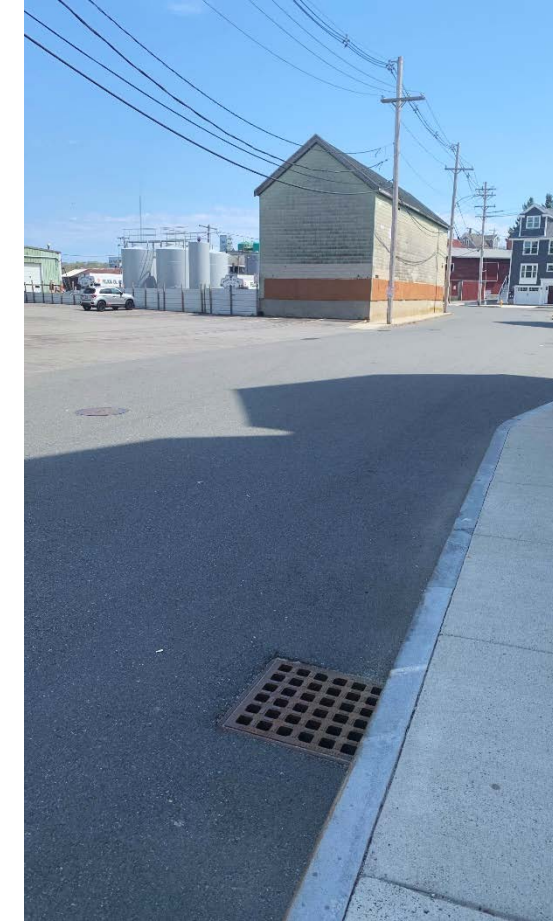
Rogers St.

Overall Grade: C



Waterfront / Industrial

Overall Grade: N/A



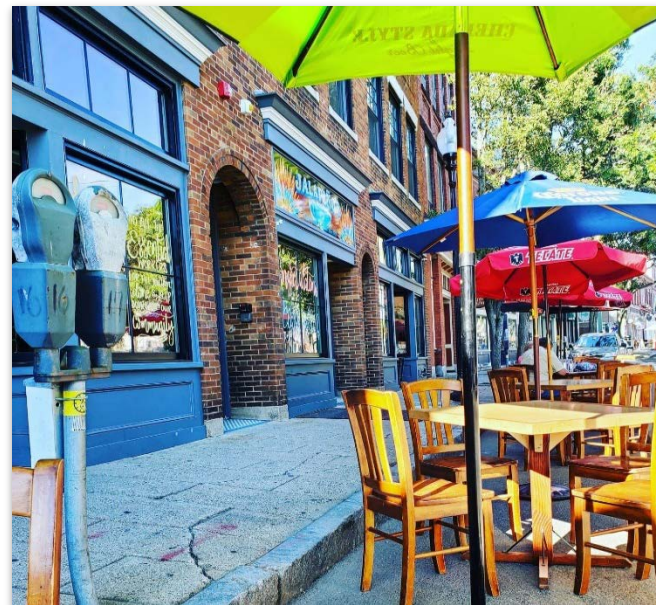
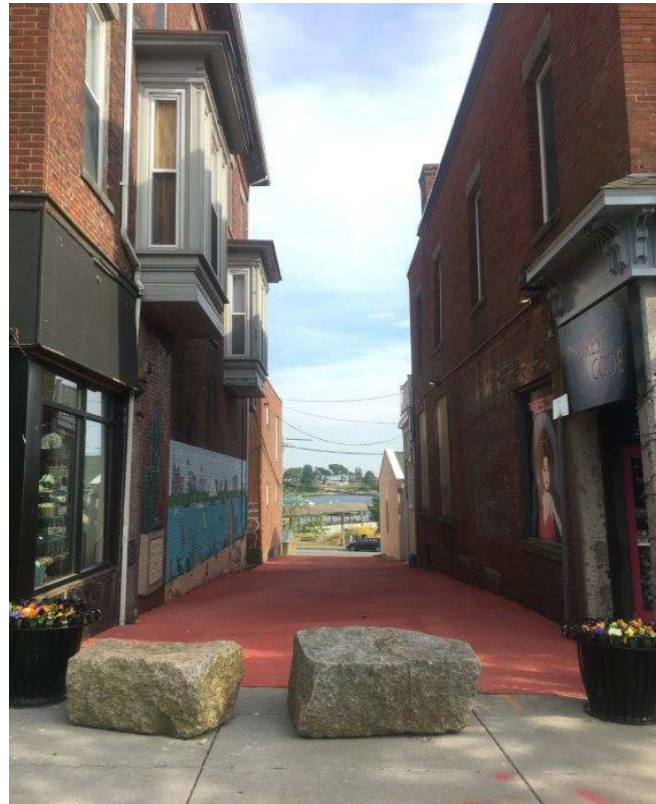
Main St.

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**





- 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