A Mill Town's Downtown: Assessing the Needs of Ware's Main Street

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Assessing the Needs of Ware's Main Street

Masters Thesis Project

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Acknowledgements

Special thanks to Dr. Mark Hamin, Director of the Masters in Regional Planning Program at the University of Massachusetts Amherst, and Karen Cullen, Town Planner for the Town of Ware, without whose guidance and constant support and direction this project would not have been possible.

I hope that the Town of Ware finds the information contained herein, useful towards the development of a downtown revitalization plan that can help such a historic mill town reach its greatest potential.

Executive Summary

At the heart of every city and town is a downtown and a Main Street that not only serves as an economic engine, but defines the community, reflects its values, and acts as a living barometer of the state of the town. Downtown Economic Development is an essential component of any community's plan for prosperity and growth.

A once thriving mill town with a robust manufacturing industry, Ware Massachusetts is a bedroom community that today is made up of many industries, none of which present an obvious symbol or unifying identity for Ware the way manufacturing once did. That reality is especially reflected in Ware's downtown, which is dotted with vacant prime street-front commercial properties, and in which depressed rents create demand for commercial space only among a struggling retail industry, service providers, commercial office space and [for the most part] small breakfast/lunch eateries.

Research abounds on the components of robust downtown centers and the myriad of tools and techniques employed by individual municipalities to meet their goals and objectives for economic growth and vitality. However, before Ware can construct such a strategy, it first needs to define what currently exists. This Masters Project assesses the current state-of-the-downtown in Ware, Massachusetts and provides data that can assist them in the construction of a strategy for downtown revitalization and long-term business development.

In January of 2013, a downtown boundary was drawn with the guidance of Ware's Town Planner and approval by the Ware Business and Civic Association. Using the guidance, primarily of Peg Barringer's fall 2012 workshop, "*Economics of Downtown... Training Guide - Lessons in Retail Attraction & 10 Things You Can Do to Improve the Retail Mix Downtown*", a strategy for data collection was developed to complete the first three steps to downtown revitalization, which include: Evaluating the Business Mix, Inventorying Vacancies and Collecting Market Information in order to lay the foundation for the eventual completion of the remaining 7 steps.

The strategy included the release of three surveys, a Business Census, a Commercial Properties Survey and a Customer Survey which were in the field for varying degrees of time between February 4, 2013 and April 26, 2013 and each had varying degrees of success.

The results reflect a weekday downtown that services a very specific demographic of people who regularly access the downtown. Offices disproportionately make up the businesses located there and visitors from 43 (mostly) surrounding towns across the three counties that Ware abuts access the downtown for these social services.

The recommendations provided propose the continued data collection of the business and commercial property owners information, the inclusion of the business and commercial property owners in the development of a downtown revitalization plan, the use of several state and local resources at Ware's disposal and need for a comprehensive market analysis of Ware's downtown.

Introduction

At the heart of every city and town is a downtown and a Main Street that not only serves as an economic engine, but defines the community, reflects its values, and acts as a living barometer of the state of the town. Downtown Economic Development is an essential component of any community's plan for prosperity and growth. For many small New England communities, there is growing recognition that a single new economic actor, like the introduction of a large new employer, may not materialize to dramatically transform these towns. Instead, communities are looking to identify their strongest assets for economic stabilization. This means supporting their existing business communities, optimizing their infrastructure and strengthening their workforce with education and training. It also means creating a vision for the future by capitalizing on natural resources and investing in the image that they presents to the public; towards establishing their own unique identity.

A once thriving mill town with a robust manufacturing industry, Ware Massachusetts is a bedroom community that today is made up of many industries, none of which present an obvious symbol or unifying identity for Ware the way manufacturing once did. That

reality is especially reflected in Ware's downtown, which is dotted with vacant prime street-front commercial properties, and in which depressed rents create demand for commercial space only among a struggling retail industry, service providers, commercial office space and [for the most part] small breakfast/lunch eateries.

In September of 2012, the Town of Ware, via Ware's Town Planner, Karen Cullen, commissioned the work of the fall 2012 Regional Planning Masters Studio at the University of Massachusetts Amherst, to collect and present data to the Town that would anchor their Master Planning process, which commenced in January 2013. The final report, entitled "Prelude to a Master Plan: Ware, Massachusetts", was over 220 pages in length and provided a detailed state-of-the-town assessment in the following areas:

- Community Demographics
- Natural Resources
  - Conservation and Recreation
  - Natural Resources and Development
- Growth and Development
  - Route 32
  - Water and Wastewater Infrastructure
  - Aesthetics
- Economic Development
  - Downtown Businesses and Business Institutions
  - Traffic and Parking Assessment
  - The Local Business Community
- The Millyard Complex
- Energy
- Public Participation

Of particular interest to the Town was the data collection, analysis and recommendations for downtown economic development. On the heels of completing Ware's new Zoning Bylaws, and in preparation for the Master Planning process, the

Town Planner sought data that chronicled the industry shifts and business development trends throughout Ware's history, and documented the changing ways consumers interact with the downtown as a result.

Ultimately, time constraints prevented a specific focus on the business community and commercial properties within the downtown, and instead focused more broadly on a strategy for economic development for the entire community. This Masters Project is an extension of that work, and seeks to operationalize some of the recommendations proposed in the fall at a micro-demographic level for Ware's downtown.

The original research question for this project was:
"What is the most effective way of constructing a scientific framework to assess Ware's downtown business community and develop strategies for long term business development?"

However, the preliminary research of the fall revealed that attempting to construct a scientific framework or speculate about a strategy for long-term business development in Ware was and remains premature. Prior to the start of this project in January, Ware's "downtown" had no official boundary; the town wasn't in possession of a database of businesses in the downtown; the industry distribution; the business types; the square footage of commercial/retail/vacant space; or the contact information for most of the commercial property and business owners. According to Ware's Town Planner, "we just aren't there yet" (Cullen, 2013).

Research abounds on the components of robust downtown centers and the myriad of tools and techniques employed by individual municipalities to meet their goals and objectives for economic growth and vitality. However, before Ware can construct such

a strategy, it first needs to define what currently exists. Therefore, a more appropriate research question was formulated to reflect Ware's place in this process and to provide them with the type of data that will be most useful to them going forward.

Primary Research Question

RQ1: What is the current state-of-the-downtown in Ware, Massachusetts and what data can best assist in the construction of a strategy for long-term business development?

Goals and Objectives

The goal of this Masters Project is to enable the town of the Ware to create a business environment in the downtown that incentivizes strategic business development based on a comprehensive analysis of downtown Ware's current business make-up and consumer data.

Sub-Goals

- To create buy-in among downtown businesses to create a unified vision for the downtown and to foster an environment that can facilitate change
- To provide the town of Ware with the data required to adequately assess the business community in the downtown
- To offer strategies for short and long term business development

Objective

The primary objective of this Masters Project is to empower the town of Ware to develop meaningful and feasible short and long term strategies for downtown economic revitalization by providing them with the tools and data they need to affect change.

Background

Town History

To understand modern day Ware, it is imperative to understand Ware's history as a mill town, an economic engine and a regional service provider. Prior to 1729, when Jabez Olmstead and Judah Marsh constructed the millyard complex on the banks of the Ware River, (which is now the eastern edge of the downtown), few if any people lived in what is now the Town of Ware.

In his book, *History and Antiquities of Every Town in Massachusetts*, published in 1841, John Warner Barber said of Ware that it "remained unsettled for many years after the adjoining towns were settled, the soil being so hard and rough that it was considered unfit for cultivation" (Barber, p. 342). At some point not long before its sale to John Read in 1716 for 2 coppers per acre, "the whole territory [of what is now Ware] was granted by the general court to a military company from Narragansett" (Barber, p. 342).

It was the development of the grist and saw mills and the manufacturing and textile jobs that were created, that attracted workers from all over the region to Ware. By the early 19th century, "Ware was a booming commercial and cotton textile manufacturing town with a thriving agricultural economy" (UMass MPR Studio, p. 11). Three major manufacturers (Otis, Stevens and Gilbert companies) produced textiles, cotton and wool goods, clothing, shoes, straw bonnets and palm-leaf hats (Barber, 343).

The demand for workers attracted many immigrant groups to the area, including French, Irish and Polish. At the time, the mills employed some 6,000 workers and, though the manufacturing industry in New England faced great competition from southern states, by World War I, the Ware mills still employed more than 2,500 people.

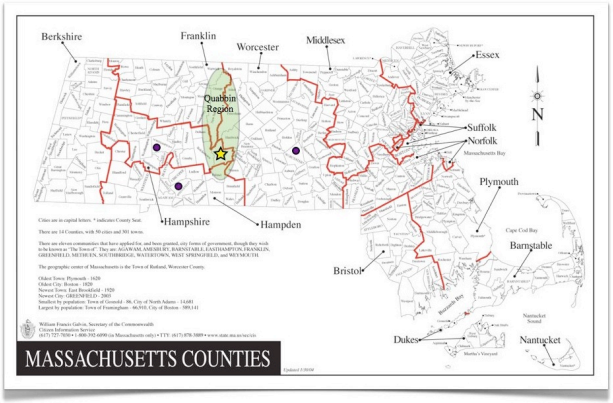
This influx of residents to the area, and particularly to the town, also fostered active, but distinctly separate, religious, secular and civic lives for the growing community. At least eight inns and even more taverns opened in Ware from the mid-18th to the mid-19th centuries. The Congregational Meeting house in town was used as much for civic public meetings as it was for religious meetings (Chase, 1911).

By the 1930's and the era of the Great Depression, the largest of the three manufacturers, Otis, was going under. In an effort to keep the mills under local ownership, the people of Ware bought out the company (the first employee buy-out of a major manufacturer in the history of America), earning them the slogan "The Town that Can't Be Licked!"; which is a slogan used and understood to this day (Chase, 1911).

But the town couldn't compete in a global market and as more and more manufacturing jobs were lost throughout the latter part of the 20th century and changes to the agricultural economy precipitated the loss of many local farms, the Town of Ware evolved into a small bedroom community "where over half of the population commutes elsewhere to work" (UMass, p. 8).

Current Community Demographics

Today the Town of Ware is a working-class, New England village of 9,860 residents and 4,120 households, located on the eastern



edge of Hampshire County, approximately 25 miles west of Worcester, 26 miles north east of Springfield and 23 miles east of Northampton.

Its geographic location is significant because in addition to its distance from any of its surrounding urban centers, it is also on the border of three counties (Hampshire, Hampden and Worcester) and two planning regions (the Pioneer Valley Planning Commission and the Central Massachusetts Regional Planning Commission). In addition, it sits at the easternmost edge of the Economic Development Council of Western MA region, the southernmost point of the Quabbin Region and just outside of the Sustainable Knowledge Corridor (Umass, p. 12). Ware's location is important to understanding some of the challenges they face, towards creating a sense of identity in a regional context, and developing an economic development strategy without the benefit of a broader market.

Yet Ware is far from secluded. As the research of the fall reflects, "it is a rural service center, long connected to the communities of the Quabbin region, providing jobs, housing and amenities. It is a bedroom community connected with employment and educational opportunity to the east and west, and also southwards towards the Mass Pike" (Umass, p. 12+13).

Ware is at once a quaint New England village, with many of the challenges of an urban center. Between 1990 and 2010 the population of Ware grew by just .53% from 9,808 to 9,860. In keeping with national

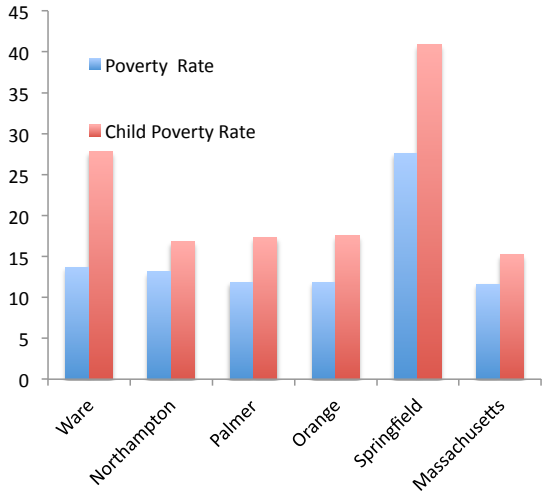
Percent of Population by Age

Age	1990	2000	2010
0 - 4	7.6	6.1	6.2
5 - 9	7.5	6.6	6.1
10 - 14	6.0	7.4	5.8
15 - 19	6.5	7.1	6.1
20 - 24	6.8	5.6	5.6
25 - 34	17.6	12.9	12.2
35 - 44	13.9	16.4	13.4
45 - 54	9.7	14.1	16.6
55 - 59	4.0	5.1	7.2
60 - 64	4.4	3.6	6.2
65 - 74	9.6	6.8	7.8
75 & over	6.5	8.3	7.0

Source: Pioneer Valley Commission, Community Profile: Ware, MA 2012

trends, and the aging of the "Baby Boomer" generation, nearly half of Ware's residents are over the age of 45 (UMass, p. 17). The smallest cohort is between the ages of 20 and 24 and that age group is 14% smaller than it was a decade ago. Ware also has a higher median age (43.7) than the nation (36.9) and the state (38.7) (Umass, p. 17).

The changes in population are also reflected in the make up of individual households. In 2010, just 16% of households in Ware could be classified as "traditional" - that is, a mother, father and children. While there was no growth in the percentage of families with school aged children, there were over 500 new households with residents over the age of 65. Single parents and adults living alone made up 37% of households, which impacts household income and poverty rates (UMass, p. 17+18).



Poverty Rates - Ware and Benchmark Areas
Source of Data: US Census
Source of Graph: UMass MRP Studio, 2013

According to a Community Profile of Ware conducted by the Pioneer Valley Planning Commission in 2010, the median household income in Ware was $66,035. It's important to note however, that research conducted during the Regional Planning Studio in the fall revealed that, while this is true, that figure includes the lesser developed, rural areas of Ware, away from the downtown. Census Tract 8201.02 (which covers most of the downtown) and is where much of the developed land is concentrated, the median income was about $28,004 in 2010 (UMass, p. 29). During the same time period, Ware's overall poverty rate (13.8 percent) was higher than the state average

(11.6 percent) and more than a quarter (27.8%) of children in Ware lived at or below the poverty line (Umass, p. 18).

Similarly, PVPC reported in 2012 that 13.9 percent of Ware residents over the age of 25 have less than 12 years of education, 37.5 percent graduated from high school, 28.1 percent achieved less than 4 years of college and 20.6 percent have a bachelors degree or higher, which is comparable with the rest of Hampshire County. However, upon closer examination, it was determined that of residents within the rural urban center Census Track, only 14% between the ages of 25 and 34 had a bachelors or graduate school degrees (Umass, p. 24).

Finally, as a result of a delay in the impact of the 2008 recession on many rural communities nationwide, Ware's residents did not begin to feel the effects of the economic recession until 2009. Prior to that, Ware's unemployment rate hovered around 5.6 percent between 2003 and 2008. In 2009, their unemployment rate jumped to 9.5% and was 9.9% as of 2010 (PVPC, 2012).

These demographics, and many others, all contribute greatly to understanding how residents of Ware interact with their downtown; what goods and services they need their downtown to provide; and their potential willingness to buy. Just as taverns and inns opened to meet the demands of Ware's residents in the 18th and 19th centuries, the downtown, as it exists today, may provide many of the services residents of Ware and surrounding towns seeks out.

Business Community

Little data existed on the business makeup of Ware's downtown at the start of this project. Even less was known about the consumer trends crucial to the development of

a downtown business strategy. However much was known about the changes the business community as a whole experienced throughout the last century, and in particular the last decade.

Since 2000, the manufacturing industry's share of employment in Ware (that is, the percentage of people the manufacturing industry employs) dropped from 20 percent to 12.1 percent in 2010. As manufacturing jobs have left the town, region and state, the other existing industries in town have seen fluctuations in their employment share (Mills, p. 106).

Two of the three major sectors that employ more than half of Ware's employed population - Educational Services/Health Care/Social Assistance (26.6%); and Retail Trade (15.2%) - are also among the industries that have seen growth in their employment share: Educational Services/Health Care/Social Assistance; Public Administration; Finance and Insurance; Real Estate/ Rental/Leasing; and Retail Trade (Mills, p. 106).

That is important because the industries with the fastest growing share of employment, are also the industries that pay the least in wages. Jobs in the retail trade industry pay a fraction of the average salary in the manufacturing industry. What this means, is that while box stores like Wal-Mart and Lowes and chains like CVS continue to dot the landscape in Ware, they are not providing the type of sustainable job creation that residents in Ware require. It also means that though the manufacturing industry has less of a presence in Ware, the jobs it offers continue to be well paid and competitive (Mills, p. 106+107).

In addition to the introduction of box stores, between 2001 and 2011 the town of Ware welcomed 42 other new businesses to its community, 15 of which opened at the height of the recession, between 2008 and 2011. In 2010, 75 percent of businesses in Ware

employed between 1 and 9 employees; 55 percent of those employed between 1 and 5 employees. It is inferred, therefore, based on these data and anecdotal information from the business institutions that support them, that the majority of businesses in Ware are family owned and operated, in addition to being small. Based on a cursory observation of businesses in the downtown, it can also be inferred that this is true not just among the broader business community in Ware, but of the downtown business community as well (Mills, p. 107).

All of these factors contribute to a business community that has changed over the years as much as it has stayed the same. The town of Ware and the business community within it continue to be self-contained. Businesses continue to be opened by families and residents in town, and in some cases, the children and grandchildren of other local business owners. For the most part, the faces are the same, the process is the same, and the size of the businesses is the same: small businesses for a quintessential small New England town. However, the industries that these small businesses make up have more variety than ever before. As Ware embarks on its Master Planning process, it will be imperative to know who the business community of downtown Ware is, in order to construct a long-term business development strategy that is thoughtful and effective (Mills, p. 107).

Review of the Literature

In a state as historic as Massachusetts, with communities that predate the Revolutionary War, many communities across the Commonwealth are struggling to redefine themselves in the 21st century and capitalize on the resources they have (i.e. historic infrastructure) that define the people as much as the place. For that reason, the Commonwealth offers multitudes of trainings, grants and access to tools and opportunities for downtowns to assess their economic status and goals and develop strategies for economic revitalization.

Chief among the state agencies this project will consults is the Department of Housing and Community Development, who's mission "is to strengthen cities, towns and neighborhoods to enhance the quality of life of Massachusetts residents". The focus of this literature review reflects the limited scope of this project and not the ambitions that Ware has for the long-term use of the data. The review assesses only the highest priority programs that guided this project through the data collection, preliminary analysis and development of recommendations.

Massachusetts Downtown Initiative (MDI)

Among the many programs they offer, the Department of Housing and Community Development offers a program to cities and towns across the Commonwealth called the Massachusetts Downtown Initiative which aims to "make downtown revitalization an integral part of community development" (MDI, mass.gov, 2013).

The program offers a range of services and assistance in what it calls "a holistic approach" (MDI, mass.gov, 2013) to downtown revitalization, which seeks to "address economic and community development needs and provide a framework of interrelated activities that promote economic development" (MDI, mass.gov, 2013). It's strategy for successful revitalization includes seven separate, but equally important components:

* Encouraging Community Involvement & Ownership
* Preserving & Enhancing Downtown Character
* Ensuring Economic Vitality
* Promoting Downtown Assets
* Getting Into & Around Downtown
* Living Downtown
* Keeping Downtown Safe (MDI, mass.gov, 2013)

This strategy is aided by support offered by MDI in the form of technical assistance, education and training with the goal of providing "lasting and positive change in the downtowns of communities across the state" (APA MA Award Submission, DHCD/MDI, 2011). Since 2003, it is estimated that MDI has awarded $502,500 in technical grants to 64 Massachusetts municipalities, which has leveraged an additional $60 million in public investment and $500,000 in private funds to improve the downtowns of the award recipients. The investment of the MDI

> has been providing technical assistance in the form of workshops, programs and professional consultant services through modest grants to communities that have resulted in a sustained, dispersed and effective impact in communities throughout the state resulting in improvements for

downtown housing, economic development, parking, design, and organizational development and planning (APA MA Award Submission, DHCD/MDI, 2011).

The works of Christine Moynihan, Principal at Graber Marketing of Walpole, Massachusetts and facilitator of the January 2012 MDI Retail Workshop "*Leveraging Best Retail Practices: Helping downtown's succeed, store by store by store...*" and MDI Coordinator, Emmie Hahn, were both utilized as each component of Ware's scope of work was operationalized.

In addition, MDI's consultants and regular facilitator, Peg Barringer of FinePoint Associates LLC. Barringer's fall 2012 workshop "*Economics of Downtown... Training Guide - Lessons in Retail Attraction & 10 Things You Can Do to Improve the Retail Mix Downtown*" served as an early instructional guide for the development of the business and commercial property surveys for this project before their review by the MDI Coordinator in February of 2013.

In her workshop presentation, Barringer states the ten ways to improve the retail mix of a downtown are to:

1. Evaluate the Business Mix
2. Inventory Vacancies, Develop Relationships with Property Owners & Help Market Space
3. Collect Market Information
4. Create Leasing Plan, Business Recruitment Priorities, Prospect List & Tell Everybody
5. Create Materials to Market the District
6. Identify & Evaluate Business Opportunities
7. Develop Relationships with Real Estate Brokers
8. Create Arts & Cultural Programming to Attract Foot Traffic
9. Encourage Concentration of Commercial Activity & Prioritize 1st Floor Space for Retail and Restaurants
10. Establish & Promote Special Financing and Tax Incentives (Barringer, 2012)

Though the needs of Ware and the timeline for this project did not allow for the opportunity to embark upon many of the strategies proposed above, the framework as a whole was used in the development of the Scope of Work, which sought to conduct the first three strategies in order to provide a solid foundation for the execution of the remaining components.

According to Barringer, the principles central to step one: evaluating the business mix are:

- Compare with other Downtowns, Business Districts & Shopping Centers - identify business types that are under-represented and over-represented
- Identify business clusters and potential complementary businesses
- Assess opportunities to capitalize on linkages with major customer generators (anchor businesses, attractions)
- Inventory downtown businesses
    - Look at composition by category
        - Retail
            - Comparison Goods
            - Convenience Goods
        - Restaurants
        - Services
            - Personal Services
            - Professional Services

(Barringer, 2012)

Interestingly, the advice of the Massachusetts Downtown Initiatives Coordinator was, rather, not to compare Ware's downtown with the downtown business make-up of other communities, in advance of a full market analysis. Her guidance suggested that such a comparison would be moot because of the myriad of factors that contribute to the success of individual downtowns including comparison goods and business clustering.

This sentiment was reinforced by Bill Ryan and Matt Kures in their 2009 article, *Downtown Mark Analysis, Improving the Process*, who posit that the first step in a

market analysis may be a Strengths Weaknesses Opportunities and Threats (SWOT) Analysis, which this project includes. In their paper, Ryan and Kures conclude:

> One downtown can't simply copy the methodology or research questions used by another as the approach used should be different depending on the type of community (urban, suburban, exurban, rural). Market characteristics are dynamic, not static, often changing within the timeframe of a typical study. Multiple business districts in an area can complicate an analysis, and the analysis must recognize downtown as one unit within a regional economy (Ryan and Kures, 2009).

Barringer's instructions for step two: Inventory Vacancies, Develop Relationship with Property Owners and Help Market Space, include:

* Obtain information about vacancies to connect prospects to appropriate space
* Develop relationships with property owners; Try to create mutual understanding about types of businesses that would be good for the district
* Refer potential tenants you would like to see in the district to owners (Barringer, 2012)

Finally, step three: Collect Market Information, proposes the analysis of trade area demographics and information about non-resident market segments including employees, students, and visitors. This step also suggests the use of consumer surveys, which this project incorporated, and focus groups, which it did not.

Division of Community Services

According to Massachusetts General Laws Chapter 40D, Section 12 and Massachusetts Regulations 760 CMR 13.00, the Department of Housing and Community Development (DHCD) can approve plans for the creation of Commercial Area Revitalization Districts (CARDs). The mission of the CARD program is to "assist communities with older downtowns or commercial centers that are threatened by disinvestment" (M.G.L. Ch. 40D). Municipalities are able to use the CARD designation "to channel private and

public investment into targeted areas in order to redress the economic decline and physical deterioration that accompanies disinvestment" (M.G.L. Ch. 40D).

