Town of Scituate Comprehensive Master Plan Update

Community Forum #3 December 10, 2019

A Changing Community Workshop

Agenda

1. Introduction

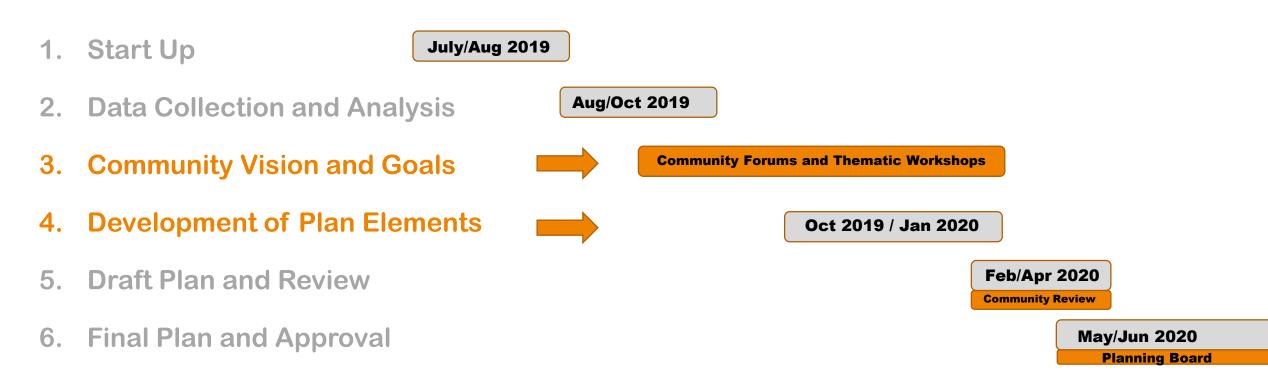
2. Process

- **3.** Previous Forum (Threats – Recommendations – Interactive Sessions)
- 4. Current Trends (Demographics – Economy – Market - Housing – Commercial Development)
- 5. A Changing Community (Projections)
- 6. Interactive Session (Mapping Assets – Prioritizing)

7. Next Steps



SeaScituate 2040 MASTER PLAN PROCESS





3. Previous Forum



Preliminary Recommendations

Extracted from previous planning exercises and ongoing SeaScituate 2040 workshops

Drinking Water

Protect current sources Explore new sources Reduce consumption Extend service to North Scituate Increase water withdrawal permit

Built environment

Identify critical infrastructure to protect Revise zoning to reduce development impact Protect natural resources Protect and adjust existing infrastructure to mitigate sea level rise and climate change - (i.e. Elevate and enhance drainage, roads, bridges, and/or flood prevention structures to facilitate ingress and egress during storm events)

Transportation

Protect and adjust existing emergency communication roads, rails to mitigate sea level rise and climate change Promote alternative modes of mobility to reduce car dependency -(i.e. Complete Streets Infrastructure)

Natural Resources

Protect wetlands Salt Marsh restoration Protect the coast and harbor Use of green space as resilient sites while serving as public amenities/attractions Protect the forestry

Wastewater / Sewer

Protect systems from flooding Upgrade aging infrastructure Prioritize investment Establish evacuation routes Complete Sewage Expansion Plan (North Scituate area is priority)

People

Affordable and resilient housing as shelter Healthy low impact housing Emergency Response Centers and Organizations Encourage a younger productive demographics

Energy

Green energy implementation for new and existing development Protect existing infrastructure

Economy

Improve the Town's Tax Base Develop North Scituate for new business and housing opportunities Engage the business sector into planning Support local business owners in maintaining vibrant, attractive, and functional retail centers



Municipal Funding:

New Growth	Estimate	Actual
FY17	\$460,000	\$508,572
FY18	\$500,000	\$572,266
FY19	\$500,000	\$836,775
FY20	\$650,000	\$-
FY21	\$600,000	\$-

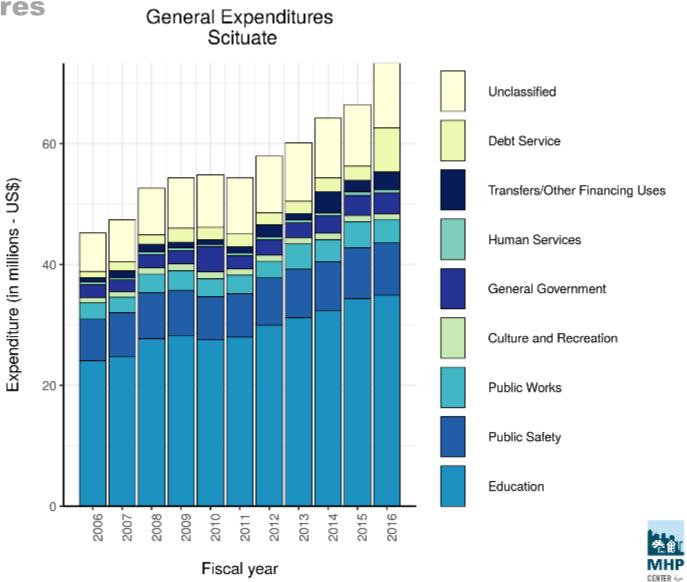
"<u>The Town has seen a steady new growth in the past several years</u>. There are several large development projects in the permitting pipeline but the actual construction start dates are not yet known and therefore not able to be captured as potential new growth for FY 2021."

Source: Town of Scituate, Massachusetts, Fiscal Year 2021 Town Budget



Municipal Funding:

General Expenditures





Source: Division of Local Services

Municipal Funding:

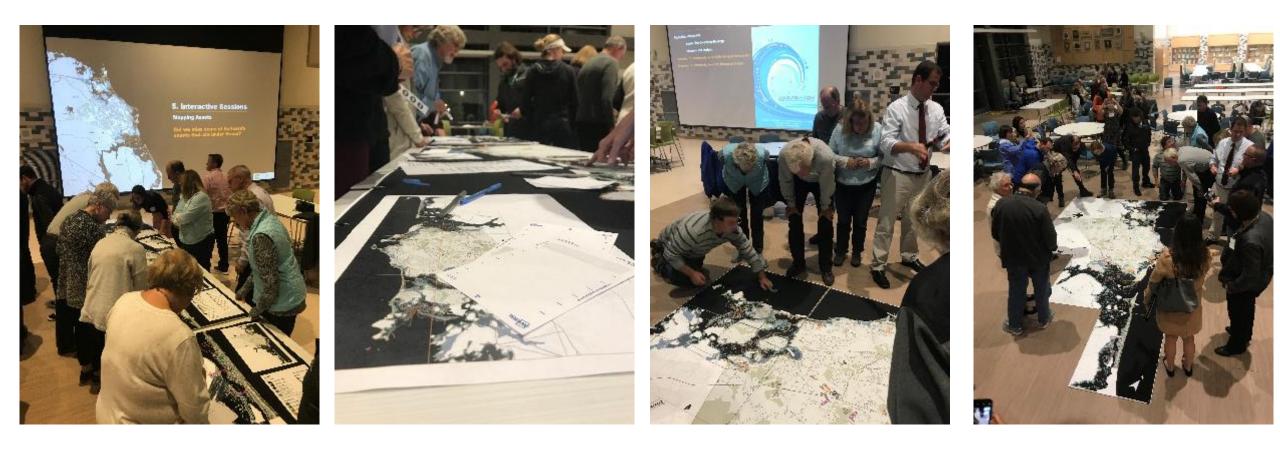
Capital Plan – FY 2020-2024

Recreation / DPW	\$247,192	
Facilities (DPW, Foreshore Protection, Fire, School)	\$66,456,747	
Golf Course (Widow's Walk upgrades)	\$940,000	
SCTV (Studio Relocation)	\$225,000	
Sewer (Water Treatment Plant, Pump Station)	\$29,376,775	
Transfer Station	\$520,000	
Water (Wells, Treatment Plant, Water Main)	\$62,490,000	
Waterways (Equipment, Docks)	\$1,747,961	
	Total \$162,003,675	



Interactive Sessions

Mapping and Prioritizing Assets

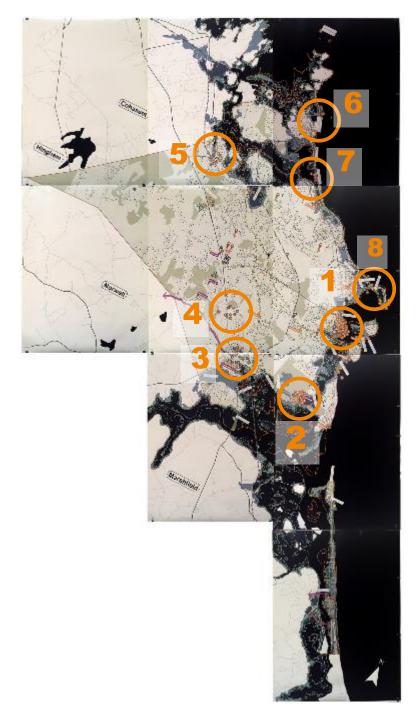


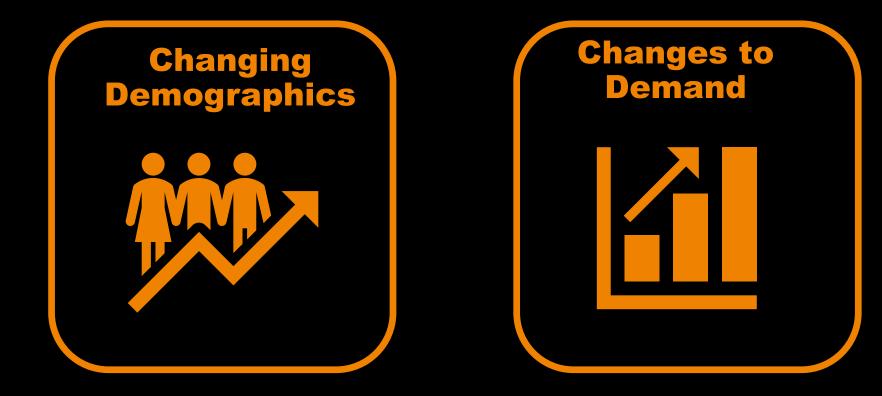


Interactive Sessions

Asset mapping and prioritizing exercise: (Scituate's assets under threat and which ones are a priority to protect)

