Appendix B: Scituate Economic Development Study: Market Analysis

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Funding provided by the Town of Scituate and the District Local Technical Assistance Program

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SCITUATE MARKET ANALYSIS

INTRODUCTION

This market study was prepared as part of the *Scituate Economic Development Study* being undertaken by the Metropolitan Area Planning Council (MAPC). The larger study looks to create a town-wide vision for economic development and will identify opportunities for and impediments to development. In order to achieve the vision, the study will include policy recommendations, development alternatives and land use and zoning recommendations.

Community Opportunities Group, Inc. (COG), with analysis and input by MAPC and the Town of Scituate, has prepared this market analysis under a contract with MAPC. The market analysis focuses on five geographic areas within Scituate: Greenbush, North Scituate, Route 3A, Scituate Harbor and Humarock. This analysis will be used by MAPC to inform a future development scenario and help determine the level of housing, retail, and other commercial uses that could be supported within the town. It will also help the town to better understand its market potential and develop alternative approaches to fostering the development of sites within town, including those near the commuter rail stations, the Harbor and along Route 3A.

CONTEXT

STUDY AREAS

SCITUATE HARBOR

The Scituate Harbor commercial district extends along Front Street from Beaver Dam Road to Edward Foster Road. The village includes the Town Marina and public way/parking lot known as Cole Parkway. The harbor accommodates maritime uses including small-scale commercial fishing and recreational boating. A continuous stretch of commercial and mixed-use buildings line both sides of Front Street along the length of the village district. Structures include a mix of historic one- and two-story commercial buildings, former homes converted to retail/office space, and newer structures with ground floor retail and two or more floors of residential condominiums above.

There is very little commercial vacancy in Scituate Harbor. The range of retail offerings is unusually rich for a town of Scituate's size, including a grocery store, drug store, hardware store, apparel, books, gifts, music, restaurants and taverns, and specialty foods. The village also has a number of service businesses, including banks, real estate offices, medical practitioners, a laundry, fitness studios, a movie theater, and a bowling alley. Nearly all establishments are independently owned; CVS and Dunkin Donuts are the only national retailers located in the harbor area.

The Scituate Harbor Merchants is a cooperative group of 96 business owners located primarily within the harbor area which was formed in 2005. This merchant's group coordinates to provide holiday decorations, seasonal planters, lighting, banners, and other décor for the district. It also hosts events to promote area businesses. Among those events is "First Fridays" which occurs the first Friday of every month where businesses have extended hours, host musicians and artists, and offer other entertainment and cultural enrichment to the area for residents and patrons. The Scituate Harbor Merchant's Association and Chamber of Commerce both provide promotional maps and brochures for area businesses and tourism.

Scituate Harbor attracts both residents and visitors alike. The volume of visitors is higher in the summer when recreational uses of the harbor are more prevalent. However, events like First Fridays are well attended throughout the year, and special events like Heritage Days and the St. Patrick's Day parade help bolster patronage. Nevertheless, some businesses are seasonal and must shutter their doors for the winter months, while others struggle to stay afloat during non-peak periods.

Previous studies including the Harbor Village Center Design Charrette conducted by The Cecil Group (2002), the Master Plan (2004), and the Waterways Management Plan (2009) which included some economic development components. These identified the waterfront as an area with historical importance and a potential stimulus for economic activity today. Maritime uses such as fishing and lobstering are long-established, while the waterfront as a destination is a newer phenomenon. These prior studies noted that the harbor area serves as the town center in many ways. The Scituate Harbor Community Building at 44 Jericho Rd., acquired by the Town in May, 2010, has space for some civic activities, but is underutilized in terms of the property's full potential and is some distance from the Harbor village. However, a harborwalk extension along the water from the Town Pier could significantly reduce that distance and potentially catalyze additional activity in the Harbor. In 1997, the former Quincy Oil property at the south end of Scituate was acquired as open space.

The Harbor Charrette noted that Cole Parkway does not contain sufficient parking during the summer and has excessive pavement for the rest of the year. The Charrette report recommended that dual use of the lot for parking and civic events be explored; this idea deserves more investigation. There is a strong community perception that there will never be enough parking, and parking at Cole Parkway is too far from businesses, although this has not been supported by parking studies. The redesign of this parking area could improve its function as a public open space for events with a strong connection to the waterfront. Updated landscaping could make it more pleasant to use, and it may be possible to provide some additional parking spaces.

A Public Access Plan by the Urban Harbors Institute (2000) and the Waterways Management Plan both focused on the need to increase public access to the waterfront and to maintain a balance of marine and land-based uses. The Town has obtained many new pedestrian connections from Front St. to the Harbor as property has been redeveloped over the last ten years. The Harborwalk is a great example of how pedestrians can be encouraged to enjoy the waterfront. This has potential to be a signature attraction for the Harbor if waterfront routes connecting the Quincy Oil property and Cole Parkway to the south, and Town Pier and the Scituate Harbor Community Building to the north can be incorporated. The Lucky Finn, a small schooner, is available to take visitors around and outside the harbor for short excursions. These types of opportunities can greatly enhance the experience of visiting the Harbor and should be expanded.

GREENBUSH

The Greenbush area is located just off the confluence of Route 3A, the Driftway and Country Way, three major roads. It contains a mix of residential and commercial uses extending along the Driftway and Country Way. The MBTA commuter rail track and station effectively divide Greenbush into two linked, but separate areas centered on each of these roads. At this time, neither is a clearly defined center. On the west side of the tracks, there are also the smaller streets of Ford Place, Drew Place and Old Country Way. The Widow's Walk Golf Course and other civic, recreation, and conservation uses are located within the Commercial zoning district but on a distant edge of the Greenbush Village area. While not usually thought of as part of Greenbush village, there are several civic and recreational uses extending north and south along Route 3A such as the Knights of Columbus Hall, the Water Division building and Greenbush Little League Field. The area is also characterized by significant amounts of ecologically sensitive land due to the presence of the Reservoir, First Herring Brook, salt marshes and estuaries.

Greenbush contains numerous restaurants and retail stores, medical offices, and other commercial buildings in addition to a few older industrial uses. There is a mix of newer and long-term businesses, and some properties which are economically obsolete or distressed, and ripe for retenanting or redevelopment. There are some unique cultural attractions, such as the Stockbridge Grist Mill, a number of historic homes and two historic cemeteries. While the area is large, efforts have been made to increase and enhance walkability. But the size of the roads, topography and distance between businesses makes walkability challenging and continued effort will be necessary. In 2010, the Town used MBTA Mitigation funds and a TOD grant to install new lighting and brick sidewalks on Country Way, Old Country Way and Ford Place. The Planning Board worked with the developers of the Riverway Condominiums to provide public access to the water and to the Clapp Cemetery. The MBTA constructed a walkway from the Driftway to the rear of Drew Place to link properties in the area.

The Greenbush area includes the Greenbush MBTA Commuter Rail station which has a substantial commuter parking facility (1,000 parking spaces). The most recent ridership numbers, which were released in 2010, showed an average of 575 inbound weekday boardings in 2009.[1] The Greenbush station has the highest ridership of all stations on the Greenbush line; weekday inbound boardings at this station represent 19 percent of all inbound boardings on the line.

The area was sewered in 2011.

NORTH SCITUATE

North Scituate is a small commercial area located at the intersection of Gannet Road and Country Way and extending along these two streets. The area has a collection of small single- and two-story commercial buildings, many within one-quarter mile of the North Scituate MBTA Commuter Rail Station. The commercial district is anchored by a number of long-term businesses, with some newer businesses having recently come to the area. There are several restaurants, professional offices, a number of hairdressers, retail stores with recreational goods, and a post office,. The commercial composition of the area is characterized by small independent businesses.

The Town made some improvements to the streetscape with the installation of new lamp posts and reconstruction of sidewalks using MBTA mitigation funds. The area is hindered by a lack of sewer service, and may need additional improvements for traffic circulation, pedestrian safety and streetscape beautification.

The commercial area abuts several residential neighborhoods with predominantly single-family homes. These homes are increasingly sought after because they are within a convenient walk to the commuter rail station. As such, commuters are frequenting the businesses in North Scituate while en route. The North Scituate station attracts the second highest number of riders on the Greenbush line and has an average of 532 weekday inbound station boardings, representing 17.6 percent of all weekday inbound boardings for the line.[2]

North Scituate is close to the Gulph River and its adjacent salt marshes. In addition, soils are poor quality for private septic systems. Sewer is a basic requirement for most redevelopment that is likely to occur.

[1] Massachusetts Bay Transit Authority, Ridership and Service Statistics, *13th Ed.* (2010), 73-74.
[2] Massachusetts Bay Transit Authority, Ridership and Service Statistics, *13th Ed.* (2010), 73-74.

A sewer main connected to the plant was laid in the MBTA ROW when the new tracks to North Scituate were installed. The Town should seriously consider requesting DEP to give North Scituate a higher priority for sewer connection.

ROUTE 3A

Route 3A runs through town along a north-south axis and is a principal arterial road in Scituate. It almost certainly has the highest traffic counts of any street. At the same time, it is a thoroughfare primarily characterized by its scenic wooded lands. Home to large swaths of protected open space and wetlands, it has few areas appropriate for economic development. The wooded areas are interrupted by only a few civic/institutional and commercial uses, and some residential developments. As Route 3A traverses south, it crosses through the Greenbush area, and there is a some nonresidential development approaching Marshfield. Existing commercial development along Route 3A is located at the northern border adjacent to significant commercial development in Cohasset, with isolated commercial nodes on the southern portion between Greenbush and Marshfield. Commercial uses on Route 3A include a tennis club, gas station, medical office building, dentist, chiropractor, and marina. Institutional uses include a VFW Hall, Knights of Columbus Hall, Police Station, Fire Station, Water Treatment Plant and Water Department offices.

HUMAROCK

Humarock is a small, ocean-front, primarily residential community located on an environmentally sensitive barrier beach. Although Humarock was once connected to the remainder of Scituate, it is now physically isolated from the rest of town, the result of the Portland Gale in 1898, a storm that shifted the mouth of the North River to the north and created what is today a peninsula. The village and its beaches are approximately a 10-15 minute drive from the rest of town, and are accessible only through Marshfield by two bridges– the Captain Stanley Bridge at Marshfield Avenue and another at Julian Street – that span the South River.

Although Humarock has historically been a seasonal community and destination, many cottages have been converted for year-round use and today there are several hundred full-time residents. New development is underway at the Village at South River, a 14-unit waterfront townhouse development currently in its second phase of construction on Central Avenue.

Humarock has a small commercial area centered at the intersection of Central and Marshfield avenues just over the Captain Stanley Bridge from Marshfield. The small village includes a post office, several independent businesses in one- and two-story structures, a marina, and a Town owned lot for beach permit parking. Although reliant on the busier summer season, most businesses operate year-round including a gift shop, specialty pet food store, a café/convenience store, hair salon, and realtor. The local fish market/lobster pound operates seasonally, although their food truck is used for special events, such as the New Year's Day Polar Plunge, in the off-season. Another small commercial district just across the bridge in Marshfield offers a convenience store, wine and beer store, small inn, restaurant and other retail amenities. In many ways, the two areas combined form the commercial center for Humarock residents and visitors, and further ties this area of Scituate to Marshfield geographically and economically.

MARKET AREA

REGIONAL CONTEXT

Scituate is located in Plymouth County, in the South Shore region of Massachusetts. Located on the coast, Scituate is bounded by Cohasset and Hingham to the north, Norwell to the west, and Marshfield to the south. The Atlantic Ocean forms the Town's eastern border.

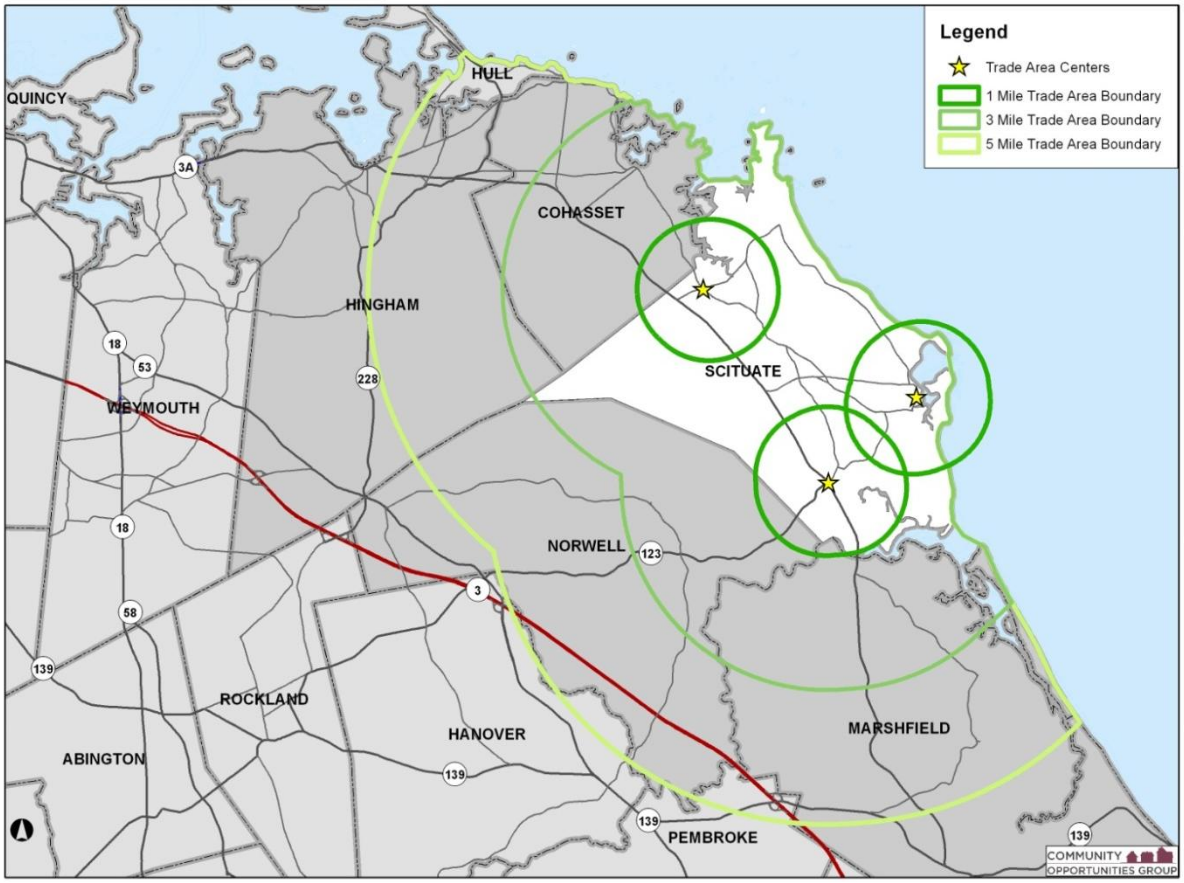
State numbered Route 3A crosses the length of the town north/south; Route 123 travels east/west and intersects with Route 3A in the southern portion of the town near Greenbush Station. The closest major highway corridor is Route 3 to the west, approximately 8 miles from Scituate Town Hall.

MARKET AREA DEFINITION

A market area is defined as the area from which a town is most likely to draw commercial activity, and within which residents will most likely seek to meet their needs for goods and services. The extent of the market area depends on factors such as population density, highway access, and the quality of destinations. Scituate is located within a region with relatively dense development (particularly to the north along Route 3A). Scituate's distance from major highway corridors, such as Route 3, limits its potential for regionally-oriented retail or commercial development. The market area for most commercial uses in Scituate is limited to the distance residents need to travel to meet every-day needs. Scituate Harbor, on the other hand, has potential to draw visitors from longer distances to access the ocean and the maritime offerings.