At its inception in 1978, the CARD designation served to connect participating municipalities with various financial incentives, most notably tax-exempt Industrial Development Bonds (IDBs). Since that time, and in part as a result of the passage of the Federal Tax Act of 1986, which restricted the use of IDBs, most of the funding sources that were attached to the CARD designation no longer exist. However, for communities that continue to participate, "the designation still serves as a vehicle for targeting local commercial revitalization efforts [by helping] municipalities prioritize local efforts and establish a framework for reinvestment" (M.G.L. Ch. 40D).

Because of their age and level of disinvestment in their downtowns (the law stipulates that municipalities can apply if they can prove they have 'one or more older commercial centers that are experiencing disinvestment' (M.G.L. Ch. 40D)) many municipalities in Massachusetts are eligible for this designation. Based on the work of the Masters Studio Project in Ware last semester, the town of Ware has compelling evidence that qualifies their downtown for this designation.

CARD designation applications require the following components, which are also, to varying degrees, components of this projects Scope of Work:

- a plan describing the nature, scope and consequences of commercial disinvestment
- identification of specific strategies that the community will employ in order to reverse disinvestment and stimulate reinvestment.

Frequently, "loss of commercial enterprises, underutilization, high vacancy rates, low rents, high rate of tenant turnover, building deterioration and insufficient infrastructure

[all of which downtown Ware is experiencing] are often used as indicators of disinvestment" (M.G.L. Ch. 40D).

Under Massachusetts Regulations 760 CMR 13.03, "Criteria for Plan Approval," an application must include:

- evidence of commercial disinvestment
- strategies to reverse this disinvestment
- evidence that the area is predominantly commercial
- evidence that plan development was publicized and that the business community was involved in the process and is committed to its implementation
- consistency with other local plans
- identification of a local implementing agency and adoption of the plan by the local governing body (M.G.L. Ch. 40D)

The CARD designation is just one of the many tools in the toolkit of trainings, grants and opportunities for municipalities like Ware to develop strategies for downtown reinvestment. Much of the evidence for this distinction has already been collected and submitted to the Town in the MRP Studio Report of fall 2012. As the recommendations for this report are assembled, this programs and others like it will be proposed for Ware's consideration.

Methodology

As the impetus for this project was born out of the work of the Regional Planning Masters Studio, and in particular the work of the Economic Development team, it is essential to first understand the methodology, goals and objectives that precipitated the research of this project and the previously established relationships that enabled its execution.

In September of 2012, the Economic Development team of the Regional Planning Masters Studio embarked on a fact-finding mission to assess the current economic climate in the Town of Ware. With a particular emphasis on the downtown area, the charge of the Economic Development team was to use the data collected to make thoughtful recommendations for future growth and prosperity.

The team identified four areas of concentration, the respective recommendations of which, it was hoped, would be relevant and applicable both to a broad-based economic development strategy and a targeted strategy tailored to the downtown.

Those concentrations included: Sense of Place, The Millyard District (which is located at the eastern edge of the downtown), Businesses and Business Institutions and a Traffic and Parking Assessment of Ware's downtown.

The initial analysis of Ware's businesses and business institutions assessed the global business community in Ware. The goal was to determine the needs of local businesses and the extent to which they felt a sense of business community, as well as to assess the services provided by local and regional business institutions and the extent to which those services met the stated needs of local businesses. The research, interviews and resulting recommendations from that section provided the basis for a closer examination of the business community in Ware's downtown.

Working with Ware's Town Planner, the following entities were identified as the umbrella organizations that either represent or provide services to Ware's business community:

* The Quaboag Valley Community Development Corporation and Business Assistance Corporation
* The Quaboag Hills Chamber of Commerce
* The Ware Business and Civic Association
* Local Banking System (Country Bank, Family First Bank, Chicopee Saving Bank)
* The local government offices of the town of Ware.

A critical analysis of each of their websites was conducted to determine what services are offered and advertised to local businesses, followed by interviews with all of the above listed organizations except for Country Bank and Family First Bank (who did not return calls and who were not initially in the study, respectively). In addition, one former business owner in Ware and the Town Planner of the Town of Montague (whose community is similarly situated and which has recently made tremendous investment in its downtown) were also interviewed.

The local interviews sought to determine:

- how the business institutions have been engaged in broad scale economic development assessments conducted by the town in the past
- to what extent they want to be involved in the process going forward
- if businesses in Ware feel that a business community exists
- where they see economic development opportunities and need
- what needs they identified among the business community
- what strategies they implemented to address those needs
- what, if any, services they provide that are not featured on their websites
- if the identified needs of businesses correspond with the current and future services the institutions [seek to] provide

Finally, two case studies were conducted (of Turner's Fall, Massachusetts and Worcester, Massachusetts) to demonstrate how municipalities successfully engage their business community and business institutions in their economic development planning process.

Among the final recommendations from the Business and Business Institutions subsection of the Economic Development report were to:

1. Engage commercial property owners and local proprietors
2. Encourage greater collaboration between the town and the regional and private business institutions, particularly throughout the Master Planning process.
3. Conduct a Business Census that creates a current demographic profile of Ware's businesses and assesses their current needs.
4. Make public and accessible the vacant properties list for would-be business owners in the real estate market.
5. Work with property owners whose properties are vacant or rundown to find solutions to make those properties economically viable again.

In January of 2013, a downtown boundary was drawn with the guidance of Ware's Town Planner and approved by the Ware Business and Civic Association. The boundary, which runs the length of Rt 9 and spans the approximate Downtown Commercial Zone, includes within it 59 commercial parcels between 23 West Main Street (the site of the Quaboag Valley Community Development Corporation) to the west and 40 East Main

Street (the Fitness Factory mill building) to the east (see Appendix 1). On January 16, 2013 recommendations one, three and four were incorporated in a Scope of Work that was shared with the Town Planner and members of the Ware Business and Civic Association at their January meeting, as the broad framework for a micro-demographic study of Ware's downtown (see Appendix 2).

Based on consultation with Elizabeth Hahn, Coordinator of Massachusetts Downtown Initiatives, and the careful review of many Commonwealth endorsed tools and techniques for assessing downtown economic viability, three surveys were developed, including a Business Census, Commercial Properties Survey and Customer Survey (see Appendices 3 respectively).

The intent was to collect comprehensive data on the commercial activity of downtown Ware including the square footage of commercial, retail, and vacant space; the types of goods and services available; indicators like annual rent that might illustrate how and why the downtown is saturated with office space; and the way consumers interact with the downtown and the reasons and frequency with which they visit.

Customer Survey

Using sample Customer Surveys provided by the Massachusetts Downtown Initiative, a Customer Survey was developed and released into the field on March 4, 2013. The survey was made available on the Town of Ware's website as well as the website of the Ware Business and Civic Association and was printed and distributed in packets of 20, which were picked up and replaced with clean surveys weekly, at the following downtown locations:

- Fitness Factory
- Wilton's Children's Outlet
- Nat Falk's

- Young Men's Library Association
- Otto's Florist
- Town Hall
- Villa's Restaurant
- Ware Cafe
- Ware Senior Center

In addition, the survey was advertised by Ware Community Television, the Springfield Republican and the Ware River News, which featured two front page articles about the project with a link to the survey and encouraged consumer participation by featuring the link on their Facebook page, which has over 900 users "following" it (see Appendices 4).

Between March 4th and April 26th, a total of 327 Customer Surveys were collected including 126 in print form. The survey sought to understand how downtown consumers interact with the downtown and included questions regarding:

- Demographic Information
- Modes of Transportation
- Reasons and frequency for visiting downtown
- Types of services and goods that would attract consumers to downtown
- Evaluation of current blend of businesses and operating hours
- Evaluation of current parking options

Business Census

The Business Census sought to collect a variety of data from downtown businesses including:

- Business type
- Services provided
- Business owner (address, resident of town, relationship to town, etc.)
- Ownership of the building out of which they operate
- Rent
- Square footage
- Square footage of retail space

- Reason for opening their establishment in Ware
- Number of Employees
- Date of opening
- Customer base
- Impact from Economic Downturn
- Involvement in Ware Business and Civic Association
- Marketing/Advertising (Barringer, 2012)

The Census was created using the online platform SurveyMonkey and was released into the field on March 4, 2013. Between February 11th and February 22nd four attempts were made to personally meet the owners of all the businesses in the census area and collect email addresses and contact information that the Town does not currently keep on file. Upon that initial introduction, only two business declined to participate.

On March 20, 2013, after disappointing online results, weekly and twice weekly visits to Ware were made with paper copies of the Census and personal requests to fill them out. It was at that time that it was discovered, most businesses do not use the internet, do not check email, are still using dial-up, and were much more willing to participate if given paper copies. Of the 72 businesses in the downtown, 81 percent (58) received the survey, 47 percent (34) filled out the business survey. Nineteen percent were never reached.

Commercial Properties Survey

Because most of the businesses in downtown Ware rent commercial space, the Commercial Properties Survey attempted to collect data directly from the property owners including:

* Purchase date
* Square footage
* Number of Units
* Unit types (store front, commercial, retail, office residential)

* Current condition
    * Responsibility of maintenance
* Vacancy Rate
* Leasing information (including rent)
* Tenant Recruitment

On April 2nd, after six weeks of attempting to identify and contact commercial property owners (whose contact information the Town of Ware also does not keep on file), the Commercial Property Survey went live online and in print form in the same style as the Business Census. Thirty-six independent entities own the 59 commercial parcels in Ware's downtown. Of those, 27 parcels are owned by just 6 entities. Sixteen (or 44 percent), spanning 37 parcels of land, received the Commercial Properties Survey. Of them, 15 survey responses from 7 property owners were submitted at the time the survey closed.

This concentration of ownership both helped and hindered the collection process. For example, Country Bank owns ten parcels in downtown Ware. After a positive and optimistic initial meeting on March 15th, repeated requests to participate in both the Business Census as well as the Commercial Property Survey were ignored. Conversely, Mark Andrews, a commercial land owner of 5 downtown properties, filled out the survey for each of his sites.

Town by Town Comparison

Finally, it was the intention of this project to conduct a series of case studies of similarly situated municipalities in Massachusetts to incorporate best practices for downtown revitalization into the recommendations. Using the data collected from the Business Census and Commercial Property Survey, the Customer Survey and the downtown

statistics of like municipalities, the hope was to determine the missing economic/ commercial activity needed to create economic stability in downtown Ware.

However, discussions with the Massachusetts Downtown Initiative revealed that a multitude of additional factors must be considered in such an assessment, including the need for a comprehensive market analysis that this project lacked the time and resources to complete. In addition, such a market analysis is premature for a community like Ware, whose business development prospects face tremendous uncertainly with the potential for a casino to be sited in Palmer in 2015.

As a result, the data collected from the three surveys, in addition to a Strengths, Weaknesses, Opportunities and Threats (S.W.O.T.) analysis form the basis for broad recommendations for downtown development as Ware proceeds with its Master Planning Process.

Results

Commercial Property Survey

The intention of the commercial property survey and business census was to assemble an inventory of commercial space and businesses in Ware's downtown to determine what current mix of businesses exist, in advance of any business development recommendations that may be generated from the Master Planning process.

Many limitations presented themselves over the course of the research, chief among them an inability to motivate property and business owners to participate, and the submission of incomplete surveys. Though the surveys were not able to achieve their goals of delivering the town with a comprehensive inventory, several themes were observed.

The downtown is made is up 59 separate parcels, 61 percent (36) of which are categorized as "commercial", 5 percent (3) are categorized as "industrial", 5 percent (3) are categorized as "institutional", 17 percent (10) are categorized as "residential/

commercial", 5 percent (3) are categorized as "residential" and 5 percent (3) are categorized as being the property of the Town of Ware.

Within that population, 38 percent (15) are labeled "commercial block", 12 percent (7) are labeled "office", 12 percent (7) are labeled "store", 5 percent (3) are labeled "bank", 5 percent (3) are labeled "restaurant", 10 percent (6) are labeled parking, and 3 percent (2) are listed as vacant, among various other identifiers, according to Ware's Town Assessors Office.

Those 59 parcels are owned by a total of 36 commercial land owners in downtown Ware, of which 53 precent are not Ware residents. Twenty-five percent (15) of parcels are owned by people or entities inside Massachusetts but outside of Ware and 3 percent (2) of parcels are owned by people or entities out of state. Further, 46 percent, or 27 of the 59 parcels located in the downtown are owned by just 6 entities, including Country Bank, which owns ten parcels in the downtown and three individuals who, combined, own 19 percent (11) of all downtown parcels. Unfortunately Country Bank, in addition to two of the other largest downtown property owners did not participate in the survey.

Of the 36 commercial property owners, it was possible to reach 44 percent (16) who own a total of 63 percent (37) of the parcels. Due to the small sample size, the lack of complete submissions and the nature of the questions, only the most salient points will be reflected here.

Sixty-six percent (10) of survey participants responded to questions about the uses for each of their commercial units. Forty-four percent (7) of parcels were listed as "office space", 31 percent (5) were listed as "retail", 13 percent (2) were listed as

"restaurants", 6 percent (1) was listed as "government", 6 percent (1) was listed as "education/dance studio" and 6 percent (1) was listed as a possible library expansion. Of the combined 28 commercial units across the 11 participants who responded to the question, 89 percent, or 25 of the 28 units, were occupied.

Sixty percent (9) of survey participants responded to questions about their annual rental range. Of them, 44 percent (4) of respondents indicated charging $4,800 - $7,200 annually or $400 - $600 per month for commercial space. Twenty-two percent (2) of respondents indicated charging $7,200 - $9,600 annually or $600 - $800 per month. Zero respondents indicated charging $12,000 - $14,400 annually or $1,000 - $1,2000 per month, and 22 percent (2) of respondents indicated charging over $14,400 annually or over $1,200 per month. Those charging the most in rent were also leasing the largest amount of space. For example: the only respondent in the survey charging over $14,400 annually in rent is leasing a space that is 6,800 sq feet. Due to the small sample size, credible inferences cannot be made about the price of renting prime downtown commercial property in Ware. However, with 44 percent of this survey paying as little as $400 - $600 per month in rent, future market analyses must include a comprehensive assessment of the renting practices of downtown commercial property owners.

Sixty percent (9) of survey participants responded to questions about the factors they consider when establishing a rental range. Among their factors of most importance: 89 percent (8) of respondents indicated they consider square footage in their calculation, 78 percent (7) indicated they consider off street parking availability and 56 percent (5) indicated they consider the property's location. Among their factors of least importance: 44 percent (4) indicated they consider competition with other area rents,

33 percent (3) indicated they consider the structure's condition and 22 percent (2) said they consider on-site amenities.

Fifty-three percent (8) of survey participants answered questions regarding the average length of their commercial leases. Twenty-five percent (2) indicated lease agreements of one year; 50 percent (4) indicated lease agreements of 2 years and 25 percent (2) indicated lease agreements of over three years, reinforcing what the Business Census confirms are small, local, long term tenants in Ware's downtown.

Finally, when asked how commercial property owners identify and select tenants, 71 percent (5) of the 7 participants who responded said they advertise and attract tenants through referrals, 14 percent (1) cited their reputation and 14 percent (1) cited networking and negotiations over details of tenancy as their preferred methods of identifying tenants.

Business Census

Within the 59 commercial parcels are 74 businesses, 8 vacant units, 4 parking lots, and 17 addresses that were unidentified in the course of the survey. The survey was distributed to the 58 businesses it was possible to reach, of which, 34 completed the survey. As the survey does not provide an accurate estimate of the percent of offices, retail and restaurant establishes, the following is a snapshot of the business that make up downtown Ware:

- 2 banks
- 3 storefront churches (and 1 parish)
- 4 social workers
- 3 lawyers
- 2 liquor stores
- 3 dance studios
- 1 gym

- assorted offices (including real estate, tax collection, insurance, accounts, medical and dental care and educational services, most of which hold storefront locations)
- assorted cosmetic/salon services (including 2 hair salons, a nail salon, 2 massage/ spa services and an electrologist)
- assorted dining (including 1 breakfast/lunch diner, 2 pizza houses, 2 lunch/dinner restaurant 1 of which has a liquor license and 1 bar)
- assorted retail (including a florist, a gift shop, a men's clothing store, a children's clothing, and a jewelry store)

In addition, the downtown is home to multiple civic purposes include Town Hall, the Young Men's Association Library, the Police Station, and Veteran's Park at Nenameseck Square, as well as the Ware River News newspaper and Ware Community Television.

The vast majority of businesses that participated in the survey are long standing businesses in Ware, having operated at their current addresses anywhere from 70 to 10 years. Only 7 establishments opened at their current addresses since 2008, including two that opened in 2012; a law firm and a social worker. The library has functioned at its current location since 1762. Unlike Rt 32 in Ware, which in the last decade has developed a commercial strip, with a Wal-Mart, Lowes, CVS and a variety of other chains, the business community in downtown Ware is entirely local.

Respondents to the survey cited a variety of reasons for establishing themselves in Ware. Fifty-three percent (14) of respondents cited being from the Town of Ware as among their reasons for opening there; 23 percent (6) cited affordability; 19 percent (5) cited market demand and proximity (they are from the region); and 15 percent (4) cited business expansion to a new market. Eight participants skipped the question.

Among their reasons for opening in the downtown specifically, 57 percent (13) of respondents cited accessibility; 48 percent (11) cited their street level/store front locations; 35 percent (8) cited affordability, 26 percent (6) cited walkability; 13 percent

(3) cited downtown investment and 9 percent (2) cited market forces. Eleven participants skipped the question.

Sixty-nine percent (22) of respondents rent commercial space, while 31 percent (10) own the location in which they work. Two participants skipped the question. Of the 69 percent who rent, 19 responded to the question about their annual rent. Eleven percent (2) indicated they pay less than $5,000 per year to rent their commercial space; 47 percent (9) indicated they pay between $5,000 - $9,999 annually or $416 - $833 per month; 16 percent (3) of respondents pay between $10,000 - $14,999 annually or $833 - $1,250; 5 percent (1) of respondents pay between $15,000 - $19,999 or $1,250 - $1,666 per month; 10.5 percent (2) of respondents pay between $20,000 - $24,000 annually or $1,666 - $2,000 per month and eleven percent (2) of respondents pay greater than $24,000 annually.

Overwhelmingly, businesses reported employing between 1 - 4 full time and 1 - 4 part time workers, as was documented in the MRP Studio Report in the fall of 2012. 61 percent, or 19 or 31 participants who responded to the question about full time staff cited employing between 1 and 4 employees; 16 percent (5) cited having no full time employees at all; 13 percent (4) cited having between 5 - 9 full time employees, 3 percent (1) cited employing between 10 - 14 and 7 percent (2) cited employing over 20 employees.

Similarly, of the 29 participants who responded to the question, 52 percent cited employing between 1 - 4 employees; 38 percent (11) cited employing no part time employees at all; and 10 percent (3) cited employing between 5 - 9 part time employees.

Downtown Ware is primarily a weekday downtown. Of the 32 participants who responded to the question, almost all reported being open Monday - Friday. Just 53 percent (18) reported having any Saturday hours and only 38 percent (12) reported being open on Sundays. In addition, most (91 - 94 percent respectively) cited being open in the mid-morning and afternoon. Fifty-six percent (18) cited being open in the early morning; 78 percent (25) reported being open in the late afternoon; 28 percent reported being open in the evening and 9 percent (3) reported being open at night. Two participants skipped the question.

Questions 20 and 21 asked businesses about their peak months and days of the week. Unfortunately, many of the respondents who filled out paper copies cited multiple months and days, where the online version required that only one be selected. The resulting data does not reveal anything particularly insightful, except that 21 percent (5) of respondents cited May and December as their peak months and 27 percent (7) of respondents identified Monday as their peak day. Most interestingly, 23 percent (6) cited Saturday as among their peak days, though the vast majority of businesses downtown are closed on Saturday.

Of the 25 participants who answered question 22 regarding peak times, 56 percent (14) indicated that mid-morning and afternoon were their busiest times during which 18 percent (5) cited serving as many as 10 - 19 customers and 21 percent (6) cited serving as many as 20 - 29 customers.

As is confirmed in the results of the Customer Survey, 78 percent (25) of respondents to question 25, regarding their client base, said the majority of the customers/clients live in Ware and towns immediately surrounding Ware (Warren, Palmer, West Brookfield, Hardwick and Belchertown.) Ninety-seven percent (29) of respondents believe their

customers drive to downtown and 23 percent (7) also believe their customers walk; which are figures that are almost exactly in line with the results of the Customer Survey.

Question 27 asked respondents to approximate the income demographic of their clientele. Twenty-one participants responded to the question and 13 did not respond. Of the responses, 48 percent (10) believe their customer base to be earning between $30,000 - $49,000 per year; 33 percent (7) believe their clientele to be earning between $50,000 - $69,000 per year; and 19 percent (4) believe their clientele to be earning less than $29,000 per year.

Taken together, questions 28 and 29, regarding the average dollar value of transactions and the frequency of customer visits illustrates, to some extent, the buying capacity of downtown consumers. Both questions had 27 respondents and 7 participants who skipped the question. Of that population, 30 percent (8) of respondents paid an average of $20 - $49 per transaction; 19 percent (5) paid under $20 and between $50 - $75 respectively. However, 26 percent (7) paid over $150.

Business owner believe that 30 percent of consumers and clients seek their services of downtown businesses daily; 15 percent (4) visit weekly; 19 percent (5) visit monthly, 11 percent (3) visit bi-monthly and still another 11 percent (3) visit every six months. However 15 percent (4) seek the services of downtown businesses annually. It can be inferred therefore, based on the demographic data of the Town, which has been reinforced by businesses estimation of their customers and the average transaction price, that consumers spending over $150 per transactions, are likely only seeking the services of downtown businesses a few times a year, if not annually.

Question 30 asked respondents if they are members of the Ware Business and Civic Association (WBCA). Twenty-nine respondents answered the question and 5 did not respond. 72 percent (21) of respondents did not belong to the WBCA while 28 percent did. Anecdotal responses ranged from "needing to join" to "not knowing anything about it" to concerns that the WBCA is overly focused on Main Street.

The final section of the survey asked businesses to what extent the most recent economic recession has effected their business. While 55 percent (17) of the 31 respondents who answered question 31 stated that their business is faring the same as it was a year ago and 32 percent (10) felt their business was doing better; 13 percent (4) felt their business was doing worse. What's more, of the 28 respondents who answered question 32, regarding the economic status of their business today versus four years ago, 43 percent (12) said it was worse, 21 percent (6) said it was same, and just 36 percent (10) said it was doing better.

Among the anecdotal responses collected from the survey, the follow are selected excerpts of how business owners feel the recession has effected their business:

[Business has] "dropped by 50 percent."

"Had to lower all prices to stay in business."

"Serve more recently unemployed and dislocated workers. As a business that caters in primarily discretionary goods, we are in decline. Most of our client's income has been reduced by inflation in housing, food, fuel, taxes and other essential monthly expenses. The "real inflation" rate appears to be significantly higher than published government statistics. Wages for most are relatively stagnate, thus less discretionary income is available for "luxuries.""

"When the economy goes down libraries get busier."

"This economy is killing me. People just tell me they don't have the money."

Customer Survey

Data collection for Ware's Customer Survey closed on April 22, 2013 with 306 responses. Since that time an additional 21 surveys have been completed that are not reflected in this survey (3 submitted online and 18 submitted in paper form). Of the 306 completed Customer Surveys, 293 were fully completed, 237 were submitted electronically, accessed through the Town of Ware website and 123 were filled out and left at one of the 9 businesses and municipal offices in Ware's downtown.

Demographic Questions

The first half of the survey asked respondents to submit non-identifying demographic information. Questions one and two asked respondents to identify their municipal affiliation. Seventy-five percent (228) of participants indicated that they reside in the Town of Ware while 25 percent (76) reported living in one of 43 different municipalities including Pittsfield, Springfield, and Chicopee; and, most frequently, Warren, Amherst, Belchertown and Monson. In addition, visitors from Boston, MA; Shelburne, VT; Ledyard, CT; Trenton, NJ; and Elmsford, NY responded to the survey. Three respondents skipped the question.

Question three asked respondents to identify their gender. Fifty-seven percent (130) of resident respondents identified as female and 43 percent (98) identified as male. Similarly, of the 76 out-of-town respondents, 67 percent (51) identified as female, 33 percent (25) identified as male and three respondents skipped the question.