- **1.** Scituate Harbor
- **2.** Water Sewer Division
- **3. Greenbush Station Area**
- 4. Reservoir
- **5.** North Scituate Station Area
- 6. Glades Rd. Sea Wall
- **7.** Potential Flooding Breach Point
- 8. Lighthouse Area Sea Wall







Historical Population and Household Growth less than County and State, Projected Growth Similar

Population & Households Compared								
	Town of Scituate	Plymouth County	State of I	МА				
Population								
2024 Projection	19,134	535,770	7,131,739					
2019 Estimate	18,601	519,639	6,916,527					
2010 Census	17,842	494,919	6,547,629					
2000 Census	17,250	472,497	6,349,100					
Projected Growth 2019 - 2024	39	6	3%	3%				
Estimated Growth 2010 - 2019	49	6	5%	6%				
Growth 2000 - 2010	39	6	5%	3%				
2019 Estimated Average Age	43.0	41.6	40.6					
Households								
2024 Projection	7,358	200,709	2,804,920					
2019 Estimate	7,105	193,463	2,710,577					
2010 Census	6,688	181,126	2,547,075					
2000 Census	6,405	168,231	2,443,572					
Projected Growth 2019 - 2024	49	6	4%	3%				
Estimated Growth 2010 - 2019	69	6	7%	6%				
Growth 2000 - 2010	49	6	8%	49				
2019 Average Household Size	2.6	2.7	2.6					



Average and Median Household Incomes Substantially Higher in Scituate than in County or State

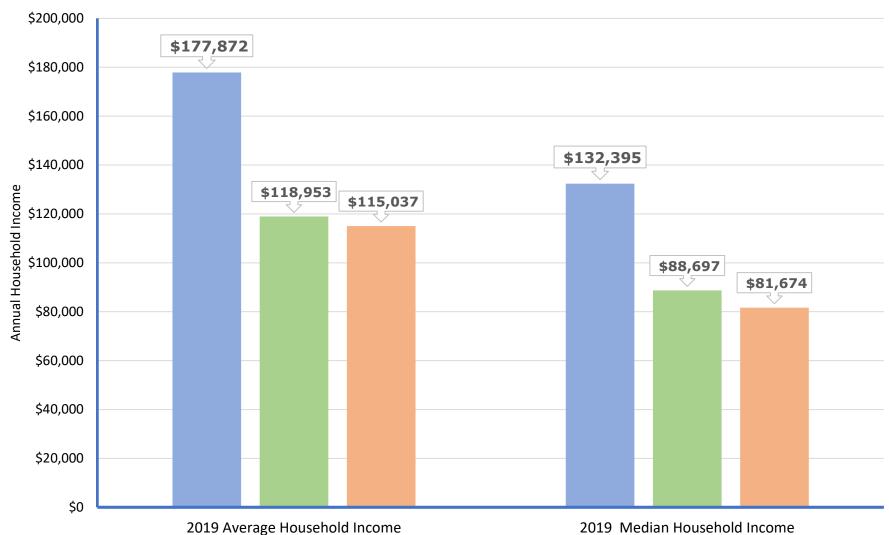
2019 Estimated Household Income		Town of Scituate		Plymouth County	,	State of MA	
		7,105		193,463		2,710,577	
Income Less than \$15,000		333	5%	12,834	7%	249,280	9%
Income \$15,000 - \$24,999		354	5%	11,843	6%	197,422	7%
Income \$25,000 - \$34,999		273	4%	11,449	6%	177,436	7%
Income \$35,000 - \$49,999		461	6%	19,069	10%	263,460	10%
Income \$50,000 - \$74,999		640	9%	28,485	15%	376,903	14%
Income \$75,000 - \$99,999		643	9%	23,037	12%	320,387	12%
Income \$100,000 - \$124,999		656	9%	21,097	11%	271,919	10%
Income \$125,000 - \$149,000		634	9%	17,873	9%	216,612	8%
Income \$150,000 - \$199,999		991	14%	20,712	11%	262,249	10%
Income \$200,000 - \$249,999		578	8%	10,461	5%	137,018	5%
Income \$250,000 - \$499,999		924	13%	11,053	6%	151,232	6%
Income \$500,000 and over		618	9%	5,550	3%	86,659	3%
Household Income Less than \$25,000		687	10%	24,677	13%	446,702	16%
Household income more than \$150,000		3,111	44%	47,776	25%	637,158	24%
2019 Families by Poverty Status							
2019 Families Below Poverty		145	2%	7,810	4%	130,371	8%
2019 Families Below Poverty with Children		107	2%	6,213	3%	95,735	6%
2019 Estimated Average Household Income	\$	177,872	\$	118,953	\$	115,037	
2019 Estimated Median Household Income	\$	132,395	\$	88,697	\$	81,674	

Source: EnvironicsAnalytics, 2019 and FXM Associates



2019 Household Incomes for Scituate, Plymouth County, and State of MA

Town of Scituate Plymouth County State of MA



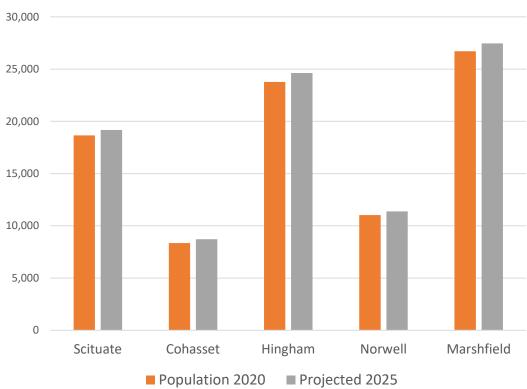


More Highly Educated, More White Collar, More Cars, Longer Travel Times to Work

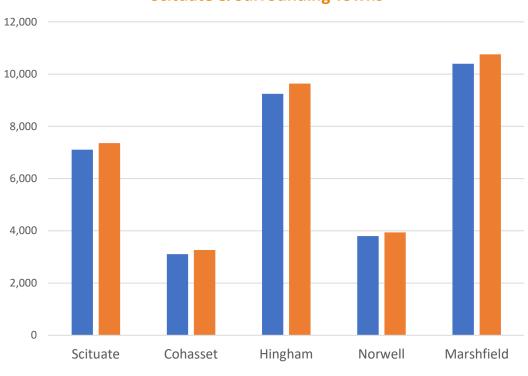
Workford	Workforce Characteristics for Scituate, Plymouth County, and State of MA									
	Town of Scituate	e	Plymouth Coun	ty	State of MA					
Education (Pop. Age 25+)	12,806		362,265		4,820,861					
Less than 9th grade	75	1%	10,237	3%	220,451	5%				
Some High School, no diploma	229	2%	17,035	5%	248,368	5%				
High School Graduate (or GED)	2,070	16%	106,062	29%	1,188,929	25%				
Some College, no degree	1,801	14%	65,930	18%	753,381	16%				
Associate Degree	1,253	10%	33,500	9%	372,047	8%				
Bachelor's Degree	4,702	37%	83,006	23%	1,135,958	24%				
Master's Degree	1,971	15%	35,225	10%	633,236	13%				
Professional School Degree	502	4%	7,583	2%	141,317	3%				
Doctorate Degree	203	2%	3,687	1%	127,174	3%				
Less than high school diploma	304	2%	27,272	8%	468,819	10%				
Bachelor's Degree or higher	7,378	58%	129,501	36%	2,037,685	42%				
Occupation Classification (Pop. Age 16+)	9,376		268,280		3,584,409					
White Collar	7,329	78%	47,090	18%	2,398,182	67%				
Blue Collar	845	9%	167,912	63%	544368	15%				
Service and Farm	1,202	13%	53,278	20%	641,859	18%				
2019 Est. Households by Number of Vehicles	7,105		190,870		2,710,577					
No Vehicles	201	3%	11,854	6%	339,251	13%				
1 Vehicle	1,745	25%	59,531	31%	964,924	36%				
2 Vehicles	3,629	51%	80,519	42%	982,077	36%				
3 Vehicles	1,165	16%	27,964	15%	305,986	11%				
4 Vehicles	274	4%	8,657	5%	88,841	3%				
5 or more Vehicles	91	1%	2,345	1%	29,498	1%				
Average Travel Time to Work (minutes)	42		36		33					

Source: EnvironicsAnalytics, 2019 and FXM Associates

Current and Projected Population and Households Less than Hingham and Marshfield, Greater than Cohasset and Norwell