Trade areas were identified for each of the three villages in Scituate (Scituate Harbor, Greenbush, and North Scituate) reflecting the strongest potential customer base for Scituate commercial areas (Map 1). A one mile radius encompasses the immediate neighborhood, and the area from which customers can comfortably walk from their homes into the villages or quickly reach by car. Scituate Harbor and Greenbush are located just over one mile apart, so their neighborhood trade areas overlap. A three mile radii for the areas combined encompasses most of Scituate and portions of Marshfield, Norwell, and Cohasset. North Scituate and Greenbush are located approximately four miles apart, and the northern and southern ends of the town are more likely to focus around one village or the other, while residents in the middle of town may gravitate in either direction. The three mile trade area extends approximately midway to Route 3, where several larger concentrations of retail are located. The trade areas' five mile radius include much of Hingham and Cohasset to the north, and extends further into Norwell and Marshfield, as well as just crossing Route 3 in Pembroke. Residents within this trade area have a range of options within their surrounding region to meet most of their shopping needs.

Map 1: Scituate Trade Areas



Humarock is included within the 5-mile trade area established for the three village areas discussed above. However, because the ocean-front community is separated from the remainder of Scituate and linked geographically and economically to Marshfield, a secondary trade area was analyzed for Humarock at one-, three-, and five-mile radii.

SOCIOECONOMIC INDICATORS

DEMOGRAPHIC TRENDS

POPULATION GROWTH

Scituate is 17.2 square miles in area and with a population density of 1,055 persons per square mile, it is more densely populated than all neighboring towns.[3] Scituate has experienced low to moderate population growth over the past two decades; projections indicate this trend continuing. Surrounding communities including Marshfield, Pembroke, and Hingham have experienced higher rates of growth over the same time period. Based on the MetroFuture projections, which take into consideration regional policy goals, MAPC projects the highest growth to take place in Hingham, while Cohasset and Pembroke are expected to experience significantly more growth than Scituate.

Table 1: Historical and Projected Population Growth

Geography	Population Density*	1990	2000	2010	2030	% Change 2010-2030
Cohasset	763	7,075	7,261	7,542	8,277	9.7%
Hanover	889	11,912	13,164	13,879	14,178	2.2%
Hingham	986	19,821	19,882	22,157	26,593	20.0%
Marshfield	883	21,531	24,324	25,132	26,422	5.1%
Norwell	503	9,279	9,765	10,506	10,420	-0.8%
Pembroke	817	14,544	16,927	17,837	19,576	9.7%
Scituate	**1,055**	**16,786**	**17,863**	**18,133**	**18,785**	**3.6%**

** Persons per Square Mile (2010)*
Source: MAPC 2011, Metrofuture 2035 Update

Table 2: Household Composition (2011)

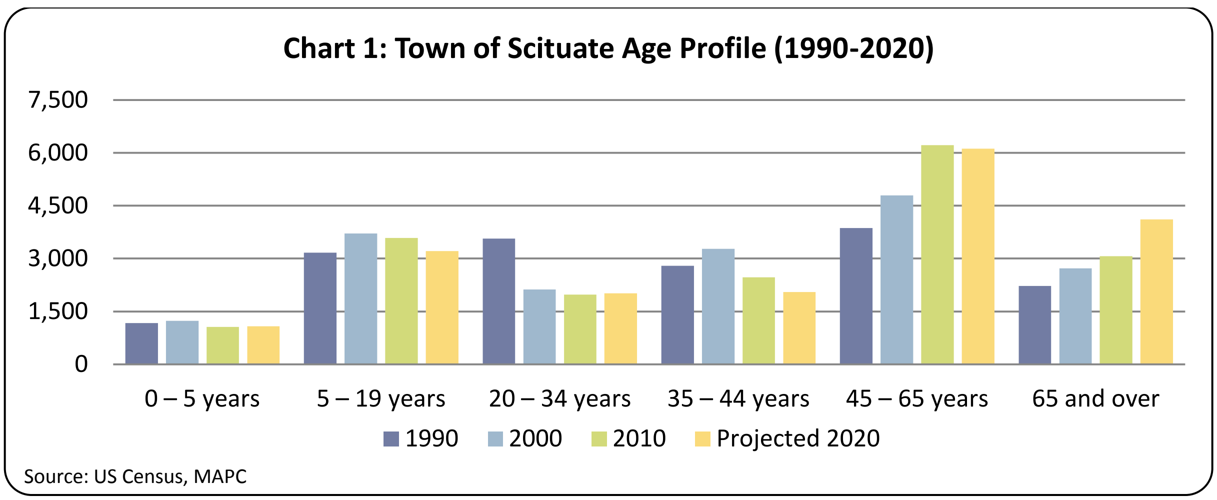
	Cohasset	Hingham	Marshfield	Norwell	Scituate	State
Total households	2,706	8,046	9,322	3,468	**6,957**	2,522,409
Families	75%	72%	73%	82%	**71%**	64%
Families with children	41%	35%	35%	41%	**34%**	29%
Nonfamily households	25%	28%	27%	19%	**29%**	36%
Single Person	24%	25%	22%	15%	**25%**	29%
65 years and over	12%	17%	9%	8%	**13%**	11%
Households with person <18	41%	36%	37%	42%	**35%**	32%
Households with person >65	31%	36%	25%	26%	**33%**	25%
Average household size	2.74	2.69	2.68	2.95	**2.58**	2.49
Average family size	3.29	3.27	3.2	3.33	**3.12**	3.1

Source: ACS 2007-2011, DP-02

[3] Metropolitan Area Planning Council, Metrofuture 2035 Update (March, 2011).

While the majority of Scituate's households are families, which make up 71 percent of all households, Scituate has the smallest average household size among neighboring communities, and a larger share of non-family households. One quarter of Scituate's households are persons living alone. A relatively small proportion of households have children, while one third of households have members over the age of 65. Only Hingham has more households with seniors.

The number of school age children is declining, as is the number of adults between the ages of 35 and 64, which is the age at which people are most likely to be parents of children under 18 years old. The number of older adults and seniors has grown significantly over the past two decades. Seniors are projected to continue being the fastest growing population group, and young adults (ages 20-34) and young children (under age 5) are expected to maintain or increase in number, while a decrease in school-aged children and older adults is anticipated. According to the ACS, the median age in Scituate is 44.7 years, which is 1.6 - 3.2 years older than the median age in neighboring towns. (See Appendix 1 for details.)



INCOME AND SOCIAL CHARACTERISTICS

Over all, median household incomes in Scituate are lower than in neighboring communities. This is attributable to the relatively high proportion of non-family households in Scituate. Among neighboring towns, median family incomes are highest in Hingham and Cohasset, while Scituate is approximately on par with Norwell and Marshfield. Non-family incomes are higher in Scituate than they are in all other neighboring communities except Hingham. Overall, median incomes in the area are quite high and have been rising steadily in most of the surrounding geographic areas.

Table 3: Incomes by Household Type (2011)			
Geography	**Median Household Income**	**Median Family Income**	**Median Non-Family Income**
Cohasset	$117,831	$147,222	$36,814
Hingham	$99,318	$132,744	$46,052
Marshfield	$93,743	$110,756	$44,966
Norwell	$109,167	$118,679	$37,520
Scituate	**$89,485**	**$111,893**	**$45,086**
Plymouth County	$74,698	$88,110	$39,894
Massachusetts	$65,981	$83,371	$38,514
Source: ACS 2007-2011, DP-03			

Changes in income have not been uniform within the region. Cohasset and Marshfield have seen only a slight rise or decline in the incomes of their residents since 2000, while Hingham, Norwell and Scituate saw slight decreases in their median household incomes. The scenario in Hingham, Norwell and Scituate is typical of many communities across the state and the country as incomes and wages have not kept pace with inflation during the recession.

Table 4: Change in Household Income (Adjusted to 2009 Dollars)			
Geography	**1999**	**2009**	**% Change**
Cohasset	$108,556	$112,917	3.9%
Hingham	$107,001	$105,870	-1.1%
Marshfield	$85,641	$89,436	4.2%
Norwell	$112,732	$108,526	-3.9%
Scituate	**$91,285**	**$88,883**	**-2.7%**
Source: ACS 2009; SOCDS 2013			

There are also variations in educational attainment within the region. Scituate's residents are more educated than residents on average in Plymouth County or Massachusetts. Ninety-eight percent of Scituate residents have completed high school and 56 percent have completed a bachelor's degree or higher. Educational attainment in Scituate is comparable but somewhat lower than in Cohasset and Hingham, where a higher proportion of residents have graduate or professional degrees.

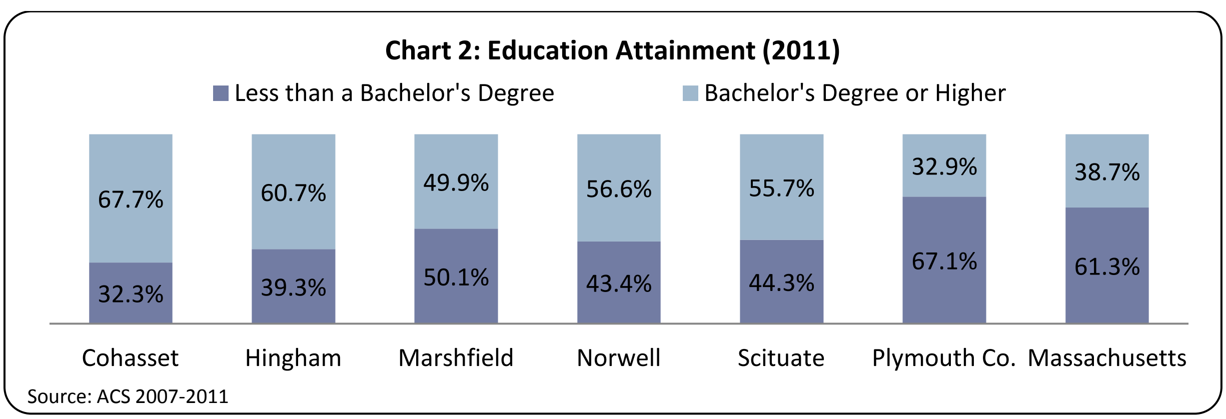


Table 5: Ethnicity and Language Spoken at Home (2011)			
Ethnicity	**Scituate**	**Plymouth County**	**Massachusetts**
White	95.0%	84.7%	76.9%
African American	1.6%	7.9%	6.1%
Asian	0.0%	1.3%	5.3%
Hispanic	0.2%	3.2%	9.3%
Foreign born	4.3%	8.0%	14.7%
Language other than English spoken at home	5.6%	11.3%	21.4%
Source: ACS 2007-2011, DP-02; US Census 2010			

Scituate's population is less racially or ethnically diverse than the population of the County or Massachusetts. While in all three geographies at least three-quarters of the population is white, all but five percent of Scituate's population is white. The vast majority of Scituate residents were born in the United States and speak English at home. Just 4.3% of the population is foreign born and 5.6% speak a language other than English at home.

ECONOMIC TRENDS

Scituate has a relatively small economy when measured in local employment. Although Scituate has the third largest population compared with its four adjacent towns, there are fewer jobs in Scituate than in any neighboring community, with the exception of Cohasset which has a much smaller population.

Table 6: Jobs to Labor Force Ratio (2012)			
Geography	**Labor Force**	**Jobs**	**Jobs: Labor Force Ratio**
Cohasset	3,775	2,573	0.68
Hingham	11,105	13,155	1.18
Marshfield	13,953	5,701	0.41
Norwell	5,462	7,946	1.45
Scituate	**9,592**	**3,364**	**0.35**
Source: MA Executive Office of Labor and Workforce Development (EOLWD).			

Table 7: Mean Travel Time to Work (2000)	
Geography	**Minutes**
Cohasset	34.7
Hingham	31.9
Marshfield	36.4
Norwell	34.3
Scituate	**37.4**
Plymouth County	32.3
Massachusetts	27
Source: US Census 2000, QT-P23	

In Scituate, there are 0.35 jobs per member of the labor force. While the ratio of jobs to workers is higher in Scituate than in Marshfield, it is lower than in other neighboring communities.

From a geographic perspective, Scituate is relatively isolated from the Boston metropolitan area due to its distance from major highways. Journey-to-work data was not collected after the 2000 census and it is unclear how or if the mean commute times were affected by the commencement of commuter rail service from Greenbush and North Scituate into South Station. However, in 2000, mean commute times to work for Scituate residents were more than ten minutes longer than they were for Massachusetts residents as a whole, and four minutes longer than average for the country. Marshfield had similarly long commute times, while Hingham had the shortest at 31.9 minutes, which was still above the state average.

Table 8: Journey to Work (2000)

Where Scituate Residents Work	Numbe r	Where Situate Workers Live:	Number
Scituate	**2,061**	**Scituate**	**2,061**
Boston	1,751	Marshfield	284
Quincy	520	Brockton	150
Hingham	459	Rockland	97
Weymouth	368	Hull	96
Cohasset	365	Quincy	94
Norwell	340	Plymouth	93
Braintree	286	Weymouth	80
Rockland	254	Pembroke	70
Brockton	180	Hingham	65
Other	2,339	Other	855

Source: US Census 2000

In 2000, 23 percent of Scituate residents who were active in the labor force both lived and worked in Scituate. Of the 6,862 members of the labor force who commuted outside of Scituate for work, 25 percent commuted to jobs in Boston. The majority of the remaining 75 percent commuted to communities within approximately 15 miles of Scituate, predominantly on the South Shore of Boston. More current data for these statistics is not available.

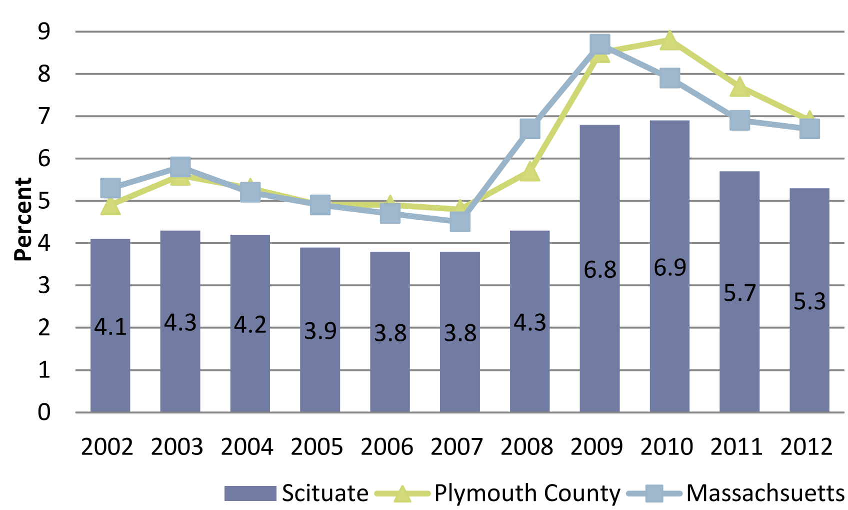
Table 9: Labor Force Participation Rates (2012)

Geography	Labor Force	Employed	Unemployed	Rate
Cohasset	3,808	3,626	182	4.8
Hingham	11,196	10,664	532	4.8
Marshfield	14,009	13,186	823	5.9
Norwell	5,444	5,202	242	4.4
Scituate	**9,592**	**9,080**	**512**	**5.3**
Plymouth County	264,300	246,026	18,274	6.9
Massachusetts	3,475,750	3,242,200	233,550	6.7

Source: MA EOWLD, 2013

The most recent seasonally adjusted annual data shows that Scituate has the second highest unemployment rate in the area. The unemployment rate is lower than the rates for the County and Massachusetts. In real numbers, the unemployment rate of 5.3% meant that an average of 512 people were unemployed during 2012. This rate is higher than it had been from 2000-2008. Unemployment was highest during 2009 and 2010, and has been steadily declining through 2012. Although not

Chart 3: Unemployment Rates (2002-2012)



Source: MA EOLWD (2013)

seasonally adjusted, the average unemployment rate between January, 2013 and July, 2013 was 5.7 percent.[4]

Unemployment rates have traditionally been lower in Scituate than in Plymouth County and Massachusetts. During the latter half of the recession, unemployment has been more pronounced in Plymouth County than Massachusetts, but prior to the recession, unemployment in the county was generally on par with the state levels.