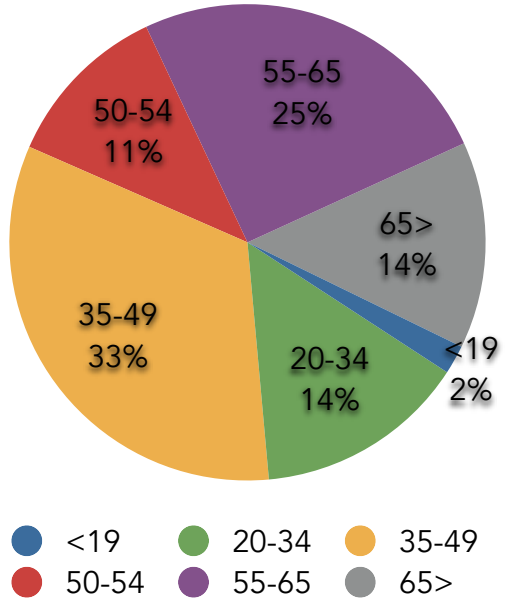
This demographic information is important because "surveys suggest that women make perhaps 80 percent of consumers' buying decisions - from health care and homes to furniture and food" (The Economist, 2006). As Ware considers business development opportunities for the downtown, it will be important to build a profile of

consumers, and to consider a consumer-base that could be as much as two-thirds women.

Question four asked respondents to identify their age. As the chart reflects, just 2 percent (6) of respondents were under the age of 19; 14 percent (44) were between the ages of 20 - 34; 33 percent (101) were between the ages of 35 - 49; 11 percent (35) were between the ages of 50 - 54; 25 percent (77) were between the ages of 55 - 65; and 14 percent (43) were over the age of 65.

The largest age brackets of respondents were those between the ages of 35 - 49 and 55 - 65, which is not surprising, giving the demography of the town. Interestingly, those age brackets were also the largest among visitors from out of Ware: 37 percent (29) of out-of-town respondents were between the ages of 35 - 49 and 24 percent (19) were between the ages of 55 - 65. This information is central to constructing a business development plan centered around Ware's consumer base.

Customer Survey Respondents by Age



It is important to note, however, that over 50 percent of respondents to this survey fall into age brackets that make up less than 40 percent of the town's population. Therefore, the results of this survey are not indicative of the opinions of all of Ware's residents, especially those under the age of 19.

Questions five and six asked respondents to indicate the number the people in their household and their respective ages. Five and 13 respondents skipped the question respectively. Of the completed answers, 17 percent (50) of respondents were households of one; .33 percent (1) of whom were under the age of 19. Forty-three percent (129) of respondents reported households of two (the largest household demographic by far); 16 percent (48) reported households of three; 17 percent (51) reported households of four; 5 percent (16) reported households of five; 2 percent (5) reported households of 6 and two respondents reported households of seven and eight respectively.

Sixty percent (179) of respondents live in one or two person household. One person households had a fairly even distribution of people between the ages of 20 - 34, 35 - 49, 50 - 54, 55 - 65 and 65 >. However, two person households illustrate a very different story: 20 percent of two person households were between the ages of 35-49 and over 50 percent were over the age of 55. The remaining 25-30 percent were distributed randomly across the 20 - 34 and 50 - 54 brackets.

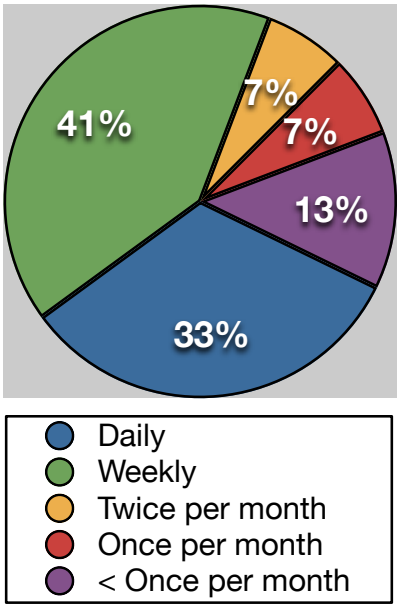
In addition, three person households had tremendous variation in age demographics residing under one roof. Twenty percent of participants residing in 3 person households reported being in the age bracket of 35 - 49. Fifty-four percent (26) reported having children under the age of 19. Twenty-seven percent (7) of that population reported at least one resident between the ages of 20 - 34 and 58 percent (16) of three person household respondents reported having residents between the ages of 35-49. At the same time, 24 percent (24) of three person households reporting residents between the ages of 55 - 65 and over 65. As the household numbers rise, significantly greater variation is observed, reflecting an abundance of multi-generational households.

This data, while useful in documenting the aging nature of Ware's population, requires greater scrutiny to be used to its greatest capacity. For example, it would be useful to study the specific results of female, residents of Ware, between the ages of 30-49 as they represent the largest population in the study.

Trip Frequency

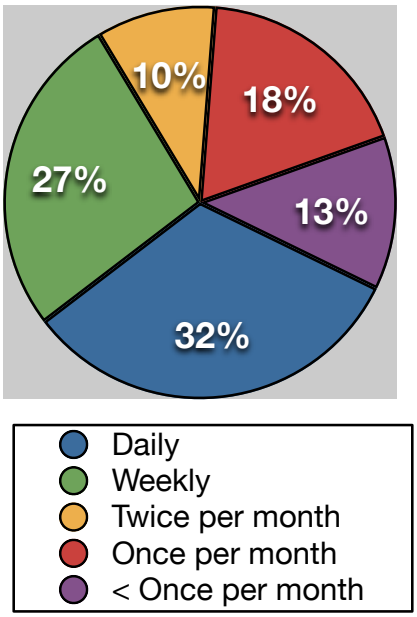
Sixty-four percent of resident respondents reported visiting the downtown at least once per week. Thirty-three percent (73) reported visiting the downtown daily. Forty one percent (91) reported visiting the downtown every week. Seven percent (15) reported visiting the downtown twice per month; 7 percent (15) reported visiting the downtown once per month; and 13 percent (29) reported visiting the downtown less than once per month.

Trip Frequency (Ware Residents)



This finding is further reinforced by a closer look at the frequency patterns of specific age groups of residents within the downtown. In every age bracket, an average of 74 percent of respondents indicated accessing the downtown daily or weekly. That is also true of the two largest age brackets in the study: 69 percent (49) of respondents between the ages of 35-49 reported visiting the downtown daily or weekly, in addition to 72 percent (41) between the ages of 55 - 65. In all cases, the percentage of respondents that visit the downtown twice or perhaps once per month or less, was in the single digits and teens.

Trip Frequency (Ware Visitors)



Of particular note however, is the frequency with which visitors from out of town reported accessing downtown Ware. Of the 76 visitors from out of town who completed the survey 32 percent (or 23 of 71) of respondents, reported accessing downtown Ware every day. A further 27 percent (19) reported visiting the downtown every week, 18 percent (13) reported visiting the downtown once per month, 13 percent (9) reported visiting less than one per month and 10 percent (7) reported visiting the downtown twice per month. 5 respondents skipped the question.

This information is critical because it reveals that nearly 60 percent of the visitors to downtown Ware [in this study] are consistent downtown consumers. The data also therefore suggests that the downtown is serving a very small, very specific population of people who are accessing it for the same purposes daily and weekly and infrequently by everyone else.

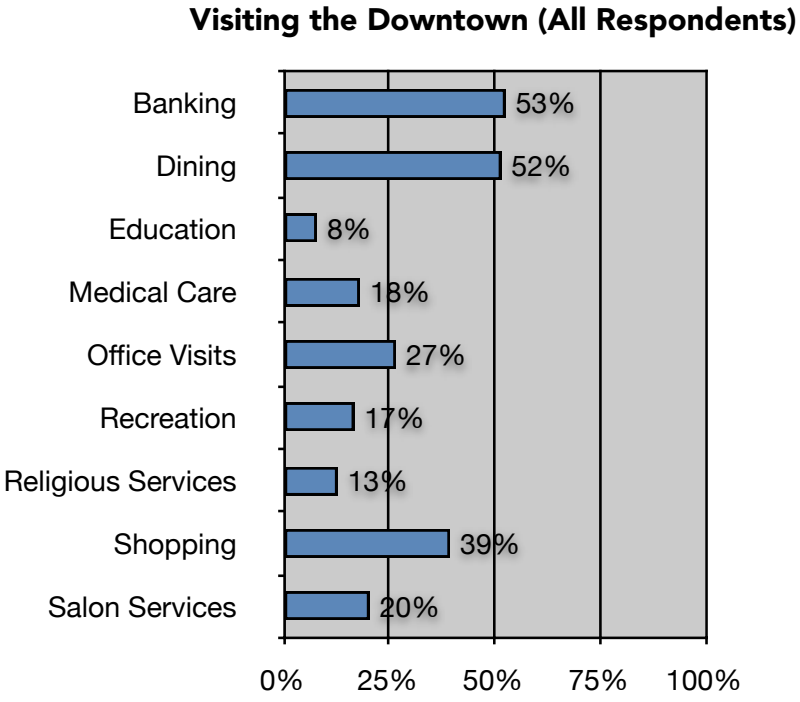
Transportation

As was reflected anecdotally by residents, Ware lacks a public transit system. Transportation is available for seniors, provided by the Ware Senior Center, weekdays between 9AM and 1PM that must be scheduled two to three days in advance (Town of Ware Senior Center, 2013), however busses connected to the Pioneer Valley Transit Authority, no longer extend to the Ware service area.

94 percent of respondents reported driving to downtown Ware as their primary mode of transportation. Zero percent, or not one single respondent, reported the use of public transit or taxis to access the downtown. In fact, in two paper copies, respondents wrote "we have public transit?" and "we have taxis?" Four percent (12) of respondents reported riding a bicycle, of which eight filled out paper copies and indicated at least one other mode of transportation, typically driving, to access the downtown. Thirteen percent (38) reported walking, including 23 respondents who filled out paper copies and indicated driving as a transportation method as well.

Reasons for Visiting the Downtown

Of the 304 respondents, 53 percent (160) reported accessing the downtown for banking needs; 52 percent (157) for dining; 8 percent (24) for education; 18 percent (55) for medical care; 27 percent (81) for office visits; 17 percent (51) for recreation; 13 percent (39) for religious services; 39 percent (120) for shopping; and 20 percent (62) for salon services.



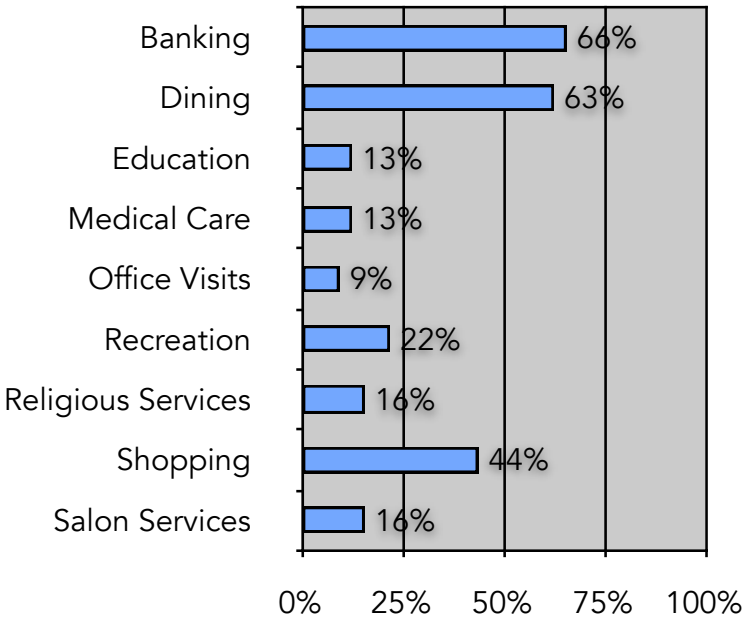
Examining the data more closely, both male and female residents of Ware access the downtown for similar purposes. Though a greater number of women access the downtown than men, both groups reported, visiting the downtown most frequently for banking (61 and 56 percent respectively), dining (60 and 55 percent respectively) and shopping (47 and 34 percent

respectively) needs. Women accessed the downtown least often for education (10 percent), religious services (18 percent) and medical care (22 percent) while men accessed the downtown least for education (8 percent), religious services (12 percent), medical care and salon services (both 13 percent).

When we examine the age distribution of resident respondents, we find similar uniformity in the big picture data, however much is revealed about the way residents of Ware in particular age brackets use their downtown. Excluding the 'under 19' demographic (because only one respondent falls into that category), banking, dining and shopping remain the biggest attractions to downtown for every age group. In addition, an average of 16 percent of people across all age demographics access the downtown for religious services. It is noteworthy that only in the age brackets 55-65 and 65 and over does the breakdown of uses begin to balance out and respondents report utilizing most goods and services available downtown.

Beyond their banking, dining and shopping needs, 20-34 year old resident respondents use Ware's downtown primarily for recreation (22 percent). This could mean the Young Men's Association Library, Nenameseck Park, Fitness Factory or one of the three dance studios located downtown. Only 9 percent (3) of respondents come to the

Visiting Downtown (Ware Residents 20-34)

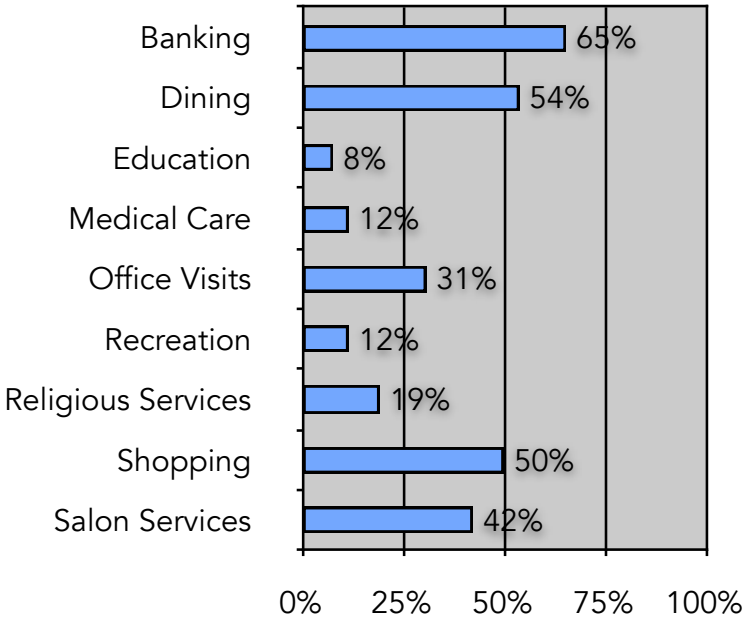


downtown for office visits, 13 percent (4) for educational purposes or medical care and 16 percent (5) for salon services.

Those percentages being to shift among resident respondents in the 30-49 year old age bracket, 25 percent (18) of whom reported accessing the downtown for office visits (up 16 points from the previous age category), 20 percent (14) for medical care (up 7 points), 10 percent (7) visit for educational purposes and 15 percent (11) visit for salon services.

Office visits become an even greater incentive to visiting downtown for resident respondents aged 50-54, at 31 percent (8). In addition, 42 percent (11) of resident respondents in this age category reported accessing downtown for salon services but only 12 percent (3) reported coming for medical care or recreational purposes.

Visiting Downtown (Ware Residents 50-54)



For resident respondents between the ages of 55-65, downtown Ware seems to be providing more of the goods and services they utilize. Twenty-one percent reported accessing the downtown for medical care, 25 percent (14) for office visits, 16 percent (9) for recreation and 12 percent (7) for salon services. In addition, 25 percent (14) of resident respondents over the age of 65 reported accessing the downtown for office

visits, 21 percent (12) for medical care and recreation, 16 percent (9) for education (the highest of every age category) and 43 percent for salon services.

All of this data underscores the reality that downtown Ware is serving the needs of it's older (and aging) populations, and failing to meet the needs of residents between the ages of 20 - 34 and 35 - 49.

With three storefront churches in addition to All Saints Parish on North Street, three lawyers, four social workers, and three dance studios, it was reasonable to assume that residents would access the downtown for office visits, religious services, and education/ recreation with much greater frequency than the data suggests. However, though a net average of only 27 percent (81) of Ware's resident respondents reported accessing the downtown for office visits, 32 percent (24) of visitors to downtown Ware identified coming to the downtown for that reason. This suggests that the offices located in downtown Ware, may not serve the residents of Ware as much as they provide services to the broader Quabbin Region, reinforcing Ware's reputation as a regional service provider.

Timing

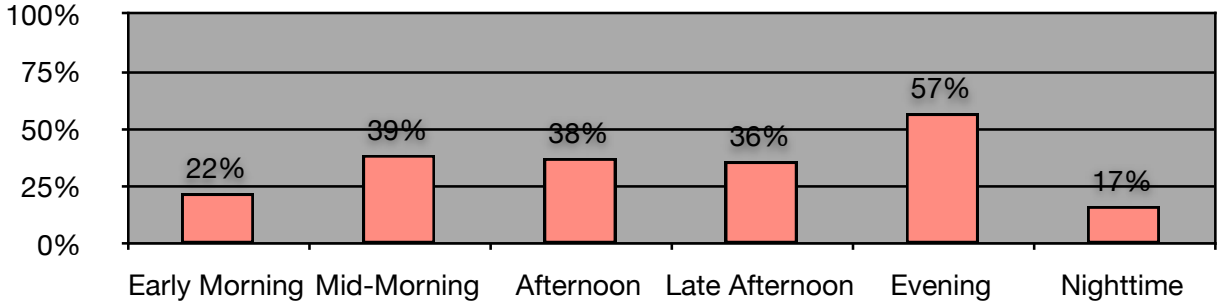
Question 9 asked participants about the time of day they access the downtown. Of the 228 resident respondents, 25 percent (56) reported visiting the downtown in the early morning; 47 percent (107) reported visiting in the mid-morning; 46 percent (104) reported visiting in the afternoon; 34 percent (78) reported visiting in the late afternoon; 43 percent (99) reported visiting in the evening and 14 percent (31) reported visiting at night.

Looking more closely at the subgroups of respondents, it is revealed that women tend to visit the downtown during the mid-morning (54 percent or 70 residents) more than men (37 percent or 36 residents) and that men report visiting the downtown in the late afternoon (39 percent or 38 residents) more than women (31 percent or 40 residents). Both groups reported visiting the downtown with nearly identical frequencies during the other timing options with the exception of nighttime, during which 16 percent (21) of women report accessing the downtown versus just 10 percent (10) of men.

Interestingly, people between the ages of 20 and 34 reported accessing the downtown in an almost perfectly even distribution across the day. Thirty-four percent (11) reported accessing the downtown in the early morning, 44 (14) percent in the mid-morning, 56 (18) percent in the afternoon, 50 percent (16) in the late afternoon, 50 percent (16) in the evening and 34 percent (11) at night.

The largest subgroup of respondents, those between the ages of 35 - 49 reported accessing the downtown in the evening more than any other group, at a rate of 57 percent (41). By contrast, resident respondents over the age of 65 reported accessing the downtown in the mid-morning, above any other subgroup, at a rate of 65 percent (24) and resident respondents aged 55 - 65 reported accessing the downtown in the afternoon, above any other subgroup, at a rate 55 percent (32).

What Time of Day do You Visit the Downtown (Ware Residents 35-49)

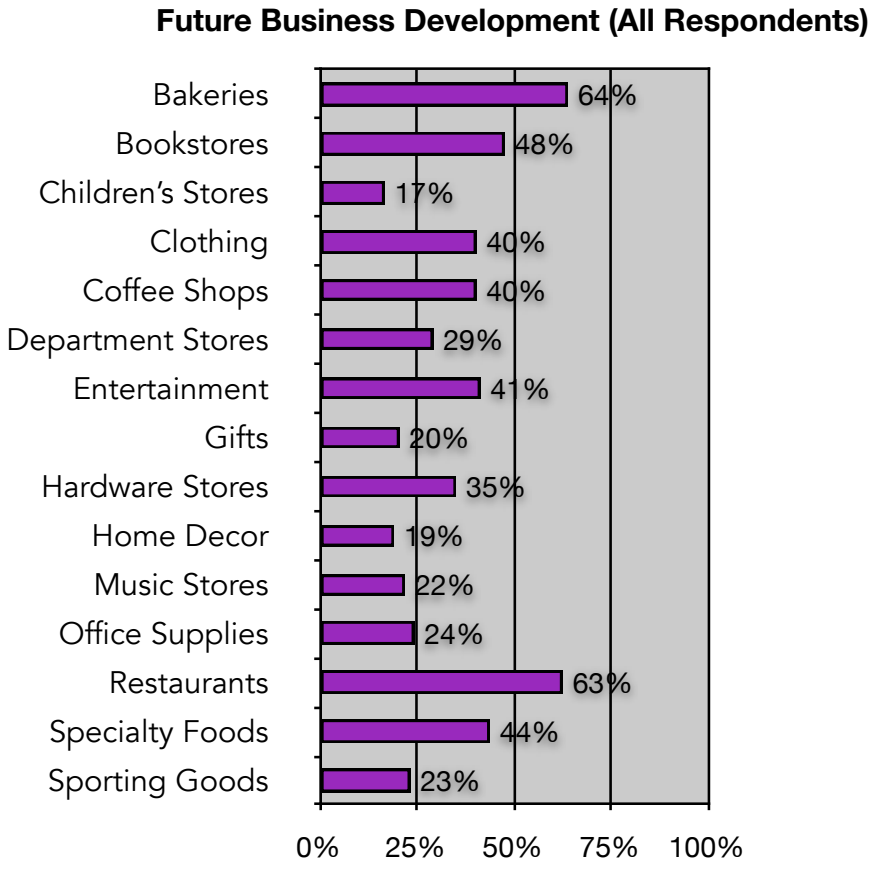


This information further illustrates the likely consumer trends of downtown Ware over the course of a day. Older age brackets tend to be accessing the downtown earlier in the day and younger age brackets tend to access the downtown in the later part of the day, which is typical of most downtowns.

Downtown Assessment

Question 10 posed the question to consumers "what new stores would attract you to shop in the downtown area?" Among the multiple choice options were: bakeries, bookstores, children's stores, clothing, coffee shops, department stores, entertainment, gifts, hardware stores, home decor, music stores, office supplies, restaurants, specialty foods, sporting goods and other.

Of the 306 responses received, 288 answered the question and 22 skipped the question. Sixty-four percent (184) of respondents indicated a desire for bakeries; 63 percent (180) indicated a desire for restaurants; 48 percent (137) indicated a desire for bookstores; 44 percent (126) indicated a desire for specialty foods; 41 percent (119) indicated a desire for entertainment; 40



percent (116) indicated a desire for clothing stores; 40 percent (116) of respondents indicated a desire for coffee shops; 35 percent (101) indicated a desire for hardware stores; 29 percent (84) indicated a desire for department stores; 23 percent (67) indicated a desire for sporting goods; 22 percent (63) indicated a desire for music stores; 24 percent (70) indicated a desire for office supplies; 20 percent (59) indicated a desire for gift shops; 19 percent (55) indicated a desire for home decor shops; and 17 percent (48) indicated a desire for children's stores.

Looking at respondent preferences among gender and age subgroups, it is worth noting that every group (men, women, and residents between the ages of 20 - 34, 35 - 49, 50 -54, 55 - 65 and 65 and over) indicated the greatest preference for a bakery, a restaurant, a bookstore and a specialty food shop. Similarly, the least requested business development was the same across demographics: gift shops, home decor, music stores, and office supplies.

Of the 129 female resident respondents, the most requested future business development that would attract them to the downtown were bakeries (67 percent), bookstores, restaurants, and clothing (53 percent), and specialty foods and entertainment (47 percent). Among their least requested businesses were sporting goods (16 percent), children's stores and office supplies (18 percent or 23 residents), and music stores. Among male resident respondents, 62 percent (61) indicated restaurants, 59 percent (58) indicated bakeries and 49 percent (48) indicated hardware stores. Among the least popular options were children's stores, gift shops, home decor and office supplies.