Current & Projected Population Scituate & Surrounding Towns



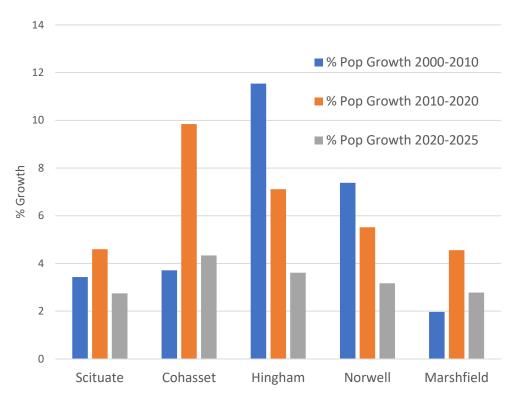
Current & Projected Households Scituate & Surrounding Towns

Households 2020 Projected 2025

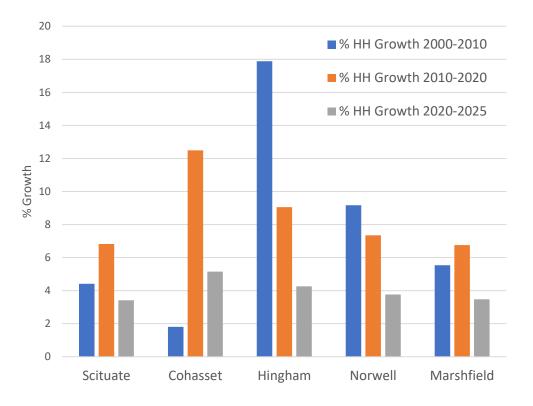


Historical and Projected Household Growth Rates Greater than Population Rates; Scituate Less than Surrounding Towns 2010 Onward

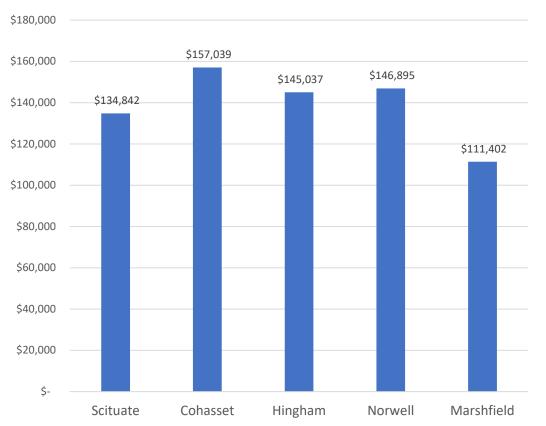
Historical & Projected Population Growth Rates Scituate & Surrounding Towns



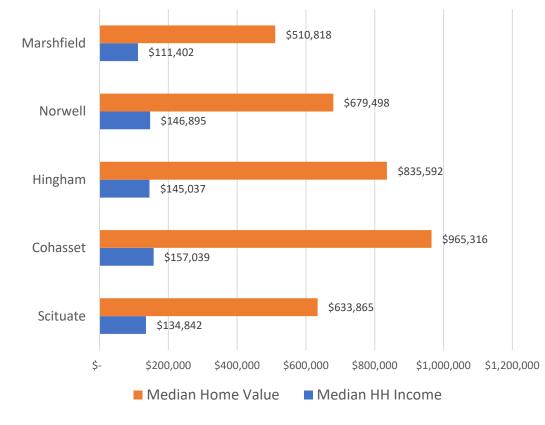
Historical & Projected Household Growth Rates Scituate & Surrounding Towns



Median Value of Owner-Occupied Housing 4.6-6.1 Times Median Incomes in Local Communities; Affordability Standard is About 2.5 Times Income

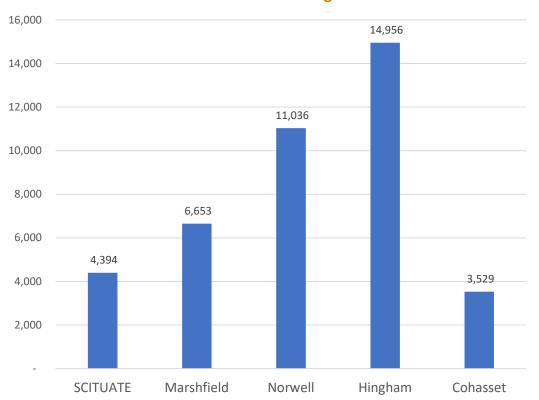


Median Household Income

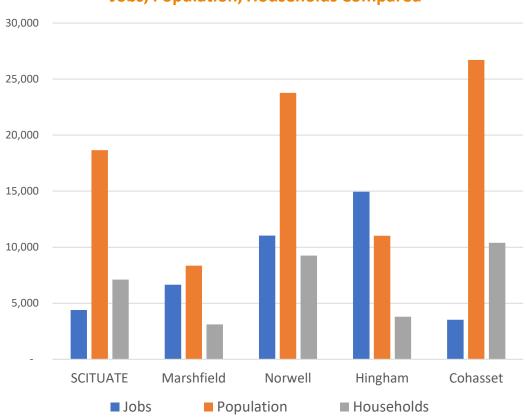


Median Incomes & Housing Values

Compared to Scituate, Only Cohasset Has a Higher Ratio of Population and Households to Jobs; Hingham Has More Jobs than Population or Households

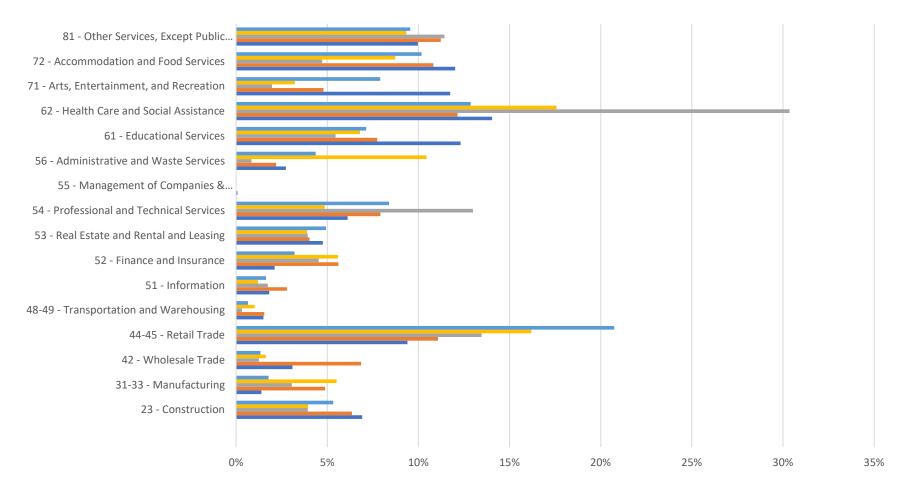






Jobs, Population, Households Compared

Scituate has Higher Proportion of Total Jobs in Arts, Entertainment & Recreation, Accommodation & Food Services, and Educational Services



Distribution of Jobs by Sector

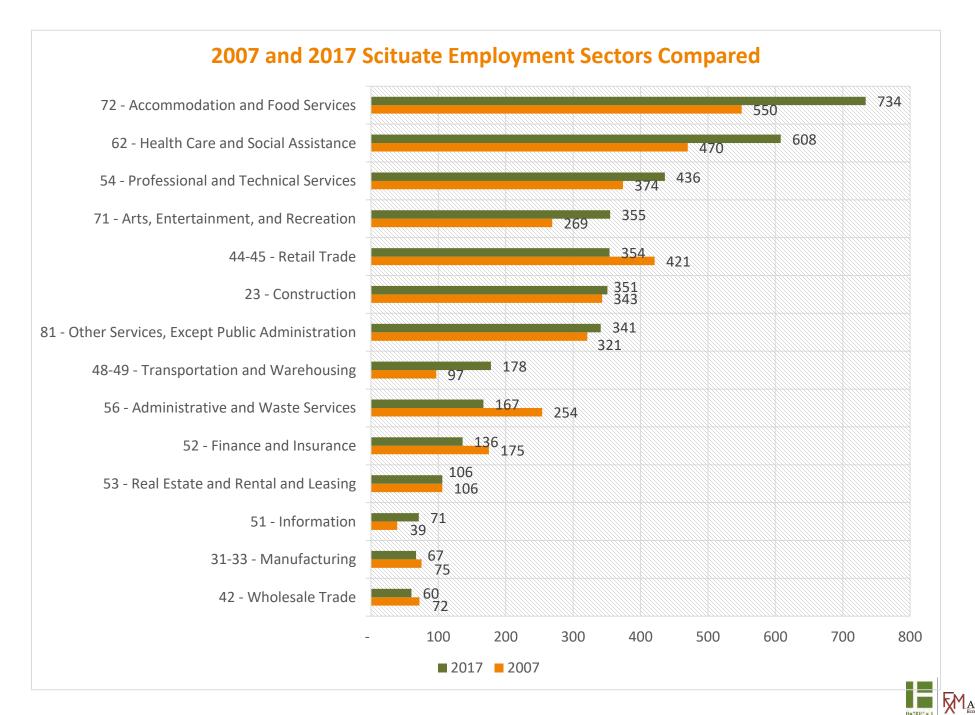


Net Gain in Jobs, Highest in Healthcare and Accommodation and Food Services (Restaurants)