About half of the town's work force is employed in management, business, science, and arts occupations; sales and office occupations comprise another twenty-seven percent, while the proportion of "blue collar" occupations such as construction, maintenance, manufacturing and transportation is relatively low, at thirteen percent.

Table 11: Employment and Average Weekly Wage by Industry (2011)

Industry	Scituate				Plymouth County	
	Establish-ments	# of Empl.	% Empl.	Avg. Weekly Wage	% Empl.	Avg. Weekly Wage
Construction	55	137	4%	$824	6%	$1,168
Manufacturing	7	53	2%	$845	8%	$1,092
Wholesale Trade	31	58	2%	$1,788	5%	$1,580
Retail Trade	45	327	10%	$462	18%	$518
Transportation & Warehousing	14	97	3%	$1,031	2%	$729
Information	11	43	1%	$621	1%	$1,386
Finance & Insurance	13	105	3%	$1,095	4%	$1,305
Real Estate, Rental & Leasing	9	14	0%	$1,278	1%	$864
Professional & Technical Services	62	143	4%	$1,382	5%	$1,282
Administrative & Waste Services	33	123	4%	$759	5%	$862
Education, Health Care & Social	44	1,116	33%	$925	20%	$821
Arts, Entertainment & Recreation	15	162	5%	$440	2%	$434
Accommodation & Food Services	31	614	18%	$311	12%	$311
Other Services	86	210	6%	$451	6%	$474
Total/Average	465	3,364		$746		$830

Note: Employment and Wage data are derived from reports filed by all employers subject to unemployment compensation laws. This may exclude some small businesses. Industry employment and payroll information is produced both quarterly and annually.
Source: MA EOLWD.

Scituate has a higher proportion of jobs in education, health care, and social services; arts, entertainment and recreation; and accommodations and food service than is generally found in Plymouth County. A concentration of jobs in the latter two industry sectors is consistent with communities whose economies are partially dependent upon tourism, though interestingly

[4] MA Executive Office of Labor and Workforce Development, 2013.

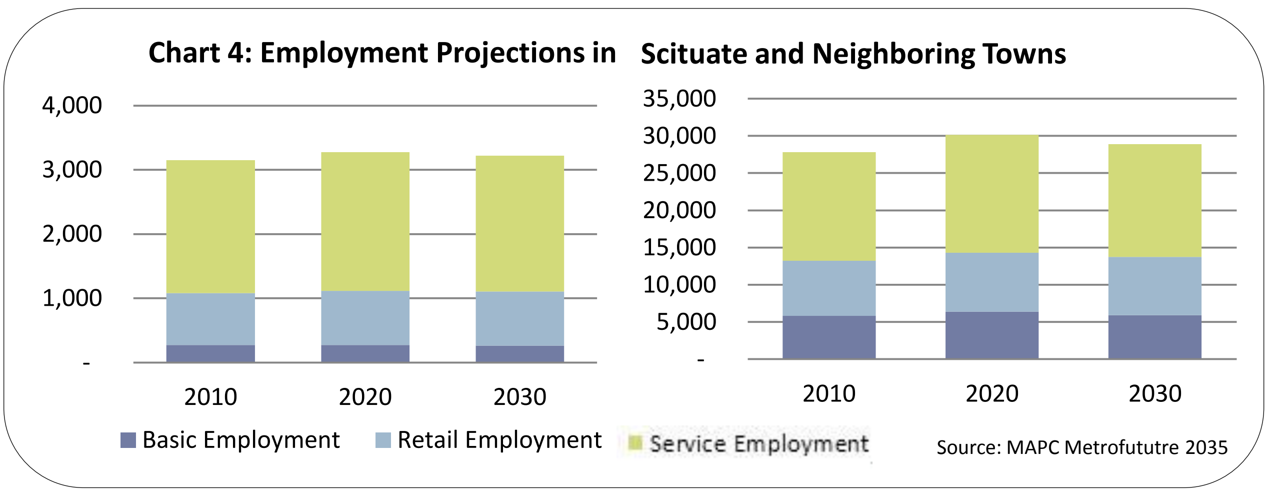
retail makes up a smaller segment of the local economy than generally found in Plymouth County. An active harbor contributes to a larger share of transportation and warehousing.[5] Scituate offers relatively few jobs in construction, manufacturing, or wholesale trade compared with Plymouth County. Wages are generally lower in Scituate than they are in Plymouth County, though a number of industries offer higher wages in Scituate than in the county, denoting a level of specialization of Scituate businesses and employees. Average annual wages are also lower in Scituate than they are in the county, and significantly lower than they are in the state. In 2007, total average wages in Scituate were just 65 percent of the total average wages in Massachusetts; in 2011, that figure was 64 percent.

Table 12: Average Annual Wage

	Scituate	Plymouth County	Massachusetts
2007 Total All Industries	$36,296	$40,404	$55,796
2011 Total All Industries	$38,792	$43,160	$60,164
Change 2000-2010	**6.90%**	**6.82%**	**7.83%**

Source: MA EOWLD, 2013

Employment in Scituate is expected to grow by 2.8 percent between 2010 and 2020 and then decline by 1.7 percent in the following decade. During the next 20 years, basic jobs are expected to continue to decline while retail and service jobs are projected to increase moderately during the next decade and then decline between 2020 and 2030.[6] Within the neighboring towns, the highest growth rates for employment are projected in Marshfield (general employment) and Hingham (retail).



[5] Maritime-related jobs are not easily identified when looking at basic industry codes. Maritime jobs are categorized under numerous industry categories including transportation and warehousing (e.g. boat hauling, support services for water transportation), of which there is a high percentage of jobs in Scituate, but also fall in sectors with lower listed employment including Construction (e.g. Ship Painting Contractors, Ship Joinery Contractors), Professional, Scientific and Technical Services (e.g. Boat Engineering Design Services), Manufacturing (Marine engines manufacturing), and others.

[6] Metropolitan Area Planning Council, Metrofuture 2035 Update (March, 2011).

COMMERCIAL SPACE IN SCITUATE

Scituate has more than 900,000 square feet of existing commercial space, as shown in Table 13. Retail and professional offices comprise the largest share, each with over 200,000 square feet. Restaurants contribute 65,000 square feet, while accommodations occupy only 23,000 square feet. Human services include daycare and nursing home facilities, with 94,000 square feet. Scituate has a modest amount of industrial and warehousing space, about 50,000 square feet of each. Office (68,000 square feet), and recreation (which includes facilities health clubs, golf facilities, etc.) contributed the greatest amount toward recent commercial development.

Table 13: Existing Supply of Non-residential Space

Use	Square Footage	Average Age	Square Feet Constructed Since 2000	Number of Parcels
Industrial	121,909	1958	3,750	13
Manufacturing	53,268			
Warehousing	52,303			
Commercial	360,640	1933	2,920	47
Retail Store	216,984			
Restaurant	65,094			
Accommodations	23,409			
Office	267,705	1965	68,224	60
Medical	22,401			
Professional	218,988			
Bank	26,316			
Human Services	93,663	1967	0	4
Recreational	70,068	1950	49,810	9
TOTAL:	913,984	1954	124,704	133

Source: Scituate Assessor's Database

DEVELOPMENT PIPELINE

Most recent growth in the region has occurred in Hingham, Weymouth and Braintree. Within the Southeast (South Shore) corridor of the MAPC region, there have been two million square feet of commercial space completed within the past five years, as well as 1,000 new residential units. Nearly one million square feet has been constructed in Hingham, where the bulk of new commercial development has occurred; 430,000 square feet has been developed in Weymouth, and 395,000 square feet in Braintree. Marshfield and Scituate both contributed a number of smaller projects in addition to the space previously described. As of 2011, an additional 800,000 square feet was under construction within the larger Southeast corridor region; of that, 475,000 square feet is located in Hingham, and 260,000 square feet in Quincy. As the table below shows, nearly 3,700 new residential units were under construction at the time the inventory was developed, with 2,500 units of these in Hingham.

Within the Southeast region, there is currently five million square feet of commercial space proposed in the development pipeline, including two million square feet in Weymouth, nearly two million square feet in Quincy, and close to 900,000 square feet in Marshfield. Over 6,600 new residential units are in the pipeline, mostly associated with large-scale development projects in Weymouth and Quincy. In total, approximately nine million square feet of commercial space has been recently constructed, is under construction, or is planned for the region.

Table 14: Market Area Major Development Project Pipeline

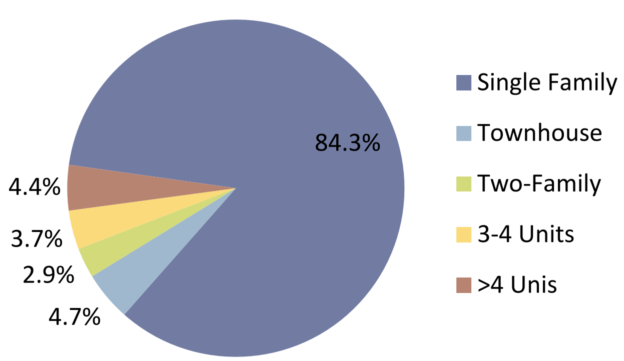
	Residential Dwelling Units	Commercial Square Feet
Completed	**907**	**2,040,034**
Braintree		395,000
Duxbury	49	45,304
Hingham	3	920,000
Marshfield	233	130,000
Norwell	50	
Quincy	280	
Scituate	206	120,030
Weymouth	86	429,700
Under Construction	**3,680**	**819,481**
Braintree	326	
Cohasset	268	
Duxbury	85	9,300
Hingham	2,512	475,000
Marshfield	308	34,000
Milton	42	2,000
Norwell	9	
Quincy		260,000
Scituate	84	39,181
Weymouth	46	
Planned	**6,647**	**4,923,353**
Cohasset	6	65,000
Duxbury	262	25,503
Hingham	143	49,000
Hull	66	
Marshfield	110	893,000
Milton	138	7,850
Norwell	135	
Quincy	1,200	1,850,000
Scituate	432	
Weymouth	4,155	2,033,000
Projected	**1,310**	**1,770,000**
Braintree	250	170,000
Quincy	1,000	1,500,000
Weymouth	60	100,000

Source: MAPC 2011

HOUSING TRENDS

The housing stock in Scituate is similar to neighboring communities. Eighty-four percent of residential structures are single-family homes and 4.7 percent are attached single-family homes. The remaining 11 percent are a mix of multi-family units; of which roughly one-third are located in buildings with more than four units. Among surrounding towns, Hingham has a substantially larger share of their housing stock dedicated to multi-family housing (totaling 30 percent of Hingham's housing units), while Marshfield is comparable to Scituate, with 83 percent single-family homes. (See Appendix 1 for details.) According the 2007-2011 American Community Survey 5-Year Estimates, 9.6% of housing units (775 units) in Scituate were for seasonal, recreational, or occasional use. This represented a decrease of 41 seasonal units from the previous census that was conducted in 2000.

Chart 5: Scituate Housing Types (2011)



Source: ACS 2007-2011

Eighty-three percent of residential units in Scituate are owner-occupied. Homeownership rates are slightly lower in Scituate than in neighboring communities (with the exception of Hingham); however, home ownership rates are higher than for Plymouth County and the state as a whole. The average household size for owner-occupied units in Scituate is smaller compared with the region and county, but larger than the state. Renter households are also comparatively small, with only Hingham containing a smaller average household size.

Table 15: Housing Tenure and Household Size (2011)

	Cohasset	Hingham	Marshfield	Norwell	Scituate	County	State
Total Units	2,910	8,640	10,672	3,571	**8,087**	199,302	2,799,357
Occupied Units	2,706	8,046	9,322	3,468	**6,957**	178,996	2,522,409
Owner-Occupied	85%	78%	85%	90%	**83%**	78%	64%
Renter-Occupied	15%	22%	16%	10%	**17%**	23%	36%
Avg. Household Size (Owner)	2.85	2.92	2.82	3.00	**2.71**	2.81	2.67
Avg. Household Size (Rental)	2.10	1.85	1.95	2.44	**1.96**	2.26	2.16

Source: ACS 2007-2011, DP-04

There is a wide disparity in home values in the region. Scituate's median home value in 2011 was $492,100. Housing values were highest in Cohasset, at $726,600 and lowest in Marshfield, at $415,500. Housing in Scituate and all neighboring communities is valued well above the median values for both Plymouth County and Massachusetts.

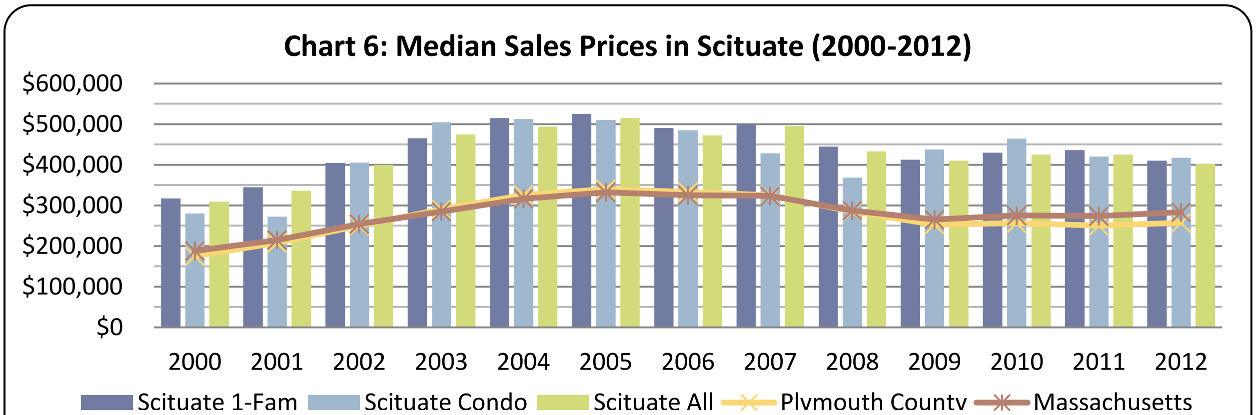
Table 16: Median Housing Values (2011)

Geography	Value
Cohasset	$726,600
Hingham	$634,800
Marshfield	$415,500
Norwell	$596,600
Scituate	**$492,100**
Plymouth Co.	$350,700
Massachusetts	$343,500

Source: ACS 2007-2011, DP-04

Although the housing market in Scituate declined between 2006 and 2009, median sales prices have been steadily increasing between 2008 and 2012 and are currently on par with the sales prices of 2002. However, Scituate's median sales prices for both condominiums and single family homes were consistently more than $100,000 higher than Plymouth County and Massachusetts sales prices. While the condominium market has experienced more volatility in sales prices during the past decade, median sales prices of condominiums have exceeded median sales prices for single family homes every year since 2008.[7] It is rather unusual for condominium sales prices to exceed that of single family homes and suggests that the waterfront condominiums in Scituate Harbor, where most condominiums in Scituate are located, are more desirable and valuable than single family homes located further inland.