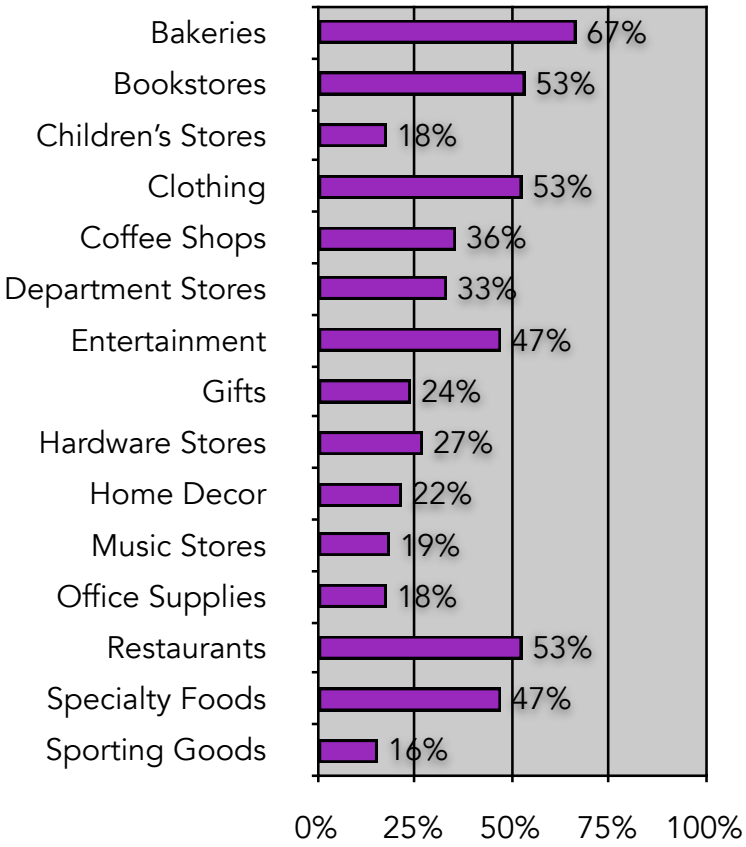
Ware resident respondents between the ages of 20 - 34 had the highest interest in restaurants at 75 percent, followed by bakeries (53 percent), entertainment and

specialty foods (50 percent). They, similarly, ranked children's stores, gift shops and home decor among their least popular options.

Resident respondents between the ages of 35 - 49 indicated support for bakeries (61 percent), restaurants (56 percent) and bookstores (53 percent) and did not support office supply stores (15 percent), home decor and sporting goods shops (24 percent) or gift shops (26 percent). Similarly, resident respondents aged 50-54 indicated support for a bakery (62 percent), restaurants (58 percent) and entertainment options (50 percent) and did not support children's stores (8 percent), music or office supply stores (15 percent).

Almost identically, Ware's 55 - 65 and 65> resident respondents indicated support for a bakery (67 and 68 percent respectively), bookstores (40 and 41 percent respectively), and restaurants (43 and 54 percent respectively). Those populations were similarly less supportive of children's stores (7 and 5 percent respectively), music stores (16 percent) and office supplies (17 and 19 percent respectively).

Business Development (Ware Female Residents)

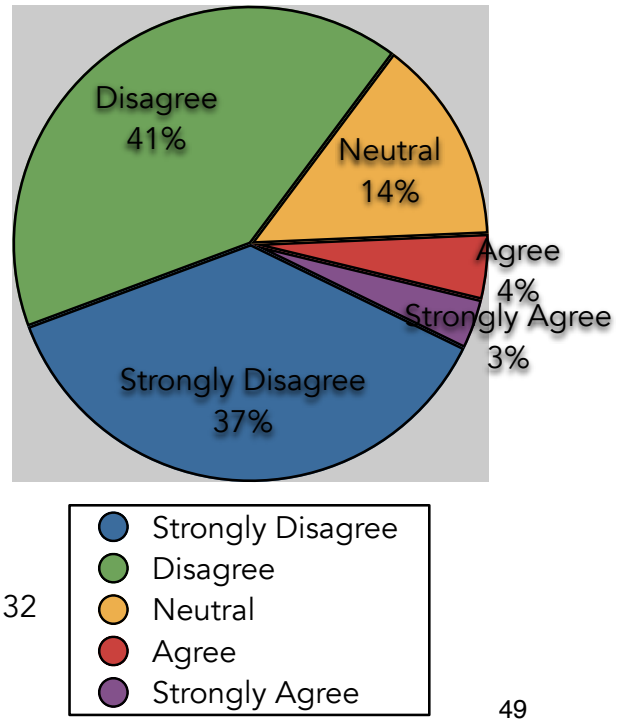


Among visitors to Ware, results were similar: 67 percent (51) indicated support for restaurants, 53 percent (40) for bakeries, and 50 percent (38) for bookstores. In addition, visitors to Ware expressed support for coffee shops at a rate of 50 percent (38), higher than any resident age category.

As Peg Barringer's research on competitive and comparative commercial activity in the downtown suggests, residents and visitors alike support the competition and options that additional restaurants would bring to the downtown.

The final five questions of the Customer Survey made five statements which respondents were asked to rate on a scale of 1-5 (1 being strongly disagree, 5 being Strongly Agree). Forty-eight percent (140) of respondents strongly agreed or agreed with the statement "Businesses in the downtown are open during hours that are convenient for me." Just 18 percent (50) disagreed or strongly disagreed and 34 percent (99) were neutral.

Retail Variety



Seventy-eight percent (227) of respondents disagreed or strongly disagreed with the statement "There is enough variety of retail stores in downtown". Only 7 percent (23) agreed and 14 percent were neutral.

Fifty percent (146) of respondents disagreed or strongly disagreed with the statement "The quality of goods/services available is ideal". 19 percent (55) strongly agreed or agreed and 32

percent (93) were neutral.

Finally, respondents were asked about parking. 48 percent (138) strongly disagreed or disagreed with the statement "Parking in the downtown is available and accessible" while 28 percent (83) strongly agreed or agreed and 24 percent (68) remained neutral, and 56 percent (165) of respondents strongly agreed or agreed with the statement "Parking impacts my decision about where to shop." In this final statement, 27 percent (78) of respondents strongly disagreed or disagreed and 17 percent (50) remained neutral.

S.W.O.T. Analysis

Strengths and Opportunities

Despite many of the perceived challenges facing downtown Ware, there are many strengths that can empower businesses and local officials as well.

The People

Throughout Ware's history, civic engagement in, not only public matters, but private business matters as well, has been a dominant characteristic of the community and its people. The "town that can't be licked" continues to make it voice heard and continues to see the potential in Ware's downtown.

At the outset of this project, it was hoped that 100 people could be convinced to participate in the Customer Survey, which was expected to be the weakest part of the inventory. In just 6 weeks, 324 people, the vast majority of whom were Ware residents, shared their opinions and spoke in one cohesive voice. These residents, the who likely

frequent the downtown more than anybody else, know exactly how they want their downtown composed.

Much of the way the downtown is composed today works for the people who use it most: in every sub-group and age bracket, banking, dining and shopping remain the biggest attractions to downtown; not office appointments. By and large, the people availing themselves of the services the downtown provides, vis a vie the saturation of office space, are from communities throughout the Quabbin Region; reinforcing Ware's reputation as a service center for the region. The question remains: how does Ware attract residents and visitors who do not currently access the downtown regularly?

Opportunity: *With visitors accessing the downtown from 43 different municipalities as far away as Pittsfield, Springfield and Chicopee, tremendous opportunity exists to capitalize on a broader market that is already finding its way to Ware.*

Opportunity: *The people have spoken - frequent and infrequent users of the downtown; Ware residents and visitors - were consistent in the types of commerce they want to see in the downtown.*

Without knowing it, resident respondents collectively voted for many of the components that economic development theory tells us is central to downtown revitalization. For example, in an informal interview with two residents of Ware, one resident recounted a time that Ware had a bakery on Main Street. He said that after church on Sundays people would walk over to the bakery to buy a loaf of crusty bread to pair with dinner and even though it wasn't a sit-down coffee shop, it became a kind of communal gathering place for the same reliable faces to meet after mass every week. That type of enterprise is not unlike having elements of the civis downtown.

Though many elements of civic life have moved out of downtown, including the Post Office and the Fire Department, the downtown is still home to Town Hall, the Young Men's Library Association, the Police Department and Veteran's Park at Nenameseck Square, the establishment of which was a civic venture on behalf of the Ware Veteran's Commission.

In addition, despite having assorted dining options in the downtown, including a breakfast/lunch diner, two pizza places, two lunch/dinner restaurants, and one bar, consumers understand the "rule of 3" and see value in options and healthy competition.

The Businesses

Ware's downtown business community is similarly civic minded. All of the businesses in the downtown are local enterprises and business owners continue to work independently to grow support for the Ware Business and Civic Association, which is a "non profit that works to expand economic opportunity for Ware businesses and to promote civic pride." Of the WBCA, one Business Census respondent said s/he joined because s/he "want[ed] to invest in Ware and want[ed] to be engaged with other business owners."

Moreover, 53 percent of businesses that responded to the Business Census cited being from Ware as as primary reason for siting their business on Main Street. These businesses are small; they are local; and they are invested in the downtown as evidenced by the multi-year leases most of them sign.

Commercial Property Owners

71 percent of the 59 properties in downtown Ware are owned by people or entities from town. Only 17 parcels are owned by people or entities outside of Ware and most of them, reside in Massachusetts. Furthermore, almost half (27) of the parcels in the surveyed area are owned by just 6 people or entities.

Opportunity: *This concentration of ownership among the commercial property owners in downtown can enable Ware to form a subgroup of downtown commercial property owners that develops a strategy for tenant recruitment and retention of the types of commercial businesses the town seeks to attract, and works with the Massachusetts Downtown Initiative and its consultants to establish rental agreements that charge what their units are worth.*

Such a group could also work with property owners whose properties are vacant or rundown to find solutions to make those properties economically viable again. Example: Country Bank owns almost 17 percent of the parcels in downtown, among them the vacant parcel across the street from its current location. In addition, they have been a friend and ally to Ware and have made significant investments in the downtown. Such a business should be included in future downtown planning efforts.

The Infrastructure

For old New England towns that are steeped in history, the downtown is the heart of the community. This is especially true for Ware, where the town's identity is linked to its history and its natural and built environments. The mill yard complex, the Ware River, and a Main Street that maintains a distinctive New England village character are all symbols of community identity and sense of place (Mills, p. 115). It is imperative that

Ware preserve these relics, and work with the property owners of those that are vacant (especially due to structural damage) to repair and maintain them in the future.

In addition, not capitalizing on the downtown's proximity to the Ware River would be a missed opportunity. Ware only developed into the thriving community that it became because of the power generated by the river. It's an important part of Ware's history. Concealing it behind 13+ foot concrete flood walls cuts off people's access to it. As Ware proceeds through its Master Planning process, they should look for opportunities to utilize the accessible sections of the river and beautify the areas that aren't.

Moreover, significant commercial development along Rt. 32 can incentivize future development of the downtown and attract more people to the area. Though parking remains a concern for many patrons, Ware should capitalize on the proximity of its residents to the downtown. Downtown business owners cited 78 percent of their clientele as Ware residents, yet over 90 percent of them drive to the downtown. Incentivizing opportunities to walk/be outside, like outdoor seating, enhanced use of Veteran's Park, outdoor seating/ ceiling to floor, open-air windows in restaurants, are all ways to change the energy of a space and drive people outside.

Weaknesses

Hours and Image

While it is true that downtowns and Main Streets are reflective of the communities of which they are the heart, it is not the job of the downtown to solely be reflective of who they are, but who, as a community, they want to be.

Ware has a weekday downtown. Only 31 percent of businesses in the survey cited being open in the evenings and only 9 percent indicated they were open at nighttime. Half of the respondents indicated being open at all on Saturdays and only 35 percent indicated they were open on Sundays. This is, in part, the result of having a downtown that is saturated with office space; on the weekends offices are closed and there is less activity and less incentive to attract consumers to downtown.

In the glory days of the grist and saw mills, downtown Ware was filled with inns and taverns. Today the downtown only has two restaurants with a liquor license, and consumers across the board are advocating for more. The lack of competition is potentially stifling the market and preventing the existing restaurants and bars from being as successful as they could be.

In addition, despite ample available parking, there is a perception that parking (particularly handicapped parking) is lacking in the downtown. This is, in part, because though parking is ample, it is inaccessible and parking laws in the downtown are rarely enforced, enabling business owners and employees to take up valuable consumer spots for many hours at a time. Modes of transportation to the downtown area are limited to auto, bicycle and foot, as there are no viable public transit options for Ware residents, including (according to the Customer Survey) taxis. Traffic congestion and the use of Rts 9 and 32 as thru-ways for large tractor trailers makes sections of Main Street (particularly in front of Town Hall) unwelcoming and potentially dangerous for pedestrian traffic.

Though vacancies in the downtown can, and for the purposes of this project, are, viewed as a potential strength for the downtown (as they provide real opportunities and space for meaningful and strategic business development), they can also be viewed as both a weakness and a threat to development. Coupled with depressed

rents that attract only specific business demographics that cannot hope to provide any added value for the downtown, vacant space (particularly store front space) is a tremendous liability and an indication of stagnation and disinvestment. Moreover, the office to retail imbalance, and percentage of prime street front property allocated to storefront houses of worship, dance studios and service providers, does not create an image of a thriving and active downtown.

Commercial Properties

Another potential opportunity and potential weakness for Ware is the concentration of ownership that exists in the downtown. It is a delicate position to be in, as the relationship of any one of the largest property owners with the town or any other property owner can sway the involvement and participation in a cohesive strategy of as much as 17 percent of downtown commercial properties.

Regarding the development of a cohesive strategy for business recruitment and retainment, as a mentioned opportunity, an additional weakness of the downtown is the apparent lack of understanding respondents of the Commercial Property Survey have with regards to rent structure. Almost two times the number or respondents to the survey said they factor in off street parking availability in their rent setting than the rental competition around them. As Ware considers a market analysis of the downtown, it will be important for commercial property owners to be involved and to understand the economic development principles of downtown revitalization, towards the goal of being able to command the value of the units they are renting.

Each of these potential weaknesses contributes or could be exacerbated by a few much bigger threats. Ware felt the impact of the 2008 economic recession later than much of the rest of Massachusetts. As a result, their unemployment and poverty rates continue to be higher than state and national averages. Few resources are available to

make significant investments in the downtown at this point. Of immediate concern, is less the business development of the future, but the vitality of the existing business community and the continued support of the residents of Ware and the Quabbin Region for which the Town of Ware has become an anchor.

Moreover, the introduction of a casino in the Town of Palmer would certain change any business development efforts the town begins to pursue between now and the date the licenses are awarded, which is schedule for early 2015. In the meantime, Ware must consider its alternatives and develop contingency plans for the various locations a casino could be sited. Even in the case that a casino is sited in Springfield could have ripple effects to the economy of Ware. However, the prospect of a casino should not leave the town of Ware in a holding pattern for the next 20 months. Rather, short term, attainable benchmarks with long term implications can be set in preparation for whatever the outcome.

Limitations and Recommendations

The primary objective of this Masters Project was to empower the Town of Ware to develop meaningful short and long term strategies for downtown economic revitalization by providing them with the tools and data they need to affect the change they want to see in their downtown. Although many relevant recommendations came out of the findings, and though a toolkit, coupled with potential support from various Commonwealth initiatives is provided, many limitations presented themselves in the course of this research that prevented a comprehensive database of businesses from being generated.

Business Census and Commercial Properties Survey

At the outset, the Town of Ware lacked contact information for any of the commercial property owners in addition to any information at all about the businesses within the newly prescribed downtown boundary, including the business name, type, industry, owner and owner's contact information. As a result, much time was invested in the early stages of this project to conduct a visual assessment of the businesses and vacant spaces, and then meet owners, explain the project and request email addresses for survey distribution. Once and twice weekly visits to Ware still did not allow for an opportunity to meet every business. In order to contact commercial property owners, conversations with business owners included questions about the property's ownership and ways to get in touch with said owner. Few attempts resulted in the completion of a survey.

After disappointing online Business Census results, frequent trips were made to downtown Ware during which it became clear that, though many businesses were willing to disclose their email addresses, few if any are regular internet users and do not check their emails regularly. Printed copies of surveys were then provided, which improved turnout, however two weeks were wasted in the process of that discovery.

In addition, paper surveys allowed businesses to respond to survey questions incorrectly (i.e. selecting multiple responses for questions that, the online edition required the selection of one), which greatly effected the results of both the Commercial Properties Survey as well as the Business Census, as both were relatively small sample sizes to begin with.

Moreover, the data produced as a result of the Business Census and Commercial Properties Survey is only relevant to the extent that it is complete and updated regularly. Motivating businesses and commercial property owners to complete the survey was challenging and the response rates reflect the incompleteness of the data and resulting databases. The data was also skewed because the population of commercial property owners who filled out the survey are committed to their properties and to the downtown and have a collective 11 percent vacancy rate, which visual inspections of the downtown indicate is inaccurate.

It became clear too late in the study that both the Commercial Properties Survey and the Business Census needed to completed in personal meetings and interviews with respective owners and filled out completely by the researcher. This method would have taken more time, and may not have been possible for some of the downtown retailers, but it could have improved the response rate and data would have be more reliable.

Customer Survey

The placement of the Customer Survey throughout the downtown, was a strategic decision, made in an effort to get a clean sample of consumers who regularly access the downtown. However, that may also have skewed the data such that the results are not a representative sample of the town, but only of those that access the downtown frequently.

In addition, several limitations in the survey itself were revealed after it's release:

- Demographic questions 4 - 6 sought to gauge the number and type of people per household. Respondents were asked their age followed by the number and age of residents living in their household. Some of them counted themselves among the

number living in their household and some didn't, requiring the manual cross referencing of each respondent.

- Question 9 posed the question "Why do you usually visit the downtown?" The multiple choice questions did not include an opportunity for downtown employee, many of whom I suspect filled out the survey, to self identify. Such information would have been useful to defining the downtown population. In addition, question 9 did not include the Young Men's Library Association as a specific option for visiting the downtown, however many of the survey responses came from there and several crossed out "Education" and replaced it with "Library." The absence of an option for "Library" may have skewed the data of that question, and in particular, the percentage of people who stated they come to the downtown for educational purposes.
- Question 11 asked respondents to identify the types of businesses that would attract them to the downtown in the future. The print version of the survey included "Antiques" as an option, however the online edition did not and so it had to be removed from the analysis of that category.

Lastly, the use of SurveyMonkey prohibited the results of any of the surveys from being downloaded in a coded format for analysis through the use of STATA, therefore all of the surveys needed to be coded by hand and prepared for STATA analysis at some future date after the completion of this project.

Recommendations

The data collected in this report, while incomplete, demonstrates a need for the Town of Ware to begin the process of developing a downtown revitalization strategy, that an academic studio project or Masters Thesis Project cannot begin to construct. The

following recommendations however, propose both macro-level and micro-level recommendations that could prepare Ware to develop such a strategy.

Macro-Level Recommendations

Finish the Survey

The Town should continue the work that began this semester to complete the Commercial Property Survey and Business Census. As identified in the limitations, it was difficult to motivate property owners and businesses to participate in the survey as a new face in Ware, who lacked the benefit of time for the business owners to develop a sense of trust and willingness. However, with coaxing from trusted town leaders and a sustained presence in the downtown, businesses were more inclined to participate.

Based on the research, and particularly the work of Peg Barringer and her *"Economics of Downtown"* workshop, the data that the Commercial Property Survey and Business Census asked for, is the right data. The town needs a list of vacant parcels and a mechanism for site identification for potential new businesses in Town. It also needs to know the square footage of commercial, residential and vacant space, as well as how much property owners are charging businesses in rent. The Commercial Properties Survey and the Business Census seek to answer those questions, however, only 100% participation will provide accurate data.

As this report's Methodology sections elaborated on, the intention of embarking on the first three steps of Barringer's *10 Things You Can Do to Improve the Retail Mix in Downtown* (Evaluate the Business Mix; Inventory Vacancies, Develop Relationships with Property Owners & Help Market Space; and Collect Market Information) was to provide the foundational information that would support the steps that followed, including: the Creation of [a] Leasing Plan, Business Recruitment Priorities, and Prospect Lists; and

Identifying & Evaluating Business Opportunities. The success of a broader downtown revitalization strategy depends on this data.

Opportunities for Future Research

The data that this report contains can be manipulated and analyzed in an innumerable amount of ways. The completion of the Business Census and Commercial Properties Survey can facilitate a more thorough and accurate analysis of the data.

In addition, before Ware can create a comprehensive downtown revitalization strategy that is thoughtful, specific to the needs of the people and businesses of Ware and has the most likelihood of success, a full scale market analysis needs to be conducted. This should include the present state of the retail market in Ware, market potential for Ware and for the region and an in-depth analysis of local and regional consumer spending.

Esri is a research firm and the architects and developers of ArcGIS mapping software that analyzes geographic information for everything from land use planning to assisting in the relief effort after the terrorist attacks of September 11, 2001. Esri data can provide the type of market data the Town of Ware needs to begin its early market analysis. This data can be retrieved through the University of Massachusetts Landscape Architecture and Regional Planning Department which will save the Town thousands of dollars trying to purchase it themselves.

It will be important to work with the Massachusetts Downtowns Initiatives to assess when it would be most opportune to conduct this analysis. The Town has indicated some concern over conducting a market analysis prematurely, as the siting of a casino in Palmer may alter Ware's economic status, however, it is important to gauge the

extent of the potential impact and proceed with the analysis it is possible to do in advance of the license awards.

Role of the Planner

Timing is crucial to the success of this initiative, as so much momentum currently exists around the Project. In Ware, it will be the responsibility of the Planner to capitalize on that momentum and identify support to complete the data collection and analysis, and finally, to begin constructing a plan for downtown revitalization.

State designations such as the CARD program, and partnerships with agencies like the Division of Community Services and the Massachusetts Downtown Initiatives (both of which are programs and agencies of the Department of Housing and Community Development) can supply the technical assistance and, to a limited extent, grant opportunities that can leverage many more dollars than the grants themselves.

Locally, the leadership of Ware's Town Hall, as championed by Ware's Town Manager and Town Planner, should consider having a more active presence in the downtown and engaging property and business owners in a strategy for the future. Experience throughout this research has revealed that many owners won't get involved or offer their opinion unless asked. As was accomplished during the survey collection by handing out paper versions, the Town needs to meet business and property owners where they are (both literally and figuratively). For example: go out for lunch and have informal conversations with restaurant owners.

1. Assemble a working group of downtown business owners via the Ware Business and Civic Association to:
    - establish a vision for Ware's downtown

- determine their specific unmet needs and the capacity for immediate or longer term change
- work with appropriate local, regional and state actors to address those needs

2. Capitalize on the concentration of ownership downtown by assembling an advisory group of commercial property owners to engage in the development of a strategy for business recruitment and retention around the vision of the WBCA, the Town and Ware's residents.
3. The town should work with property owners whose properties are vacant or rundown to find solutions to make those properties economically viable again. Commercial property owners should be required to maintain their properties (especially historic buildings in the downtown) such that if the building incurs structural damage that renders the property uninhabitable, the owner should be required to make sufficient repairs to bring the property back up to code within an allotted timeframe (Mills, p. 120). Ware has space to attract tenants that reflect the type of downtown they want.

Micro- Level Recommendations

Beyond the construction of a downtown revitalization strategy, a market analysis and working groups that could take many months to assemble, it is also important to consider the smaller scale data that came out of this research and listen to the people who access the downtown everyday.

Consumers want a bakery; they want more restaurants; and they want specialty food shops. Some respondents have very specific stores in mind. As Ware begins to recruit new businesses to the downtown, they should place a particular emphasis on the attraction and retention of those types of businesses.

Finally, 76 people from 43 municipalities and four states visited downtown Ware during the course of this project's data collection. Though many were accessing the downtown for the myriad of social services offered there, they were also accessing retail shops, as evidenced by the collection of the print addition. Further analysis of where consumers from out of town are spending their money can guide shorter term business development, outside of a comprehensive strategy, that attracts a growing a varied demographic.

These recommendations are designed to empower the Town of Ware to take action on short and longer term initiatives to the extent that they are able and on a timeline that works for them. Many opportunities exist for robust revitalization and Ware should take advantage of all of the state, regional and local resources at their disposal to affect the kind of change they want to see in their downtown.