	2007	2017	Absolute Change	% Change
Sectors	Employment	Employment	in Total Jobs	in Total Jobs
23 - Construction	343	351	8	2%
31-33 - Manufacturing	75	67	(8)	-11%
42 - Wholesale Trade	72	60	(12)	-17%
44-45 - Retail Trade	421	354	(67)	-16%
48-49 - Transportation and Warehousing	97	178	81	84%
51 - Information	39	71	32	
52 - Finance and Insurance	175	136	(39)	-22%
53 - Real Estate and Rental and Leasing	106	106	0	0%
54 - Professional and Technical Services	374	436	62	17%
56 - Administrative and Waste Services	254	167	(87)	-34%
62 - Health Care and Social Assistance	470	608	138	29%
71 - Arts, Entertainment, and Recreation	269	355	86	32%
72 - Accommodation and Food Services	550	734	184	33%
81 - Other Services, Except Public Administration	321	341	20	6%
TOTAL All Industries	3,566	3,964	398	11%
Total New Jobs			611	

Scource: Mass Departmentof Labor, ES202 Data Series, Ajusted Values, 2007 and 2017; Regional Economic Information System, 2017; and FXM Associates





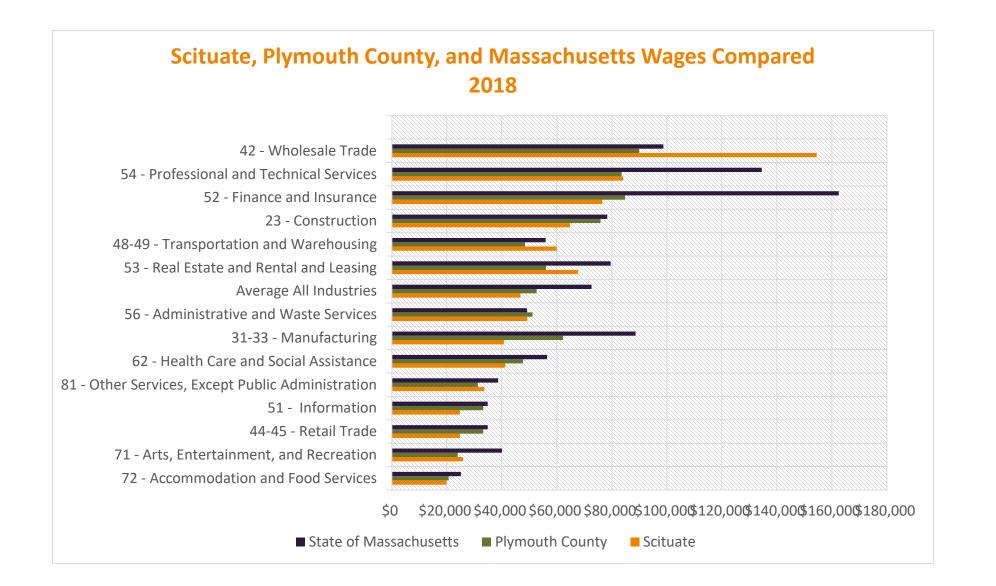
ASSOCIATES HOWARD STEIN HURSON

Wages in Most Sectors Below County and State Averages

Wages by Sector, 2018, Scituate, Plymouth County, and State of Massachusetts							
Sectors	Scituate	Town as % of County	Town as % of State	Plymouth County	State of Massachusetts		
23 - Construction	\$64,740	85%	83%	\$75,868	\$78,312		
31-33 - Manufacturing	\$40,716	65%	46%	\$62,192	\$88,608		
22 - Utilities				\$122,512	\$116,688		
42 - Wholesale Trade	\$154,440	172%	156%	\$89,960	\$98,748		
44-45 - Retail Trade	\$24,752	74%	71%	\$33,228	\$34,892		
48-49 - Transportation and Warehousing	\$59,956	124%	107%	\$48,412	\$55,900		
51 - Information	\$29,328	39%	25%	\$75,972	\$117,780		
52 - Finance and Insurance	\$76,492	90%	47%	\$84,812	\$162,500		
53 - Real Estate and Rental and Leasing	\$67,756	121%	85%	\$56,056	\$79,560		
54 - Professional and Technical Services	\$84,084	101%	63%	\$83,564	\$134,524		
55 - Management of Companies				\$105,560	\$135,096		
56 - Administrative and Waste Services	\$49,244	96%	100%	\$51,168	\$49,192		
62 - Health Care and Social Assistance	\$41,288	87%	73%	\$47,684	\$56,420		
71 - Arts, Entertainment, and Recreation	\$25,844	108%	65%	\$23,920	\$40,040		
72 - Accommodation and Food Services	\$19,864	96%	79%	\$20,696	\$25,116		
81 - Other Services, Except Public Administration	\$33,644	108%	87%	\$31,252	\$38,636		
92 - Public Administration				\$76,648	\$78,312		
Average, All Industries	\$46,800	89%	64%	\$52,676	\$72,592		
Median, All Industries	\$45,266	78%	61%	\$58,084	\$73,684		

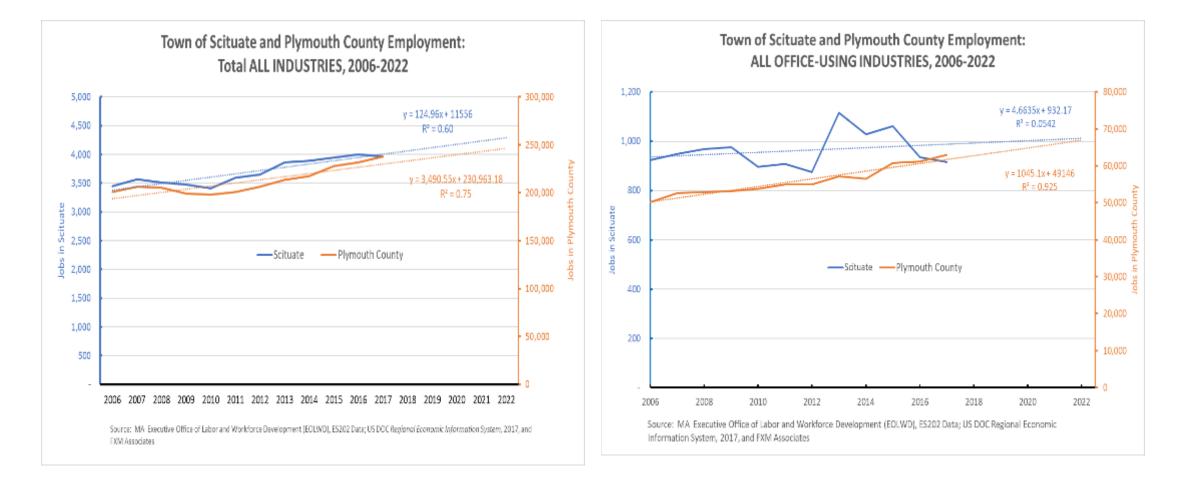
Source: MA Executive office of Labor and Workforce Development (EOLWD),ES202 Data, 2018, 3rd Quarter; and FXM Associates





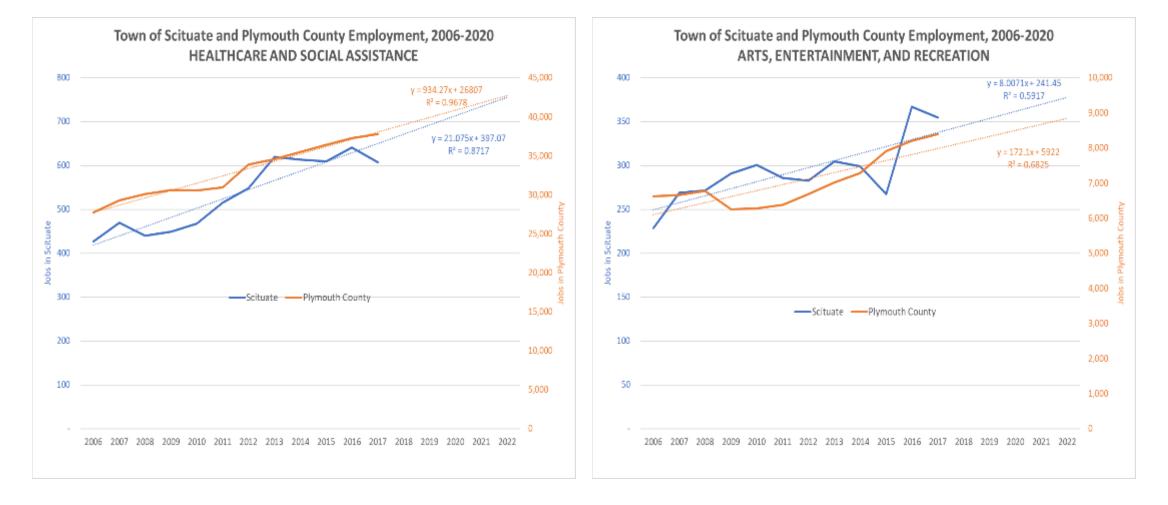


Overall Employment Projected to Grow; Recent Decline in Office-Using Industries, But Historical Growth Countywide is Promising

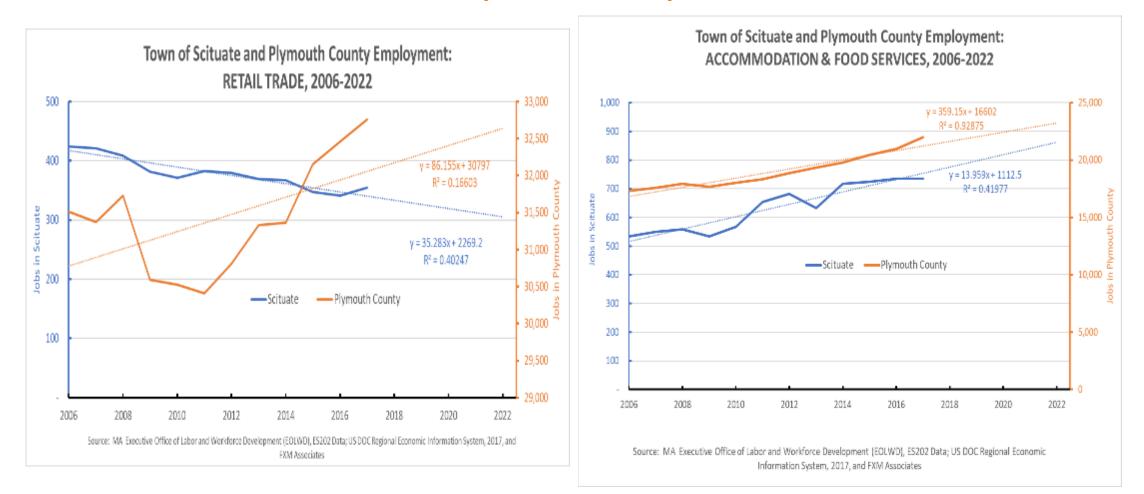




Projected Growth in Healthcare and in Arts, Entertainment & Recreation



Long Term Decline in Retail Jobs Though Some Recent Growth; Long Term and Projected Growth in Accommodation & Food Services (Restaurants)





Projected Demand For Additional Commercial Space Based on Historical Employment Growth

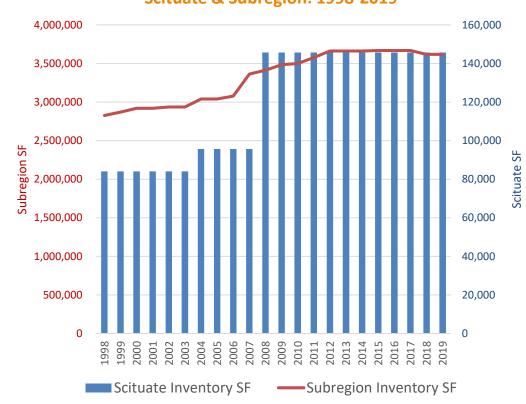
		Scituate	Plymou	uth County
	Projected New	Projected Space Demand	Projected New	Projected Space
Sector	Jobs	(SF)	Jobs	Demand (SF)
42 - Wholesale Trade	4	2,109	(109)	(54,436)
44-45-Retail trade	(49)	(24,415)	(122)	(237,500)
Office-using				
51- Information	17	4,327	(210)	(52,428)
52-Finance & Insurance	56	14,012	1,571	392,789
53- Real Estate and Rental Leasing	17	4,226	1,238	309,583
54 - Professional, Scientific, & Technical	61	15,256	895	223,686
56-Administrative & Support;Waste Mgt&Remed.	(56)	(13,963)	449	112,195
Subtotal Office-using	95	23,858	3,943	985,825
62-Health care and Social Assistance	148	59,065	4,885	1,953,916
71-Arts, Entertainment, and Recreation	23	9,084	446	178,307
72 - Accommodation & Food Services	128	22,467	1,232	216,819
81- Other Services (Except Pub Admin)	2	377	600	119,992
TOTALS	351	92,544	10,875	3,162,924

Scituate Projected Space Demand Through 2022 Based on Historical Employment Trends

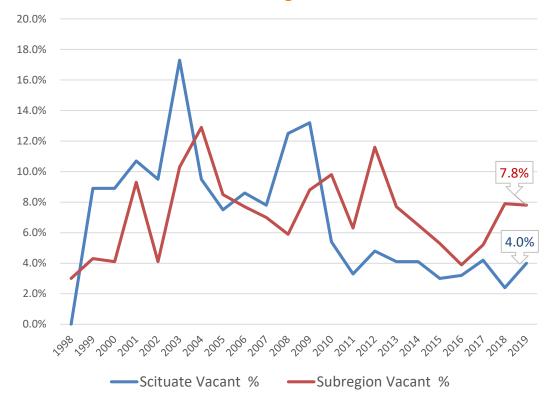
Scource: REIS, Massachusetts Department of Labor and Workforce Development, ES202 reports (adjusted by REIS); FXM Associates



Scituate Office Space Inventory Flat as is Subregion: Vacancies Low



Office Space Inventory Scituate & Subregion: 1998-2019

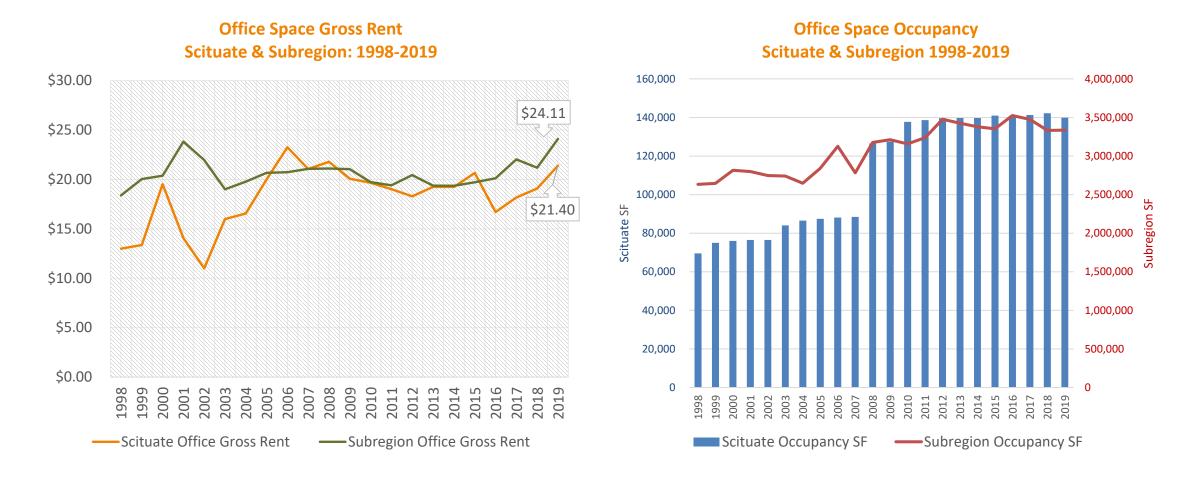


ASSOCIATES

HOWARD STEIN HUDSON

Space Vacancy Rate Scituate & Subregion: 1998-2019

Office space rents climbing; projected increase in occupancy demand – Scituate 7,600 SF/year; Subregion 86,000 SF/year

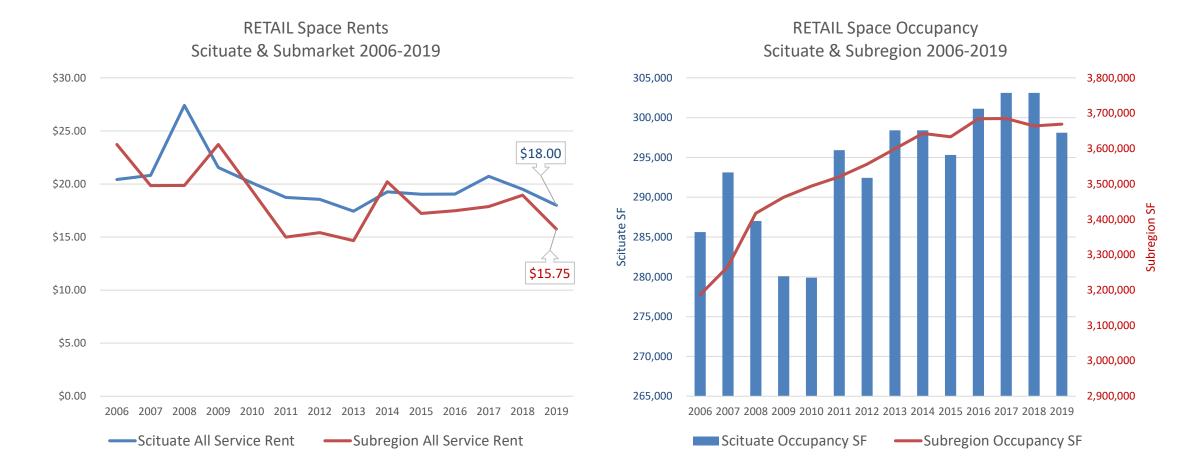


No change in Scituate RETAIL space inventory since 2006 compared to 380,000 SF added in Subregion; vacancy rates very low

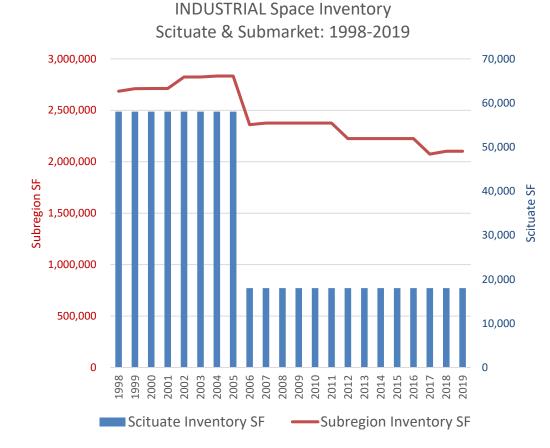


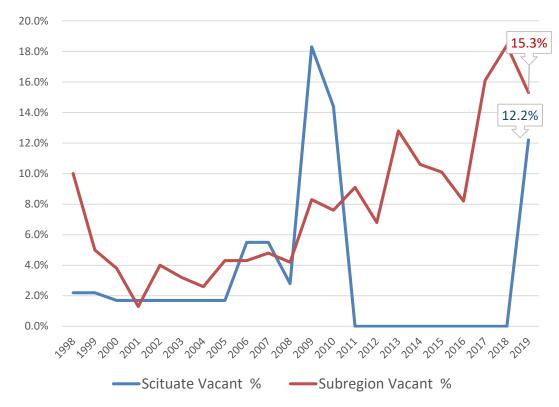


RETAIL rents low; *minor* projected increase in occupancy demand – Scituate 2,400 SF/year; Subregion 53,000 SF/year