Median sales prices in the area follow similar patterns to median home values. Sales prices among the five communities were highest in Cohasset and Hingham, and lowest in Scituate and Marshfield. During the recession, median sales prices dropped the most dramatically in Marshfield and Norwell (by 15.7 percent and 16.4 percent, respectively) between 2008 and 2012. Scituate fared slightly better and saw only a 7.6 percent decline in sales prices. Only Hingham saw an increase in median sales prices during the same time period, at 0.3 percent.



Source: The Warren Group (2013)

[7] The Warren Group, Town Stats, 2013.

Seventeen percent of households in Scituate are renters.[8] The rental market in Scituate is impacted by the presence of seasonal rentals which affect rent prices and limit the number of available year-round rentals. Apartment complexes are relatively rare in the region and the diversity of rental housing available is somewhat limited. The ACS shows median gross rents are lower in Scituate than in neighboring communities. Current market rents in Scituate for non-seasonal housing are approximately $1,200 for a one bedroom unit, and $1,600 for a two bedroom unit.[9] Nearby apartment complexes in Hingham and Cohasset offer rental units starting at approximately $1,700 for a one bedroom apartment and $2,200 for a two bedroom apartment; in apartment complexes in Marshfield the rates are lower at $1,250 for a one bedroom and $1,450 for a two bedroom unit.[10]

Table 17: Median Rents (2011)

Geography	Rent
Cohasset	$991
Hingham	$1,673
Marshfield	$1,212
Norwell	$1,366
Scituate	$948
Plymouth County	$1,088
Massachusetts	$1,037

Source: ACS 2007-2011, DP-04

Seasonal rentals in Scituate are almost entirely composed of single family homes, the bulk of which are within extremely close proximity to the waterfront, and many of which are located in Humarock. Rental rates average approximately $1,650 per week during peak season for two bedroom homes; $2,850 during peak season for three bedroom homes; and $3,800 per week during peak season for homes with four bedrooms or more.[11] Some seasonal rentals are offered for rent during the off season, typically at a weekly or monthly rate that tends to be significantly lower than the peak rate. These units may offer relatively affordable, if temporary, rental housing options.

MARKET SEGMENTS

RETAIL

Due to the town's distance from major highways, the generally small size of available parcels and the extent of retail offerings in the region, Scituate is not likely to attract major national retail stores or big-box outlets. While the town's geographic location may not be a boon to national retailers, it is an advantage for local retailers due to the concentration of population in an area that is relatively shielded from competition from national retailers. As a result, Scituate supports an unusually diverse mix of retail offerings and can likely support more.

[8] ACS 2007-2011, DP-04
[9] Rental Market Survey by Community Opportunities Group, 2013
[10] Rates listed are for Avalon Shipyard, Avalon Cohasset, and The Village at Marshfield, 2013
[11] Rental Market Survey by Community Opportunities Group, 2013

Currently, all of the retail needs of residents in Scituate cannot be met within Scituate. For example, men's clothing and shoes generally must be purchased outside of Scituate. When goods or services must be purchased outside a given trade area, this is referred to as *leakage*, because estimated purchases by area residents exceed estimated sales. A *surplus* occurs where estimated sales exceed estimated expenditures by residents, indicating that customers come from elsewhere to make purchases in the trade area. A retail gap analysis (see Appendix) has revealed that Scituate experiences surpluses and leakages in the following categories:

- Scituate Harbor is strongest in the Convenience category, with surplus sales in supermarket, liquor store, and pharmacy stores. The village also generates surplus sales in specialty retail and eating establishments, particularly apparel, sporting goods, books, and gifts, as well as full service restaurants.
- Scituate Harbor is underserved by limited service restaurants (particularly those that offer breakfast or lunch), specialty foods, and home furnishings.
- Greenbush is underserved in most retail categories, while expenditures on convenience goods (groceries, health and personal care, and most types of specialty retail) are high.
- Near the train stations in North Scituate and Greenbush, the retail categories which have the strongest sales relative to consumer spending are liquor stores and limited service restaurants.
- Humarock is underserved in all retail categories.

The data obtained from the gap analysis does not lead directly to conclusions about commercial opportunities, rather it informs which retail sectors hold the greatest potential for growth. Leakage for certain types of stores, such as general merchandise department stores, is the result of a trend toward highway-oriented "big box" stores. Residents currently travel beyond five miles from Scituate's villages for most general merchandise shopping. In these cases it might not make sense to try to fill those gaps where locally-oriented shops would be at a competitive disadvantage. On the other hand, a surplus in some categories may indicate where villages provide advantageous locations for certain types of stores (such as restaurants and convenience retail), or a niche that can be built upon and made more attractive – such as tourism-oriented businesses.

By order of magnitude, the amount of new retail space that might be absorbed in the short to mid-term future (10 to 15 years) is roughly 80,000 square feet, in addition to existing spaces that might be renovated or reconfigured. This estimate is based on the development potential in each of the commercial centers based on retail gaps identified, and assumes residential growth along with increased tourism in Scituate and the region will support retail activity. (See Table 3.1 in the Appendix for more on estimated development.) Most of the additional retail space would likely be located in the Greenbush area through new development and redevelopment, with some potential for further development along Route 3A near North Scituate. A limited amount of new commercial space could be gained in the North Scituate and Scituate Harbor areas through redevelopment of existing properties with more intensive buildout, which might provide for a mix of local retail, service, and professional office tenants.

There may be some potential for national or regional chain retailers to be added in the future, particularly in the Greenbush area. However, that development would be contingent upon a like increase in residential development and population in that area. Typical rents for first floor retail are approximately $20-$24 per square foot. Smaller floor plans (under 25,000 square feet) would be likely more appropriate for Scituate's market area. Encouraging retail uses that stay open later will enable more residents to shop locally who commute outside of Scituate for work. A critical mass of commercial activity during evening hours is necessary to support later hours.

More restaurants can help to drive economic growth in the villages, in particular at Scituate Harbor, where destination dining establishments could result in spillover retail. The types of specialty retail stores in Scituate are indicative of the town, and the Harbor Area in particular, being a destination for tourism and leisure activities. Other retail opportunities include maritime-related businesses that cater to both tourism and a working waterfront. A concentration of sporting goods and building materials in the harbor generates surplus sales in the area, as do convenience offerings such as liquor stores and pharmacies. Some common categories of retail that appear to be underserved include limited service restaurants, specialty foods, and home furnishings.

TOURISM

Scituate's oceanfront location offers opportunities for further development of the tourism sector. While Scituate Harbor continues to serve as a working waterfront, there are very few tourism or recreational businesses in Scituate *that capitalize on the waterfront*. Boat tours and fishing excursions are offered by three companies, but there are likely further opportunities to expand upon the offerings of boat tours, clamming or fishing/boating excursions, and kayak, boat, and bicycle rentals.

The Waterways Commission, Department of Public Works, and Planning Department have been developing plans for a Harbor Walk and other improvements that will support marine-related tourism, and commercial and recreational activity. The Town's Waterways Management Plan seeks to optimize the balance of Scituate's unique waterfront resources between land- and marine-based uses. Economic development planning should be coordinated with waterways planning to address mutual goals.

Scituate's beaches are a natural asset which sets it apart from some neighboring towns. The town currently provides very little beach access to residents from neighboring towns, which limits the potential to attract tourist dollars into Scituate. There is concern by some that opening the beaches to accommodate visitors will overwhelm their capacity and will not contribute to the town economically. This may represent a lost opportunity for the business community in Scituate, and was mentioned specifically as an impediment in Humarock. A mechanism to expand beach access in connection with local businesses could help to spur tourism. For example, a beach guest pass program could be used as a customer incentive by local businesses such as hotels or restaurants or other tourism-related businesses.

While increased tourism would benefit Scituate, and Harbor Area businesses in particular, several critical issues will need to be addressed to support seasonal tourism. There is very limited parking in Scituate Harbor during peak season. An increase in restaurants or shops would likely exacerbate this issue. A parking management plan, possibly utilizing the Greenbush MBTA station as satellite parking with shuttle service during peak seasons and special events, may help mitigate this issue. Capacity to attract water-bound visitors to Scituate Harbor could be enhanced by providing dinghy parking and publicly offered boat slips for temporary use. Additionally, strategies to further increase access to the beach permit parking lot in Humarock could be considered to enhance tourism and business activity particularly in summer months.

Tourism could also benefit from lengthening the season, strengthening Scituate as a year-round destination. While water-based recreation will largely remain seasonal, quality restaurants and shops and continued marketing efforts will help attract shoppers and diners from the region to the Harbor Area. Although Scituate is not the only waterfront community in the area, Scituate Harbor is uniquely situated and offers a more robust commercial area in walking distance to the harbor than can be found in neighboring towns.

Outside of Scituate Harbor, the town offers a number of outdoor attractions that can foster tourism. Scituate is home to three golf courses, a large amount of conservation land, and a number of rivers and saltmarshes. The *Scituate Master Plan* (2004) recommended encouraging recreation as a tourist attraction (golf, walking, biking, aquatics), and recreation based businesses (outfitters, kayak and bicycle rental, ocean excursions, etc.) connected to a bike/trailway network similar to that located on the Driftway.

MARITIME

Scituate Harbor remains a working waterfront. As of 2009, there were 60-65 commercial fishing vessels in Scituate, the bulk of which are lobster boats on moorings. Fifteen ground fish vessels tie up at the Town Pier[12]. The impact of the fishing industry on Scituate's economy is limited, however it gives Scituate Harbor its unique character as a genuine working harbor in addition to supporting a number of resident families. In recent times, economic and regulatory conditions have taken a toll on the fishing industry and it is unlikely that those conditions will change in the near future. The town has invested in infrastructure to support commercial fishing, including the rehabilitation of a commercial fishing pier. Finding ways to expand upon the fishing opportunities that are available is important to supporting that part of Scituate's economy and the public investments that have been made to serve it.

The Town needs to be creative in finding ways in which fishing could boost the local economy. Restaurants could partner with fishermen to expand their menus by offering locally-sourced fish. Over the past several years there have been efforts to re-establish shellfishing in the North and South Rivers, which has been limited in the past by poor water quality. Similar efforts could be made to use local shellfish in Scituate restaurants. Further opportunities to support the commercial fishing industry may be found with commercial aquaculture, boat repair, and fish processing.

There are approximately 606 moorings in the harbor and 238 slips; the waiting list for a mooring is about 3-7 years. There are also 11 private marinas in Scituate. Scituate Harbor is attractive to transient boaters, with its facilities and the retail offerings within walking distance of the harbor. Over the summer the harbor is full to capacity and boaters contribute substantially to the seasonal trade in the Harbor village. More signage for way-finding, and more merchandise targeted to boaters could help connect the Harbor village with the water-bound market. The Town acquired Young's Boatyard in 2004, now the Scituate Maritime Center and Marine Park. The Marine Park includes a boatyard with facilities for boat repair and maintenance. This primarily serves recreational boats. Provision of additional space and services for transient boats, improvements to the public launching ramps, and a dinghy dock would help increase capacity for recreational boating.

The Town's waterfront is potentially an immense draw for daytrippers and other visitors. Its attraction can be further increased by expanding private boat rentals like the newly established Freedom Boats, and more special charter tourist boats like the Lucky Finn. Previous studies conducted by the Town have determined that potential ferry service from Scituate to Boston is not feasible.

[12] Scituate Waterways Commission, *Town of Scituate Waterways Management Plan*, 2011

To balance the seasonal character of recreational boating, one way to increase year-round activity on the waterfront could be to expand on scientific marine research and educational activities. The National Oceanic and Atmospheric Administration's (NOAA) Ocean Service management office currently oversees the 842 square mile Stellwagen Bank National Marine Sanctuary from headquarters located in Scituate. NOAA conducts scientific research, monitoring, exploration, education programs, and outreach. Other agencies or businesses conducting coastal research may find synergy by locating near this organization in Scituate.

HOTEL/B&B

Accommodations within Scituate are limited to the Inn at Scituate Harbor, the Oceanside Inn Bed and Breakfast, and the Cliffside Bed and Breakfast. The Inn at Scituate Harbor has 29 guest rooms and caters to guests seeking accommodations in Scituate for weddings, funerals, and fishing charters, as well as to corporate clients during the week. The Cliffside Bed and Breakfast offers three guest rooms and the Oceanside Inn offers four guest rooms. The nearest national chain hotels to Scituate are located in Rockland: the Quality Inn, Comfort Inn, and Best Western, which provide a total of 300 rooms. Smaller independent hotels, inns, and bed and breakfasts provide approximately 175-200 additional rooms. There are as estimated 475-500 hotel and guest rooms in Scituate, Cohasset, Hingham, Marshfield, Norwell, and Rockland.

Scituate's waterfront location and golf courses are popular tourist and wedding destinations. However, both sectors are potentially hampered by a lack of accommodations that cater to guests interested in staying for only one night, that have a variety of price points, or that are appropriate for families. Scituate can likely support additional hotel space (up to 25,000 square feet[13]) either as boutique hotel or national chain options, to serve currently unmet needs for lodging. The Town's program to provide guest passes to the beach should give hotels an additional regional draw and make them competitive with private rental homes.

Humarock could also benefit from additional accommodations. There are no hotels or inns on the peninsula, and the only option for short stays is the Bridgewaye Inn's four guest rooms across the river in Marshfield. Another small inn or bed and breakfast establishment (up to 5,000 square feet) in Humarock's commercial district could be feasible.

INDUSTRIAL/OFFICE

Scituate has many service businesses, medical providers, and other small office users. Anecdotally, vacancy rates for existing space are consistently low. Upper floor office spaces rent for approximately $15-$20 per square foot. All of the village areas could probably support a

[13] See Table A3-1 in Appendix 3 for more detail.

limited amount of additional small-scale office space (10,000 square feet combined[14]) for local professional service-related uses as well as start-up companies and satellite offices. Due to a lack of highway access, Scituate is unlikely to attract office users seeking large spaces. The Greenbush area has the greatest potential to support continued/additional office uses due to the availability of land and access to major roadways. The land available for light industrial uses was greatly diminished with acquisitions by the MBTA in the late 1990's. A portion of the Greenbush area, such as the end of Union St., could be designated as a Commercial zoning district. With zoning changes, there may also be some limited potential on Route 3A and additional potential on the waterfront for maritime related industrial uses such as fish processing and boat repair.

MIXED USE

All of the village areas have potential for more intensive development with ground floor retail/professional offices and upper floor residences. Commercial space should be appropriately arranged and priced to support the types of retail or professional office tenants best suited for the location. Design should foster visibility and accessibility of first floor uses. Small, independent shops and professional offices provide the most likely market for commercial space in mixed use buildings. Rental housing would likely be more compatible with proximity to other uses than condominiums.

Mixed-use structures can be challenging to finance, and are not always conducive to successful commercial occupancy. If ground floor retail is a priority in specific locations, it may be necessary for the residential space to "subsidize" the commercial rents in order to provide an amenity that benefits the residents and the district. Adjacent residential and commercial space are a good alternative for larger sites that allow the commercial space to be concentrated where it has the greatest visibility and contributes to an active pedestrian environment.

RESIDENTIAL

According to the ACS, as of 2011, ninety-five percent of housing in Scituate was valued at $300,000 or more and eighty-four percent of the housing stock was comprised of single family homes. A comparison of the existing housing inventory to potential demand suggests that there is a significantly unmet need for all types of multifamily housing alternatives to serve the town's current residents. (See Appendix 3.) According to the findings of the 2007 Housing Needs Assessment by Karen Sunnarborg (used as the Town's Housing Production Plan) the Town needs a wider range of affordable housing options including first-time homeownership

[14] See Table A3-1 in Appendix 3 for more detail.

opportunities, particularly for younger households entering the job market and forming their own families as well as seniors looking to downsize from their existing single-family homes[15].

According to the 2005 Housing Needs Analysis by Community Opportunities Group, many single family homes are occupied by households who wish to downsize, prefer to live in more compact neighborhoods, have maintenance or support services, or a single floor living area. This study found that about 20 percent of residents surveyed were considering leaving Scituate because there are too few local options that meet one or more of the following reasons:

- *Housing costs are too expensive*
- *They cannot afford to maintain their homes.*
- *They want to downsize.*
- *They want to move into a retirement community.*[16]

Scituate's 2008 Housing Production Plan found significant gaps in rental housing, as well as housing that is accessible to the disabled, and opportunities for first-time homeownership. As Scituate experiences a pronounced shortage of year-round rentals and entry level homes, strong demand for more multi-family residential is anticipated (both for ownership and rental), as well as smaller single family homes. With the advent of the commuter rail and an increasingly aging population, housing demand in for both multi-family and smaller single-family residential products is expected to grow significantly.

Population and household projections suggest that the demand for multi-family housing alternatives will increase, as elderly residents comprise the fastest growing segment of the population. MAPC projects that the number of *households* in Scituate will grow by 12 percent between 2010 and 2035 (gaining approximately 700 households), comparable to the projected growth rate of 13 percent for the entire MAPC region[17]. By contrast, the projected *population* growth rate is only 4 percent for Scituate, which implies that household size will continue to shrink.

The housing market offers potential in the following areas:

- Existing overlay districts near North Scituate and Greenbush commuter rail stations allow for higher density housing to be constructed. Priority should be given for the construction of year-round rental housing. Adjustments to the Zoning Bylaw may be

[15] Karen Sunnarborg, Town of Scituate Housing Needs Assessment, prepared for the Planning Board, July, 2007.
[16] Community Opportunities Group, Inc., Town of Scituate Housing Needs Analysis, prepared for the Scituate Housing Partnership, 2005.
[17] MAPC, *MetroFuture Projections 3025 Update*, 2011

needed to clarify the option for of multi-family residential development without retail or office space.

- Luxury condominiums in Scituate Harbor have had a positive impact on condominium sales.The construction of additional mixed-use buildings to increase the number of residents living in the Harbor area will have a positive impact on Harbor area businesses. The same is true for each of the transit-centered commercial areas, and in the Humarock Village Residential Overlay district.

  The provision of zoning to facilitate the construction of smaller, entry level, attached and detached single-family homes will serve the needs of those looking for starter homes and empty nesters looking to downsize.

DEVELOPMENT CONSIDERATIONS

There is limited availability of land in Scituate that is suitable for development. Much of the remaining land has significant natural resource constraints. Nevertheless, there are underutilized parcels in each of the commercial areas which could accommodate new investment and redevelopment, given the adequacy of infrastructure, environmental conditions, and market conditions to create feasible development opportunities. In addition to characteristics specific to each of the commercial areas, the following considerations will generally influence the market potential for commercial and residential development.

SEWER

The Town is town has recently completed Phase 3 of six planned phases to extend sewers to priority areas based on environmental conditions. The Harbor Village and Greenbush areas have sewer currently, but extension to North Scituate is planned for Phase 5, after the Front Street area, which is next in line. As the Town is currently in the process of a water improvement project, the next phase of the sewer project is anticipated to begin in 3-5 years, although there is discussion about accelerating or re-ordering the plan for sewer improvements.

The most important part of North Scituate to sewer will be the Business District. Sewer services in the Greenbush area extends north from the rotary along Route 3A for a limited distance, but there is not presently a plan to extend service along Route 3A to the south of the rotary.

ZONING

North Scituate and Greenbush have seen relatively little new development as a result of the overlay districts. Although the density bonuses are attractive to prospective developers, and several applications were received, the depressed market has discouraged new construction. As mixed use buildings, particularly those that involve the redevelopment of existing buildings, offer unique challenges for financing, more flexibility in requirements may be critical to the development of a feasible pro forma. Currently, the base zoning requires one parking space per bedroom for multifamily units. While the overlay district reduces these parking requirements, they are still somewhat high. Commercial parking requirements requiring one space per every 300 square feet of gross area generally for business activities are also high, although many existing buildings are grandfathered through specific language in the Zoning Bylaw. In addition, the highest density bonuses that could be granted in Scituate Harbor require the construction of underground parking. Underground parking is attractive for many reasons; however, the provision of underground parking in a flood prone area may be inadvisable.

Further exploration into the location and sizes of existing commercial zones, the allowed uses, and dimensional requirements should be undertaken.

Humarock has seen new development as a result of the Humarock Village Residential Overlay District, which allows for higher residential densities in the Village Center, and was adopted at Town Meeting in 2008. The Village at South River, a 14-unit waterfront luxury townhouse development is currently in Phase II of construction on the former Nautical Mile restaurant property just north of Marshfield Avenue.

FEMA

The Federal Emergency Management Agency (FEMA) has proposed revisions to the Flood Insurance Rate Maps (FIRMs.). Currently under appeal by the Town, these maps capture significantly larger areas as flood hazard zones for which flood insurance is required. In addition, the revisions raise required minimum first floor heights – meaning that many structures (including those recently constructed) no longer meet minimum base flood elevation requirements.

The new FEMA maps and requirements will have a significant impact on the cost of building residential and commercial structures in Scituate. For example, the entire Scituate Harbor commercial area has been impacted by the map revisions and mandates to carry costly flood insurance is expected to have a significant impact on a business community that is largely comprised of independent businesses, many of which operate in owner-occupied commercial space.

MBTA

The extension of the Greenbush commuter rail line has had less than the expected increase in ridership and so far, little impact on the local economy. The low ridership numbers are largely attributed to the fact that the line opened in October 2007, just as the national (and global) financial crisis set in. As unemployment rates surged in the first five years after the commuter rail line went into service, potential commuters and pleasure-trippers stayed home. As the economy recovers and the commuter rail's influence on the real estate market takes hold, ridership may yet approach the levels which had been projected prior to the recession.

As new development generates increased ridership, it will be more feasible for the MBTA to increase weekday frequency and reinstitute weekend train service. Although commuter rail service has the most direct impact on the residential market and there is less correlation between transit stations and retail volume, as train stations spur residential growth, there is an indirect economic benefit as there are more residents to support local businesses.

SUBAREA FINDINGS

SCITUATE HARBOR

OPPORTUNITIES

Ongoing infrastructure improvements in Scituate Harbor have enhanced the image and capacity of the village to support both land- and water-based tourism, as well as marine-related commercial uses. While several properties along Front Street have been redeveloped, several underutilized properties remain which have potential to be redeveloped with a larger building-to-lot coverage (FAR), and a mix of residential and commercial uses. The town-owned Scituate Harbor Community Building is also underutilized and could provide an excellent opportunity for a variety of activities, particularly if a more direct connection to Front Street could be established with an extension of the harbor walkway to the Town Pier.

Recreational boating plays a major role in Scituate Harbor, with a total of about 1200 boats moored or on slips. There is potential to establish more marine-related businesses, especially sight-seeing boat tours, charter boats, and kayak sales/rentals. Opportunities for some activities, such as recreational fishing, may be maximized, but the Town should seek to leverage opportunities for other visitor-oriented activities on the Harbor. Retail that caters to marine activity would be in demand during the summer season, but might not be sustainable unless it is combined with merchandise that generates year-round sales. Marine research, education, and additional boat repair could provide a year-round supplement to the fishing industry.

Scituate Harbor's waterfront resources, along with its unique character and diverse mix of independent businesses help to establish the village as a tourism destination. Continued expansion of programming, completion of the Harbor Walk and other recommended pedestrian improvements, redesign and beautification of Cole Parkway and establishing the Harbor area as a Cultural Center will contribute toward extending the season beyond the summer months. The addition of quality restaurants will also attract more year-round visitors. All kinds of restaurants would be fitting, in particular a diner or similar daytime breakfast or lunch spot, evening café, bakery, lunch, ethnic, and high end.

CONSTRAINTS

The Harbor area's traditional base of seasonal, weather-dependent tourism is a limiting condition for businesses who struggle to maintain viability throughout the year. The focus on tourism also limits the opportunity for residents to shop locally, as store hours and merchandise do not cater to their needs.

Parking is another issue that affects businesses in the Harbor area, especially toward the north end of the Front Street commercial district where the lack of street parking and limited off-street parking leave few spaces available to serve businesses year-round. Around Cole Parkway and toward southern end of the Harbor village, parking capacity becomes an issue during the peak summer months or special events. Parking management may be beneficial in order to make full use of the available parking.

Despite the dense, walkable scale of the Scituate Harbor commercial district, additional improvements are needed to make the pedestrian environment more inviting. The speed of traffic on Front Street, lack of streetscape or pedestrian amenities, and the expansive pavement along the waterfront at Cole Parkway detract from the Harbor as a desirable shopping district. Way-finding and gateway signage is needed, especially to direct patrons to businesses located off of Front Street and in newer buildings where the ground floor is higher than street elevation.

Infrastructure and utilities are another concern for businesses in the Harbor. Due to its waterfront location, the district is particularly vulnerable to flooding and frequent electrical outages due to wind and storms. The pending changes to the FEMA flood zone maps are of particular concern to Harbor area businesses. Since many of the commercial spaces are owner-occupied, it would be prohibitive for small business owners to undertake improvements or pay expensive flood insurance premiums. This could have a significant negative impact on the future vitality of the commercial district. It may be advantageous to bury overhead utilities; this would certainly increase the overall attractiveness of the area. Other towns have done this in a limited area. Over the long term, it might be beneficial to shift commercial zoning uphill from Front Street as flooding becomes an increasing problem.

GREENBUSH

OPPORTUNITIES

Of all of Scituate's commercial areas, the Greenbush area has the greatest potential for growth and expansion, with both short term and longer-term redevelopment opportunities on both sides of the train station, including some sizeable sites. A portion of the MBTA property on the east side of New Driftway is substantially underutilized, offers a prime redevelopment site, and is proposed to be auctioned in the near future.

While there is significant room for growth, balance should be maintained between retail development and other uses. The presence of the train station makes the Greenbush area very attractive for residential development, which can help to support commercial vitality in the village and other commercial areas nearby. There is also potential for limited office/light industrial uses on the periphery of the district.

The adaptive reuse of the landmark Jacob-Hatch medical office building defines the historic character of Greenbush Village, and serves as a model for development appropriate for a district that is both transit- and auto-oriented, in a community whose unique character is an important asset.

The proximity of the Greenbush area to both the Harbor and the heavily used access from Route 3A could provide opportunities for stronger way-finding, to support better pedestrian, bicycle, and transit connections. At some point in the future, if weekend rail service is reinstated, these improvements could help to balance the relative share of activity generated by year-round residents and seasonal tourists.

Retail or mixed use development should be concentrated in visible core areas, allowing for higher density residential development and possibly other commercial uses on the periphery. While Greenbush initially appears spread out over a large geographic area, it is possible to imagine it with two separate, complimentary sections. The New Driftway/Driftway intersection is a gateway both to the commuter rail station and Scituate Harbor. Traffic is higher than on Country Way, where the neighborhood has a more laid-back feel. Recently, property owners in a small area south of the Driftway submitted a petition to add their land to the existing Village Business Overlay District. This would allow mixed use with first floor retail proximate to that intersection. This could create potentially create a vibrant retail area with easy access to the train and Greenbush.

The existing part of Greenbush in the General Business zoning district is adjacent to a large residential area to the north on Country Way, and to the Reservoir on the west. The train track and station cut this area off from the main route to the harbor. This area is potentially quite scenic, and could serve for offices and residential space which can benefit from being on a side road.

CONSTRAINTS

Even with sewer, the portion of the Greenbush area near the Reservoir has significant environmental constraints. Proposed changes to the Zoning Bylaw, required as a condition of the Town's Water Withdrawal Permit, include restrictions on impervious surface. In addition, there is much underutilized land, which has made it too expansive to establish a compact village atmosphere. In the past, Greenbush was home to several light industrial uses such as contractors yards, welding shops, car repair. They were located on land taken by the MBTA for parking. These uses no longer have many sites they can call home. This problem is one the Town as a whole needs to address.

NORTH SCITUATE

OPPORTUNITIES

North Scituate Village has a smaller scale, walkable mixed use configuration, as well as a distinct character and anchor businesses. The district also has several older commercial buildings and underutilized properties that could be redeveloped if sewer were available to accommodate a more intensive mix of uses with residential and/or office space on upper floors.

The train station makes North Scituate highly desirable for residential development. There could be a strong market for multifamily housing within walking distance of the station. While there is no direct correlation between train station and commercial uses, increasing residential density would support business growth.

CONSTRAINTS

Without sewers, North Scituate is fully built out at its present extent. Providing sewer infrastructure would be necessary to facilitate new investment in the redevelopment, expansion, or upgrading of existing buildings. While the next phase of the sewer plan is expected to begin in 3-5 years (after completion of the ongoing water improvement project), there has been discussion about accelerating or reordering the sewer plans to provide a more timely extension to North Scituate.

In 2000, the Town completed an upgrade of the Wastewater Treatment Plant, resulting in an increase of .6 million gallons capacity. The total capacity of the plant is now 1.6 million gallons. A plan for sewering environmentally sensitive areas and other locations in need of sewer was approved by DEP, which included six phases. The Town has completed Phases I – III, with Phase IV consisting of properties between Hatherly Rd. and Tilden Rd., and other areas near Scituate Harbor. North Scituate, Captain Peirce Rd. west of Country Way and Bulrush Farm Rd. are in Phase V. Phase VI covers the coastal areas of Minot and the Glades. According to the DPW Sewer Division, the plant's capacity is adequate for expansion of the system for Phases I through VI. To move North Scituate up in the sequence would require approval by DEP.

North Scituate's location is relatively far from highways or destinations that might attract patrons aside from residents of the immediate surrounding area. It is also situated somewhat at a distance from Scituate Harbor. Improved way-finding signage could help to direct visitors to the village from Route 3A.

ROUTE 3A

OPPORTUNITIES

Commercial development in very limited locations could complement the town's economic base. In particular, the area near existing commercial development along the northern end of Route 3A in Scituate could be expanded or improved. If possible, extending sewer service to this area would increase the potential for expanding commercial development.

Enhancing the relationship between Route 3A and the village areas at Greenbush and North Scituate through pedestrian infrastructure, signage, and/or sewer connections could help to increase the visibility of both the village commercial centers and outlying businesses. Strengthening the connection to the town's established commercial centers could also help outlying businesses benefit from programming and marketing efforts targeted to their geographic areas.

CONSTRAINTS

There is limited potential for commercial development along Route 3A, given substantial protected open space, environmental constraints, and the lack of sewer infrastructure. There are plans in the future to extend sewer service to the northern end of Route 3A as part of Phase 5 of the sewer extension plan. While the intersection with First Parish Road has been discussed as a potential development site if the Town Hall were to be relocated moved, the proximity of the high school might limit the types of businesses that could occupy this location. Increasing residential development along the Route 3A corridor may also tend to increase resistance to commercial development.