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APPENDICES

Downtown Ware

Study Area for Revitilization Project - 2013

Appendix I

Town of Ware
126 Main Street
Ware MA 01082

www.townofware.com

Town of Ware
126 Main Street
Ware MA 01082

www.townofware.com

Downtown Ware

Revitilization Project - 2013

Parcels, with Study ID and Use

(Use from Assessor data)

Town of Ware
126 Main Street
Ware MA 01082

www.townofware.com

Downtown Ware

Revitilization Project - 2013

Parcels, with Study ID

Appendix II

To: Karen M. Cullen, Ware Director of Planning & Community Development

From: Christina Mills, Intern
University of Massachusetts, Amherst
Regional Planning Master Project

Date: January 16, 2013

Re: Scope of Work

The goals of this Master Project are to:

- create buy-in among downtown businesses to create a unified vision for the downtown and to foster an environment that can facilitate change
- provide the Town of Ware with the data required to adequately assess the business community in downtown
- offer strategies for short and long term business development

These goals will be met by completing the following:

Visioning and Buy-In Work with the Ware Business and Civic Association to create a subgroup of downtown business owners to: • establish a vision for Ware's downtown • determine their specific unmet needs and the capacity for immediate or longer term change • work with appropriate local, regional and state actors to address those needs	**20%**
Business Census Complete a micro-demographic profile of 59 downtown parcels including businesses, commercial buildings and space based on an agreed upon boundary of downtown.	**20%**
Customer Survey Assemble a customer survey of downtown businesses to determine demand and identify missing commercial activity and opportunities for growth.	**10%**

Evaluate Similarly Situated Municipalities Research the economic/commercial make-up of downtowns in like municipalities in the Commonwealth (i.e. percentage of retail space/office space/vacant space/restaurants/street front space/service providers/etc.)	**15%**
Findings Triangulate the current commercial activity based on the business census, downtown statistics of similarly situated municipalities, and the demands of the consumer base to determine the missing economic/commercial activity in downtown Ware.	**20%**
Strategies for Success Working with state agencies and private consultants, and based on the findings of missing commercial activity, develop strategies to attract the type of business development necessary for economic revitalization in downtown.	**15%**
Final Report	**100%**

Appendix III

Ware community development director Karen Cullen wins professional planner of year award

By Jim Russell

on February 21, 2013 at 8:00 AM

WARE – The Ware municipal planner's office evokes a refined sense of order, maps neatly displayed, documents and proposals filed in place, Schubert's C major symphony "the great" quietly playing on radio.

Karen M. Cullen, AICP, the town's director of planning and community development, won the 2012 Professional Planner Award from the Massachusetts chapter of the American Planning Association. Making progress on how to revitalize the Main Street downtown area is among her top priorities.

She never expected the award.

"I was flabbergasted, I had no idea I was nominated," said Cullen, 55, in a recent interview.

She recounted reading about it online – at first wondering who the other Karen Cullen is in the state working as a planner.

The American Planning Association advocates "excellence in community planning, promoting education and citizen empowerment, and providing the tools and support necessary to meet the challenges of growth and change," according to the organization's website.

"She is an extremely hard worker - she has common sense, a lot of experience," Town Manager Stuart Beckley said. "It is a pleasure working with her. She has performed admirably."

Cullen is overseeing a comprehensive survey – of the downtown building stock, business needs and consumer preferences - that could provide the basis for improving the downtown over the next ten years. How to revitalize Ware's downtown has confounded the community since the 1970's, when the first master plan's stated goal included making Main St. a better place.

"A lot of work needs to be done as far as downtown is concerned," Cullen said. "Downtown needs to be revitalized, but how are we going to do it?" Data gleaned from the three-pronged survey will guide those decisions, she said.

In this era of extra-tight budgets, Cullen recruited a University of Massachusetts graduate student who will collect the survey data as part of her master's project – at no cost to Ware.

The work is being done by Christina Mills, who is working on her master's degree in landscape architecture and regional planning. Her adviser is UMass Professor Mark Hamin.

Prior to joining Ware government in July 2011, Cullen was a principal planner in the private sector at Concord Square Planning and Development starting in 2008. She was also the director in Spencer of the office of development and inspectional services.

Cullen earned her master's degree in regional planning at the UMass in 1983.

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Ware Public Schools gearing up for MCAS

Preparation occurs all school year long

By Melissa Fales
Reporter

WARE –For Ware Public School administrators, teachers and students, March means that the first round of Massachusetts Comprehensive Assessment System (MCAS) testing is just around the corner.

"We are assessing the data from the first day we receive it," said Jan Yardley, WPS director of accountability.

Yardley said the district will receive the early MCAS results before summer break. "Teachers will be able to see data while this year's classes are fresh on their minds," said Yardley. "They'll see what information students mastered and what they didn't."

Yardley said administrators and teachers sit down together to analyze the data, looking for areas of strength and weakness within each subject area. "We start with the big picture and look at trends over time," said Yardley. "Then we narrow it down to individual class-

See MCAS, Page 14

Hardwick selectmen approve EMS study

Eval will be funded by grant at no cost to town

By Melissa Fales
Reporter

HARDWICK – At a March 12 meeting, the Hardwick Board of Selectmen approved a study of the town's Emergency Medical Service (EMS) needs to be completed by the Central Massachusetts Regional Planning Commission (CMRPC). The study will also consider the potential for regionalizing EMS with other towns.

Members of the Hardwick Rescue Squad (HRS) Board of Directors have approached the selectmen asking for $30,000 to keep the ambulance service going. Increased state regulations have significantly raised the operating costs of the privately-run, non-profit service.

Board of Selectmen Chairman Eric Vollheim asked Vice Chair Kenan Young to lead the meeting, allowing Vollheim to speak as a member the HRS Board of Directors. He explained that only a few years ago, HRS was a volun-

See STUDY, Page 14

ROBOTICS TEAM MEETS MASTERS

Grade Five student David Shea takes a closer look at Gompei-saurus Rex with Professor Ken Stafford.

Shown below, while at the controls, Grade Six student Sebastian Lachance reacts to watching Gompei-saurus Rex respond to his commands. Also shown is Robotics Team member Professor Brad Miller.

Turley Publications photos by Melissa Fales

WARE - The Worcester Polytechnic Institute/Academy of Math and Science Robotics Team paid a visit to the Ware Middle School March 4. The team demonstrated Gompei-saurus Rex, an award-winning robot built by W.P.I. students in 2011. Some students had the opportunity to take a turn at the controls, steering Gompei-saurus Rex and making the robot perform various tasks. Students had many questions for the team about the robots, including how much the materials cost (less than $3,000), how it got its name (from Gompei, the W.PI. mascot) and how long it took to build (six weeks). "Demonstrating Gompei-saurus Rex is one of my favorite things to do," said team leader Professor Ken Stafford. "It's exciting to see children get interested in engineering and science."

Planner praised for bylaw overhaul

By Matthew Bernat
Reporter

WARE – Fighting city hall is a lot easier when your office is located there.

Frustrated by zoning bylaws that stifled potential businesses, Director of Planning and Community Development Karen Cullen became motivated to rewrite those laws. A massive undertaking, those efforts earned her a Massachusetts Professional Planner Award of the Year recently.

"I absolutely felt this had to be done," Cullen said. "The old laws were a big impediment to economic growth in this town."

Hired in July 2011, Cullen said in her first six months a dozen people called to ask about setting up shop locally. After learning a special permit, and more red tape, was required; the phone stopped ringing.

"I never heard from them again," Cullen said.

Re-drafting bylaws started with weekly meetings between Cullen, planning board members and the zoning board of appeals. She credited both boards for the huge effort needed to streamline the laws.

For months, Wednesday nights meant debating various bylaws, noting possible modifications, then re-writing them. Sometimes, the workload required an 80-hour workweek for Cullen because no money was available to hire an outside firm.

A graduate student from the University of Massachusetts' Regional Planning Department did help with research, she said.

The aid was welcome as re-writing Massachusetts bylaws is a "very, very difficult" task, said Cullen. Before the changes bylaws conflicted with state law. Sometimes they even conflicted with language in other local laws.

See PLANNER, Page 14

Hardwick sewer rates soar

By Betsy Calvert
Reporter

HARDWICK - Sewer rates will jump 51 percent on July 1, from $527.91 a year to $795.84, per dwelling unit. Two selectmen, in their role as sewer commissioners, approved the new rate at the Sewer Commission's regular meeting on March 11.

"Ouch," said Commissioner Richard Kmiec, upon hearing the new rate.

With the new rates, the town can now deal with its discharge violation issued in February by the state Department of Environmental Protection, Chief Operator Richard S. Kusmierczak said. The discharge violation is for phosphorus. Back in 2009, the town was supposed to have reduced its phosphorus discharge below a maximum of 1 milligram per liter, but the town hasn't been able to do it, said Kusmierczak. Next year, he said, the town will use $30,000 from the enterprise fund to buy special metallic salts to remove the high levels of phosphorus that are currently flowing into the Ware River, and eventually polluting the Long Island Sound.

The sewer's Enterprise Fund, only a few years old, already has a deficit of $100,000, or about a quarter of the full sewer budget, Kusmierczak said. Sewer commissioners Kmiec and Kenan Young decided that gradually raising the rate over a period of years would no longer be sufficient to address the deficit.

An incremental approach eases the pain for those property owners in town, Kmiec noted. About half of the town's dwelling units are in one of the two sewer districts.

But the remaining taxpayers, who pay for their own septic fields, foot the bill whenever there is a deficit in the Enterprise Fund, Young said. The rate increase moves the expense back to the owners of the 557 housing units on the sewer lines, in the villages of Gilbertville and Wheelwright.

In the few years since closing its landfill, the town has struggled to set accurate sewer rates, Kusmierczak said, because the landfill used to pay for the sewer system by paying it to process the landfill sludge. Now, Barre's landfill sends

See RATES, Page 14

Downtown community survey launched

WARE - In the Fall of 2012, the town of Ware embarked upon a large-scale Master Plan process. Using supporting research conducted by the UMass Landscape Architecture and Regional Planning Department, this year-long process will create a 10-year vision and strategic plan for Ware in areas ranging from community and economic development, education, housing, infrastructure, and transportation.

UMass graduate student, Christina Mills, is continuing the work begun last fall to examine the current business mix of the downtown, the available space for new businesses and the way residents and consumers use the downtown and the types of businesses they want to see.

Beginning this week, consumers from Ware and surrounding towns are invited to participate in a Customer Survey of Ware's Downtown. The survey takes less than 5 minutes to complete and has been designed to gather basic information about customer activity – or non-activity. It provides a range of suggested business types which could foster the development of a more vibrant, walkable and engaging downtown. Finally, it asks a

See SURVEY, Page 7

Sherman Hill Road house fire a total loss

Turley Publications photo by Melissa Fales

This home at 41 Sherman Hill Road was destroyed by an early morning fire March 12.

By Melissa Fales
Reporter

WARE – A family of seven was displaced by an early morning fire March 12 that tore through their home at 41 Sherman Hill Road.

The Fire Department received the report of the fire at 2:30 a.m. "The house was fully engulfed by the time we arrived on the scene," said Fire Chief Thomas W. Coulombe. Coulombe said efforts to fight the fire were hampered by the lack of water as the rural area has no fire hydrants. "We had to call in mutual aid tankers for a continuous water

See FIRE, Page 14

Ware School Committee

Wednesday night's Ware School Committee will be posted online today and then printed in the paper next week. The News is printed Wednesday afternoons. To read and comment on the story, go to www.warenewsonline.com and click on the blue "reader forum" button.

reader forum
www.warenewsonline.com

Ware Business & Civic Assoc.

The Town That Can't Be Licked - PO Box 602 - Ware, MA 01082

Login Form

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Password

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Log in

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- Forgot your username?
- Create an account

Masterplan Survey

Looking at Ware's Downtown From a Different Point of View

In the Fall of 2012, the Town of Ware embarked upon a large-scale Master Plan process. Using supporting research conducted by the UMass Landscape Architecture and Regional Planning Department, this year-long process will create a 10-year vision and strategic plan for Ware in areas ranging from community and economic development, education, housing, infrastructure, and transportation.

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walkable and engaging downtown. Finally, it asks a few questions about how the respondent feels about existing businesses (hours, variety, quality) and parking.

Take the survey online here!

It is also available in printed form at many businesses throughout Ware, the Senior Center, Young Men's Library Association, and at many offices in Town Hall. Surveys can be returned where they were picked up or to the Town Hall. For further information, please contact Karen Cullen, AICP, Director of Planning & Community Development at 413-967-9648 ext. 118.

- < Prev
- Next >

Downtown Ware: Commercial Property Owners Survey

Appendix IV

Thank you for participating in the Town of Ware's Commercial Property Owners Survey. Your feedback will help us to understand the uses of commercial properties in the downtown, track vacant properties and market trends, and will give us the foundation to plan for the future.

The survey is a total of 26 questions and should take 15 - 20 minutes to complete. Most questions are multiple choice with an optional comment section.

We appreciate your participation.

1. Please state the name of the property owner.

2. Please state the address of the downtown commercial property?

3. What year was the property purchased?

Condition and Maintenance

4. What is the current condition of the structure?

- ◯ Uninhabitable
- ◯ Fair
- ◯ Good
- ◯ Excellent

5. Who is responsible for the maintenance and up-keep of the property?

- ◯ Lessees
- ◯ Owner

6. What is the square footage of the property?

Downtown Ware: Commercial Property Owners Survey

Commercial Area

7. Does the property have a first floor store front?

- ◯ Yes
- ◯ No

8. Is each store front unit currently occupied?

	Yes	No
1.	◯	◯
2.	◯	◯
3.	◯	◯
4.	◯	◯
5.	◯	◯

9. If not, how long have they been vacant?

1.
2.
3.
4.
5.

10. What type of businesses occupy your commercial units?

- ☐ Office
- ☐ Retail
- ☐ Restaurant

Other (please specify)

11. What is the total number of commercial units on the property?

12. What is the total number of OCCUPIED commercial units on the property?

Downtown Ware: Commercial Property Owners Survey

13. What is the total square footage of each unit?

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

14. What is the square footage of RETAIL SPACE of each unit?

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Residential Area

15. What is the total number of residential units on the property?

16. What is the total number of OCCUPIED residential units on the property?

Downtown Ware: Commercial Property Owners Survey

17. What is the square footage of each residential unit?

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Rental Agreements

18. What is your annual commercial rental range?

- $4,800 - $7,200
- $7,200 - $9,600
- $9,600 - $12,000
- $12,000 - $14,400
- $14,400+

19. What is your annual residential rental range?

- $4,800 - $7,200
- $7,200 - $9,600
- $9,600 - $12,000
- $12,000 - $14,400
- $14,400+

20. What factors do you consider when establishing your rental range?

- [ ] Property location (corner lot, prime lot, etc.)
- [ ] Square footage
- [ ] Structure condition
- [ ] Competition with other area rents
- [ ] Off street parking availability
- [ ] On-site amenities

Other (please specify)

Length of Occupancy

21. What is the average duration of stay for your commercial tenants?

- ◯ < 6 months
- ◯ > 6 months
- ◯ > 1 years
- ◯ > 2 years

22. What is the average length of your commercial leases?

- ◯ Monthly
- ◯ 1 year
- ◯ 2 years
- ◯ 3 years
- ◯ 3 years+

23. What is the average duration of stay for your residential tenants?

- ◯ < 6 months
- ◯ > 6 months
- ◯ > 1 years
- ◯ > 2 years

Downtown Ware: Commercial Property Owners Survey

24. What is the average length of your residential leases?

- ◯ Monthly
- ◯ 1 year
- ◯ 2 years
- ◯ 3 years
- ◯ 3 years+

Tenant Identification

25. What is the capacity to convert your commercial units into other uses? (i.e. a former cafe into retail space.)

- ◯ Easily Convertible
- ◯ Convertible with limitations
- ◯ Not Convertible

Other (please specify)

26. How do you identify and select tenants?

The End.

Thank you very much for taking the time to complete our survey. Your input is valuable and will help us to better understand the dynamics of Ware's downtown. We appreciate your help!

Ware's Downtown Business Inventory

Thank you for participating in the Town of Ware's Downtown Business Inventory. Your feedback will help us to understand the business mix in the downtown, how your commercial space is used, and will give us the foundation to plan for the future.

The survey is a total of 33 questions and should take 15 - 20 minutes to complete. Most questions are multiple choice with an optional comment section.

We appreciate your participation.

1. Please tell us the name of your business.

2. What type of business do you operate?

Other (please specify)

3. [RETAILERS ONLY] What type of goods do you sell?

- [ ] Alcohol
- [ ] Antiques
- [ ] Children's Clothing
- [ ] Electronics
- [ ] Furniture
- [ ] Interior/Crafts/Flowers
- [ ] Jewelry
- [ ] Men's Clothing
- [ ] Music/Games
- [ ] Women's Clothing

Other (please specify)

Ware's Downtown Business Inventory

4. [OFFICES ONLY] What type of services do you provide?

- [ ] Accounting
- [ ] Automotive
- [ ] Banking
- [ ] Business Assistance
- [ ] Civic
- [ ] Cosmetic
- [ ] Educational
- [ ] Law
- [ ] Medical
- [ ] Mental Health
- [ ] Real Estate
- [ ] Religious
- [ ] Veterinary

Other (please specify)

5. [RESTAURANTEURS ONLY] What type of restaurant do you operate?

6. [RESTAURANTEURS ONLY] do you serve alcoholic beverages at your establishment?

- ( ) Yes
- ( ) No

7. What year did you open your business?

8. What year did you open your business at your current address?
(If same as previous answer, please answer again.)

9. What was your reason for locating in Ware, MA? (Please check all that apply.)

- [ ] Affordability
- [ ] Assistance from the Town
- [ ] Business expansion to a new market
- [ ] Friendly Business Environment
- [ ] You're from Ware
- [ ] You're from the Region
- [ ] Market Demand

Other (please specify)

Ware's Downtown Business Inventory

10. What was your reason for opening in downtown? (Please check all that apply.)

- [ ] Accessibility
- [ ] Affordability
- [ ] Downtown Investment
- [ ] Market Forces
- [ ] Street level, store front
- [ ] Walkability

Other (please specify)

11. Do you rent or own the property in which your business is located?

- ( ) Rent
- ( ) Own

12. [RENTERS ONLY] Approximately how much is your annual rent?

- ( ) < $5,000
- ( ) $5,000 - $9,999
- ( ) $10,000 - $14,999
- ( ) $15,000 - $19,999
- ( ) $20,000 - $24,000
- ( ) $24,000 >

13. What is the approximate square footage of the unit your business occupies?

14. What is the approximate square footage of the retail space (the space that customers/clients have access to) in the unit your business occupies?

15. How many full-time employees (including you) does your business employ?

- ( ) None
- ( ) 1 - 4
- ( ) 5 - 9
- ( ) 10 - 14
- ( ) 15 - 20
- ( ) 20 >

Ware's Downtown Business Inventory

16. How many part-time employees (including you) does your business employ?

- ◯ None
- ◯ 1 - 4
- ◯ 5 - 9
- ◯ 10 - 14
- ◯ 15 - 20
- ◯ 20 >

17. Which days of the week is are you open for business? (Please check all that apply.)

- ☐ Weekdays
- ☐ Weekends
- ☐ 7 Days a Week
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday

18. What are your hours of operation? (Please check all that apply.)

- ☐ Early Morning
- ☐ Mid-Morning
- ☐ Afternoon
- ☐ Late Afternoon
- ☐ Evening
- ☐ Nighttime

19. If you normally close at 5pm or before, are you open on any evenings?

- ☐ No
- ☐ Sunday
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

20. What is the peak month of operation for your business?

21. What is the peak day of the week for your business?

22. What is the peak time of day for your business? (Please check all that apply.)

- ☐ Early Morning
- ☐ Mid-Morning
- ☐ Afternoon
- ☐ Late Afternoon
- ☐ Evening
- ☐ Nighttime

23. How many customers/clients does your business serve in an average day?

24. How many customers/clients does your business serve during its busiest time?

25. Where are the majority of your customers/clients from?

Other (please specify)

26. How do most of your customers/clients get to your business? (Please check all that apply.)

- Walk
- Taxi
- Bicycle
- Public transportation
- Drive

Other (please specify)

27. What is the estimated income demographic of your customer/client base?

Other (please specify)

28. What is the dollar value of your average transactions?

29. How frequently do your customers/clients seek your services?

Ware's Downtown Business Inventory

30. Are you a member of the Ware Business and Civic Association? Why or why not?

- ◯ Yes
- ◯ No

Please explain why or why not?

31. Is your business doing better, worse or the same as it was 1 year ago?

Please comment.

32. Is your business doing better, worse or the same as it was 4 years ago?

Please comment.

33. How (if at all) was your business affected by the recent economic recession?

The End.

Thank you very much for taking the time to complete our survey. Your input is valuable and will help us to better understand the dynamics of Ware's downtown. We appreciate your help!

TOWN OF WARE
Planning Department
126 Main Street, Suite G, Ware, Massachusetts 01082
413.967.9648 ext. 118

Customer Survey

Help Ware's town officials plan for the future of downtown by telling us what you come to downtown for; what you love about it; and what you'd like to see. Please take a minute to tell us your experience and give us your opinion. We can't plan for the future until we understand how you use downtown today! Thank you for your time.

Are you a Ware resident? (Please circle.)

Y / N

If no, home ZIP code:_____

Gender: (Please circle.)

M / F

Age: (Please check.)

___ < 19
___ 20 –34
___ 35 – 49
___ 50 – 54
___ 55 – 65
___ 65+

How many people live in your home?_____

What are their ages? (Please cite the number of people in each age bracket.)

___ < 19
___ 20 –34
___ 35 – 49
___ 50 – 54
___ 55 – 65
___ 65+

How often do you visit the downtown?

___ Daily
___ Weekly
___ Twice per month
___ Once per Month
___ < Once per month

How do you get to the downtown?

___ Bicycle
___ Drive
___ Taxi
___ Walk
___ Public Transit

Please continue to back page.

Why do you usually visit the downtown? (Please check all that apply.)

___ Banking
___ Dining
___ Education
___ Medical Care
___ Office Visits (Government, Law, Accounting, Real Estate, etc.)
___ Recreation
___ Religious Services
___ Salon Services
___ Shopping

What time of day do you usually visit the downtown? (Please check all that apply.)

___ Early Morning
___ Mid-Morning
___ Afternoon
___ Late Afternoon
___ Evening
___ Nighttime

What new stores would attract you to shop in the Downtown Area? (Please check all that apply.)

___ Antiques
___ Bakeries
___ Bookstores
___ Children's Stores
___ Clothing
___ Coffee Shop
___ Department Stores
___ Entertainment
___ Gifts
___ Other_____
___ Hardware
___ Home Decor
___ Music Stores
___ Office Supplies
___ Restaurant
___ Specialty Foods
___ Sporting Goods

Please rate the following statements on a scale of 1 - 5 (1 = Strongly Disagree - 5 = Strongly Agree).

Businesses in the downtown are open during hours that are convenient for me.

1 2 3 4 5

There is enough variety of retail stores in downtown.

1 2 3 4 5

The quality of the goods/services available is ideal.

1 2 3 4 5

Parking in the downtown is available and accessible.

1 2 3 4 5

Parking impacts my decision about where to shop.

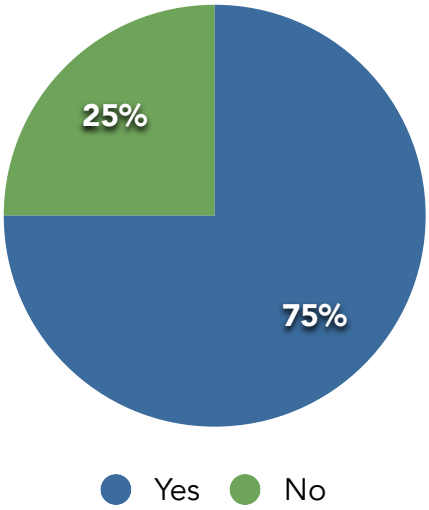
1 2 3 4 5

Thank you very much for taking the time to complete our survey. Your input is valuable and will help us to better understand the dynamics of Ware's downtown. You can leave the survey at the business in which you filled it out, or send it to the Planning and Community Development Office, Ware Town Hall, 126 Main Street, Suite G. We appreciate your help!