INDUSTRIAL space inventory flat or declining, vacancy rates increasing

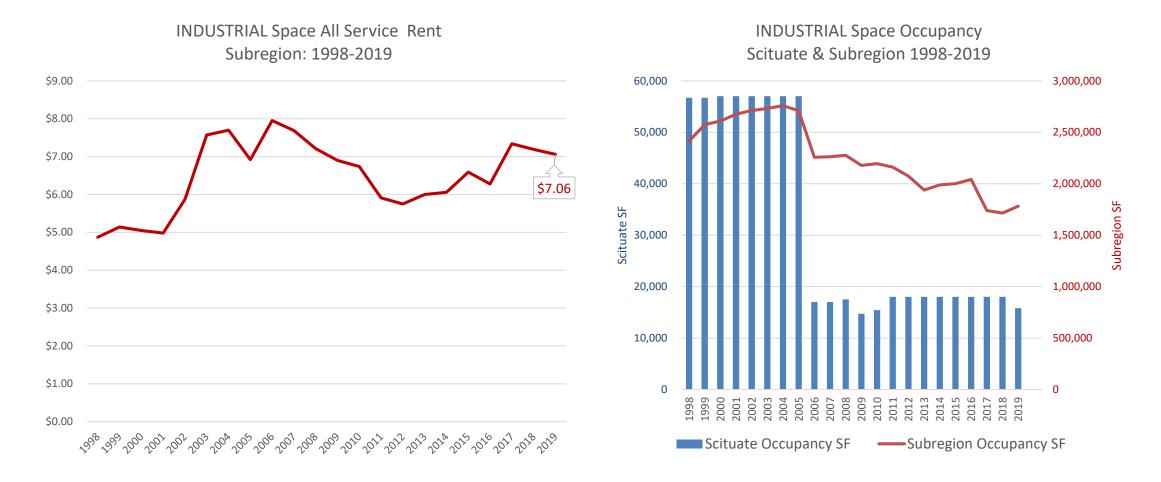




INDUSTRIAL Space Vacancy Rate Scituate & Submarket: 1998-2019



INDUSTRIAL space rents increasing slightly, occupancy flat or declining



Retail Opportunity/Gap Analysis shows additional stores potential based on current sales leakages

Retail Stores	N	/larket Area Gap	Supportable SF	Potentially Captured SF	Potentially Supportable Stores	Projected Annual Demand Growth
Furniture stores (NAICS 4421)	\$	6,237,835	17,621	5,000	1	3.21%
Floor covering stores (NAICS 44221)	\$	6,140,442	16,074	4,100	1	3.04%
Electronics and appliance stores (NAICS 443)	\$	8,991,033	18,520	5,500	1	2.32%
Nursery, garden center, and farm supply stores (NAICS 44422)	\$	5,290,179	20,649	3,200	2	3.00%
Pharmacies and drug stores (NAICS 44611)	\$	17,744,268	32,558	12,150	1	3.08%
Other health and personal care stores (NAICS 44619)	\$	4,262,897	13,280	4,100	1	3.00%
Family clothing stores (NAICS 44814)	\$	20,172,645	53,759	12,000	2	1.35%
Full-service restaurants (NAICS 722511)	\$	15,897,589	28,541	10,200	2	2.71%
Limited-service restaurants (NAICS 722513)	\$	18,254,324	55,653	10,000	5	2.72%
Totals	\$	102,991,212	256,657	66,250	16	

Retail Opportunities in the North Scituate MBTA Retail Market Area: 2019

Sources: EnvironicsAnalytics Spotlight Reports, 2019; The Chesapeake Group, 2013; industry sources; and FXM Associates



Retail Opportunity/Gap Analysis shows additional stores potential based on current sales leakages

Retail Opportunities in the Greenbush MBTA Retail Market Area: 2019

Retail Stores	Market Area Gap	Supportable SF	Potentially Captured SF	Potentially Supportable Stores	Projected Annual Demand Growth
Electronics and appliance stores (NAICS 443)	14,580,947	30,034	5,500	1	2.90%
Lawn and garden equipment and supplies stores (NAICS 4442)	8,938,890	24,094	10,000	1	2.88%
Pharmacies and drug stores (NAICS 44611)	7,113,170	13,052	12,150	1	2.97%
Other health and personal care stores (NAICS 44619)	2,135,432	6,652	4,100	1	2.98%
Family clothing stores (NAICS 44814)	9,426,246	25,121	6,000	1	1.33%
Jewelry stores (NAICS 44831)	5,747,097	7,425	4,200	1	0.50%
Sporting goods stores (NAICS 45111)	3,680,152	11,254	6,000	1	0.67%
Full-service restaurants (NAICS 722511)	18,164,992	32,612	15,300	3	2.67%
Limited-service restaurants (NAICS 722513)	19,757,084	60,235	8,000	4	2.60%
Totals	\$ 89,544,010	210,480	71,250	14	

Sources: EnvironicsAnalytics Spotlight Reports, 2019; The Chesapeake Group, 2013; industry sources; and FXM Associates



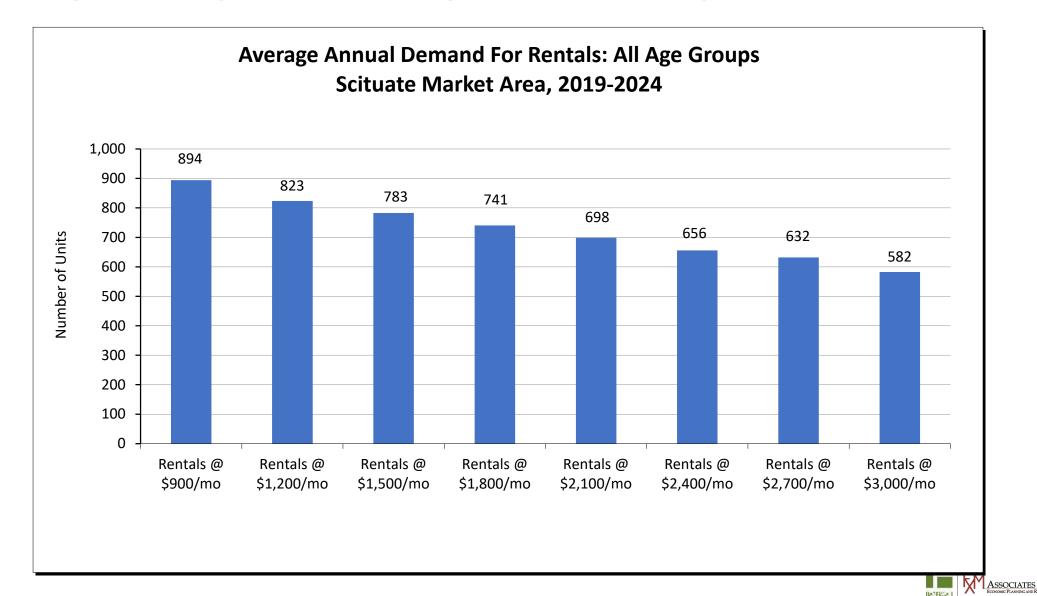
Rental housing an important part of social & economic development, especially as it provides opportunities for younger workers and empty nesters

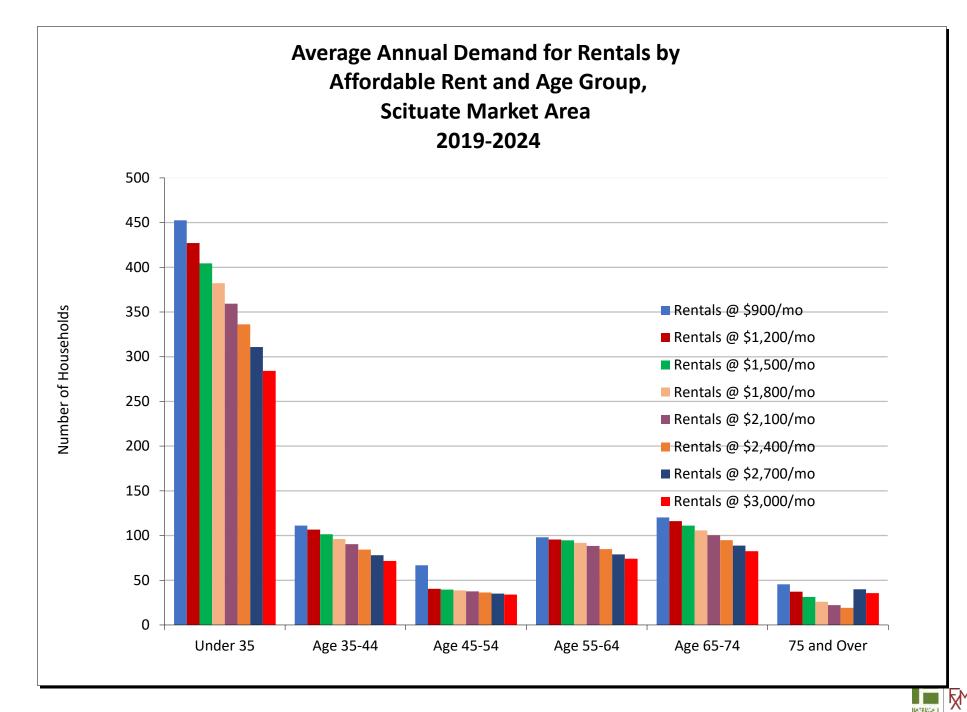
Housing Demand Context				
20-Minute Market Area				
Population Households Renter Households			84,718 32,239 5,939	
	% Renters		18%	
Renters Moving in Average	Year		1,074	
% of All Households Median Household Income		\$	3% 123,624	

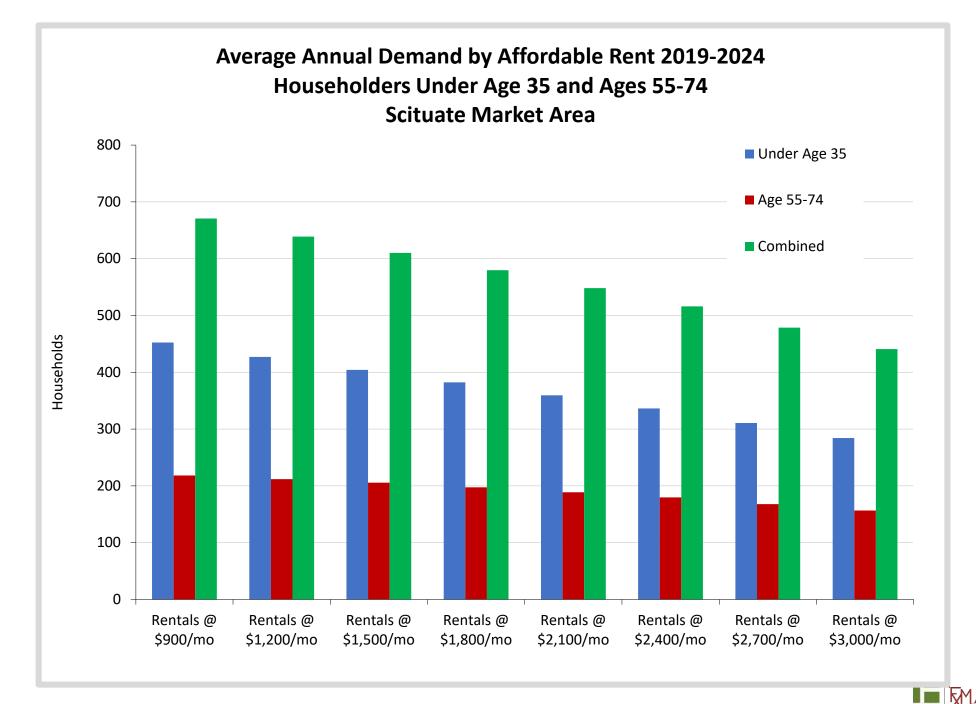
Source: EnvironicsAnalytics, Spotlight. 2019 estimates, and FXM Associates



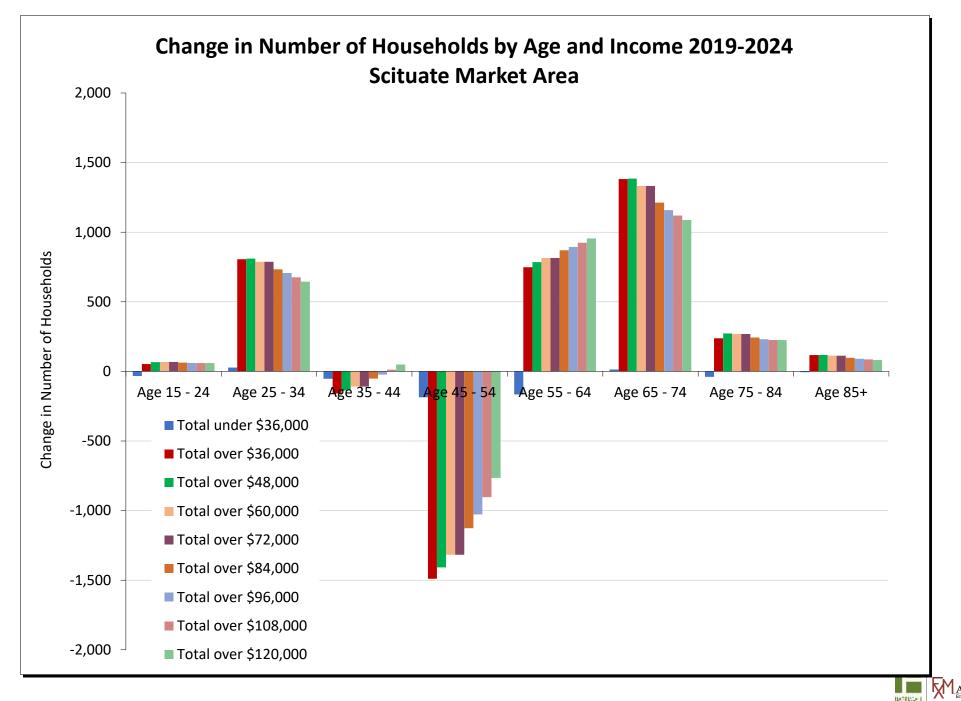
FXM's *Housing Demand Model* accounts for mobility (propensity to move), tenure (propensity to own or rent), and affordability



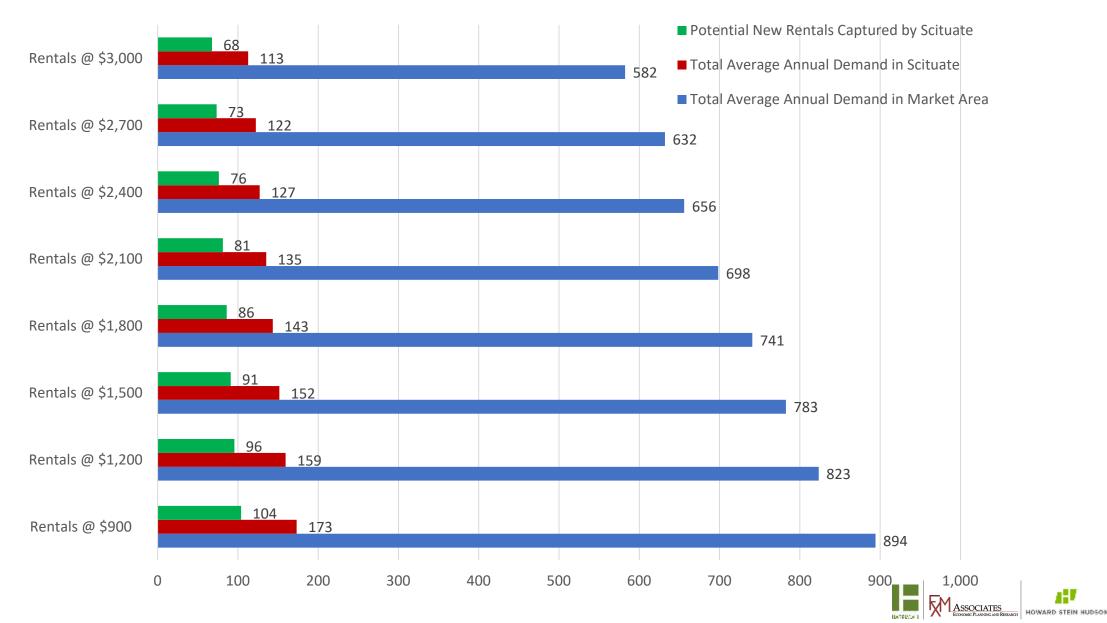




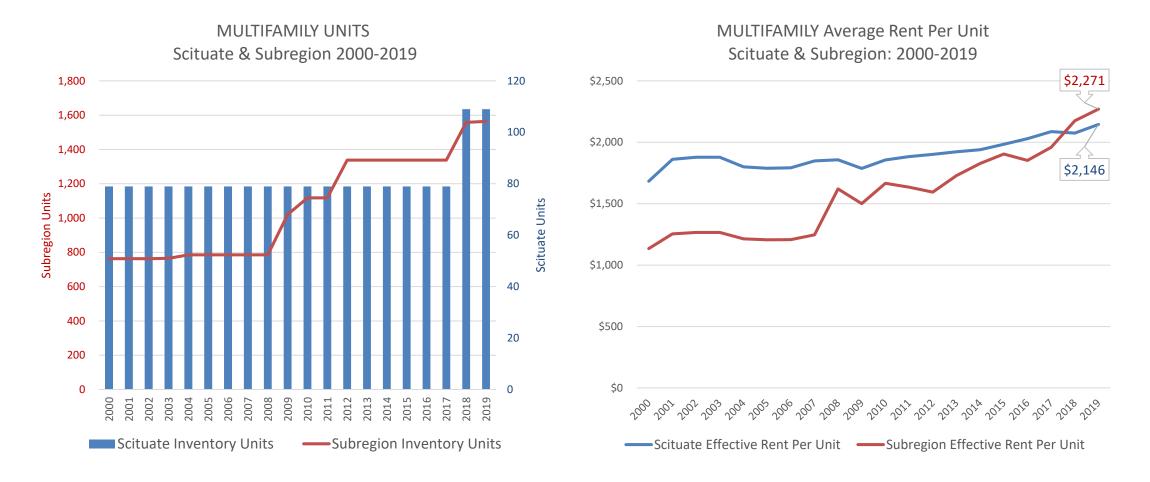
ILSOFECIAL



Average Annual Demand for Rentals: Market Area, Scituate, Estimated Potential New Rentals Capture



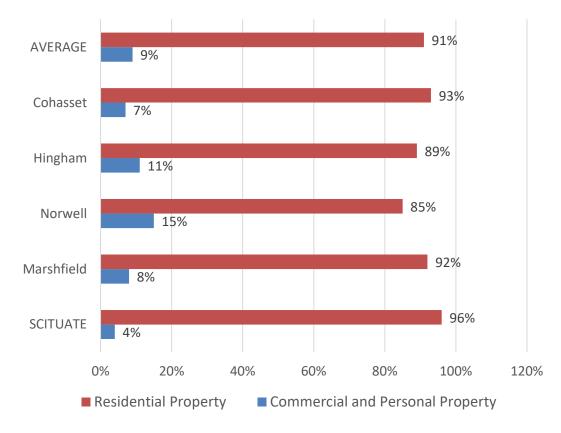
Little change in Scituate inventory (30 units since 2000); Subregion added 800 units (5.5% per year); rents increasing by 5.3% per year in the Subregion



Scituate tax rates average, commercial valuation lowest



Tax Rates per \$1,000 Valuation FY 2019



Sector % of Assessed Value FY 2019

6. Interactive Session

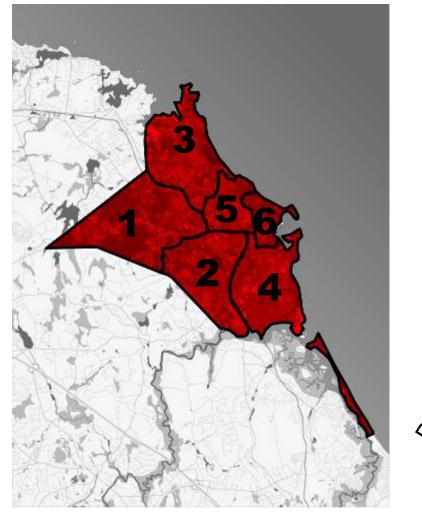
Survey Mapping Role Playing

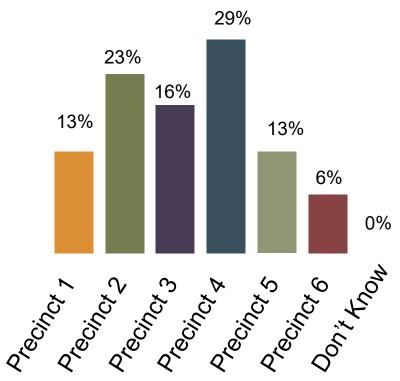


Survey

Which precinct do you live in?

Precinct 1
Precinct 2
Precinct 3
Precinct 4
Precinct 5
Precinct 5
Precinct 6
Precinct 6



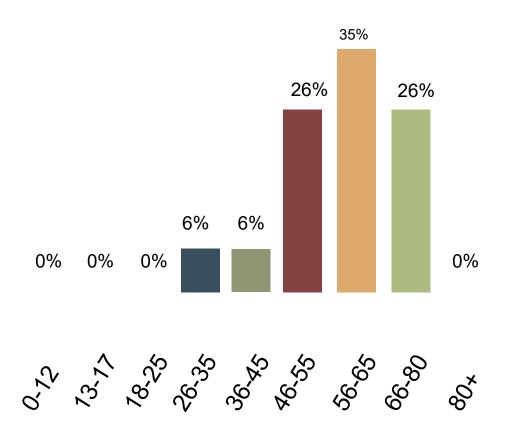




Survey

What is your age group?

1. 0-12	
2. 13-17	
3. 18-25	
4. 26-35	
5. 36-45	
6. 46-55	
7. 56-65	
8. 66-80	
9.80+	



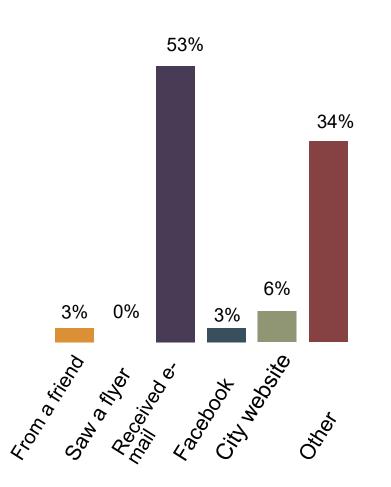




Survey

How did you hear about this forum?

- 1. From a friend
- 2. Saw a flyer
- 3. Received e-mail
- 4. Facebook
- 5. City website
- 6. Other





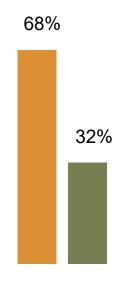




Have you attended one of the previous forums?

1. Yes

2. No









Interactive Sessions

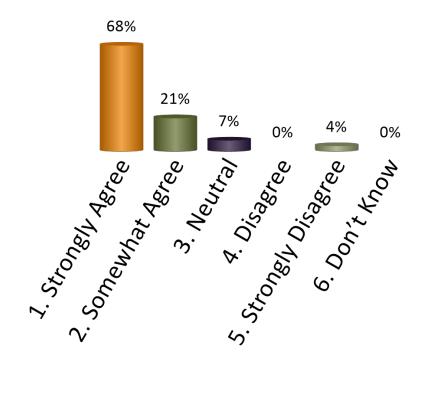
The goal of this activity is to build consensus toward a strategy for improving Scituate's resiliency by responding to hypothetical scenarios through the perspectives of various stakeholder and community groups





How strongly do you agree with the need to attract a younger working population (25-55 years) to contribute to the Town's tax base and its economic vibrancy in the future?

- **1. Strongly Agree**
- 2. Somewhat Agree
- 3. Neutral
- 4. Disagree
- 5. Strongly Disagree
- 6. Don't Know



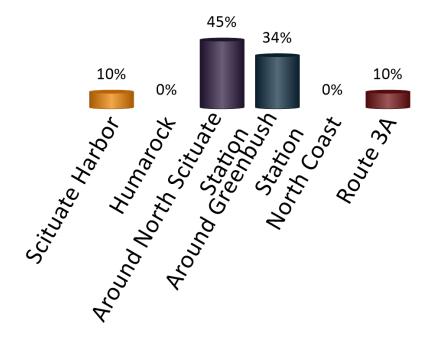




Survey – Commercial Development

Where do you think it is the <u>highest</u> <u>priority</u> area where Scituate should develop commercial and retail opportunities?

- 1. Scituate Harbor
- 2. Humarock
- 3. Around North Scituate Station
- 4. Around Greenbush Station
- 5. North Coast
- 6. Route 3A



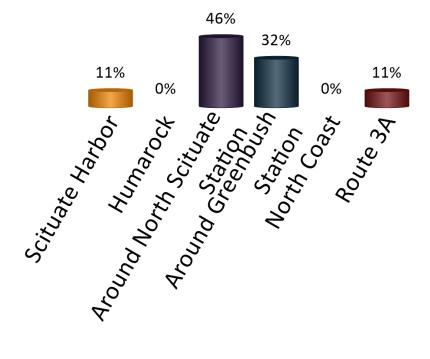




Survey – Housing Development

Where do you think it is the <u>highest</u> <u>priority</u> area where Scituate should develop housing opportunities?

- 1. Scituate Harbor
- 2. Humarock
- 3. Around North Scituate Station
- 4. Around Greenbush Station
- 5. North Coast
- 6. Route 3A





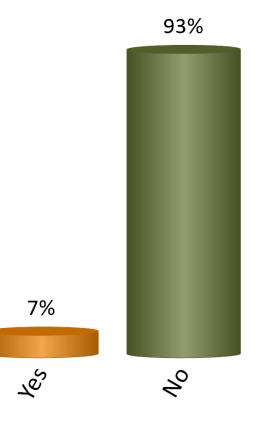


Survey – Commercial and Housing Development

Did your perspective about the locations for housing and commercial development in Scituate change after the exercise?

1. Yes

2. No







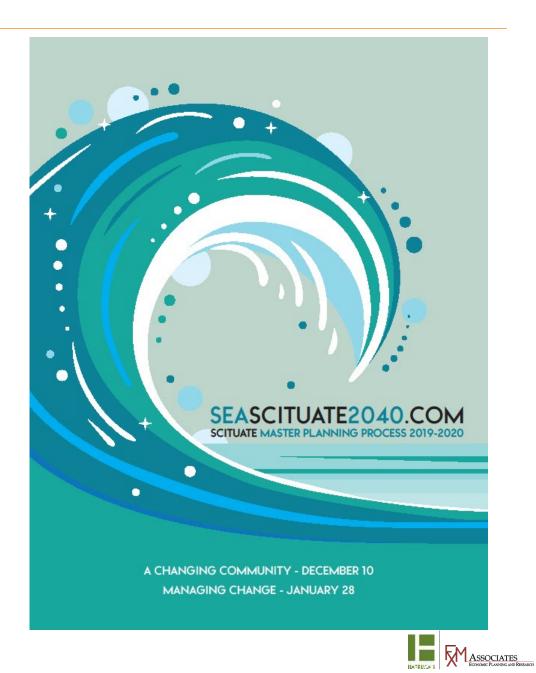
September – **D**ecember

Master Plan Committee Meetings

Research and Analysis

Begin Master Plan Draft

January 28 – Community Forum #4 (Managing Change)



HOWARD STEIN HUDSON

Town of Scituate Comprehensive Master Plan Update

Community Forum #3 December 10, 2019

A Changing Community Workshop