HUMAROCK

OPPORTUNITIES

Limited commercial development along Marshfield Avenue would enhance the village environment in Humarock by providing additional amenities for residents and seasonal visitors. Similar to Scituate Harbor, but on a much smaller scale, retail that caters to tourists would be in demand during the summer season, but might not be sustainable unless it is combined with merchandise that appeals to year-round residents of Humarock and neighboring Marshfield.

Specifically, an additional restaurant (limited or full-service) that appeals both to summer residents and tourists holds potential, perhaps in conjunction with a small inn that provides lodging options beyond home rentals. Food trucks – perhaps affiliated with existing Scituate restaurants - could also provide additional, temporary, food options during peak periods when more dining options could be supported. There is potential to establish more marine-related recreational businesses, especially kayak and paddle board sales/rentals. Increasing access to Humarock beaches would also improve business conditions by bringing more potential customers to the community. Further lowering parking pass fees for Marshfield residents (to Humarock beaches only), and providing some passes to day tourists may be options. These additions, combined with Humarock's unique character and miles of beaches, could help to better establish it as a tourism destination without sacrificing the "hidden" charm many residents find appealing.

CONSTRAINTS

Additional commercial development in Humarock is extremely limited given its isolated nature, limited land area, and significant environmental constraints as a barrier beach area.

The market area for Humarock is limited. Humarock is an isolated peninsula accessed only by two small bridges that are miles from the closest major highway. It is a destination, the "end of the road" as one business owner stated, and relies heavily on seasonal residents and tourists. It does not benefit from pass through traffic which many year-round businesses rely on to survive.

Significantly, as a barrier beach, flood risk in Humarock is extremely high. Barrier beaches provide natural storm and flood protection by absorbing the force of storm waves, thus protecting inland resources. As a result, development costs are higher since new structures are required to be built above base flood zones. Expensive flood insurance also adds to owner and developer costs.

APPENDIX

APPENDIX 1: DATA

Table A1- 1: Historic and Projected Population

Town	Population (Decennial Census)									MetroFuture Projections		
	1930	1940	1950	1960	1970	1980	1990	2000	2010	2020	2030	2035
Scituate	3,118	4,130	5,993	11,214	16,973	17,317	16,786	17,863	18,133	18,586	18,785	19,060
Cohasset	3,083	3,111	3,731	5,840	6,954	7,174	7,075	7,261	7,542	8,111	8,277	8,386
Hanover	2,808	2,875	3,389	5,923	10,107	11,358	11,912	13,164	13,879	13,975	14,178	14,406
Hingham	6,657	8,003	10,665	15,378	18,845	20,339	19,821	19,882	22,157	26,558	26,593	27,044
Marshfield	1,625	2,419	3,267	6,748	15,223	20,916	21,531	24,324	25,132	25,759	26,422	26,842
Norwell	1,519	1,871	2,515	5,207	7,796	9,182	9,279	9,765	10,506	10,352	10,420	10,522
Pembroke	1,492	1,718	2,579	4,919	11,193	13,487	14,544	16,927	17,837	18,922	19,576	19,962
Rockland	7,524	8,087	8,960	13,119	15,674	15,695	16,123	17,670	17,489	18,181	18,642	19,019

Table A1- 2: Household Composition (2011)

	Cohasset	Hingham	Marshfield	Norwell	**Scituate**	Plymouth Co.	Massachusetts
Total households	2,706	8,046	9,322	3,468	**6,957**	178,996	2,522,409
Families	74.7%	72%	73%	81.5%	**71%**	70.5%	63.6%
Families with children	40.6%	35%	35%	40.9%	**34%**	32.8%	29.2%
Nonfamily households	25.3%	28%	27%	18.5%	**29%**	29.5%	36.4%
Householder living alone	23.9%	25%	22%	15.1%	**25%**	24.1%	29.0%
65 years and over	12.2%	17%	9%	8.4%	**13%**	10.1%	10.7%
Households with person <18	40.6%	36%	37%	42.0%	**35%**	36.2%	31.6%
Households with person >65	30.8%	36%	25%	26.2%	**33%**	26.4%	25.2%
Average household size	2.74	2.69	2.68	2.95	**2.58**	2.69	2.49
Average family size	3.29	3.27	3.2	3.33	**3.12**	3.22	3.1

Source: ACS 2007-2011, DP-02

Table A1- 3: Median Age (2011)

Cohasset	43.1
Hingham	43.1
Marshfield	41.5
Norwell	43
Scituate	**44.7**
Plymouth County	40.8
Massachusetts	38.9

Source: ACS 2007-2011, DP-05

Table A1- 4: Age Cohorts (2011)

	Number	Percent
Total population	18,115	100%
Male	8,478	46.8%
Female	9,637	53.2%
Under 5 years	1,057	5.8%
5 to 9 years	1,444	8.0%
10 to 14 years	1,433	7.9%
15 to 19 years	1,062	5.9%
20 to 24 years	623	3.4%
25 to 34 years	1,013	5.6%
35 to 44 years	2,539	14.0%
45 to 54 years	2,886	15.9%
55 to 59 years	1,504	8.3%
60 to 64 years	1,509	8.3%
65 to 74 years	1,558	8.6%
75 to 84 years	1,052	5.8%
85 years and over	435	2.4%
Median age (years)	44.7	(X)

Source: ACS 2007-2011, DP-05

Table A1- 5: Educational Attainment (2011)

	Cohasset	Hingham	Marshfield	Norwell	**Scituate**	Plymouth Co.	Massachusetts
No High School Diploma	1.2%	2.6%	2.0%	2.5%	**2.0%**	8.1%	11.1%
HS Graduate or GED	12.9%	16.5%	22.4%	17.7%	**18.6%**	30.5%	26.3%
Some college, no degree	11.1%	13.7%	16.6%	15.3%	**17.4%**	19.1%	16.2%
Associate's degree	7.0%	6.6%	9.2%	7.9%	**6.3%**	9.4%	7.6%
Bachelor's degree	36.8%	34.3%	33.5%	37.6%	**34.2%**	21.3%	22.1%
Graduate or professional degree	30.9%	26.4%	16.4%	19.0%	**21.5%**	11.5%	16.6%
HS Graduate or higher	98.7%	97.4%	98%	97.4%	**98%**	91.9%	88.9%
Bachelor's degree or higher	67.7%	60.7%	49.9%	56.6%	**55.7%**	32.9%	38.7%

Source: ACS 2007-2011, DP-02

Table A1- 6: Racial Composition (2011)

	Cohasset	Hingham	Marshfield	Norwell	**Scituate**	Plymouth Co.	Massachusetts
Total population	7,483	14,834	17,136	10,430	**5,201**	492,934	6,512,227
Hispanic or Latino (of any race)	0.3%	0.2%	1.7%	1.7%	**0.4%**	3.2%	9.3%
White	99.6%	96.7%	97.3%	95.6%	**97.9%**	87.8%	83.4%
Black or African American	0.4%	1.2%	1.1%	0.6%	**0.6%**	9.1%	7.9%
American Indian and Alaska Native	0.0%	0.1%	0.1%	0.4%	**0.1%**	0.7%	0.6%
Asian	0.8%	2.0%	1.6%	2.6%	**2.1%**	1.7%	5.9%
Native Hawaiian/Pacific Islander	0.0%	0.0%	0.0%	0.2%	**0.0%**	0.1%	0.1%
Other Race	0.3%	0.6%	1.4%	1.3%	**1.0%**	2.6%	4.6%

Source: ACS 2007-2011, DP-05

Table A1- 7: Incomes by Household Type (2011)

Geography	Household Income		Family Income		Non-Family Income	
	Median	Mean	Median	Mean	Median	Mean
Cohasset	$117,831	$165,064	$147,222	$202,962	$36,814	$50,873
Hingham	$99,318	$151,577	$132,744	$182,834	$46,052	$67,856
Marshfield	$93,743	$112,646	$110,756	$129,666	$44,966	$63,626
Norwell	$109,167	$142,496	$118,679	$158,943	$37,520	$69,371
Scituate	**$89,485**	**$121,077**	**$111,893**	**$142,036**	**$45,086**	**$64,636**
Plymouth County	$74,698	$92,462	$88,110	$106,868	$39,894	$53,581
Massachusetts	$65,981	$88,577	$83,371	$106,335	$38,514	$54,309

Source: ACS 2007-2011, DP-03

Table A1- 8: Average Annual Employment in Scituate (2000-2013)

Year	**Labor Force**	**Employed**	**Unemployed**	**Rate**
2012	9,592	9,080	512	5.3
2011	9,523	8,981	542	5.7
2010	9,554	8,893	661	6.9
2009	9,488	8,840	648	6.8
2008	9,540	9,128	412	4.3
2007	9,531	9,168	363	3.8
2006	9,445	9,083	362	3.8
2005	9,549	9,176	373	3.9
2004	9,517	9,117	400	4.2
2003	9,537	9,127	410	4.3
2002	9,628	9,231	397	4.1
2001	9,596	9,318	278	2.9
2000	9,519	9,311	208	2.2

Source: MA Executive Office of Labor and Workforce Development

Table A1- 9: Labor Force Participation Rates (July 2013)*

Geography	Labor Force	Employed	Unemployed	Rate
Cohasset	3,910	3,697	213	5.4
Hingham	11,460	10,875	585	5.1
Marshfield	14,291	13,447	844	5.9
Norwell	5,622	5,305	317	5.6
Scituate	**9,831**	**9,259**	**572**	**5.8**
Plymouth County	270,683	251,083	19,600	7.2
Massachusetts	3,551,100	3,295,100	255,900	7.2

Source: MA Executive Office of Labor and Workforce Development
Note: Data is not seasonally adjusted.

Table A1- 10: Industries Employing Residents in the Region (2011)

	Cohasset	Hingham	Marshfield	Norwell	Scituate	Plymouth Co.	Massachusetts
Civilian employed population 16 years & over	3,415	10,096	13,019	4,800	**8,872**	243,993	3,280,503
Agriculture, forestry, fishing and hunting, and mining	0.40%	0.40%	0.60%	0.30%	**0.50%**	0.50%	0.40%
Construction	4.80%	4.70%	10.10%	7.10%	**6.20%**	7.60%	5.60%
Manufacturing	5.70%	5.90%	4.60%	7.20%	**5.50%**	8.00%	9.70%
Wholesale trade	2.00%	2.90%	2.70%	2.70%	**3.70%**	3.20%	2.60%
Retail trade	9.60%	12.10%	10.30%	7.50%	**11.90%**	13.00%	10.90%
Transportation and warehousing, and utilities	2.80%	2.00%	5.30%	3.30%	**2.10%**	4.70%	3.70%
Information	3.70%	3.00%	3.80%	2.70%	**2.30%**	2.40%	2.60%
Finance and insurance, and real estate and rental and leasing	13.90%	16.70%	13.70%	15.60%	**10.50%**	9.30%	8.00%
Professional, scientific, and management, and administrative and waste management services	22.70%	17.30%	9.30%	16.60%	**17.80%**	9.80%	12.90%
Educational services, and health care and social assistance	26.60%	24.30%	24.10%	21.40%	**25.60%**	25.00%	27.10%
Arts, entertainment, and recreation, and accommodation and food services	3.60%	5.90%	8.00%	6.40%	**6.20%**	7.50%	8.00%
Other services, except public administration	1.10%	1.80%	3.20%	5.10%	**4.20%**	4.50%	4.50%
Public administration	3.10%	3.20%	4.40%	4.20%	**3.50%**	4.60%	4.10%

Source: ACS 2007-2011, DP-03

Table A1- 11: Class of Employee (2011)							
	Cohasset	Hingham	Marshfield	Norwell	Scituate	Plymouth Co.	Massachusetts
Civilian employed population 16 years and over	3,415	2,711	2,212	4,800	**2,530**	243,993	3,280,503
Private wage and salary workers	73.90%	79.90%	80.20%	77.60%	**77.70%**	79.50%	80.40%
Government workers	10.10%	9.40%	11.60%	12.70%	**16.20%**	14.10%	13.00%
Self-employed in own not incorporated business workers	16.00%	10.70%	8.30%	9.70%	**6.20%**	6.30%	6.40%
Unpaid family workers	0.00%	0.00%	0.00%	0.00%	**0.00%**	0.10%	0.10%

Source: ACS 2007-2011, DP-03

Table A1- 12: Employment and Wages by Sector, 2007-2011								
	2007				2011			
Description	**# of Est.**	**Total Wages**	**Avg. Monthly Emp.**	**Avg. Weekly Wage**	**# of Est.**	**Total Wages**	**Avg. Monthly Emp.**	**Avg. Weekly Wages**
Total, All Industries	428	$119,978,737	3,307	$698	465	$130,541,910	3,364	$746
Goods-Producing Domain	72	$12,821,218	261	$945	64	$8,345,962	192	$836
Construction	64	$9,812,889	189	$998	55	$5,867,380	137	$824
23 - Construction	64	$9,812,889	189	$998	55	$5,867,380	137	$824
Manufacturing	7	$2,971,527	71	$805	7	$2,328,957	53	$845
31-33 - Manufacturing	7	$2,971,527	71	$805	7	$2,328,957	53	$845
DUR - Durable Goods Manufacturing	5	$2,769,888	53	$1,005	5	$2,113,877	38	$1,070
Service-Providing Domain	356	$107,157,519	3,046	$677	401	$122,195,948	3,172	$741
Trade, Transportation and Utilities	83	$18,807,933	503	$719	90	$18,447,465	482	$736
42 - Wholesale Trade	29	$6,558,845	58	$2,175	31	$5,391,539	58	$1,788
44-45 - Retail Trade	43	$8,347,780	352	$456	45	$7,858,044	327	$462
48-49 – Transportation/Warehousing	10	$3,777,633	89	$816	14	$5,197,882	97	$1,031
Information	7	$993,222	33	$579	11	$1,389,124	43	$621
51 - Information	7	$993,222	33	$579	11	$1,389,124	43	$621
Financial Activities	23	$5,909,641	116	$980	22	$6,906,724	119	$1,116
52 - Finance and Insurance	13	$4,533,238	97	$899	13	$5,976,205	105	$1,095
53 - Real Estate and Rental and Leasing	10	$1,376,403	18	$1,471	9	$930,519	14	$1,278
Professional and Business Services	87	$13,654,558	327	$803	95	$15,130,952	266	$1,094
54 - Professional and Technical Services	52	$8,580,949	164	$1,006	62	$10,276,980	143	$1,382
56 - Administrative and Waste Services	35	$5,073,609	163	$599	33	$4,853,972	123	$759
Education and Health Services	38	$43,094,649	1,050	$789	44	$53,683,824	1,116	$925
62 - Health Care and Social Assistance	27	$15,352,300	440	$671	31	$20,870,121	479	$838
Leisure and Hospitality	44	$12,692,264	678	$360	46	$13,649,396	776	$338
71 - Arts, Entertainment, and Recreation	15	$3,969,231	164	$465	15	$3,708,388	162	$440
72 - Accommodation and Food Services	29	$8,723,033	514	$326	31	$9,941,008	614	$311
Other Services	67	$4,268,782	173	$475	86	$4,920,230	210	$451
81 - Other Services, Ex. Public Admin	67	$4,268,782	173	$475	86	$4,920,230	210	$451

Table A1- 13: Employment Projections

Municipality	Total Employment	Basic Employment	Retail Employment	Service Employment
	2010			
Cohasset	2,470	200	823	1,447
Hingham	11,790	2,147	4,222	5,420
Marshfield	5,225	1,241	1,248	2,736
Norwell	8,344	2,249	1,096	4,998
Scituate	3,152	274	808	2,070
	2020			
Cohasset	2,519	204	829	1,485
Hingham	12,796	2,230	4,595	5,971
Marshfield	5,937	1,636	1,344	2,957
Norwell	8,893	2,296	1,185	5,413
Scituate	3,276	274	844	2,158
	2030			
Cohasset	2,485	207	815	1,463
Hingham	12,328	2,053	4,551	5,724
Marshfield	5,586	1,488	1,312	2,786
Norwell	8,508	2,133	1,168	5,207
Scituate	3,220	265	841	2,114

Source: MAPC Metrofuture 2035

Table A1- 14: Existing Housing Types

	Cohasset	Hingham	Marshfield	Norwell	**Scituate**	Plymouth Co.	Massachusetts
Total housing units	2,910	8,640	10,672	3,571	**8,087**	199,302	2,799,357
1-unit, detached	85.8%	69.9%	83.0%	93.3%	**84.3%**	70.5%	52.4%
1-unit, attached	2.5%	2.7%	4.1%	0.0%	**4.7%**	3.8%	4.9%
2 units	3.9%	2.5%	1.1%	0.8%	**2.9%**	5.8%	10.6%
3 or 4 units	4.3%	1.9%	1.5%	1.7%	**3.7%**	6.3%	10.9%
5 to 9 units	2.4%	5.9%	2.7%	1.2%	**2.1%**	3.6%	6.1%
10 to 19 units	0.4%	2.2%	5.6%	0.8%	**0.6%**	3.0%	4.3%
20 or more units	0.6%	14.6%	0.6%	0.7%	**1.7%**	4.4%	10.0%
Mobile home	0.0%	0.4%	1.5%	1.5%	**0.0%**	2.5%	0.9%
Boat, RV, van, etc.	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%

Source: ACS 2007-2011, DP-04

Table A1- 15: Year Structure Built (2011)

	Cohasset	Hingham	Marshfield	Norwell	**Scituate**	Plymouth Co.	Massachusetts
Total housing units	2,910	8,640	10,672	3,571	**8,087**	199,302	2,799,357
Built 2005 or later	2.3%	7.9%	1.8%	1.3%	**2.3%**	3.2%	2.6%
Built 2000 to 2004	4.2%	10.4%	3.2%	8.8%	**3.6%**	5.7%	4.1%
Built 1990 to 1999	9.1%	4.5%	11.7%	6.7%	**7.4%**	9.0%	7.3%
Built 1980 to 1989	8.7%	10.4%	10.1%	11.6%	**11.2%**	12.1%	10.8%
Built 1970 to 1979	11.9%	12.0%	20.8%	21.6%	**9.8%**	16.0%	11.7%
Built 1960 to 1969	13.0%	10.9%	16.0%	20.8%	**15.0%**	12.3%	10.4%
Built 1950 to 1959	13.3%	9.4%	15.2%	15.2%	**17.2%**	11.5%	11.5%
Built 1940 to 1949	3.6%	6.7%	5.4%	4.1%	**5.7%**	5.1%	6.1%
Built 1939 or earlier	33.8%	27.7%	15.9%	10.1%	**27.7%**	25.1%	35.4%

Source: ACS 2007-2011, DP-04

Table A1- 16: Median Housing Values (2011)

	Cohasset	Hingham	Marshfield	Norwell	**Scituate**	Plymouth Co.	Massachusetts
Owner-occupied units	2,307	6,311	7,877	3,124	**5,758**	138,788	1,604,473
Less than $50,000	0.6%	0.4%	0.7%	0.2%	**0.7%**	1.7%	1.6%
$50,000 to $99,999	0.5%	1.0%	1.2%	0.9%	**0.7%**	1.5%	1.4%
$100,000 to $149,999	0.0%	0.3%	1.4%	0.3%	**0.0%**	2.3%	3.8%
$150,000 to $199,999	1.0%	1.4%	2.0%	0.4%	**1.1%**	5.2%	8.1%
$200,000 to $299,999	3.3%	6.8%	11.7%	3.6%	**2.7%**	24.7%	24.3%
$300,000 to $499,999	18.8%	19.0%	54.6%	30.8%	**47.0%**	43.9%	39.1%
$500,000 to $999,999	53.1%	55.0%	26.5%	52.5%	**42.7%**	17.8%	18.2%
$1,000,000 or more	22.8%	16.0%	1.9%	11.4%	**5.1%**	2.8%	3.6%
Median (dollars)	726,600	634,800	415,500	596,600	**492,100**	350,700	343,500

Source: ACS 2007-2011, DP-04

APPENDIX 2: RETAIL GAP ANALYSIS

The Gap Analysis provides a comparison of *demand* within a geographic area, defined as the estimated spending potential of area residents for various types of goods and services, and *supply*, identified as sales of those goods and services. The size of the difference between the estimated demand and actual sales is the "retail gap" (represented as demand minus supply). Where estimated purchases by area residents exceed estimated sales, the retail sector is described as having "leakage"; that is, residents on balance leave the trade area to make purchases. A "surplus" occurs where estimated sales exceed estimated expenditures by residents, indicating that customers come from elsewhere to make purchases in the trade area.

Trade areas were identified for each of the villages in Scituate (Scituate Harbor, Greenbush, North Scituate, and for Humarock) reflecting the strongest potential customer base for Scituate commercial areas (Maps 1 and 2). A one mile radius encompasses the immediate neighborhood, and the area from which customers can comfortably walk from their homes into the villages. Scituate Harbor and Greenbush are located just over one mile apart, so their neighborhood trade areas overlap. The 3 mile radii encompass most of the town of Scituate and portions of Mansfield, Norwell, and Cohasset. North Scituate and Greenbush are located approximately four miles apart, so that the northern and southern ends of the town are more likely to focus around one village or the other, while residents in the middle of town may gravitate in either direction. The three mile trade area extends approximately midway to Route 3, where several larger concentrations of retail are located. The five mile radius trade areas include much of Hingham and Cohasset to the north, as well as extending further into Norwell and Marshfield, just crossing Route 3 in Pembroke. Residents within this trade area have a range of options within their surrounding region to meet most of their shopping needs.

Table A2-1 interprets the surplus or leakage in broad groupings of retail categories that relate specifically to downtown commercial activity. "Convenience goods" include grocery and specialty food stores, drug stores, and florists. The "Entertainment" category includes restaurants, eateries, and drinking establishments. "Shopping goods" include furniture, apparel, gifts, hobbies, used merchandise (which may include vintage or antique stores), as well as other types of purchases. A full list of retail sectors in greater detail follows on the following tables.

Scituate Harbor is strongest in the Convenience category, with surplus sales in supermarket, liquor store, and pharmacy stores. The village also generates surplus sales in specialty retail and eating establishments, particularly apparel, sporting goods, books, and gifts, as well as full service restaurants. These types of specialty retail stores are indicative of the Harbor being a destination for tourism and leisure activities. A concentration of sporting goods and building materials generates surplus sales within the three mile and five mile trade areas, as do convenience offerings such as liquor stores and pharmacies. Some common categories of retail that appear to be underserved include take-out restaurants, specialty foods, and home furnishings.

The other villages, in particular Greenbush, are underserved in most retail categories. Residents within the one, three, and five mile trade area spend significantly more on convenience goods such as groceries, health and personal care, and most types of specialty retail. Near the train stations, the retail categories which have strongest sales relative to consumer spending are liquor stores, take-out restaurants. A notable exception is stores that sell building materials, which are strong in the wider trade areas surrounding all of Scituate's villages.

The smaller the geographic area the greater the imbalance between demand and supply is likely to be. In Scituate, for example, the villages have no household appliance stores, thus there is one hundred percent leakage in this category; meanwhile sporting goods stores in Scituate Harbor contribute approximately four times the volume of sales as estimated demand within the one mile trade area. (See Appendix 2.) Over a broader geographical area, such extreme differences between retail demand and supply diminish.

The data obtained from the Gap Analysis does not lead directly to conclusions about commercial opportunities. Leakage for certain types of stores – such as general merchandise department stores, is the result of a trend toward highway-oriented "big box" stores. Residents currently travel beyond five miles from Scituate's villages for most general merchandise shopping. In these cases it might not make sense to try to fill those gaps where locally-oriented shops would be obsolete.

A surplus may indicate saturation of stores in a category that can be supported in the trade area. On the other hand, a surplus in some categories may indicate where villages provide advantageous locations for certain types of stores (such as restaurants and convenience retail), or a niche that can be built upon and made more attractive – such as tourism-related specialty retail.

Table A2-1: Gap Analysis Summary, Scituate Harbor, Greenbush, and North Scituate Areas

	1 Mile Radius	3 mile radius	5 mile radius
Convenience Goods, Food	Harbor: Surplus in food and beverage, pharmacies, and florist **North Scituate:** Surplus in beerand wine, convenience food, and pharmacy **Greenbush:** Surplus in beer and wine; leakage in all other categories. **Humarock:** Leakage in all categories	**Harbor:** Surplus in beer and wine, and pharmacy **North Scituate:** Surplus in beer and wine, and pharmacy **Greenbush:** surplus in beer and wine; leakage in all other categories. **Humarock:** Leakage in all categories	**Harbor:** Surplus in beer and wine and pharmacy **North Scituate:** Surplus in beer and wine, and pharmacy **Greenbush:** Surplus in food and beverage, and pharmacy **Humarock:** Leakage in all categories.
Entertainment (Restaurants, bars)	**Harbor:** Surplus in full service restaurants; leakage in other categories. **North Scituate:** Surplus in limited service restaurants; leakage in all other categories **Greenbush:** Surplus in limited service restaurants; leakage in all other categories **Humarock:** Leakage in all categories.	**Harbor, North Scituate, Greenbush, and Humarock:** Leakage in all categories of food service and drinking places.	**Harbor, North Scituate** and **Greenbush:** Leakage in all categories of food service and drinking places. **Humarock**: Surplus in drinking places; leakage in all other categores of food service.
Shopping Goods	**Harbor:** Surplus in hardware, sporting goods, books, and gift stores **North Scituate**: Surplus in hardware; leakage in all other categories **Greenbush:** Surplus in garden centers, women's clothing, and sporting goods. **Humarock:** Leakage in all categories.	**Harbor:** Surplus in building materials, women's clothing, and sporting goods **North Scituate:** Surplus in building materials and sporting goods **Greenbush**: Surplus in building materials, power equipment, and sporting goods. **Humarock**: Leakage in all categories.	**Harbor:** Surplus in building materials; leakage in all other categories. **North Scituate:** Surplus in building materials; leakage in all other categories. **Greenbush:** Surplus in building materials and sporting goods. **Humarock**: Surplus in lawn, garden equipment and supply stores; leakage in all other categores.
Auto-related and non-store retailers	**Harbor:** Leakage in auto-related retail; surplus non-store retail **North Scituate, Greenbush and Humarock:** Leakage in all categories.	**Harbor, North Scituate**, **Greenbush,** and **Humarock:** Leakage in all categories of auto-related and non-store retail.	**Harbor, North Scituate** and **Greenbush :** Leakage in all categories of auto-related and non-store retail. **Humarock:** Surplus in direct selling establishment; leakage in all other categories.

Table A2-2: Retail Gap Analysis (Scituate Harbor)			
	0-1 Mile	0-3 Miles	0-5 Miles
Estimated Population in 2011	3,712	14,451	28,705
Estimated Households in 2011	1,656	5,741	10,907
Estimated Median Household Income in 2011	$81,594	$87,707	$95,432
Total Estimated Spending Potential	$81,507,248	$294,570,203	$582,625,153
Total Estimated Actual Store Sales	$63,670,239	$116,580,135	$208,815,798
Total Retail Trade and Food & Drink Gap/Surplus	$17,837,009	$177,990,068	$373,809,355
Motor Vehicle and Parts	$14,450,391	$51,408,490	$97,821,328
Furniture & Home Furnishings	$1,538,319	$5,938,366	$10,785,467
Furniture Stores	$1,048,452	$3,730,595	$6,562,936
Home Furnishings	$489,866	$2,207,771	$4,222,530
Electronics and Appliance Stores	$1,644,199	$5,613,746	$11,174,532
Appliances, TVs, Electronics	$1,222,666	$4,267,269	$8,395,194
Computer and Software	$370,518	$1,163,721	$2,417,540
Photographic Equipment	$51,015	$182,756	$361,798
Building Material, Garden Equipment	$5,116,318	$1,891,621	$19,425,088
Hardware Stores	($379,943)	$1,030,878	($290,843)
Food & Beverage	($12,582,014)	$9,028,703	$18,137,642
Supermarkets	($8,293,357)	$11,508,057	$20,930,429
Convenience	$391,354	$487,272	$1,089,855
Specialty Food	$541,977	$1,987,660	$3,879,680
Beer & Wine	($5,221,988)	($4,954,286)	($7,762,321)
Health & Personal Care Stores	($7,431,985)	$791,540	($2,058,934)
Pharmacy	($8,336,034)	($2,191,098)	($7,957,229)
Cosmetics	$293,557	$797,421	$1,682,418
Optical	$233,926	$858,534	$1,735,272
Other Health/Personal Care	$376,567	$1,326,683	$2,480,605
Clothing & Accessories Stores	$1,290,517	$10,532,821	$23,197,067
Clothing	$559,692	$6,953,065	$16,312,628
Shoes	$395,174	$1,476,358	$2,358,117
Jewelry, luggage, leather goods	$335,650	$2,103,398	$4,526,322
Sporting, Hobby, Book, & Music	($1,693,409)	$1,979,555	$6,123,030
Sporting goods, hobby, instruments	($1,354,747)	$1,234,983	$3,867,735
Books and periodicals	($408,061)	$501,956	$1,783,981
Music	$69,399	$242,616	$471,314
General Merchandise	$9,685,520	$34,317,054	$69,147,569
Miscellaneous Retail	$698,438	$5,350,235	$11,574,804
Florists	($64,209)	$199,898	$150,054
Office Supplies, Stationery, Gifts	$312,063	$2,201,923	$4,791,361
Used Merchandise	$141,807	$702,001	$1,472,314
Other Miscellaneous Store Retailers	$308,778	$2,246,413	$5,161,075
Food Services & Drinking Places	($1,043,216)	$12,473,762	$29,526,762
Full Service Restaurants	($1,840,080)	$5,383,128	$15,212,258
Limited Service Restaurants	$1,578,255	$5,478,773	$10,161,785
Drinking Establishments	$379,614	$1,089,787	$2,104,115

Table A2-3: Retail Gap Analysis (Greenbush)			
	0-1 Mile	0-3 Miles	0-5 Miles
Estimated Population in 2011	2,476	16,807	34,747
Estimated Households in 2011	1,059	6,484	13,247
Estimated Median Household Income in 2011	$83,625	$91,141	$93,996
Total Estimated Spending Potential	$54,390,753	$343,861,559	$711,730,847
Total Estimated Actual Store Sales	$19,327,096	$115,473,994	$290,764,165
Total Retail Trade and Food & Drink Gap/Surplus	$35,063,657	$228,387,565	$420,966,682
Motor Vehicle and Parts	$9,035,597	$61,743,079	$121,140,186
Furniture & Home Furnishings	$1,185,272	$7,385,518	$14,309,414
Furniture Stores	$708,582	$4,405,060	$8,404,898
Home Furnishings	$476,690	$2,980,457	$5,904,517
Electronics and Appliance Stores	$1,020,302	$6,592,462	$12,103,388
Appliances, TVs, Electronics	$797,910	$4,996,117	$8,909,623
Computer and Software	$188,785	$1,382,862	$2,752,027
Photographic Equipment	$33,607	$213,484	$441,738
Building Material, Garden Equipment	$3,739,991	$5,094,174	$16,395,567
Hardware Stores	$290,944	($292,716)	$874,960
Food & Beverage	$2,169,453	$14,817,863	($14,244,436)
Supermarkets	$2,413,967	$16,224,783	($10,471,929)
Convenience	$263,130	$1,136,264	($89,962)
Specialty Food	$442,163	$2,251,058	$5,102,991
Beer & Wine	($949,807)	($4,794,242)	($8,785,536)
Health & Personal Care Stores	$611,789	$4,981,308	$5,141,114
Pharmacy	$14,519	$1,458,150	($1,321,435)
Cosmetics	$191,398	$987,731	$2,097,627
Optical	$158,888	$1,012,443	$1,706,108
Other Health/Personal Care	$246,984	$1,522,984	$2,658,815
Clothing & Accessories Stores	$1,876,596	$13,756,936	$29,568,562
Clothing	$1,213,482	$9,476,915	$20,826,894
Shoes	$273,664	$1,731,254	$3,183,574
Jewelry, luggage, leather goods	$389,450	$2,548,767	$5,558,095
Sporting, Hobby, Book, & Music	$406,541	$3,046,663	$5,929,544
Sporting goods, hobby, instruments	$267,954	$2,037,853	$3,110,150
Books and periodicals	$93,963	$728,559	$2,246,100
Music	$44,624	$280,252	$573,295
General Merchandise	$6,530,402	$39,741,173	$75,877,742
Miscellaneous Retail	$912,160	$6,406,643	$13,072,083
Florists	$46,274	$112,445	$257,662
Office Supplies, Stationery, Gifts	$428,198	$2,674,177	$4,310,095
Used Merchandise	$132,244	$865,880	$1,854,644
Other Miscellaneous Store Retailers	$305,444	$2,754,141	$6,649,682
Food Services & Drinking Places	$1,041,667	$17,860,140	$39,619,273
Full Service Restaurants	$1,528,786	$7,658,468	$20,328,416
Limited Service Restaurants	($808,840)	$7,707,950	$14,123,153
Drinking Establishments	$248,481	$1,585,636	$2,247,593

Table A2-4: Retail Gap Analysis (North Scituate)			
	0-1 Mile	0-3 Miles	0-5 Miles
Estimated Population in 2011	2,588	18,496	38,268
Estimated Households in 2011	930	6,742	14,249
Estimated Median Household Income in 2011	$80,253	$78,028	$73,664
Total Estimated Spending Potential	$51,543,738	$370,268,422	$773,416,577
Total Estimated Actual Store Sales	$30,065,709	$181,902,253	$372,688,092
Total Retail Trade and Food & Drink Gap/Surplus	($1,046,932)	$1,694,997	$413,065
Motor Vehicle and Parts	$5,780,384	$56,999,880	$107,781,437
Furniture & Home Furnishings	$280,839	$4,982,486	$12,521,167
Furniture Stores	$266,307	$3,367,581	$8,627,633
Home Furnishings	$14,531	$1,614,904	$3,893,534
Electronics and Appliance Stores	$949,846	$6,927,400	$13,399,711
Appliances, TVs, Electronics	$687,280	$5,140,231	$10,713,604
Computer and Software	$230,642	$1,556,868	$2,680,789
Photographic Equipment	$31,924	$230,301	$5,319
Building Material, Garden Equipment	$3,653,819	($2,573,259)	$23,788,377
Hardware Stores	($305,523)	($470,862)	$411,676
Food & Beverage	($1,046,932)	$1,694,997	$413,065
Supermarkets	$333,272	$3,825,701	$9,071,563
Convenience	($308,706)	($185,461)	$203,605
Specialty Food	$299,457	$1,979,632	$527,076
Beer & Wine	($1,370,955)	($3,924,875)	($9,389,179)
Health & Personal Care Stores	($4,803,023)	($9,828,904)	($8,275,524)
Pharmacy	($5,274,381)	($13,339,989)	($14,651,122)
Cosmetics	$116,955	$953,307	$2,213,253
Optical	$156,047	$1,106,792	$2,286,780
Other Health/Personal Care	$198,356	$1,450,986	$1,875,565
Clothing & Accessories Stores	$1,447,016	$14,291,317	$25,788,287
Clothing	$993,726	$10,417,597	$17,606,069
Shoes	$33,462	$963,216	$2,434,057
Jewelry, luggage, leather goods	$419,830	$2,910,503	$5,748,161
Sporting, Hobby, Book, & Music	$708,526	$4,103,286	$6,262,597
Sporting goods, hobby, instruments	$441,757	$2,174,468	$3,504,156
Books and periodicals	$225,632	$1,629,324	$2,126,138
Music	$41,137	$299,495	$632,304
General Merchandise	$6,469,639	$43,567,698	$85,792,831
Miscellaneous Retail	$1,135,153	$7,721,194	$14,807,547
Florists	$31,829	$50,729	$140,888
Office Supplies, Stationery, Gifts	$484,311	$3,188,087	$5,789,380
Used Merchandise	$108,348	$913,301	$1,912,180
Other Miscellaneous Store Retailers	$510,666	$3,569,077	$6,965,100
Food Services & Drinking Places	$677,591	$13,655,564	$27,072,779
Full Service Restaurants	$1,511,898	$7,616,852	$13,073,758
Limited Service Restaurants	($1,044,726)	$3,011,706	$8,249,013
Drinking Establishments	($129,731)	$1,042,930	$2,741,820

Table A2-5: Retail Gap Analysis (Humarock)			
	0-1 Mile	0-3 Miles	0-5 Miles
Estimated Population in 2011	1,709	11,957	35,663
Estimated Households in 2011	700	4,573	13,593
Estimated Median Household Income in 2011	$70,486	$62,434	$69,344
Total Estimated Spending Potential	$32,113,247	$190,036,137	$583,164,711
Total Estimated Actual Store Sales	$751,034	$11,636,583	$159,563,342
Total Retail Trade and Food & Drink Gap/Surplus	$31,362,213	$178,399,555	$423,601,370
Motor Vehicle & Parts Dealers	$8,077,464	$46,956,278	$116,964,786
Automobile Dealers	$4,615,594	$27,306,211	$75,997,108
Other Motor Vehicle Dealers	$339,766	$1,968,938	$5,876,187
Auto Parts, Accessories & Tire Stores	$416,618	$2,435,359	$5,424,067
Gasoline Stations	$2,705,486	$15,245,770	$29,667,424
Furniture & Home Furnishings Stores	$771,397	$4,504,638	$9,369,988
Furniture Stores	$365,642	$2,167,894	$5,613,770
Home Furnishings Stores	$405,754	$2,336,745	$3,756,217
Electronics & Appliance Stores	$827,804	$5,650,867	$17,490,045
Bldg Materials, Garden Equip. & Supply Stores	$945,112	$5,863,259	$6,867,293
Bldg Material & Supplies Dealers	$817,074	$5,142,434	$7,868,287
Lawn & Garden Equip & Supply Stores	$128,037	$720,825	($1,000,994)
Food & Beverage Stores	$5,418,575	$30,170,337	$70,736,388
Grocery Stores	$4,699,863	$26,992,855	$69,507,075
Specialty Food Stores	$83,523	$516,668	$808,556
Beer, Wine & Liquor Stores	$635,189	$2,660,813	$420,757
Health & Personal Care Stores	$3,093,655	$17,729,140	$51,504,051
Clothing & Clothing Accessories Stores	$2,191,701	$12,519,113	$32,873,670
Clothing Stores	$1,610,197	$9,280,803	$23,915,769
Shoe Stores	$293,057	$1,651,485	$4,567,066
Jewelry, Luggage & Leather Goods Stores	$288,447	$1,586,825	$4,390,835
Sporting Goods, Hobby, Book & Music Stores	$828,808	$4,612,773	$11,082,992
Sporting Goods/Hobby/Musical Instr Stores	$697,757	$3,747,880	$8,546,954
Book, Periodical & Music Stores	$131,052	$864,894	$2,536,038
General Merchandise Stores	$3,267,561	$19,577,611	$41,700,015
Department Stores Excluding Leased Depts.	$1,811,581	$10,933,283	$24,972,970
Other General Merchandise Stores	$1,455,980	$8,644,327	$16,727,045
Miscellaneous Store Retailers	$724,364	$4,247,795	$7,123,842
Florists	$64,959	$339,692	$726,268
Office Supplies, Stationery & Gift Stores	$281,908	$1,639,269	$639,715
Used Merchandise Stores	$126,151	$717,015	$1,933,385
Other Miscellaneous Store Retailers	$251,347	$1,551,819	$3,824,473
Nonstore Retailers	$1,941,695	$8,579,177	$23,901,428
Electronic Shopping & Mail-Order Houses	$1,381,615	$8,166,837	$25,076,346
Vending Machine Operators	$46,990	$279,051	$853,852
Direct Selling Establishments	$513,091	$133,288	($2,028,770)
Food Services & Drinking Places	$3,274,077	$17,988,566	$33,986,870
Full-Service Restaurants	$1,758,032	$9,901,560	$20,605,224
Limited-Service Eating Places	$1,246,526	$6,726,850	$13,473,475
Special Food Services	$174,073	$941,499	$381,488
Drinking Places - Alcoholic Beverages	$95,446	$418,657	($473,317)

APPENDIX 3: ESTIMATED DEVELOPMENT POTENTIAL

An estimate of potential demand for new commercial square footage by subarea was undertaken as part of the analysis. It is important to note that these are rough estimates of what could potentially be built over the next 10-15 years based on findings from the retail gap analysis, growth in tourism, additional professional office workers, and need for accommodations in the area.

Total estimated additional commercial development represents generally a 10 to 15 percent growth over existing commercial space. The potential is predicated on maintaining a balance between residential growth in the village areas with locally-oriented retail and services to serve area residents and visitors. Due to Scituate's location away from highways, combined with regional competition, there is little potential to expand the commercial base beyond what can be supported by the local market (residents, tourists, and commuters).

Table A3-1: Potential Commercial Development by Type and Size (Estimate)

Greenbush (including commercial zones along the Driftway)				
	Number	Avg Square Footage/Each	Total Square Footage	Development Criteria
Full Service Restaurants	2	3,000	6,000	Full Service Restaurant Gap
Limited Service Restaurants	2	1,500	3,000	Limited Service Restaurant Gap / Residential Potential / Commuters
Local Retailers	4-6	500-1,500	4,000	Misc Retailers, Clothing, Shoes, Furniture, Electronics Gap / Residential Potential / Commuters
National/Regional Chain	1	25,000	25,000	General Merchandise, Specialty Food Gap
Hotel	1	25,000	25,000	Demonstrated need for more hotel space
Professional Office Space*	40	250	5,000	Growth in medical and professional office workers
SUBTOTAL			***68,000***	
North Scituate				
	Number	Avg Square Footage/Each	Total Square Footage	Development Criteria
Full Service Restaurants	1	3,000	3,000	Full Sevice Restaurant Gap
Limited Service Restaurants	1	1,500	1,500	Limited Service Restaurant Gap / Village Setting / Commuters
Local Retailers	1-2	500-1,500	2,000	Based on gap in Misc Retailers
Professional Office Space*	20	250	2,500	Growth in professional office workers (lawyers, accountants, second office, etc.)
SUBTOTAL			***9,000***	

Scituate Harbor				
	Number	Avg Square Footage/Each	Total Square Footage	Development Criteria
Full Service Restaurants	1	3,000	3,000	Full Service Restaurant Gap, Seasonal Residents/Tourist Spending
Limited Service Restaurants	2	1,500	3,000	Limited Service Restaurant Gap, Boating/Tourist Spending
Local Retailers	2-3	500-1,500	2,000	Clothing/Other Misc Retail/Furniture Gap, Boating/Tourist Spending
Professional Office Space*	15	250	2,500	Growth in professional office workers (lawyers, accountants, second office, etc.)
SUBTOTAL			***10,500***	
3A				
	Number	Avg Square Footage/Each	Total Square Footage	Development Criteria
National/Regional Chain Retail or Small Plaza	1	25,000	25,000	Potential for some regional retail adjacent to Cohasset retail cluster.
SUBTOTAL			***25,000***	
Humarock				
	Number	Avg Square Footage/Each	Total Square Footage	Development Criteria
Full or Limited Service Restaurant	1	1,500	1,500	Full Service Restaurant Gap, Seasonal Residents/Tourist Spending
Local Retailers	1	500-1,500	1,000	Misc Retailers, Clothing/Shoes Gap, Seasonal Resident/Tourist Spending
Small Inn/B&B	1	5,000	5,000	Demonstrated need for more hotel space
SUBTOTAL			***7,500***	
TOTAL ESTIMATED Development Potential				
Subtotal: Retail and Food Service			***80,000***	
Subtotal: Accommodations			***30,000***	
Subtotal: Office			***10,000***	
TOTAL			**120,000**	

*Professional office space based on an average 250 square feet per worker, and due to limited opportunity for office development, assumes between a 5%-10% increase in total space over 10-15 year timeframe.
Source: MAPC

APPENDIX 4: ESTIMATED HOUSING DEMAND

An estimate of potential demand for various types of housing is based upon the composition of households in Scituate and an approximation of the forms of housing that would likely meet the needs of households if a range of options were available. COG prepared a model of housing type preference for various categories of households, shown in Table A3-1. The preference model assumes that single family homes are preferred by the majority of middle-aged households and families with children, while other forms of housing including multifamily condos, townhouses, rental units, and senior or assisted housing are likely to suit the needs of older households. Multifamily housing alternatives would also be more likely to suit the needs of young adult and/or single parent households who do not have the financial resources to purchase a single family home.

Table A3-1: Estimated Housing Demand: Alternative Housing Types

Household Types	Est. 2011 Total House-holds	% of HH (2011)	Estimated Housing Type Preference[1]				
			Single-Family Homes	2-Family or Townhouse	Multi-family Condo	Multi-family Rental	Other[2]
Individuals or Couples, Age 75+	899	13%	180 20%	135 15%	180 20%	135 15%	180 20%
Individuals or Couples, Age 65-74	1,057	15%	529 50%	106 10%	211 20%	106 10%	106 10%
Individuals/Couples, Age 35-64, No Children	2,390	34%	1,434 60%	359 15%	239 10%	359 15%	0 0%
Young Adults, up to Age 34	282	4%	71 25%	71 25%	71 25%	71 25%	0 0%
Married Households with Children	1,907	27%	1,526 80%	191 10%	0 0%	191 10%	0 0%
Single Parent Families	422	6%	169 40%	84 20%	84 20%	84 20%	0 0%
Total (% of total)	**6,957**	**100%**	**3,909** **56%**	**946** **14%**	**785** **11%**	**946** **14%**	**286** **4%**

Source: ACS 2007-2011, Community Opportunities Group, Inc.

(1) Approximately half of the two-family/townhomes are assumed to be rental units.
(2) May include manufactured home community, assisted living, nursing home, or other group living arrangement.

Based upon the actual number of households in Scituate within each category (ACS 2007-2011), the potential demand for each type of housing is projected. A comparison of the existing housing inventory to potential demand suggests that there is a significantly unmet need for all types of multifamily housing alternatives to serve the town's current residents. Many single family homes may be occupied by households who would wish to downsize, to live in more compact neighborhoods, or to have maintenance or support services, but cannot find suitable options. The housing gap analysis is limited to households who currently reside in Scituate, and does not account for those who may have relocated to other communities to secure housing that meets their needs. Aging of the town's households, as projected, will further increase the potential demand for multifamily housing options.