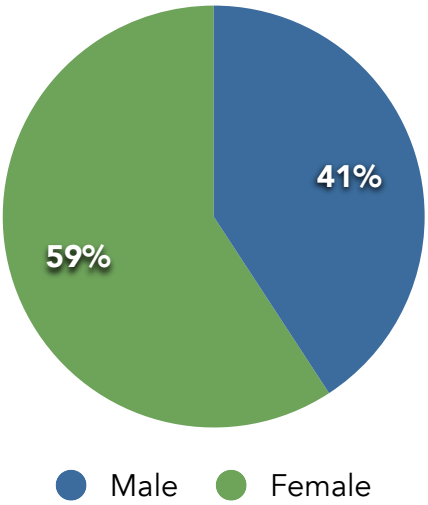
Appendix V
Customer Survey - Results

Residency (By gender)

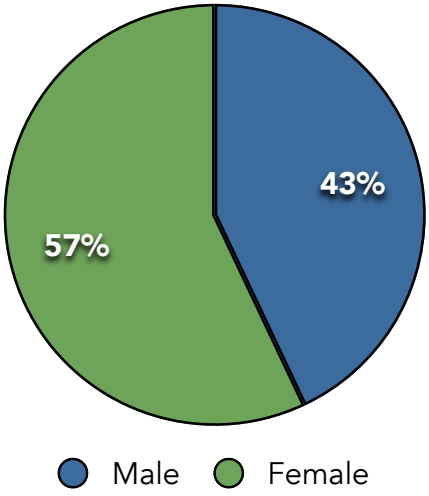
Are You a Ware Resident?



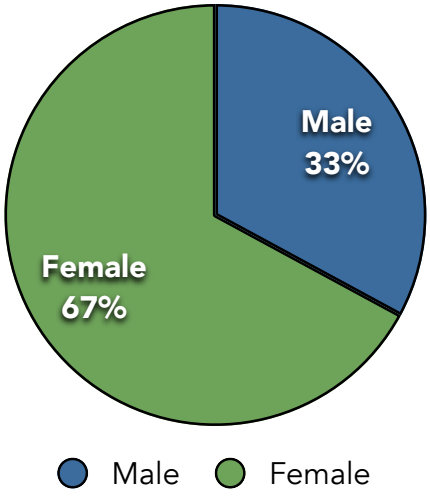
Gender



Ware Residents by Gender

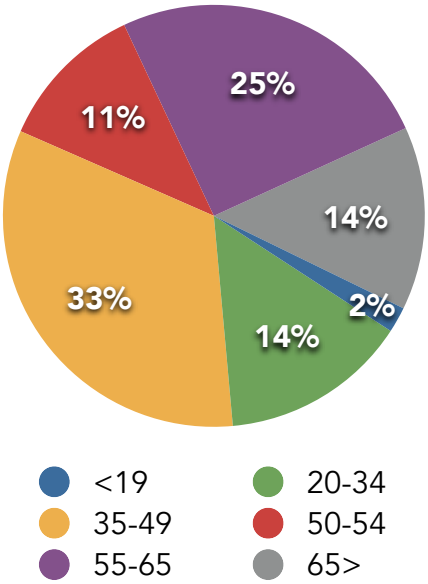


Visitors to Ware by Gender

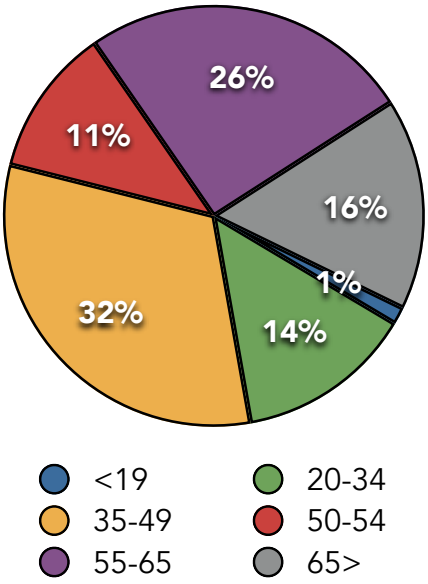


Age (Broken down by residency)

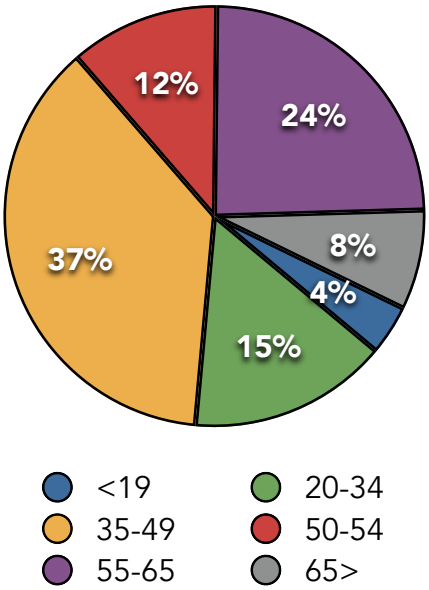
Age



Ware Residents by Age

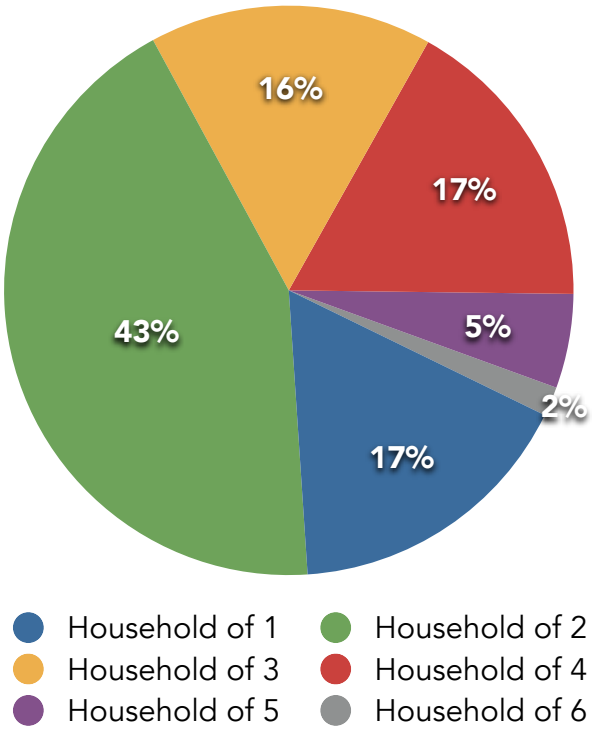


Visitors to Ware by Age

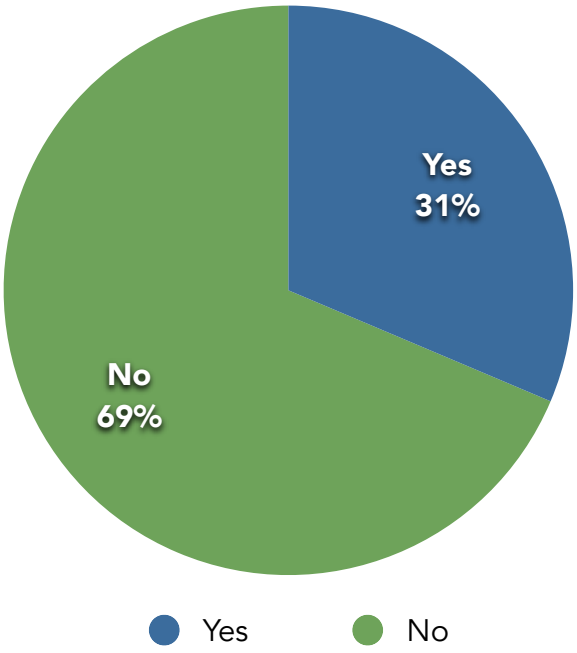


Household Size

Number of Household Occupants

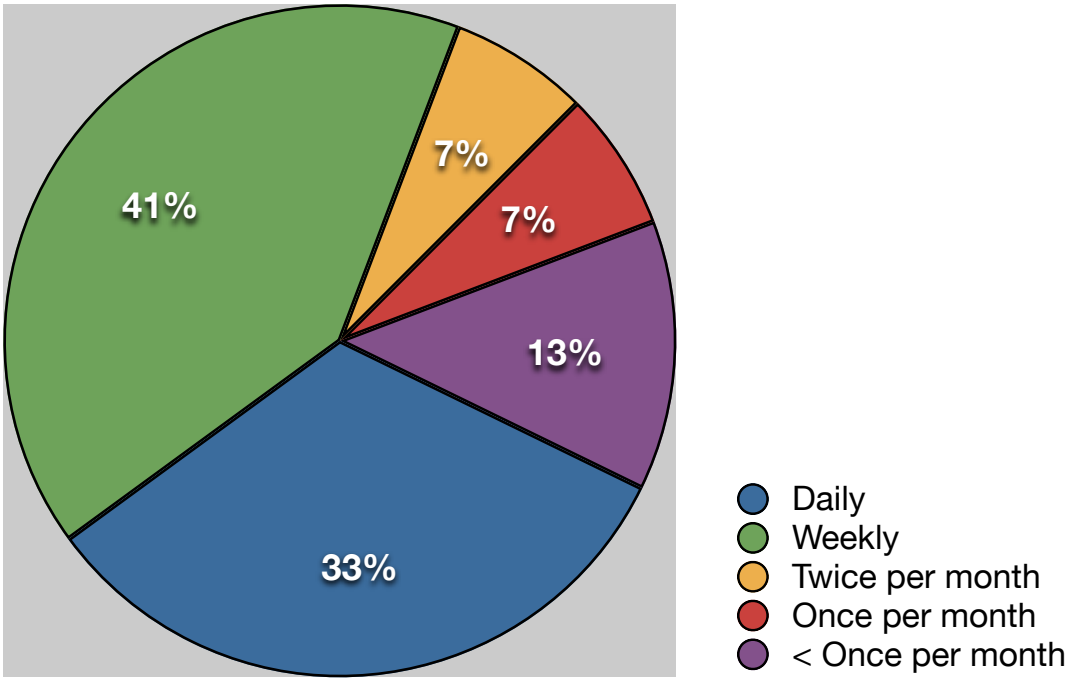


Respondents with Children Under 19 in Household

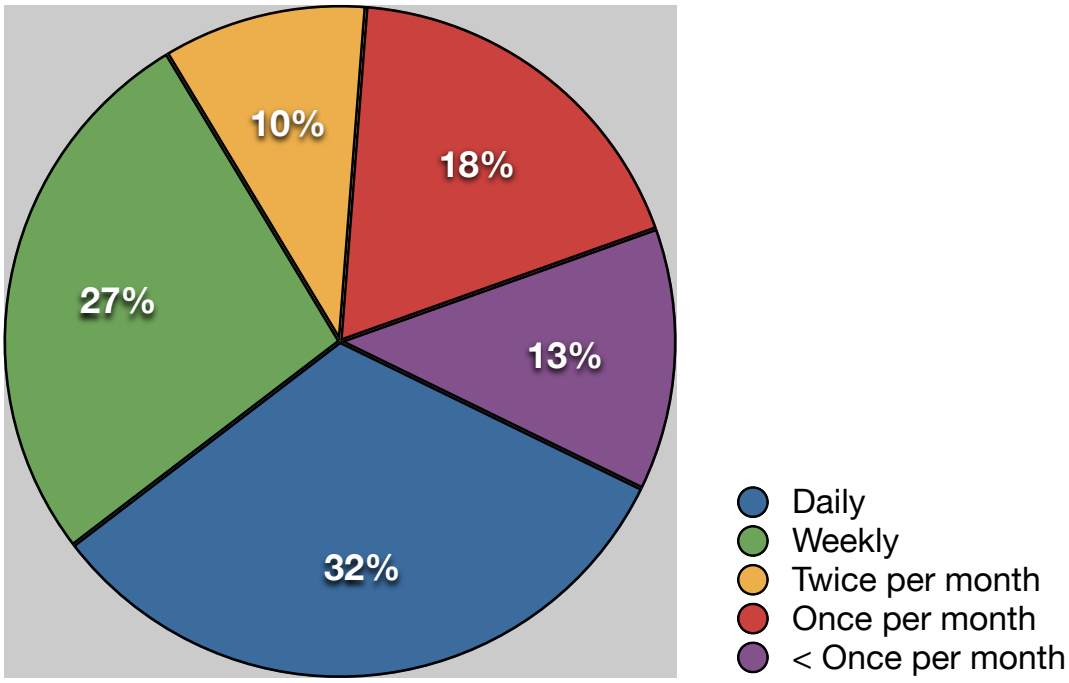


How Often Do You Visit the Downtown?

Trip Frequency (Ware Residents)

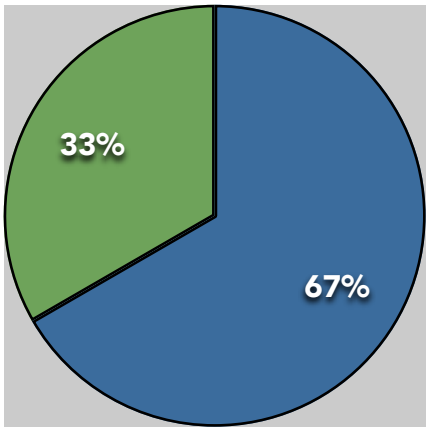


Trip Frequency (Ware Visitors)



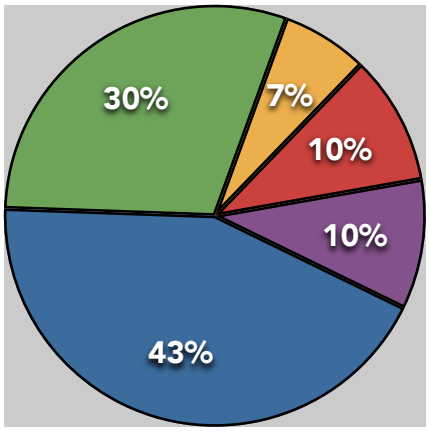
How Often Do You Visit the Downtown?
(By residency and age)

Trip Frequency (Ware Residents <19)



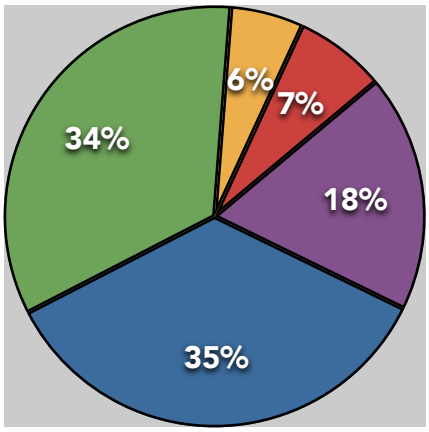
- Daily
- Weekly
- Twice Per Month
- Once Per Month
- < Once Per Month

Trip Frequency (Ware Residents 20-34)



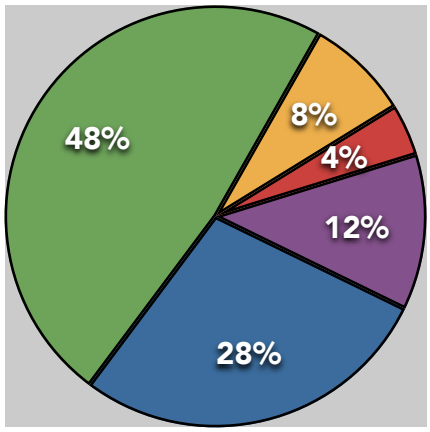
- Daily
- Weekly
- Twice Per Month
- Once Per Month
- < Once Per Month

Trip Frequency (Ware Residents 35-49)



- Daily
- Weekly
- Twice Per Month
- Once Per Month
- < Once Per Month

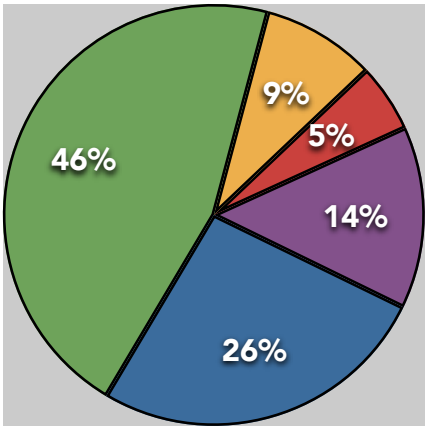
Trip Frequency (Ware Residents 50-54)



- Daily
- Weekly
- Twice Per Month
- Once Per Month
- < Once Per Month

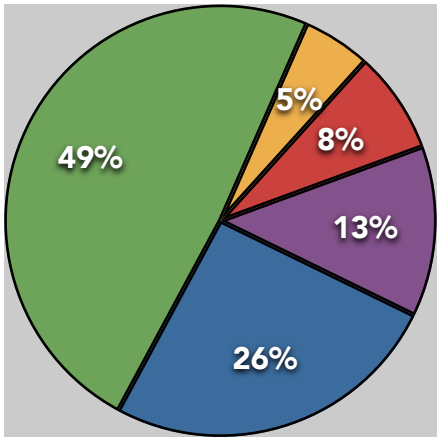
How Often Do You Visit the Downtown?
(By residency and age)

Trip Frequency (Ware Residents 55-65)



- Daily
- Weekly
- Twice Per Month
- Once Per Month
- < Once Per Month

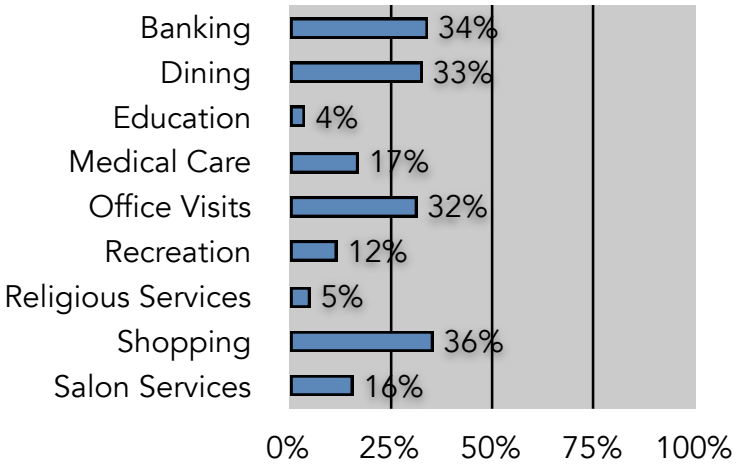
Trip Frequency (Ware Residents 65>)



- Daily
- Weekly
- Twice Per Month
- Once Per Month
- < Once Per Month

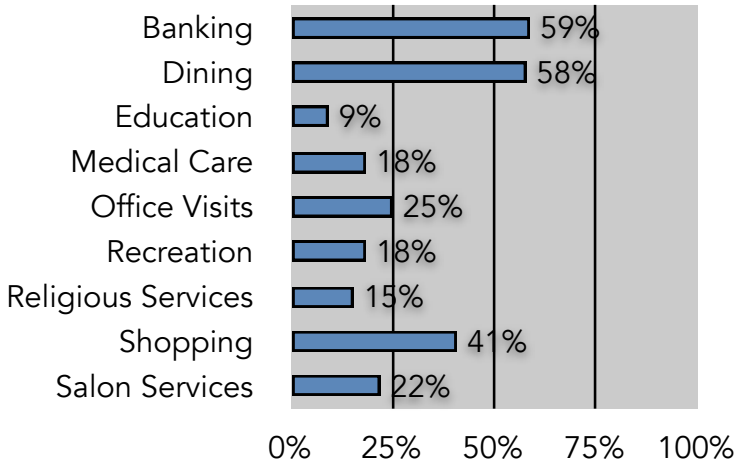
Why Do You Visit the Downtown?
(By residency and age)

Reasons for Visiting the Downtown (Ware Visitors)

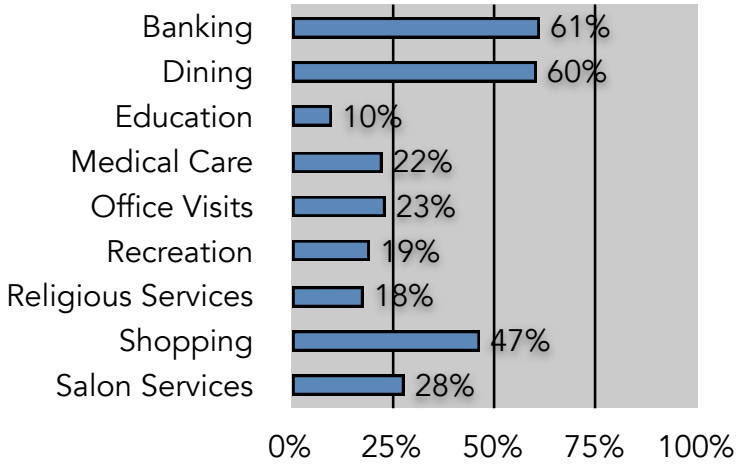


Why Do You Visit the Downtown? (cont.)

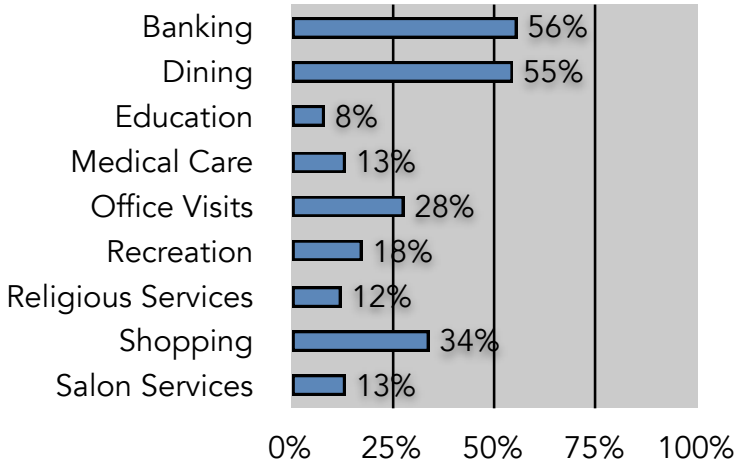
Reasons for Visiting the Downtown (All Ware Residents)



Reasons for Visiting the Downtown (Ware Female Residents)

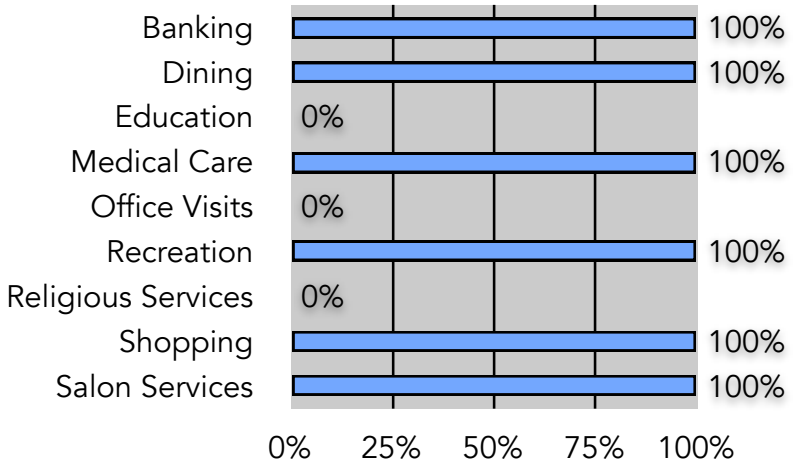


Reasons for Visiting the Downtown (Male Residents)

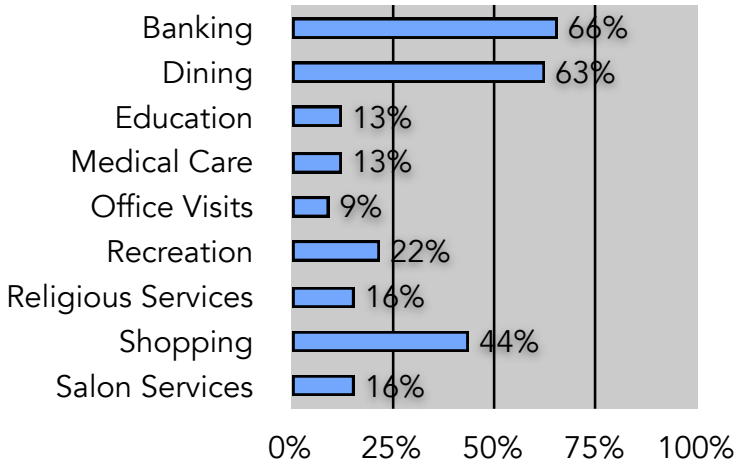


Why Do You Visit the Downtown? (cont.)

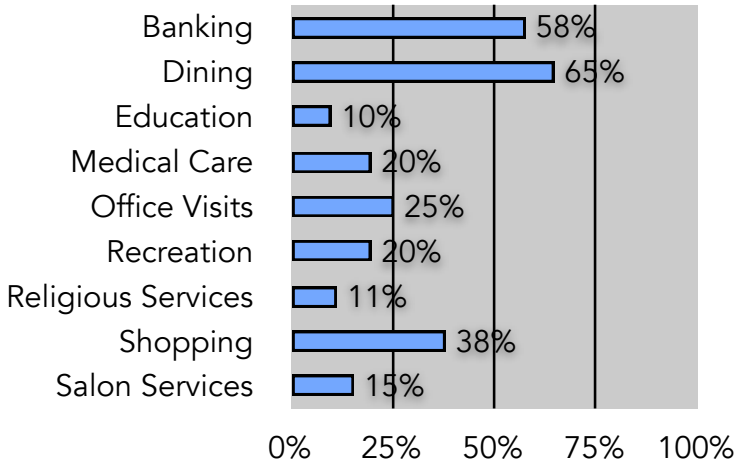
Reasons for Visiting Downtown (Ware Residents <19)



Reasons for Visiting Downtown (Ware Residents 20-34)

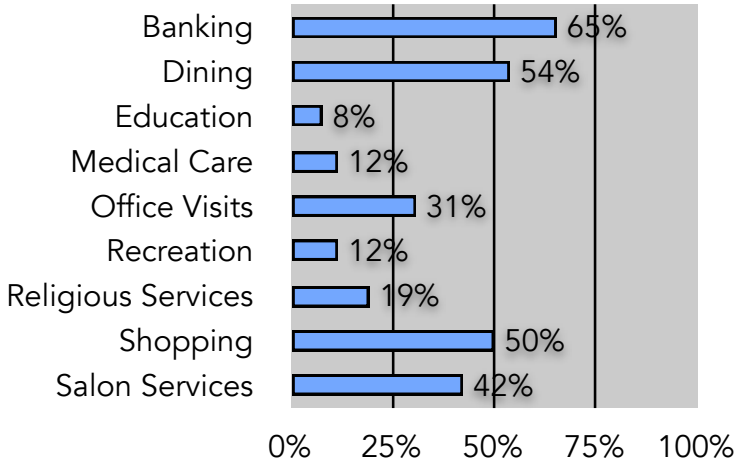


Reasons for Visiting Downtown (Ware Residents 35-49)

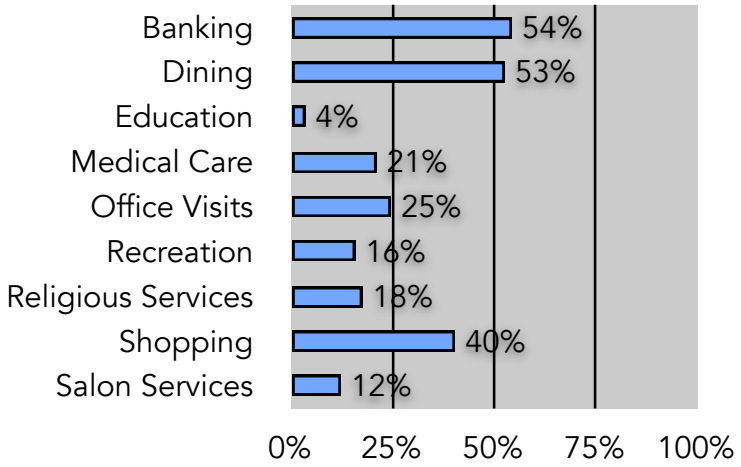


Why Do You Visit the Downtown? (cont.)

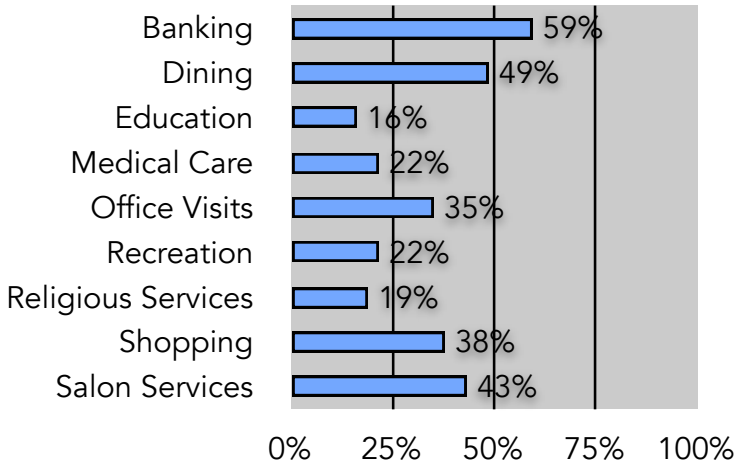
Reasons for Visiting Downtown (Ware Residents 50-54)



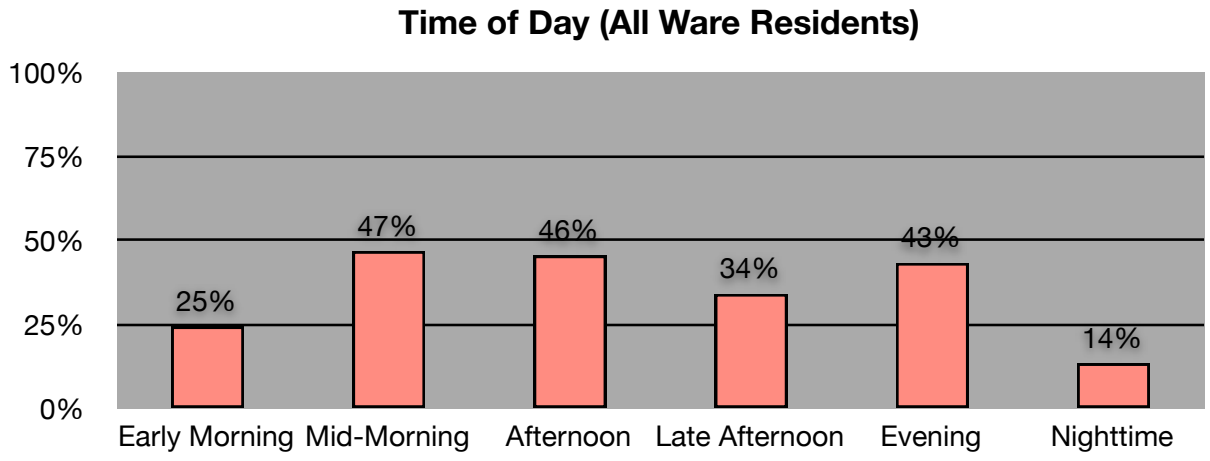
Reasons for Visiting Downtown (Ware Residents 55 - 65)

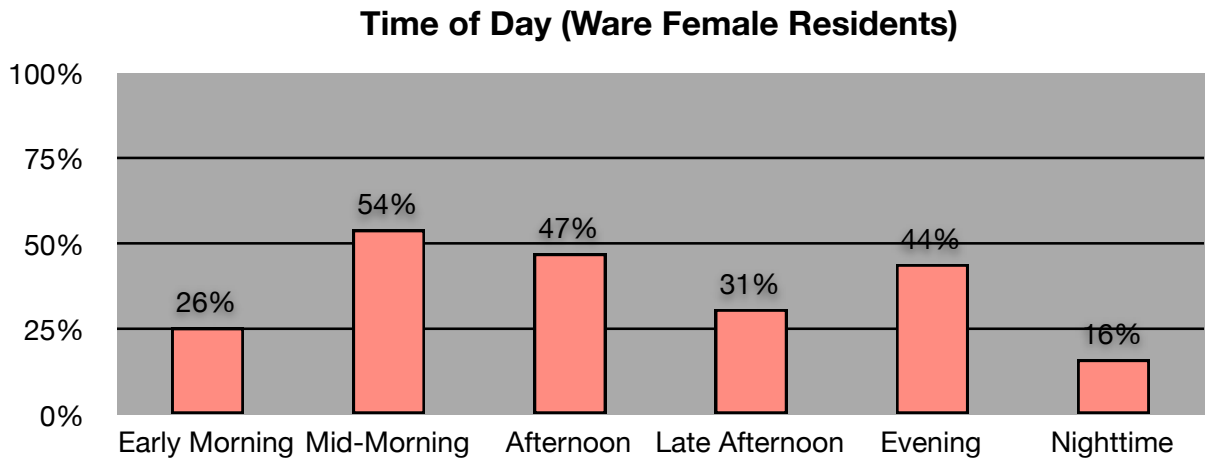


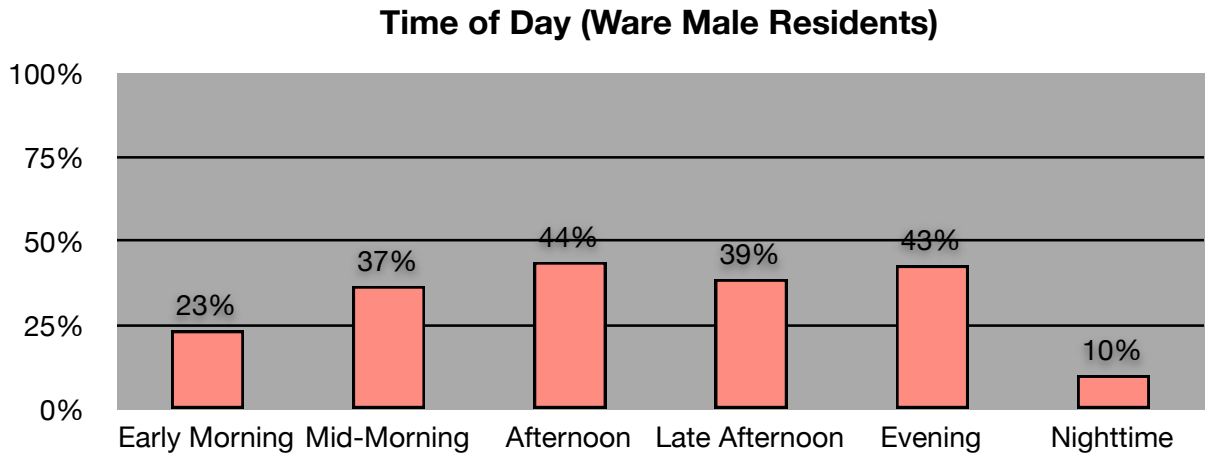
Reasons for Visiting Downtown (Ware Residents 65>)



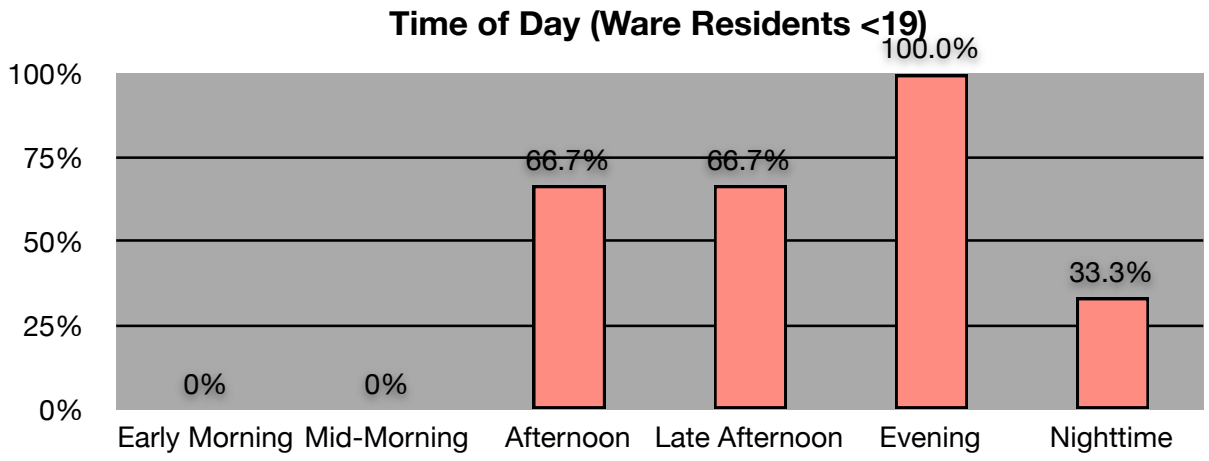
What Time of Day do You Visit the Downtown?
(By gender and age)

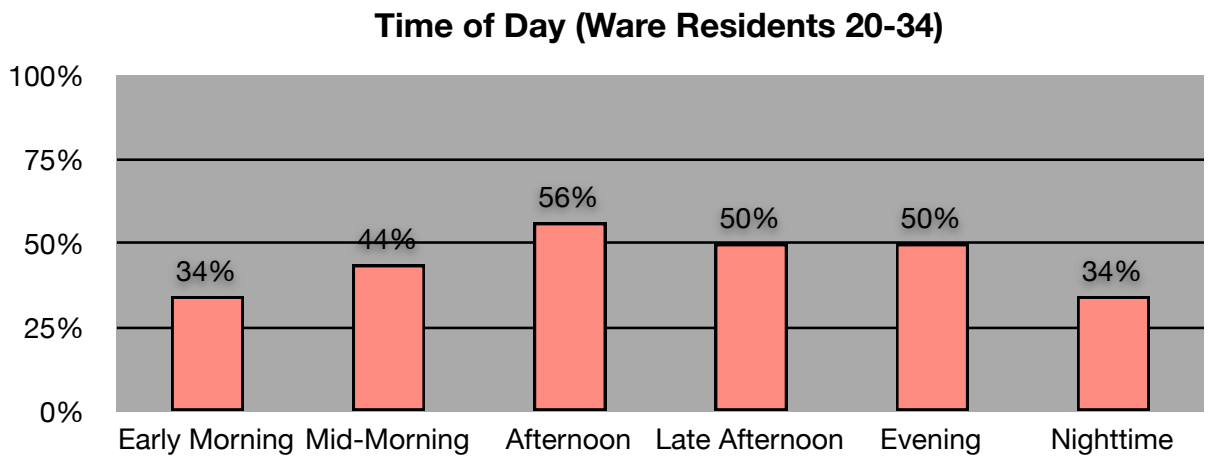


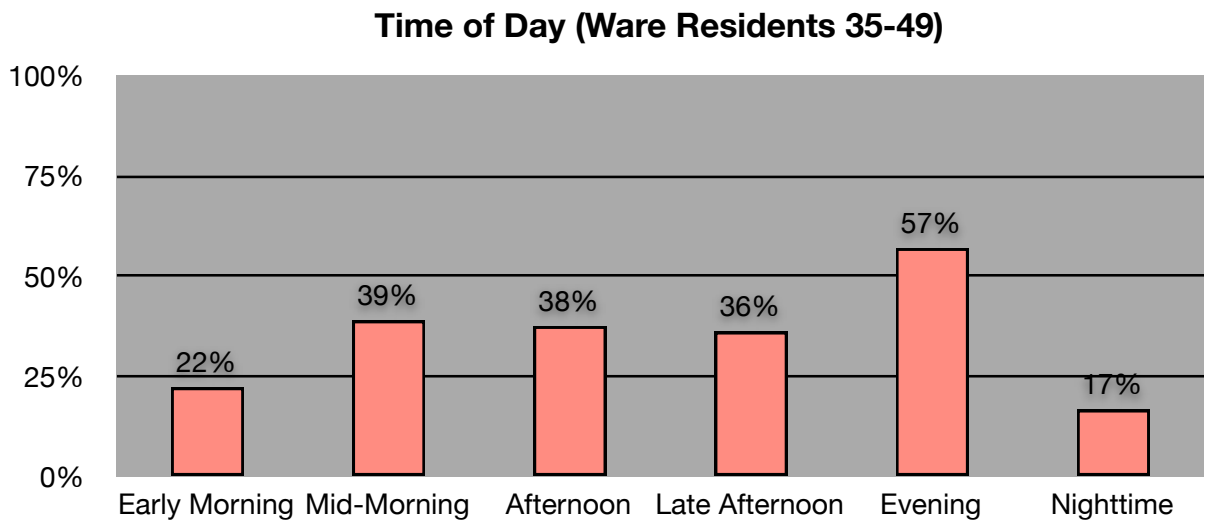




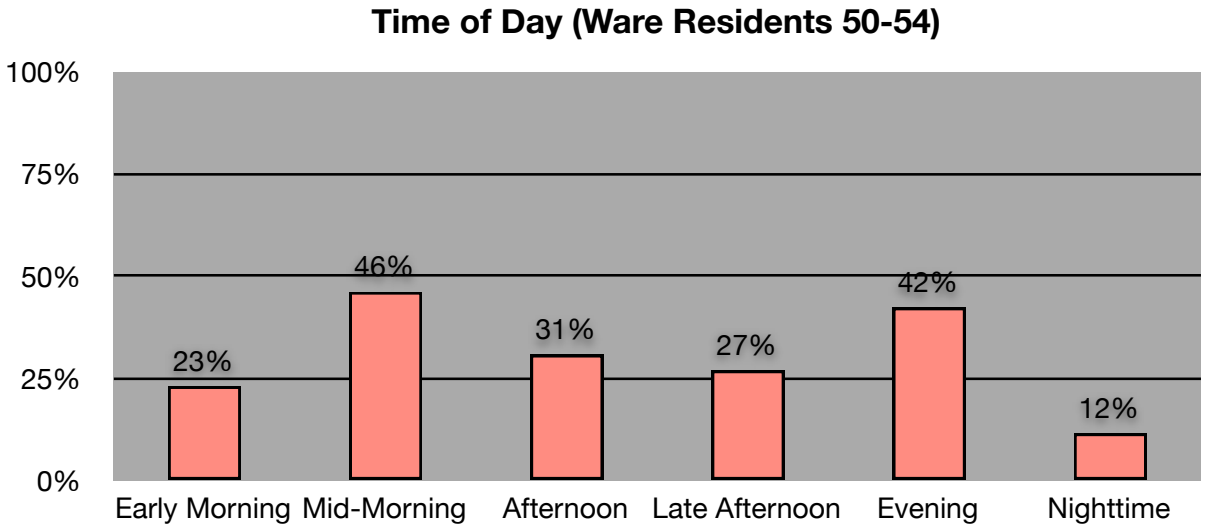
What Time of Day do You Visit the Downtown? (cont.)

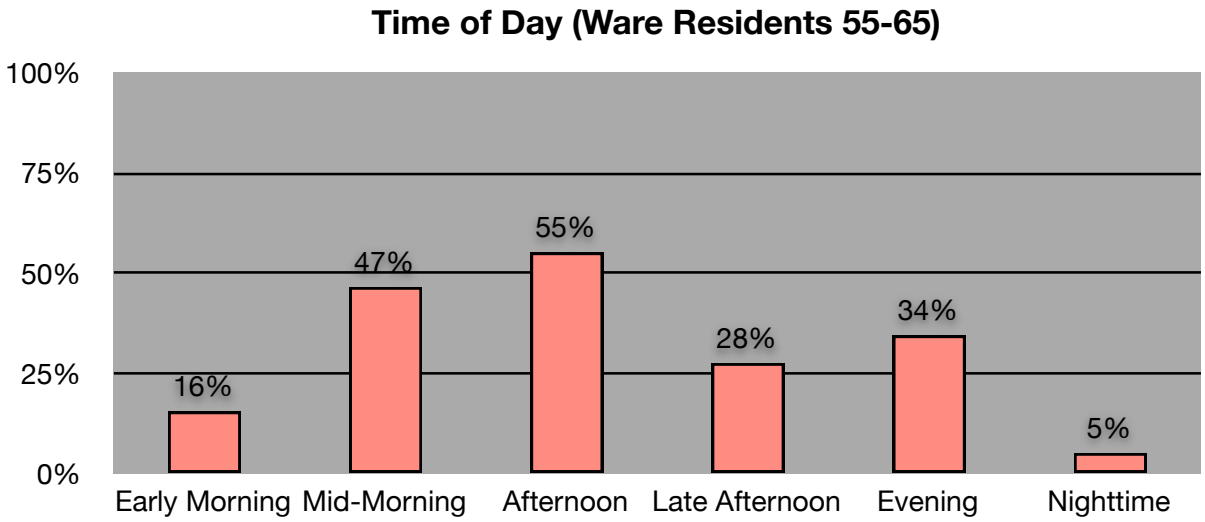


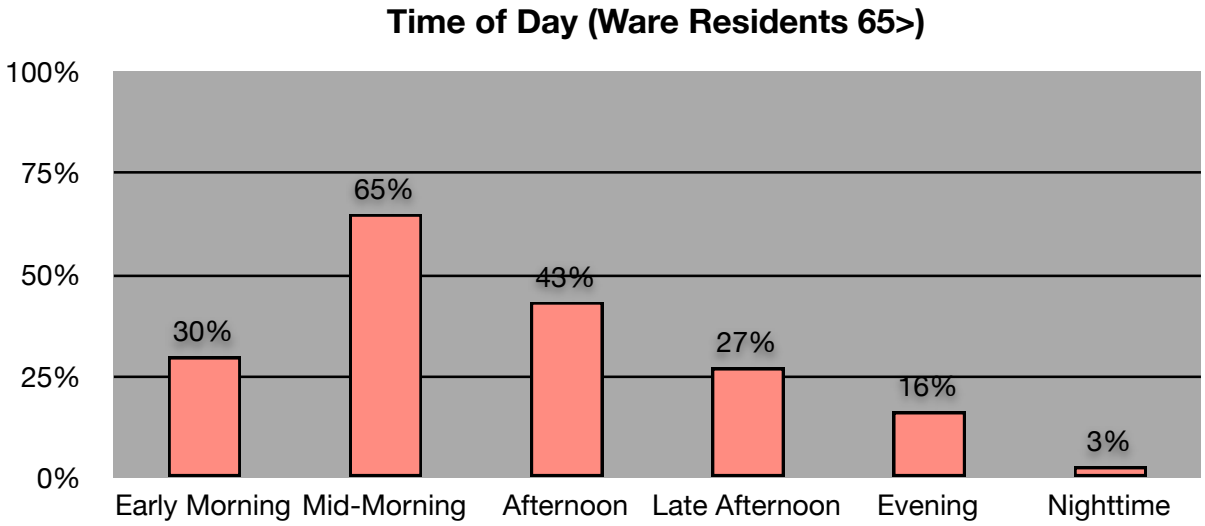




What Time of Day do You Visit the Downtown? (cont.)

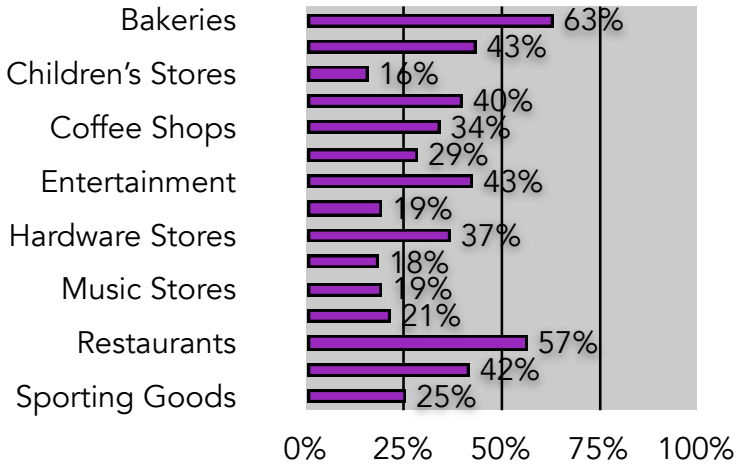




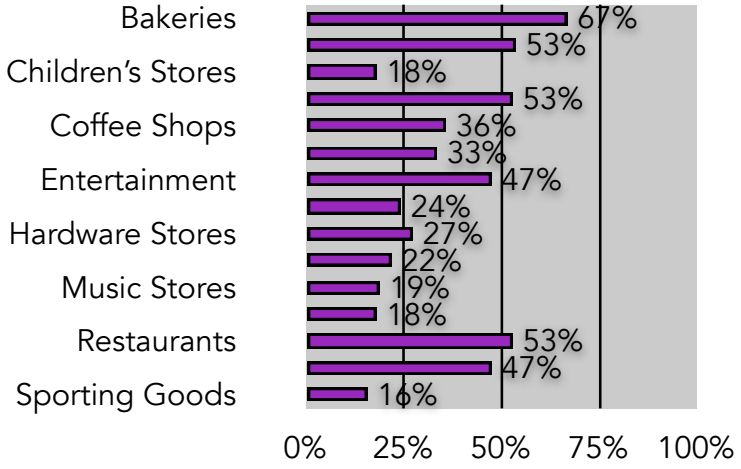


What Types of Businesses Would Attract You to the Downtown? (By residency, age and gender)

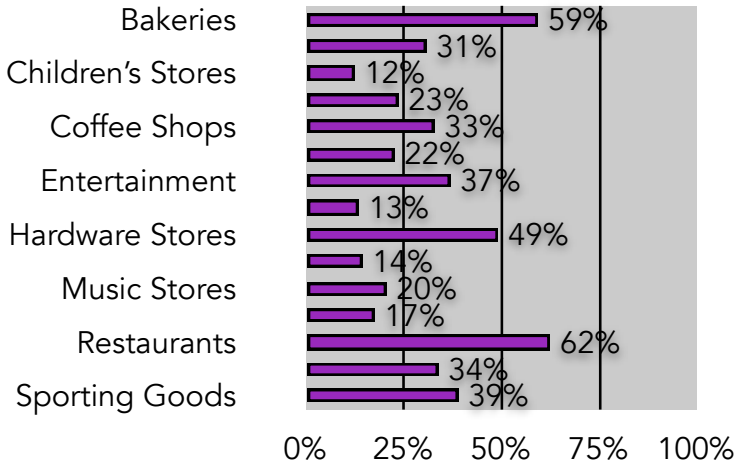
Future Business Development (All Ware Residents)



Future Business Development (Ware Female Residents)

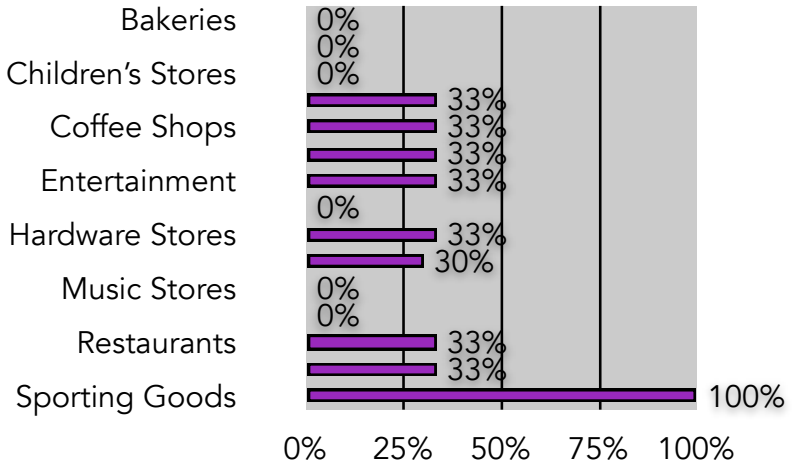


Future Business Development (Ware Male Residents)

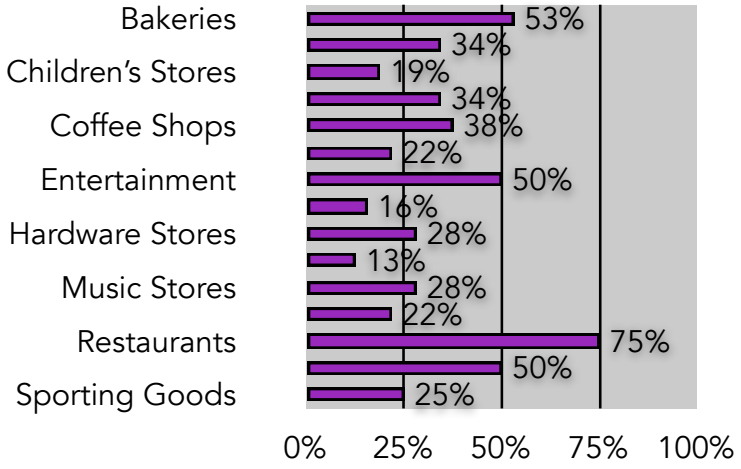


What Types of Businesses Would Attract You to the Downtown? (cont.)

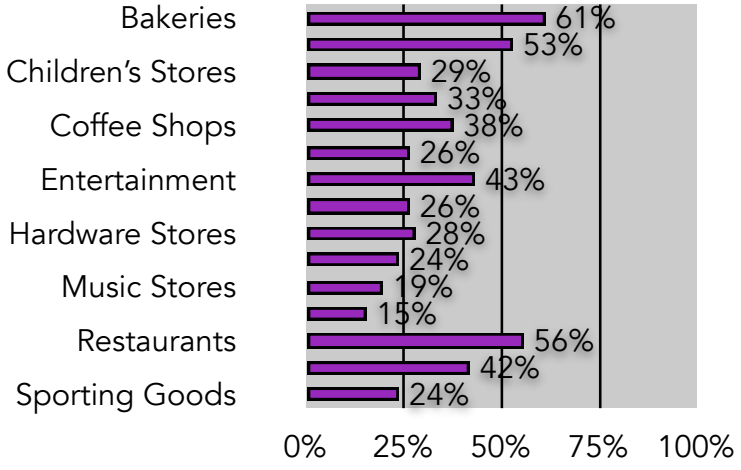
Future Business Development (Ware Residents <19)



Future Business Development (Ware Residents 20-34)

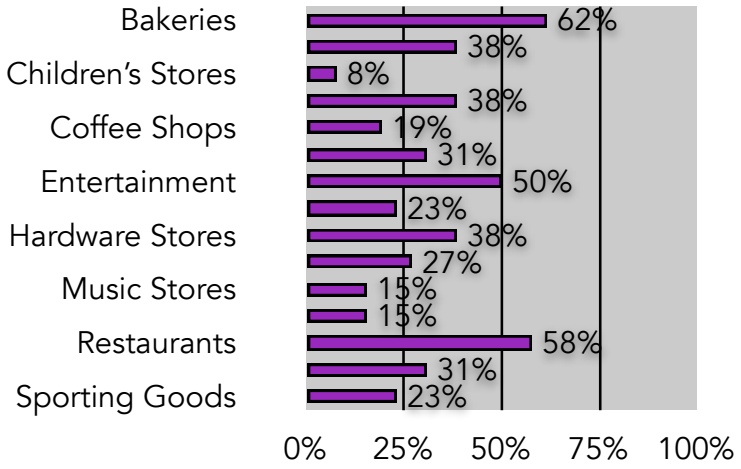


Future Business Development (Ware Residents 35-49)

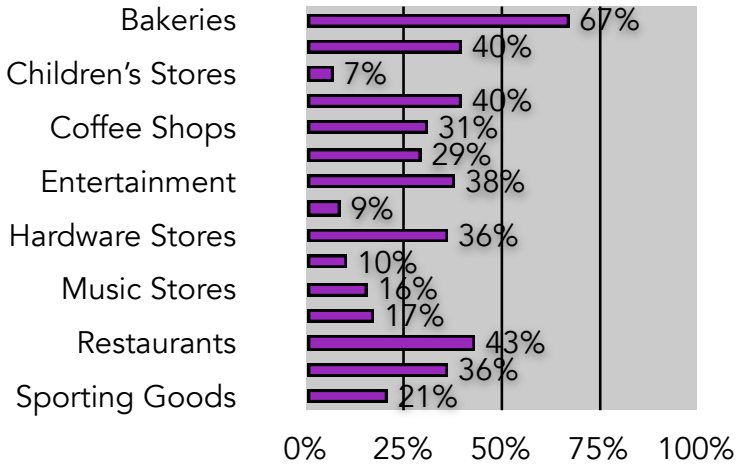


What Types of Businesses Would Attract You to the Downtown? (cont.)

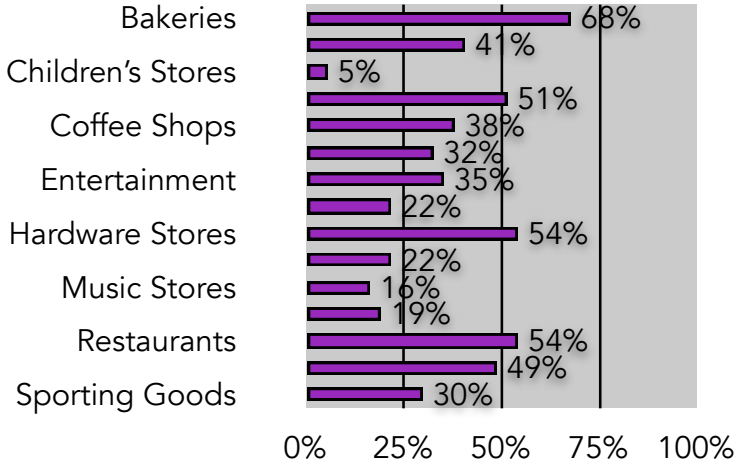
Future Business Development (Ware Residents 50-54)



Future Business Development (Ware Residents 55-65)



Future Business Development (Ware Residents 65>)

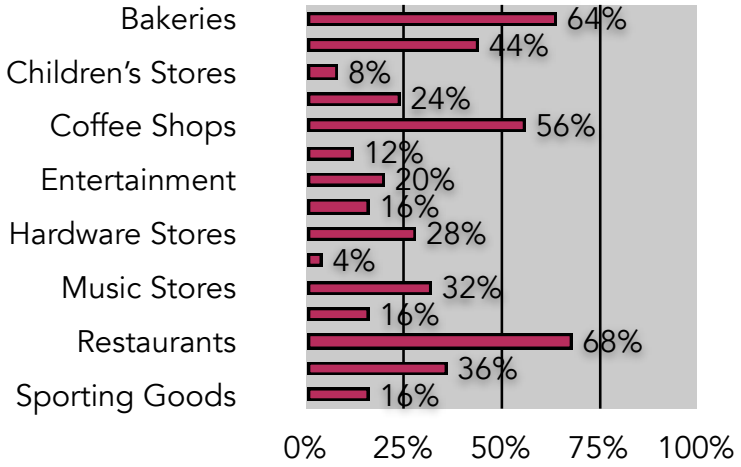


What Types of Businesses Would Attract You to the Downtown? (cont.)

Future Business Development (All Ware Visitors)

Future Business Development (Ware Female Visitors)

Future Business Development (Ware Male Visitors)



What Types of Businesses Would Attract You to the Downtown? (cont.)

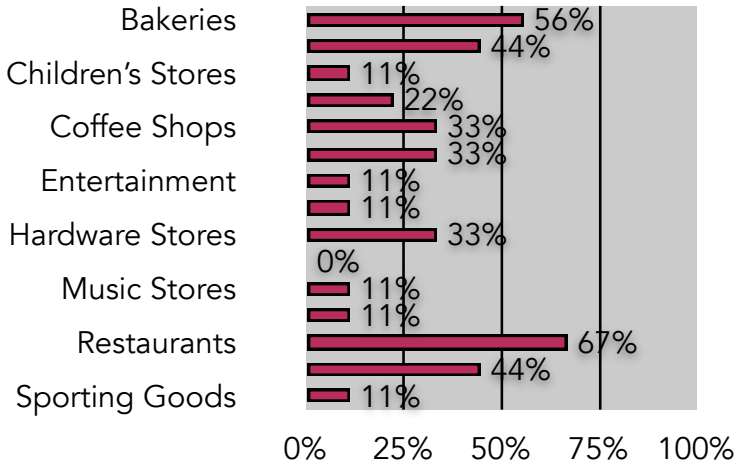
Future Business Development (Ware Visitors <19)

Future Business Development (Ware Visitors 20-34)

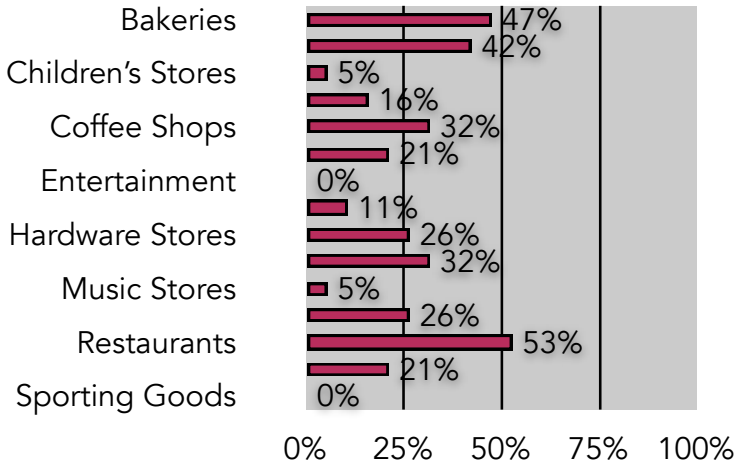
Future Business Development (Ware Visitors 35-49)

What Types of Businesses Would Attract You to the Downtown? (cont.)

Future Business Development (Ware Visitors 50-54)



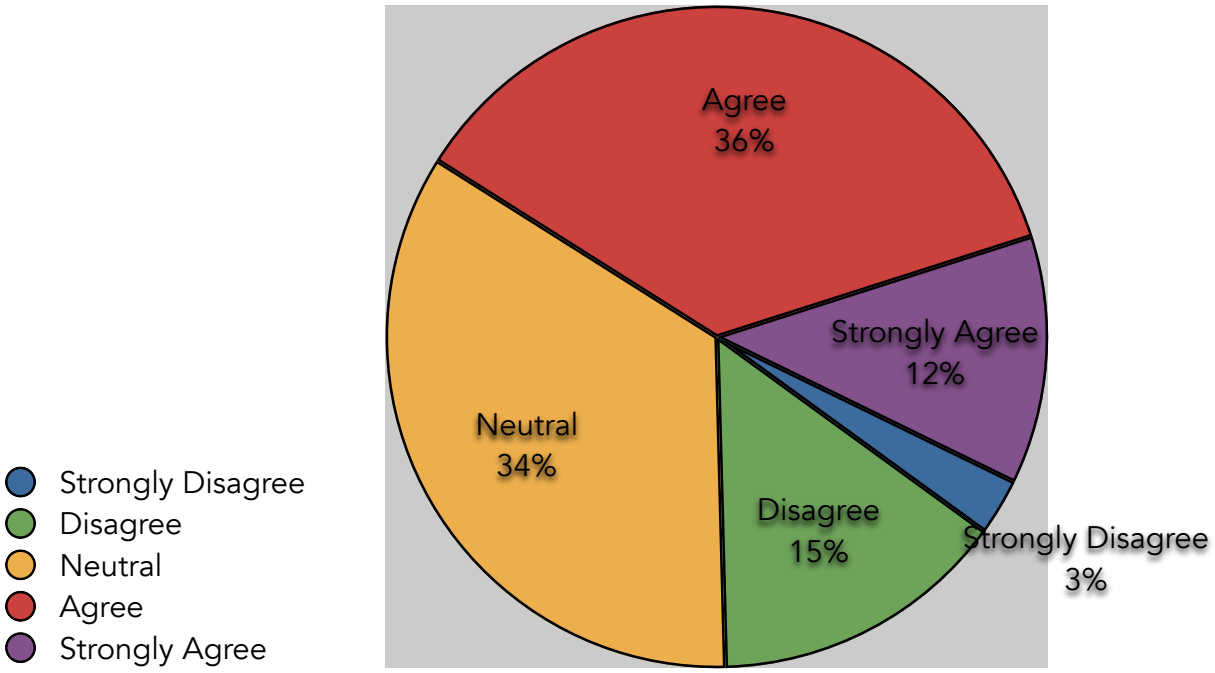
Future Business Development (Ware Visitors 55-65)



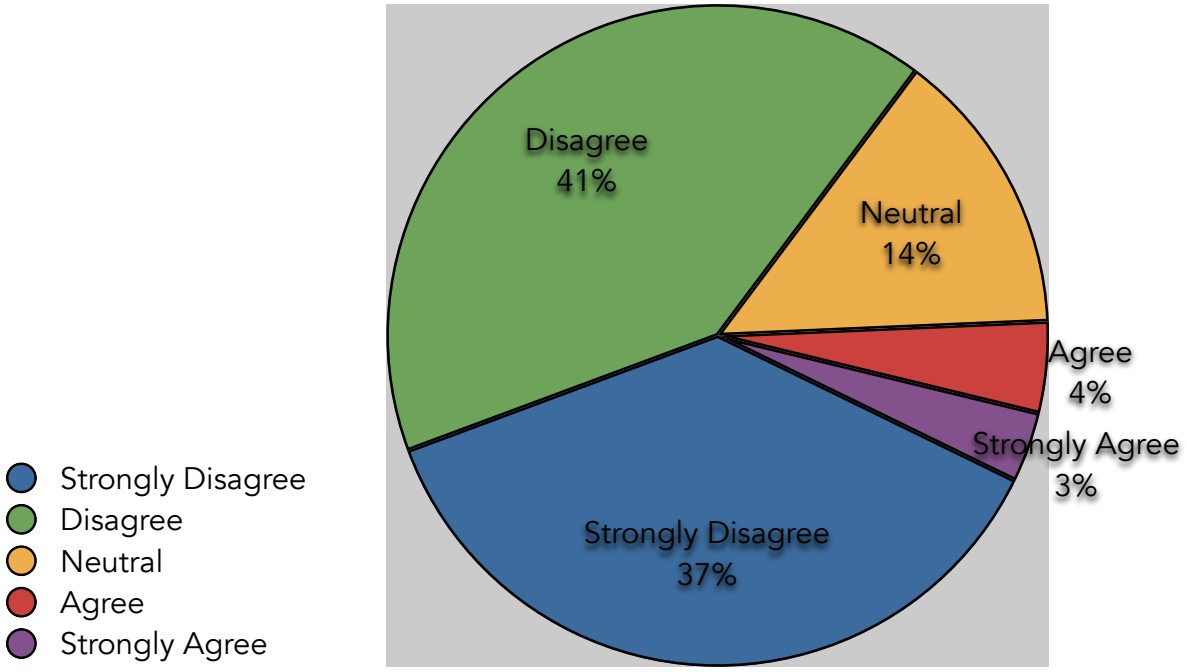
Future Business Development (Ware Visitors 65>)

Rank the Statement

Businesses in the downtown are open during hours that are convenient for me.

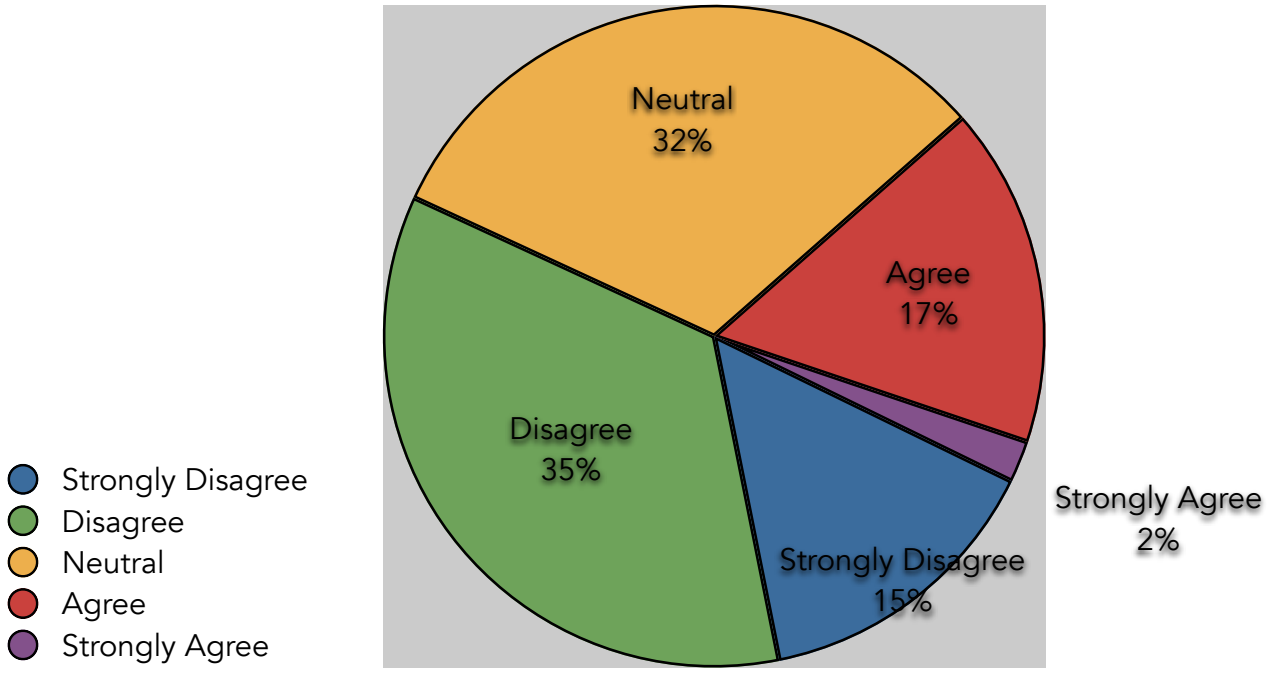


There is enough variety of retail stores in downtown.

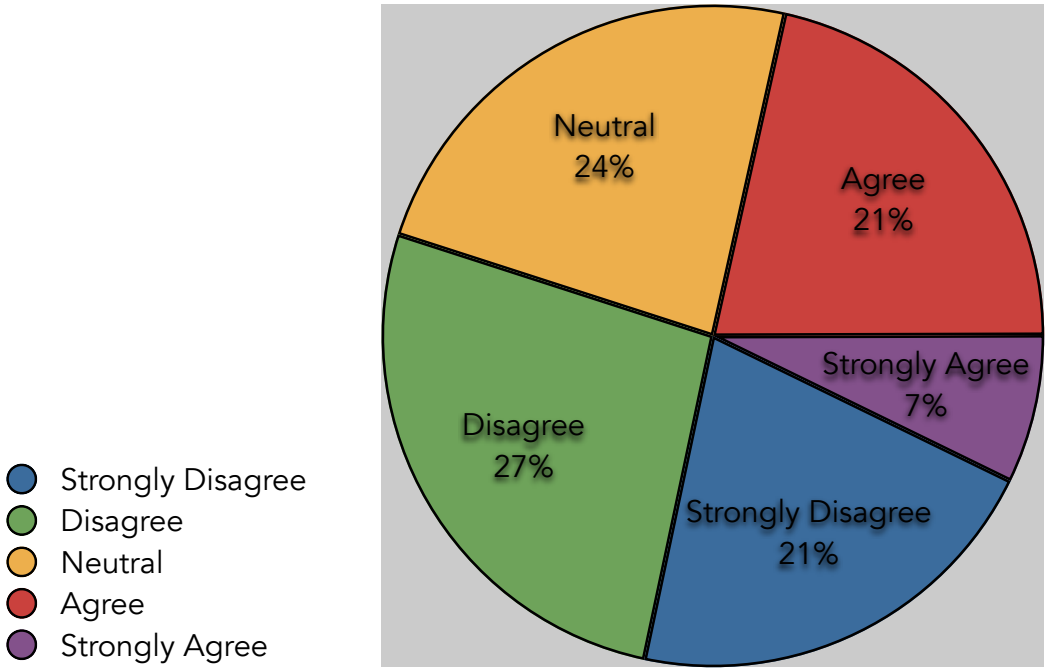


Rank the Statement (cont.)

The quality of the goods/services available is ideal.

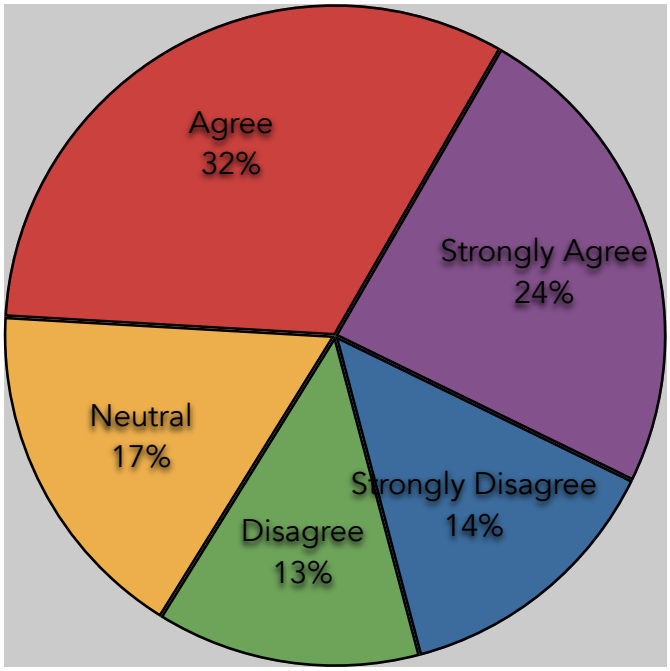


Parking in the downtown is available and accessible.



Rank the Statement (cont.)

Parking impacts my decision about where to shop.



- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree