VISIONING, BRANDING, WAYFINDING, & BUSINESS DEVELOPMENT PLAN

Ware
MASSACHUSETTS

Ware, Massachusetts

Visioning, Branding, Wayfinding & Business Development Plan

Town of Ware, Massachusetts

Prepared by:

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1   Introduction

The Town of Ware, with funding from the Edward and Barbara Urban Foundation, secured Arnett Muldrow & Associates to conduct a broad-based planning exercise for the Ware Community. The plan was led by the Town Planning and Community Development Department in conjunction with the Ware Business & Civic Association (WB&CA). A steering committee of community stakeholders was charged with guiding the consultants through the planning process.

The effort is intended to build off of the ongoing comprehensive Master Plan process that began in early 2013. Guided by a steering committee, the Master Plan has been a community-driven project with ongoing public outreach; the end result of which will be a comprehensive plan for the future growth and development of the Town of Ware.

This Visioning, Branding, Wayfinding and Business Development Planning effort is also the result of a stakeholder driven process which began in October of 2014, and finished in March of 2015.

1.1   Plan Elements

This project has completed four specific elements of the Master Plan:

- **Community Vision** – Building on the outreach efforts of the Master Plan, including its SOAR Analysis (Strengths, Opportunities, Aspiration, Results), a collaborative vision and core values was created to guide the future of the Town of Ware.

- **Community Identity** – Using the community vision as a foundation, a consistent market position and branding strategy was created for the Town of Ware. This includes a brand statement, graphic identity, tag line and overall message that present the Town's vision and core values. It is accompanied by specific marketing strategies to promote the community. The Community Identity recommendations are included in a separate deliverable that includes all graphic and logo resources, as well as a style guide with recommendations for implementation. This is an appendix of this report.

- **Wayfinding** – The third element was the creation of a series of directional signage to direct locals and visitors to the various civic, cultural, and recreational destinations that exist in the Ware community. A wayfinding manual has been created including templates for design elements, sign locations and content. This is also included as an appendix to this report.

- **Business Development Strategy** – This project is designed to be a market-based planning effort, and includes a comprehensive market analysis that begins with a market definition study to determine Ware's true trade areas, and ends with detail on growth opportunities within the community based on market demand. This is followed by a business development work plan for the Town that focuses on business growth, downtown revitalization, market positioning, and partnerships.

1.2   Background Input

Over the course of project, key stakeholders were engaged to discuss the future of Ware as well as the community's overall identity. This input occurred in one-on-one meetings and focus group sessions with the steering committee, business leaders, partner agencies, community residents, area industries, tourism and recreation representatives, elected leaders, and the general public. Key points from this community input are outlined below. It should be noted that this is what was conveyed to Arnett Muldrow by stakeholders, some of which had differing viewpoints.

What We Heard

- It was stated that Ware has growing social issues related to low income housing, lack of transportation, crime, drug use, and aging population.

- Some felt that the school system is declining through school choice, which affects Ware's quality of life, opportunities for new businesses, and ability to grow.

- Others stated strongly that this was a misconception, and particularly that the new administration at Ware Public Schools have done an excellent job of turning the tide and improving the school system.

- The current challenge is more with the perception of the school system, and people's lack of awareness in the quality of Ware's schools.

- Downtown Ware, the area generally along Main Street from its intersection with West Street to the Millyard, is declining with continued disinvestment, vacancy, and blight. This includes parking, and lack of maintenance in both public and private properties.

- Some felt that downtown was a lost cause, with the need for new investment to be pushed to West Street. However, the majority of stakeholders, while realizing downtown's current condition, felt strongly that the Ware community must refocus on downtown to improve quality of life, create a vibrant commercial environment, and build a destination for Ware citizens and visitors.

- Similar potential was seen for the Millyard district, and stakeholders felt that its unique architecture and layout offered an opportunity to redevelop the district in ways seen in nearby textile and mill sites within the region. Still, the Millyard has major infrastructure needs particularly with sewer, and some of the buildings in the lower Millyard may be deteriorated beyond repair.

- In terms of potential for Downtown and the Millyard, an opportunity may be to grow Ware's creative economy, using the success of Workshop 13 as an anchor. The town and region have a number of creative artists and artisans who need a place to both practice and sell their creative works.

- Similarly, there is a great opportunity to grow outdoor activity and recreation with the Quabbin Reservoir, the new Rail Trail, Grenville Park, and Ware's public parks. In doing so, the Town of Ware would become the foundation of the outdoor experience.

- As the largest town in the immediate region, Ware was historically and continues to be the economic center of a larger rural area. The market research included later in this report shows Ware's current geographic pull, and past commercial growth has seen national chains (Walmart, Lowe's) choose to invest in Ware.

- Still, while Ware has seen commercial investment, it has small town competitors in terms of character. Ware has a distinct industrial heritage and feel while other nearby communities have more of a traditional New England village character.

- Just like commerce, Ware has many services these nearby areas do not such as fire & safety, excellent health care system, financial services, and employment.

- Businesses appreciate the efforts of the Ware Business & Civic Association (WB&CA). The organization has built credibility among its partners, as well as a positive momentum.

- Still, while the WB&CA is a great grass-roots business organization, there is a lack of an economic and business recruitment entity in Ware. This is very common in communities like Ware. It was stated that the Town does not have the capacity to do this and regional entities such as the Quaboag Chamber may focus efforts elsewhere within the region.

- The Quaboag Valley Community Development Corporation (QVCDC) and Business Assistance Corporation currently provide technical assistance and loans to small businesses. Stakeholders mentioned this as a positive and also felt there may be an opportunity to grow other business support and development services.

- Similarly, the WB&CA, Town, and private sector have been responsible for some very positive changes in recent months. This includes Workshop 13, 250th anniversary celebration, Ware Fall Fest, restoration of the town fountain, construction of the new Fire Station, and a growing volunteer base.

- Still, some residents continue to be threatened by change. Or rather they have such a lack of self-esteem in the community, that they don't feel change is possible.

- Finally, there is a general lack of faith in this community in the Town government's ability to cause positive change. Many felt the Town:

  - Is "difficult" to do business in, making it a challenge to operate business with various fees and strict codes. Many felt that the Town discourages business and growth, is heavy handed in dealing with business, and is not willing to work with them.

  - Is lacking in proactive planning and foresight to move Ware into the future.

  - Lacks the understanding of a responsibility in investing in public infrastructure.

  - Provides limited input on key issues through the Town Meeting and committee representation. Departments are often not open or available to help citizens & business.

Broad Needs for Ware

Numerous needs, businesses and activities were mentioned by stakeholders, including:

- Branch of Higher Education	- Industrial Park/ growth of industry
- Hotel and new lodging	- Senior housing, Nursing home
- Child care center	- Farmers Market downtown
- More hiking trails and recreation	- Downtown events
- Art galleries	- Organic grocery
- Variety of new restaurants, coffee shop	- Applebee's, Chili's
- Specialty shopping in downtown	- Motorcycle dealer/service
- Microbrewery	- Improved parking downtown
- Cabela's	- Small independent outfitter

2   Ware Community Vision

This section represents a long-term vision for the Ware Community. It is founded on broad goals developed in conjunction with the Master Plan Steering Committee, the steering committee for this project, and Ware citizens. This vision is the culmination of ongoing public and stakeholder discussion, and presents a collaborative vision and set of core values to guide the future of the Town of Ware.

2.1   Ware Community Vision

Based on the continued dialogue of stakeholders, public, and steering committee, the following vision statement has been drafted:

Ware, Massachusetts is a vibrant and growing community where our citizens are proud of the town we call home. Our hometown is one where we meet at unique shops and businesses in our revitalized downtown, where a growing diverse economy is being cultivated, where we respect the land and enjoy unrivaled outdoor recreation opportunities, and where our government and its partners work together to provide efficient and up-to-date services for all of our citizens. We are committed to revitalize and improve our community.

2.2   Strategic Elements and Goals

All stakeholder and public input has fallen into six common themes as identified below. Each of these themes represents a different element of Ware's collaborative vision. As part of a strategic vision, there are three goals established for each theme.

Photo Credit: Jack Casio

1 - We Are Ware

Destination - Ware is a destination for commerce, culture, and recreation, while providing an excellent quality of life for its citizens.

Scenic - Ware is nestled amongst scenic hills, the Quabbin Reservoir, and the flowing waters of the Ware River.

Aspiration - We are a community with high aspirations, where our citizens create positive change.

2 - Downtown

Pleasant - The Town coordinates with businesses to create a pleasant environment with a clean, attractive, and well-lit streetscape.

Diverse - Downtown becomes more diverse through enhanced marketing and business recruitment by stakeholders.

Walkable - Downtown is more pedestrian friendly, with improved crosswalks, a rail trail, and an attractive streetscape.

3 - Prosperity

Collaboration - The WB&CA becomes the conduit for property owners and the Town to work collaboratively to better utilize properties.

Infrastructure - Infrastructure improvements are made to our sewer lines, transit, streets, and sidewalks, and natural gas is added.

Investment - The Town proactively plans for new investment through guidelines, regulations, and readiness for grant funding.

4 - Vibrant

Culture - The community supports expanded educational opportunities that provide a broad cultural base including arts and music.

Education - The community coordinates with various partners to increase career opportunities, e.g. opening a college satellite campus.

Gatherings - Ware becomes more active with a variety of opportunities for healthier living and spaces for socializing.

Photo Credit: Jack Casio

5 - Adventure

Greenway - The rail trail grows to connect Hardwick to Palmer; Ware and its downtown become the hub of an active trail network.

Quabbin - Ware solidifies itself as the place where the Quabbin outdoor experience begins.

Activity - Ware becomes the destination for outdoor recreation, with many activities and outdoor-based businesses.

Photo Credit: Jack Casio

6 - Engaged

Connected - Ware citizens increase engagement in civic functions, partnering with the Town government to improve our town.

Awareness - People are aware of our improving local assets such as safe streets, active bikeways, and connection to the environment.

Pride - Ware builds community pride through the active involvement of the people of Ware.

3   Market Analysis

This chapter presents the findings of the market analysis for the Town of Ware. The market definition section of this report provides a description of the geography of Ware's customer base, and the individual market studies present specific business recruitment and development opportunities. The data will prove to be useful to Ware, its partners, as well as to individual businesses and property owners looking to make investments in the community.

3.1   Market Definition

The market definition exercise establishes the **true** geography of the retail trade area for Ware and provides the baseline data for the subsequent analyses. In order for the conclusions to be accurate, it is important that the market analysis reflect the consumer habits within Ware's trade areas rather than arbitrary study areas such as political boundaries and drive-time scenarios. Therefore, the process began with a zip code survey of customers to determine the market base relevant to Ware and its businesses. This includes determining its place within the larger region and nearby competitive markets.
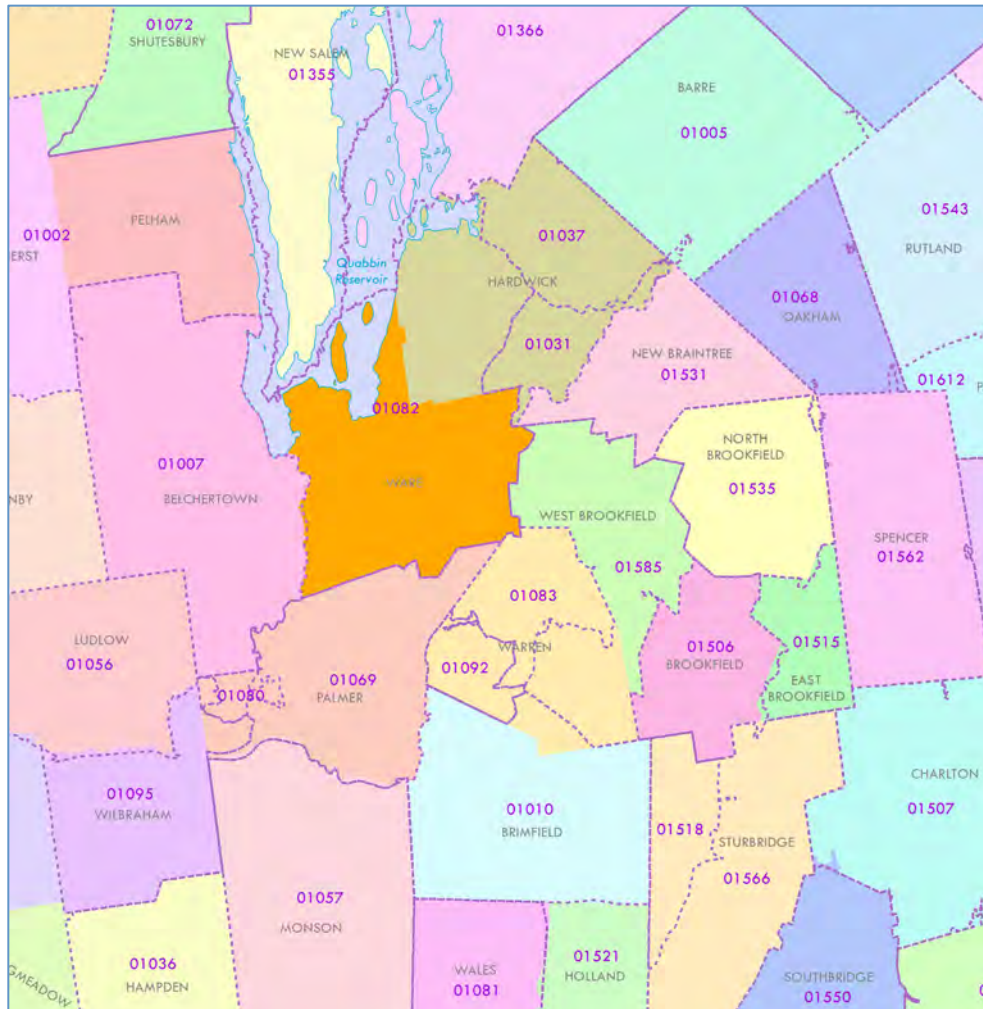
Figure 1: Map of Region and Zip Codes. Source: Argis.com.

Figure 2: Zip code survey instrument. Arnett Muldrow & Associates.

Survey Participation

Arnett Muldrow enlisted the assistance of area businesses to track consumers. During a one-week period, thirty-three businesses tallied the resident zip codes of their customers.

Each business was provided a form to record zip codes and was asked to keep a log of its customers.

Zip Code Survey Results

- The survey was held the week of October 16th through October 22nd.
- The thirty-three businesses that participated included a cross section of those in Ware including:

  - Restaurant   - Clothing   - Personal Care   - Jewelry

  - Auto Service   - Auto Dealer   - Textile Outlet   - Appliance

  - Antiques   - Banking   - Finance   - Sporting Goods

  - General Merchandise - Pharmacy   - Electronics   - Gift Shop

- 3,593 individual customer visits were recorded during the survey week, an average of 109 per business.
- These customers came from 137 unique zip codes and 14 unique states.

The tables below show the results of the zip code survey as compared to peer communities in which Arnett Muldrow has performed similar analyses. The communities selected are either located in New England, are of similar size to Ware, are near urban markets, are former mill towns, or have little or no interstate access. They present a comparison of total unique visitors from different zip codes and different states. It should be noted that the other communities may have had a different number of businesses participate or may have conducted the survey at a different time of year.

In general, communities that have a broad geographic market are shown to the left on the charts (more zip codes and states), and those with a stronger local market base are shown to the right. For the purposes of these charts, Ware is identified with red bars.
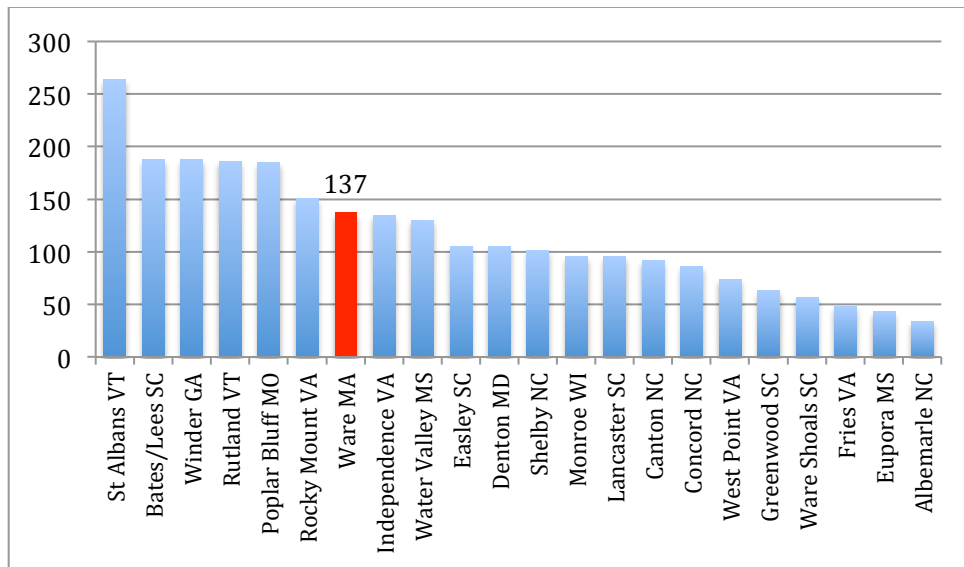
Figure 3: Comparison of unique zip codes recorded during zip code survey.

During the survey week, participating businesses had 137 unique zip codes.   The data ranges from 264 in St Albans, VT to just 34 in Albemarle, NC. When compared to peer communities,

Ware is in the upper third suggesting a market that likely pulls from a broader geographic consumer base than many of its peers.
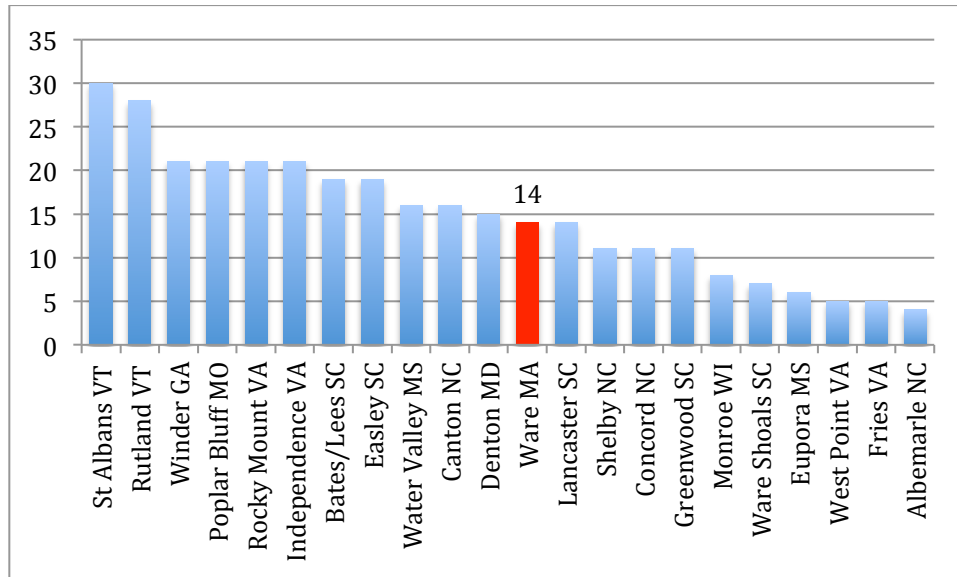
Figure 4: Comparison of unique states recorded during survey period.

Ware had customers from 14 unique states during the survey week. This is in the middle third of peer communities, and suggests Ware's geographic reach, while broad, likely comes from the surrounding geographic region.

Customer Base

The chart below shows Ware's customer base broken down by place of residence. The chart identifies the **primary zip code,** not the municipal boundary**.** For example, while the Town of Hardwick may include multiple villages (Hardwick, Gilbertville, etc), it represents individual zip codes for Hardwick (01037) and Gilbertville (01031).
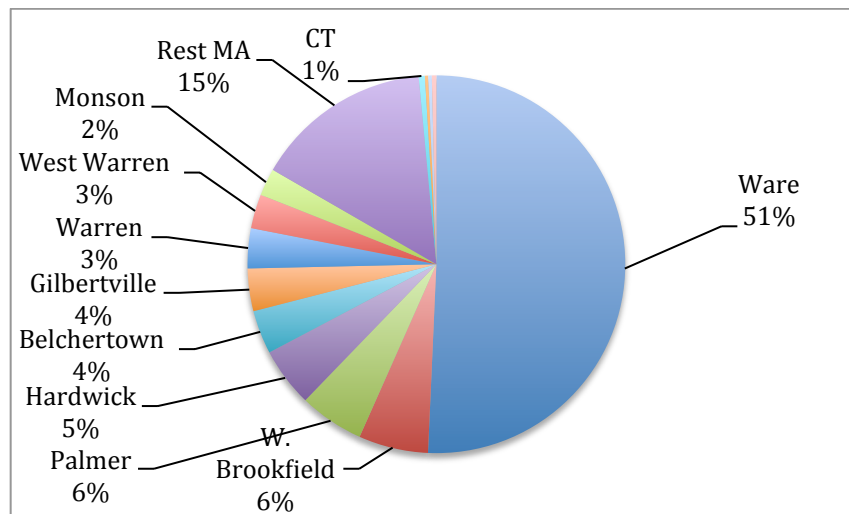
Figure 5: Percentage of Customer Visits – ALL BUSINESSES

- 51% of the customers came from the primary 01082 Ware zip code. This is somewhat typical in a community like Ware, but also shows that Ware's bread and butter market is its local citizenry.
- West Brookfield (01585) and Palmer (01069) were the next largest consumer bases with 6%.
- Outside of the Ware zip code, market penetration is fairly evenly spread across the zip codes that surround the community.
- 84% of all customers came from Ware or adjacent zip codes.
- 97.7% of customers reside in the three county area of Hampshire, Worcester, Hampden.

Local Market by Business:

The data presented above represent Ware businesses as a whole. However, individual businesses typically show different trade patterns. The chart below show the Town of Ware market by individual businesses for each of the thirty-three businesses that participated. The average of all businesses is shown in red.
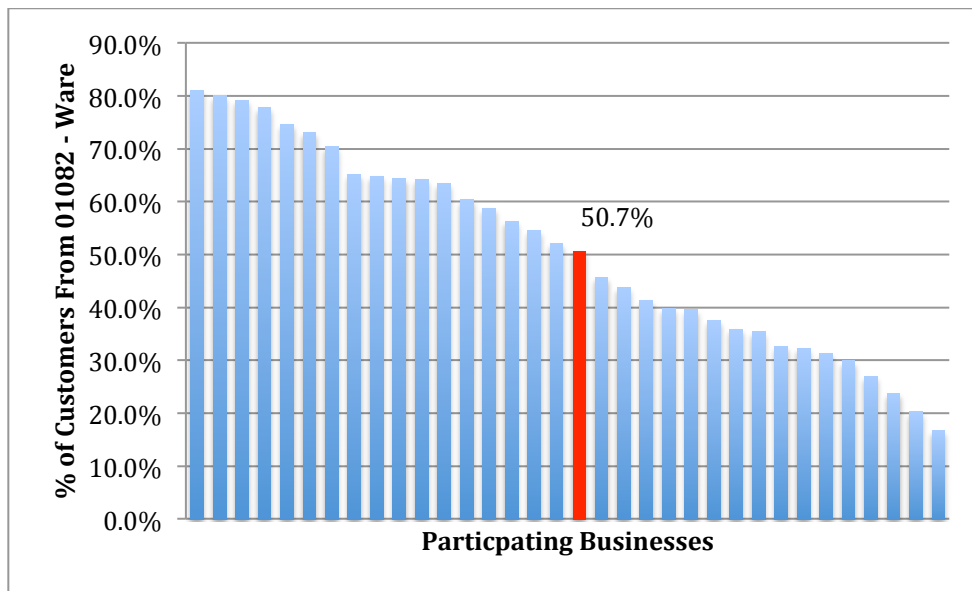
Figure 6: Percent Ware by Business

Participating businesses had an average of 50.7% of customers living within the 01082 Ware zip code, ranging from 16.8% to 80.9% depending on the business.

Just 2.3% of all customers during the survey week could be considered "visitors". These customers reside outside of the three-county region of Hampshire, Hampden, and Worchester. They could be regional visitors from nearby Hartford, CT, or they could be a true tourist from Florida, Ohio, or beyond. Regardless, the 2.3% visitor figure is extremely low compared to peer communities.

Customer Base by Business Type and Business Location

The customer base varies slightly when compared by the various business types. When broken down in this manner, the sample size of each category is small, but the data does confirm expectations. For example, personal care would have a localized base while retail serve a broader geography.
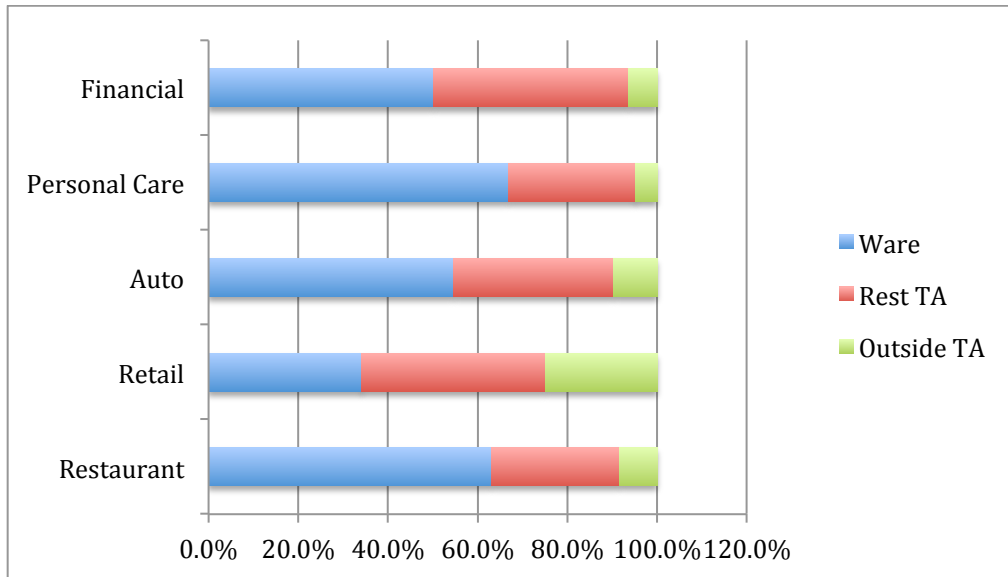
Figure 7: Location of Ware Customers by TYPE of Business.

Each category is broken down below by the percentage of the customer base represented by residents of Ware and three counties.

Financial

- 50.2% Ware - 01082
- 43.4% Adjacent zip codes
- 6.3% - rest of customer base

Personal Care

- 66.8% Ware - 01082
- 38.3% Adjacent zip codes
- 4.8% rest of customer base

Retail
- 34.1% Ware - 01082
- 40.9% Adjacent zip codes
- 24.0% - rest of customer base

Restaurants
- 63.1% Ware - 01082
- 28.5% Adjacent zip codes
- 8.3% - rest of customer base

In a sense, these numbers show common trends. Businesses such as personal care and financial services will serve residents primarily that live within a community. Retail and restaurants have the potential to have a broader geographic base. For example, just 4.8% of personal care customers live outside the three-county region while 24% of retail businesses have customers from outside. Moreover, *destination* businesses truly have the potential to pull in the broadest overall base including true tourists. As an example, a destination restaurant like

Rose32 in Gilbertville will serve a local and tourist market while a McDonald's will serve consumers more on a convenience basis. Of course, both restaurant types are important to a healthy consumer market. A "destination" restaurant does not always mean a high-priced or high-end restaurant. Rather, it would be business that is unique within the area, has a great atmosphere, and generates activity. Janine's Frostee is a great example. It serves reasonably priced foods in a great environment, and even programs cruise-in events or sponsors special nights like "Polish Night" with special menus.

Similarly, creating a destination environment such as a vibrant downtown district will complement more localized retail that may be found in and around a community's big-box districts. While downtown Ware may not currently be considered a "destination", it does pull in a broader overall market. Again, destination districts like a downtown can and should coexist in a community with big-box retail.
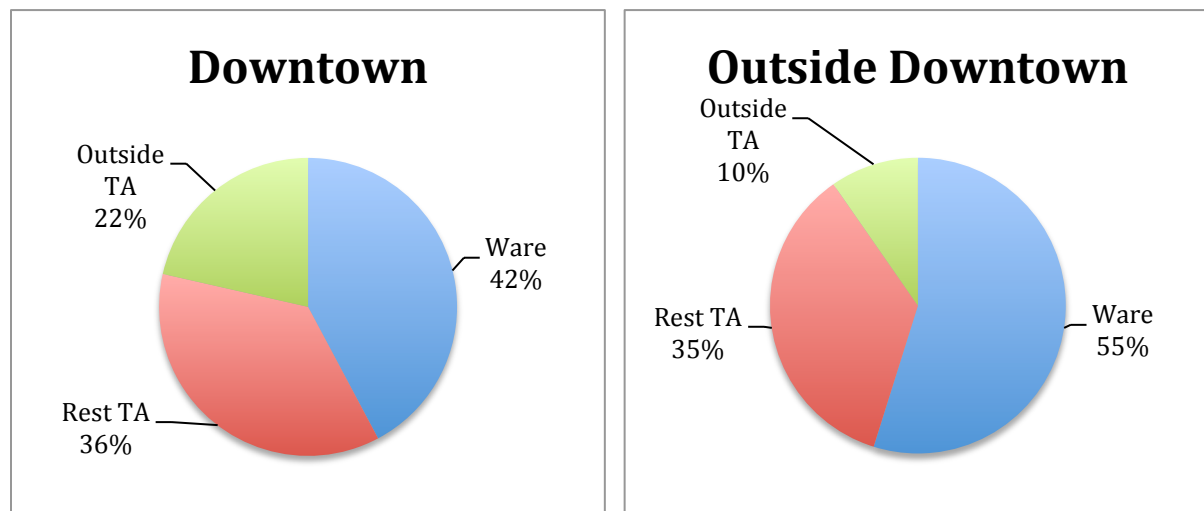
Figure 8: Location of Ware Customers by LOCATION of Business.

Downtown

- 42% Ware Zip Code
- **36% Adjacent zip codes**
- **22% - rest of customer base**

Outside of Downtown

- **55% Ware**
- 35% Adjacent zip codes
- 10% rest of customer base

Ware's customer base varies by business type and location.
- Overall, retail establishments (jewelry, clothing, antiques, gifts, etc), have the broadest overall market in terms of business type, whereby nearly a quarter of their customers come from outside of the immediate region, the three-county area surrounding Ware.
- Similarly, Downtown has a broader overall market than those businesses outside of downtown. 22% of downtown consumers live outside of the immediate region.

3.2 Trade Area Definitions

The data above were presented simply as totals from each individual zip code. However, zip codes vary by geographic area and total population and cannot be analyzed by total visits alone. For example, there were 64 visits from New Braintree (01531) and 199 from Palmer (01069). This may suggest that Ware has a deeper penetration into Palmer than New Braintree. However, the total population of the Palmer zip is nearly ten times that of the population of the New Braintree zip. Therefore, there is a much deeper penetration into New Braintree (relative to its population) than Palmer.

In other words, market penetration cannot be determined simply by the total number of visits but by visits in relation to population. The table below shows customer visits per 1,000 residents for each of the highest representative zip codes.

Zip Code	Area	2010 Pop	Visits	Visits/1000 Pop
01082	Ware	10917	1822	166.90
01083	Warren	1452	123	84.71
01031	Gilbertville	1811	131	72.34
01037	Hardwick	2990	182	60.87
01531	New Braintree	1209	62	51.28
01092	West Warren	2580	105	40.70
01585	West Brookfield	6048	214	35.38
01069	Palmer	12140	201	16.56
01057	Monson	8552	84	9.82
01005	Barre	5390	51	9.46
01007	Belchertown	14690	134	9.12
01009	Bondsville	1929	17	8.81
01010	Brimfield	3918	30	7.66
01080	Three Rivers	2393	15	6.27
01068	Oakham	1958	11	5.62
01506	Brookfield	3350	18	5.37
01535	North Brookfield	4696	18	3.83
01036	Hampden	5086	13	2.56
01562	Spencer	11694	18	1.54

Figure 9: Primary and Secondary Trade Areas. Visits per 1,000 population

Because the number and type of participating businesses vary from community to community, no specific number determines the primary and secondary trade areas. However, when comparing visits per 1,000 population in relation to the time frame in which the survey was conducted, breaks in the visits per 1,000 will begin to emerge. Whenever these breaks become significant, this determines the differences in trade areas.

By this measure, Ware's **Primary Retail Trade Area (PTA)** is defined as the Ware zip code (01082).   This zip had more than 166 customer visits per 1000 residents. Customers from this zip code represented **52%** of the total visits during the survey period. Typically, a trade area is more than one individual zip code.   This analysis is another indicator of a locally oriented customer base from Ware.

Six additional zip codes had more than 35 visits per 1000 residents and made up Ware's **secondary trade area**; Warren (01083), Gilbertville (01031), Hardwick (01037), New Braintree (01531), West Warren (01092), and West Brookfield (01585). Customers from these zips represented **23%** of the total visits during the survey period.

The map below illustrates the trade areas for Ware. The primary trade area is shown in orange, and the secondary is shown in purple.
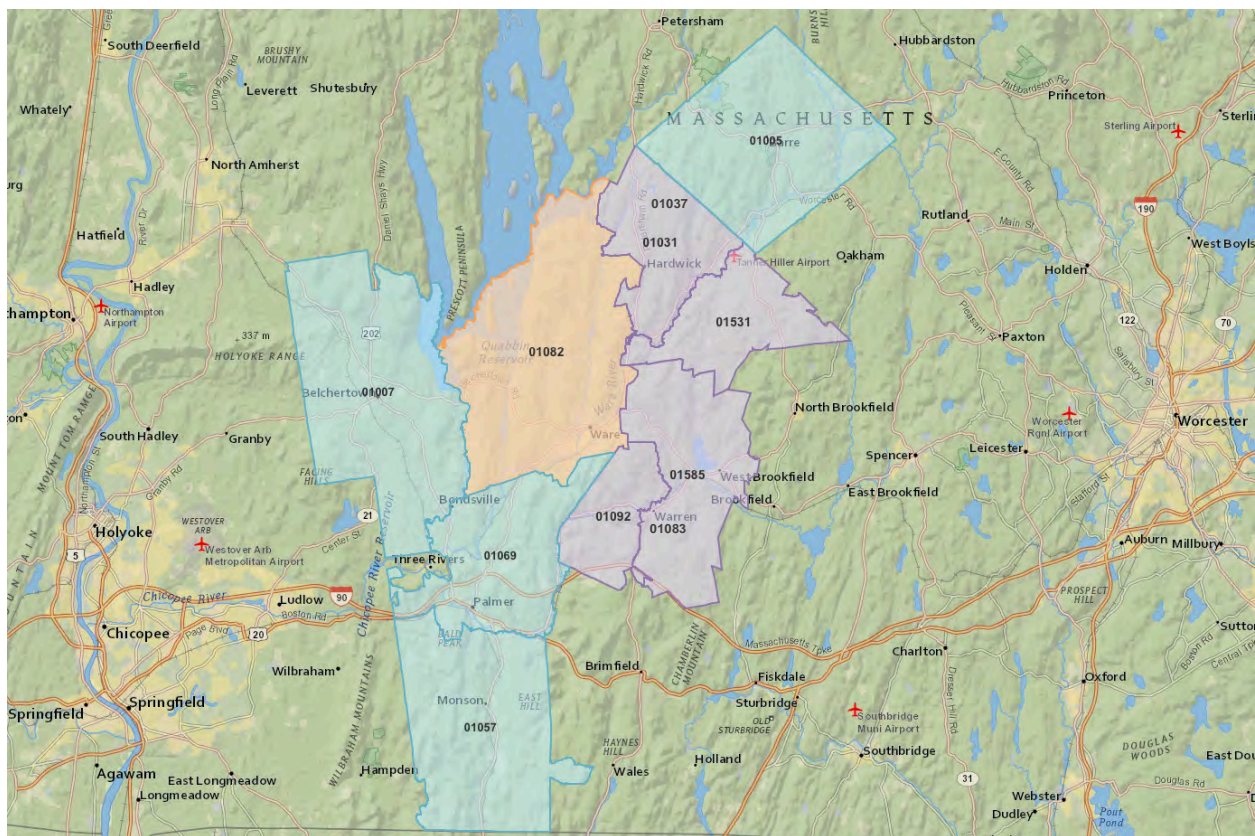
Figure 10: Ware PTA (orange) and STA (purple) trade areas.

The area in light blue in the map above represents a "tertiary" trade area. These four additional zip codes are ones that fall outside of Ware's local trade area, but with greater than 9 visits per 1000 populaiton. Ware businesses are performing well in these zips comparatively. All told, the PTA, STA, and tertiary trade area represent 88% of Ware's customer base.

Once again, it should be noted that the zip code areas above do not correspond with municipal boundaries. In most cases the zip code covers a town and unincorporated areas surrounding.

Market Definition Conclusions:

• Ware has a local oriented market. 51% of customers live in the Ware zip code and 76% live in the primary and secondary trade areas.

• Ware's primary and secondary trade areas reach out generally to the East, and comprise a population base of approximately 27,000 residents.

• The primary trade area is the 01082 Ware zip code, while the secondary trade area is six additional zip codes. This is somewhat out of the ordinary when the trade areas cover a broad geographic area and a total of seven zip codes, with just the main zip code being the primary trade area.

• Ware's market is likely affected by the Quabbin to the north, the Massachusetts Pike that is located closer to communities like Palmer, as well as the Springfield metro area.

• Just 2.3% of Ware's customers come from outside of the three counties of Hampshire, Worcester, and Hampden. This visitor base is extremely small and uncommon in peer communities, but also confirms Ware's strong local customer base.

• Downtown Ware, on the other hand, does see nearly a quarter of its customer base residing outside of the local trade areas.

• It should be noted that the big-boxes (Walmart, Lowes) at Gibb's Crossing did not participate in the zip code survey. Due to corporate regulations, it is always difficult to get these businesses to share trade information. In rural areas like Ware however, Walmarts are often regional attractors and have the potential to pull in consumers from a much larger region, but particularly get more local customers from nearby communities with no Walmart. It therefore can reasonably be assumed that had Walmart participated, there would be a much larger number of customers coming from Palmer, Belchertown, Monson, etc. If this were the case, Palmer in particular may show up in Ware's trade area, or at least the trade area for Walmart itself.

• This is important when we consider that Ware does have decent penetration into these nearby competitive markets of Palmer, Belchertown, Monson, and Barre. This tertiary trade area represents 13% of the market, and adds another 50,000 population that is relevant to Ware businesses.

3.3 Retail Market Analysis

Ware and its commercial offerings serve the market defined in the previous section.   The primary and secondary trade areas in particular are the basis for the analysis below. In this section, Ware's retail market is examined to identify potential opportunities for retail growth through three key studies:

1. A **retail leakage** gap analysis that will look at the primary and secondary trade areas to see how much money is "leaking" from the area to stores in other areas.

2. From this, a **space demand analysis** will be developed to illustrate how much retail space could potentially be brought back into Ware based on the demand in the market.

3. A **retail shares** analysis that examines performance of retail stores in Ware's trade areas as a benchmark of the larger regional trade area.   This study will seek to determine if there are any retail-clustering opportunities for the community.

Retail Leakage Analysis

"Retail Leakage" refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by the stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside the area are said to be "leaking." If a community is a major retail center with a variety of stores, it will be "gaining" rather than "leaking" retail sales. Even large communities may see leakage in certain retail categories.

The data presented below come from Claritas, Inc., a national retail marketing service used by town planners, retail and restaurant site planners, and national chains for their market research. Claritas gets its data from a number of sources. Sales expenditures primarily come from the Census for Retail Trade gathered on a county level by the US Census Bureau. Claritas updates the data each year using local trade associations, local sales tax data, wage and employment data, then allocates it to block group levels. Overall, the sales data come from the following sources: Census of Retail Trade; Annual Survey of Retail Trade; Claritas Business Facts; Census of Employment and Wages; Sales Tax Reports; and various trade associations.

Retail Leakage in the Primary and Secondary Trade Areas

For the year 2013,

- Stores in Ware's primary trade area sold $201 million in merchandise. Consumers living in Ware's PTA spent $180 million in merchandise. Therefore, Ware's PTA **gained $21 million** in sales last year.

- Stores in Ware's secondary trade area sold $26 million in merchandise, while residents in the same area spent $212 million in merchandise. Therefore, STA **leaked $185 million** in sales last year.

- This represents a combined trade area leakage of $163 million

- The Town of Ware gained over $80 million, indicating that while its trade areas show significant demand, Ware is pulling in customers from outside of the Town limits. However, virtually all of this gain is in grocery, general merchandising (Walmart), and home centers (Lowes). Almost all other categories show demand.

Leakage translates to opportunity based on current demand, and often suggests key commercial segments for a community to recruit. The table beginning on the following page details the consumer expenditures, retail sales, and inflow/outflow of dollars by individual retail category within the local trade areas.

Opportunity Gap - Retail Stores	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
Total Retail Sales Incl Eating and Drinking Places	**179,505,188**	**201,250,642**	**-21,745,454**	**211,757,001**	**26,477,638**	**185,279,363**
Motor Vehicle and Parts Dealers-441	**31,755,790**	**14,693,777**	**17,062,013**	**38,324,755**	**2,147,418**	**36,177,337**
Automotive Dealers-4411	25,601,225	8,555,629	17,045,596	32,318,535	1,128,877	31,189,658
Other Motor Vehicle Dealers-4412	3,383,790	861,205	2,522,585	2,774,980	479,785	2,295,195
Automotive Parts/Accsrs, Tire Stores-4413	2,770,775	5,276,943	-2,506,168	3,231,240	538,756	2,692,484
Furniture and Home Furnishings Stores-442	**3,572,427**	**358,401**	**3,214,026**	**4,292,076**	**719,929**	**3,572,147**
Furniture Stores-4421	1,887,442	242,086	1,645,356	2,298,338	719,929	1,578,409
Home Furnishing Stores-4422	1,684,985	116,315	1,568,670	1,993,738	0	1,993,738
Electronics and Appliance Stores-443	**3,316,612**	**3,492,919**	**-176,307**	**3,789,398**	**0**	**3,789,398**
Appliances, TVs, Electronics Stores-44311	2,412,213	2,442,261	-30,048	2,738,331	0	2,738,331
Household Appliances Stores-443111	451,111	1,387,576	-936,465	512,374	0	512,374
Radio, Television, Electronics Stores-443112	1,961,102	1,054,685	906,417	2,225,957	0	2,225,957
Computer and Software Stores-44312	807,017	1,050,658	-243,641	926,603	0	926,603
Camera and Photographic Equipment Stores-44313	97,382	0	97,382	124,464	0	124,464
Building Material, Garden Equip Stores -444	**19,209,529**	**22,774,542**	**-3,565,013**	**22,343,966**	**5,942,404**	**16,401,562**
Building Material and Supply Dealers-4441	16,379,270	7,564,012	8,815,258	19,221,068	5,627,436	13,593,632
Home Centers-44411	6,607,633	6,399,153	208,480	7,752,292	0	7,752,292
Paint and Wallpaper Stores-44412	275,858	0	275,858	325,151	0	325,151
Hardware Stores-44413	1,663,586	113,891	1,549,695	1,896,963	1,457,809	439,154
Other Building Materials Dealers-44419	7,832,193	1,050,968	6,781,225	9,246,662	4,169,627	5,077,035
Building Materials, Lumberyards-444191	3,001,131	393,311	2,607,820	3,493,858	1,560,424	1,933,434
Lawn, Garden Equipment, Supplies Stores-4442	2,830,259	15,210,530	-12,380,271	3,122,898	314,968	2,807,930
Outdoor Power Equipment Stores-44421	893,916	12,637,075	-11,743,159	869,209	314,968	554,241
Nursery and Garden Centers-44422	1,936,343	2,573,455	-637,112	2,253,689	0	2,253,689
Food and Beverage Stores-445	**23,080,974**	**81,682,307**	**-58,601,333**	**26,678,889**	**2,431,279**	**24,247,610**
Grocery Stores-4451	15,342,155	34,161,346	-18,819,191	17,639,970	1,557,451	16,082,519
Supermarkets, Grocery (Ex Conv) Stores-44511	14,283,409	32,289,299	-18,005,890	16,456,077	1,226,007	15,230,070
Convenience Stores-44512	1,058,746	1,872,047	-813,301	1,183,893	331,444	852,449
Specialty Food Stores-4452	1,878,126	31,484,687	-29,606,561	2,169,355	0	2,169,355
Beer, Wine and Liquor Stores-4453	5,860,693	16,036,274	-10,175,581	6,869,564	873,828	5,995,736

Opportunity Gap - Retail Stores	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
Health and Personal Care Stores-446	**9,531,867**	**19,923,248**	**-10,391,381**	**10,969,676**	**0**	**10,969,676**
Pharmacies and Drug Stores-44611	7,584,348	19,435,170	-11,850,822	8,714,068	0	8,714,068
Cosmetics, Beauty Supplies, Perfume Stores	665,567	0	665,567	764,633	0	764,633
Optical Goods Stores-44613	426,726	155,714	271,012	507,442	0	507,442
Other Health and Personal Care Stores-44619	855,226	332,364	522,862	983,533	0	983,533
Gasoline Stations-447	**18,251,905**	**9,327,315**	**8,924,590**	**21,218,698**	**1,297,845**	**19,920,853**
Gasoline Stations With Conv Stores-44711	13,510,701	8,956,503	4,554,198	15,572,818	0	15,572,818
Other Gasoline Stations-44719	4,741,204	370,812	4,370,392	5,645,880	1,297,845	4,348,035
Clothing and Clothing Accessories Stores-448	**8,197,132**	**3,394,706**	**4,802,426**	**9,738,662**	**252,242**	**9,486,420**
Clothing Stores-4481	4,485,423	3,239,394	1,246,029	5,258,413	252,242	5,006,171
Men's Clothing Stores-44811	240,624	0	240,624	278,831	0	278,831
Women's Clothing Stores-44812	1,057,369	2,407,874	-1,350,505	1,265,743	0	1,265,743
Childrens, Infants Clothing Stores-44813	265,077	0	265,077	296,349	0	296,349
Family Clothing Stores-44814	2,348,500	831,520	1,516,980	2,734,814	252,242	2,482,572
Clothing Accessories Stores-44815	192,442	0	192,442	230,325	0	230,325
Other Clothing Stores-44819	381,411	0	381,411	452,351	0	452,351
Shoe Stores-4482	673,073	155,312	517,761	754,423	0	754,423
Jewelry, Luggage, Leather Goods Stores-4483	3,038,636	0	3,038,636	3,725,826	0	3,725,826
Jewelry Stores-44831	2,696,742	0	2,696,742	3,329,956	0	3,329,956
Luggage and Leather Goods Stores-44832	341,894	0	341,894	395,870	0	395,870
Sporting Goods, Hobby, Book, Music Stores-451	**3,547,047**	**1,910,363**	**1,636,684**	**3,900,720**	**101,115**	**3,799,605**
Sportng Goods, Hobby, Musical Inst Stores-4511	3,070,808	1,910,363	1,160,445	3,336,117	101,115	3,235,002
Sporting Goods Stores-45111	1,623,444	1,372,903	250,541	1,790,173	101,115	1,689,058
Hobby, Toys and Games Stores-45112	872,807	537,460	335,347	915,507	0	915,507
Sew/Needlework/Piece Goods Stores-45113	284,725	0	284,725	274,783	0	274,783
Musical Instrument and Supplies Stores-45114	289,832	0	289,832	355,654	0	355,654
Book, Periodical and Music Stores-4512	476,239	0	476,239	564,603	0	564,603
Book Stores and News Dealers-45121	411,864	0	411,864	488,984	0	488,984
Book Stores-451211	362,121	0	362,121	432,659	0	432,659
News Dealers and Newsstands-451212	49,743	0	49,743	56,325	0	56,325
Prerecorded Tapes, CDs, Record Stores-45122	64,375	0	64,375	75,619	0	75,619

Opportunity Gap - Retail Stores	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
General Merchandise Stores-452	**21,628,283**	**35,152,794**	**-13,524,511**	**24,851,941**	**1,635,086**	**23,216,855**
Department Stores Excl Leased Depts-4521	9,066,657	18,703,248	-9,636,591	10,450,806	0	10,450,806
Other General Merchandise Stores-4529	12,561,626	16,449,546	-3,887,920	14,401,135	1,635,086	12,766,049
Miscellaneous Store Retailers-453	**5,314,674**	**1,679,947**	**3,634,727**	**5,981,970**	**308,416**	**5,673,554**
Florists-4531	192,151	96,834	95,317	223,918	0	223,918
Office Supplies, Stationery, Gift Stores-4532	2,347,549	393,662	1,953,887	2,719,281	220,670	2,498,611
Office Supplies and Stationery Stores-45321	1,122,992	0	1,122,992	1,319,746	0	1,319,746
Gift, Novelty and Souvenir Stores-45322	1,224,557	393,662	830,895	1,399,535	220,670	1,178,865
Used Merchandise Stores-4533	359,093	989,686	-630,593	422,358	64,239	358,119
Other Miscellaneous Store Retailers-4539	2,415,881	199,765	2,216,116	2,616,413	23,507	2,592,906
Non-Store Retailers-454	**14,556,290**	**0**	**14,556,290**	**16,891,299**	**2,488,853**	**14,402,446**
Foodservice and Drinking Places-722	**17,542,658**	**6,860,323**	**10,682,335**	**22,774,951**	**9,153,051**	**13,621,900**
Full-Service Restaurants-7221	7,853,613	3,734,483	4,119,130	10,299,800	1,455,131	8,844,669
Limited-Service Eating Places-7222	7,094,929	2,587,996	4,506,933	9,116,148	0	9,116,148
Special Foodservices-7223	1,902,982	0	1,902,982	2,440,899	7,314,403	-4,873,504
Drinking Places -Alcoholic Beverages-7224	691,134	537,844	153,290	918,104	383,517	534,587
GAFO*	**42,609,050**	**44,702,845**	**-2,093,795**	**49,292,078**	**2,929,042**	**46,363,036**
General Merchandise Stores-452	21,628,283	35,152,794	-13,524,511	24,851,941	1,635,086	23,216,855
Clothing and Clothing Accessories Stores-448	8,197,132	3,394,706	4,802,426	9,738,662	252,242	9,486,420
Furniture and Home Furnishings Stores-442	3,572,427	358,401	3,214,026	4,292,076	719,929	3,572,147
Electronics and Appliance Stores-443	3,316,612	3,492,919	-176,307	3,789,398	0	3,789,398
Sporting Goods, Hobby, Book, Music Stores-451	3,547,047	1,910,363	1,636,684	3,900,720	101,115	3,799,605
Office Supplies, Stationery, Gift Stores-4532	2,347,549	393,662	1,953,887	2,719,281	220,670	2,498,611
* General Merchandise, Apparel, Furniture & Other						

Figure 11: Retail Leakage by Category in Ware's Primary and Secondary Trade Areas. Source: Claritas, Inc.

The numbers on this page account for all retail business sales and consumer buying power within Ware, including demand for those establishments that do not currently exist in Ware. For example, Ware has no "musical instruments" stores and show $0 in retail sales in that category. However, it does show demand (consumer expenditures) in musical instrument stores. In some cases, there may be only one store of that category in a community. If this is the case, Claritas does not disclose that information because it is considered proprietary trade information for an individual business.

Space Demand Analysis

While there is a certain amount of leakage in specific categories, Ware cannot reasonably expect to recapture 100% of the sales leaking from its trade areas. Residents will continue to go to Springfield and beyond for certain purchases, or buy products online. Therefore, we must use a capture scenario that illustrates the potential for additional retail should some of the lost revenues be captured in the categories where retail leakage exists.

Through strategic recruitment, economic development and marketing, a community can reasonably expect to recapture a certain amount of sales that are leaking out of the area. Typically, a community could capture 20% of leakage from the primary trade area (one in every five dollars) and 10% of the leakage from the secondary trade area (one in every ten dollars). In the case of Ware, we looked at an additional scenario of capturing 15% from the entire trade area (PTA & STA).

The table on the following page illustrates the new or expanded retail space that could be supported in Ware by capturing some of the leaking sales. The table also shows supportable retail space by square footage for individual retail categories. The sales per square foot for retail store types have been obtained from *Dollars and Cents of Shopping Centers*, published by ULI.

Retail Stores	20% of PTA Outflow	10% 0f STA Outflow	Potential Capture	Sales per Square Foot	Calculated Capture	Combined Capture 15%
Selected Retail Categories Below	-2,577,184	10,128,682	7,551,498		67,721	83,979
Furniture Stores	329,071	157,841	486,912	141.84	3,433	3,409
Home Furnishing Stores	313,734	199,374	513,108	167.75	3,059	3,185
Household Appliances Stores	-187,293	51,237		245.44	0	
Radio, Television, Electronics Stores	181,283	222,596	403,879	207.17	1,950	2,268
Computer and Software Stores	-48,728	92,660	43,932	207.17	212	494
Camera and Photographic Equipment Stores	19,476	12,446	31,923	542.63	59	61
Building Material and Supply Dealers	1,763,052	1,359,363	3,122,415	142.38	21,930	23,608
Hardware Stores	309,939	43,915	353,854	121.08	2,922	2,464
Grocery Stores	-3,763,838	1,608,252		371.79	0	
Health and Personal Care Stores	-2,078,276	1,096,968		247.29	0	351
Clothing and Clothing Accessories Stores	249,206	500,617	749,823	164.60	4,555	5,698
Women's Accessory & Specialty	-270,101	126,574		164.60	0	
Shoe Stores	103,552	75,442	178,995	158.81	1,127	1,202
Jewelry Stores	539,348	332,996	872,344	263.92	3,305	3,425
Luggage and Leather Goods Stores	68,379	39,587	107,966	198.82	543	557
Sporting Goods Stores	50,108	168,906	219,014	153.46	1,427	1,896
Hobby, Toys and Games Stores	67,069	91,551	158,620	146.28	1,084	1,283
Sew/Needlework/Piece Goods Stores	56,945	27,478	84,423	74.91	1,127	1,120
Book Stores	72,424	43,266	115,690	161.16	718	740
General Merchandise Stores	-2,704,902	2,321,686		133.90	0	10,858
Florists	19,063	22,392	41,455	149.82	277	320
Gift, Novelty and Souvenir Stores	166,179	117,887	284,066	168.55	1,685	1,789
Foodservice and Drinking Places	2,136,467	1,362,190	3,498,657	201.63	17,352	18,081
Drinking Places -Alcoholic Beverages	30,658	53,459	84,117	88.07	955	1,172

Figure 12: Capture Scenario for Ware. Sources: Claritas, Inc., Dollars & Cents of Shopping Centers, Arnett Muldrow & Associates.

Based on this scenario table, Ware's trade areas show demand for between **67,721 and 83,979 square feet of additional retail space**. The numbers on this page as well as Figure 11 account for all retail business sales and consumer buying power within Ware, including demand for those establishments that do not currently exist in Ware. The retail chart provides more detail on all categories and subcategories.

Retail Shares Analysis

The retail shares analysis compares Ware's primary trade area businesses as proportion of a larger region. This analysis is used to benchmark selected retail categories to determine if particular retail types are underperforming (representing an opportunity for expansion) or performing exceptionally well (representing an opportunity for clustering related businesses around a certain strength).

For the purposes of this study, Ware's primary trade area is compared to a 30-minute drive time from Ware Town Hall. Generally speaking, this area comprises the greater Ware region, including the communities of Ware, Belchertown, Palmer, Hardwick, Gilbertville, the Brookfields, Barre, Brimfield, Petersham, New Braintree, Oakham, and Spencer, among others.

The total sales for all businesses in the primary trade area account for a **21.9%** share of all retail within the region shown above. This is a fairly high percentage, once again showing Ware's market pull from the larger rural region that surrounds the community.

Any category significantly above the benchmark share of 21.9% in the PTA would represent a clustering opportunity. This means that Ware has a larger portion of regional retail sales in that category. That particular category is a regional attractor and there may be the potential for expansion in an effort to build a cluster. There may also be a need to market and position the community as a destination for a particular use.

Anything significantly below the benchmark suggests there is a general lack of supply in that category. This would point us back to the retail leakage study to determine if there is enough opportunity to support additional space in Ware.

Retail Shares Analysis	Sales		Share
	PTA	**30-minute Region**	**%**
Total Retail Sales	**$201,250,642**	**$919,179,186**	**21.9%**
Automotive Parts/Accsrs, Tire Stores	$5,276,943	$10,845,891	48.7%
Appliances, TVs, Electronics Stores	$2,442,261	$6,147,163	39.7%
Household Appliances Stores	$1,387,576	$4,110,000	33.8%
Radio, Television, Electronics Stores	$1,054,685	$2,037,163	51.8%
Computer and Software Stores	$1,050,658	$2,104,231	49.9%
Home Centers	$6,399,153	$9,199,050	69.6%
Outdoor Power Equipment Stores	$12,637,075	$15,352,716	82.3%
Beer, Wine and Liquor Stores	$16,036,274	$37,531,145	42.7%
Pharmancies and Drug Stores	$19,435,170	$47,394,934	41.0%
Clothing Stores	$3,239,394	$4,177,315	77.5%
Women's Clothing Stores	$2,407,874	$2,478,534	97.1%
Sporting Goods Stores	$1,372,903	$3,984,515	34.5%
Gen Mdse - Department Stores	$18,703,248	$25,965,739	72.0%
Used Merchandise Stores	$989,686	$1,803,121	54.9%

Figure 13: Shares Analysis for Primary Trade Area. Source: Claritas, Inc.

The shares study shows a number of business types that are perfoming well compared to the region. These are shown in the table above. Generally, the ability to build retail clusters is centered on destination based retail, such as restaurants, antiques, furniture, etc. In Ware, the businesses are primarily those of local needs. However, certain destination retail show clustering opportunities – clothing, sporting goods, antiques.

Retail Analysis Conclusions:
- Ware serves a broad regional market. There are 22,583 residents in its local trade areas, and another 50,000 in its tertiary trade area.

- All retail numbers show that Ware truly is a retail center of this broader rural region, particularly with everyday needs of grocery, general merchandising, and home centers.

- Still, there is significant demand for new business, and Ware can leverage its retail magnet status to grow other segments of the commercial market.

- Based on Ware's existing retail market, as well as the offerings within the region, there is still demand potential in the following areas:

  o **Restaurants**
    - The PTA & STA are leaking over $24 million combined.
    - There is demand for up to 18,000 square feet of new restaurants. This is split equally between full & limited service.
    - Understanding a typical independent restaurant can be between 2,000 – 5000 square feet, this suggests demand for between three to eight restaurants.
    - Ware has recently seen a restaurant close. It is important to note that the data presented above are real numbers representing real demand. Of course, any business needs to have a solid business plan, meet the needs of the customer base, and be financially sound.
  o **Building Material & Supply Dealers**
    - There is demand for up to 23,000 square feet of space. With Lowes serving Ware residents, all of this demand comes from the secondary trade area.
    - As a frame of reference, a typical Lowes is around 115,000 square feet.
    - Therefore, Ware's potential lies with smaller hardware, lawn & garden, etc.
  o **Furniture & Home Furnishings**
    - There is demand for 6,500 square feet of furniture/home furnishings space.
    - As a frame of reference, a typical Pier 1 will average around 10,000.
    - Smaller independents could be supported here, and with the potential to cluster businesses around Berkshire Blanket, the opportunity could be greater.
  o **Clothing**
    - There is up to 5,700 square feet of demand.
    - Most of this demand in Family & Women's categories.
    - One or two independent clothing establishments could be supported in downtown Ware.
  o **Specialty**
    - There is various limited demand for other specialty categories.
    - This includes electronics, gifts, jewelry, sporting goods & hobby, etc.

- o **General Merchandising**
    - There is demand for up to 10,858 square feet new space.
    - With a typical Dollar General type store beginning around 10,000 square feet, this does suggests the potential for another similar product in Ware.
    - Of course, all of this demand comes from the secondary trade area, and while it could be accommodated in Ware, the presence of the Walmart supercenter may see any new general merchandising locating elsewhere in the secondary trade area.

3.4   Demographics and Segmentation

General demographics for the Primary (PTA) and Secondary Trade area (STA) are shown below. This is followed by a market segmentation report that describes Ware residents by socioeconomic and life stage characteristics, providing a broader understanding of the Ware market.

Demographic Observations for the Combined Trade Area for Ware
All data below are from the Nielsen Claritas for 2014.

- In 2014, Ware's combined trade area had a population of 22,583. This represents a growth of 0.66% over 2010.

- The trade area is 49% male and 51% female.

- The region's median age is 42 years, which is slightly older than peer communities, yet also common in rural areas.

- Ware's trade area population in 2014 was 95% white.

- There are 9,066 households in Ware's combined trade area.

- The trade areas are classified as:

    - 57.45% - White Collar Occupations

    - 24.20% - Blue Collar

    - 18.35% - Service and Farm

- Ware's trade areas had a 7.8% unemployment rate in 2014.   The State of Massachusetts was 6.3% during the same year.

- The mean travel time to work was 35 minutes.

- Median household income was $54,023 in 2014.

- 8.1% of residents were below the poverty level.

- The average household size was 2.45 persons.

- Educational Attainment – population that is 25 years and older

    - 22.5% have an Bachelor's degree or higher

    - 7.5% have an Associate's degree

    - 20.7% have some college with no degree

    - 38.7% have just high school degree or equivalent.

    - 10.7% have less than a 12-grade education.

Market Segmentation for the Ware's Combined Trade Area (PTA & STA)

This analysis breaks down the counts and percentages of social group cluster and will help identify the population based on their demographic groupings including age, gender, income, education, occupation, and ethnic group. Each cluster group will desire specific products.

For this analysis, all data comes from PRIZM NE cluster groups as calculated by Claritas, Inc. The PRIZM cluster groups are centered on four groups of urbanization: Urban, Second Cities, Suburbs, and Town and Rural.

There were 9,066 households in Ware's combined trade area in 2014. This is classified as 100% Town and Rural. This urbanization is then broken down into social group and life stage categories as shown in the chart below. (Source: Claritas, Inc.)
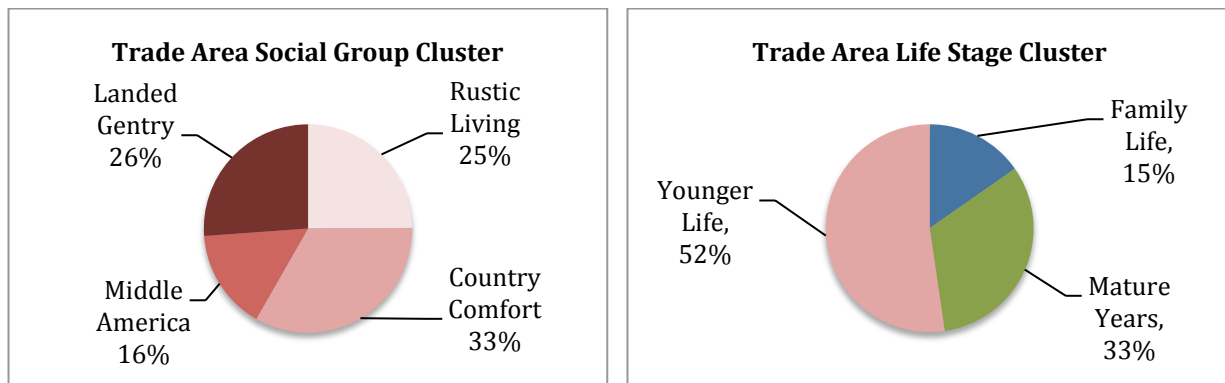
Figure 14: Social Group Segmentation (left) and Life Stage Segmentation (right) for the combined trade area. Source: Claritas, Inc.

Finally, each of these social and life stage groups can be broken down into detailed subcategories as identified in the chart below. The chart represents a breakdown of all the segments in the overall market base in combined trade area.

Ware Trade Area Market Segmentation

Mayberry-ville
15%

Country Casuals
11%

Young and Rustic
9%

Big Fish, Small Pond
9%

Traditional Times
7%

Greenbelt Sports
6%

Fast-Track Families
5%

Crossroads Villagers
4%

Simple Pleasures
4%

Red, White and Blues
4%

Big Sky Families
4%

Golden Ponds
4%

Heartlanders
3%

Old Milltowns
3%
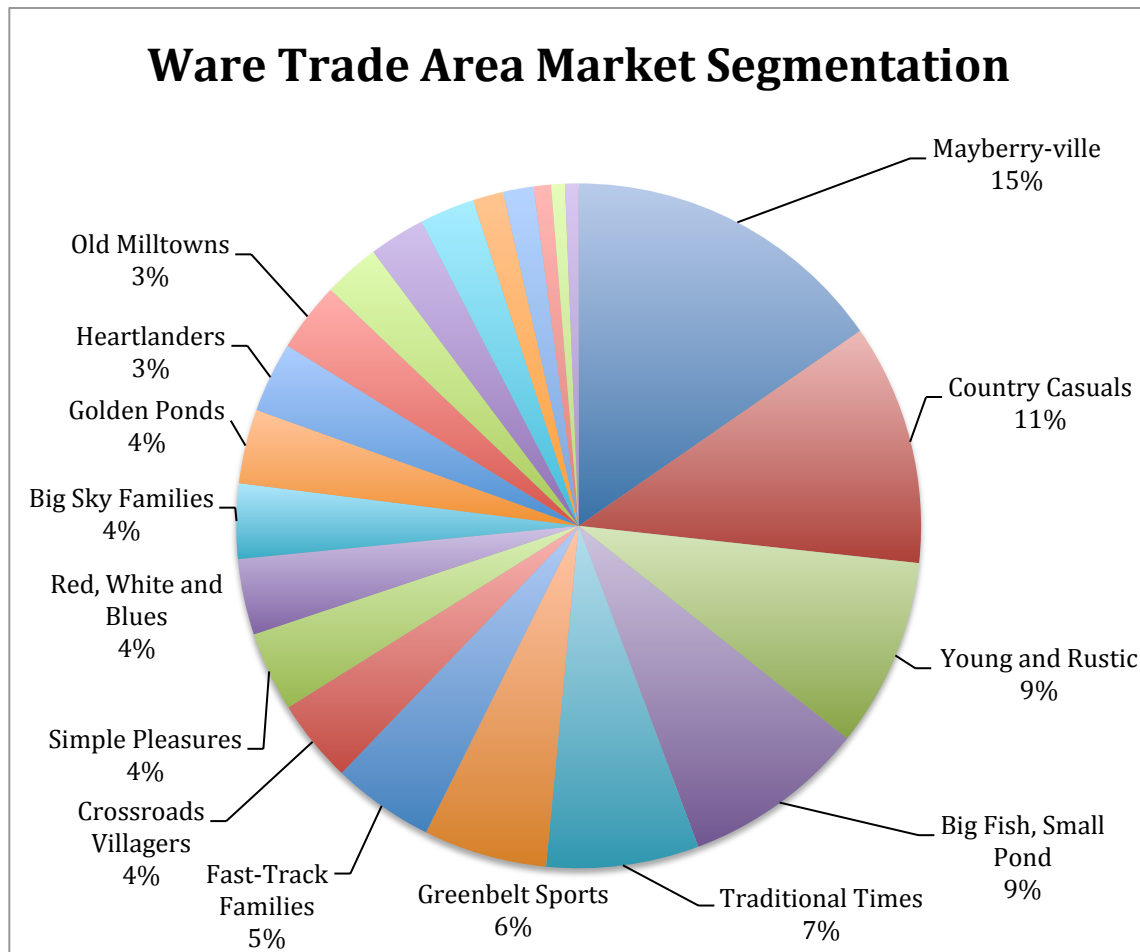
Figure 15: Market Segmentation for combined trade area. Source: Claritas, Inc.

Segmentation Observations

The top four segments make up over 40% of the market and include:

- Mayberryville – **15.35%**
- Country Casuals – **11.38%**
- Young and Rustic – **8.92%**
- Big Fish, Small Pond – **8.66%**

A detailed description of each of these segments is shown below. A description of ALL segments can be found at **www.mybestsegments.com**, a service of Nielsen Claritas, Inc.

37 - Mayberry-ville

Upper Mid Older w/o Kids

Like the old Andy Griffith Show set in a quaint picturesque burg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, upper-middle-class couples like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles, and pickup trucks.

Social Group: 12 - Country Comfort
Lifestage Group: 01 - Midlife Success

Demographics Traits

- **Urbanicity:** Town/Rural
- **Income:** Upper Mid
- **Income Producing Assets:** Above Avg
- **Age Ranges:** 45-64
- **Presence of Kids:** HH w/o Kids
- **Homeownership:** Mostly Owners
- **Employment Levels:** BC, Service, Mix
- **Education Levels:** High School Grad
- **Ethnic Diversity:** White

Lifestyle & Media Traits

- Shop at Sears Hardware
- Go hunting
- Read American Hunter
- Watch NASCAR
- GMC Sierra Diesel

25 - Country Casuals

Upscale Older w/o Kids

There's a laid-back atmosphere in Country Casuals, a collection of older, upscale households that have started to empty-nest. Most households boast two earners who have well-paying management jobs or own small businesses. Today, these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares, and going out to eat.

Social Group: 11 - Landed Gentry
Lifestage Group: 01 - Midlife Success

Demographics Traits

- **Urbanicity:** Town/Rural
- **Income:** Upscale
- **Income Producing Assets:** High
- **Age Ranges:** 45-64
- **Presence of Kids:** HH w/o Kids
- **Homeownership:** Mostly Owners
- **Employment Levels:** Management
- **Education Levels:** College Graduate
- **Ethnic Diversity:** White

Lifestyle & Media Traits

- Shop at Eddie Bauer
- Buy collectibles online
- Read Backpacker
- Watch The Big Bang Theory
- Chevrolet Corvette

48 - Young & Rustic

Lower Mid Middle Age w/o Kids

Young & Rustic is composed of middle-aged, restless singles. These folks tend to be lower-middle-income, high school-educated, and live in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars, and dating.

09 - Big Fish, Small Pond

Upscale Older w/o Kids

Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, including belonging to country clubs, maintaining large investment portfolios, and spending freely on computer technology.

Figure 16: Market Segmentation for combined trade area. Source: Claritas, Inc.

Social Group	Lifestage	Code	Name	Households	Pct.	Pred. Inc.	Age	Pred HH Comp.	Pred. Tenure/Type	Pred. Education	Pred. Employment	Pred. Race
COMBINED TRADE AREA - Ware MA				Descriptions for each of the segments can be found at www.mybestsegments.com								
Country Comfort	Midlife Success	37	Mayberry-ville	1392	15.35%	Midscale	Age 35-64	Married Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, BC, Farm	White
Landed Gentry	Midlife Success	25	Country Casuals	1032	11.38%	UpperMid	Age 35-64	Married Couples	Owner / SFDU	Some College	WC, BC	White
Rustic Living	Striving Singles	48	Young and Rustic	809	8.92%	LowerMid	Age 65+	Singles/Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC	White, Black, Hispanic
Landed Gentry	Affluent Empty Nests	9	Big Fish, Small Pond	785	8.66%	Upscale	Age 45+	Married Couples	Owner / SFDU	College Grad.+	Exec, Prof, WC	White
Country Comfort	Conservative Classics	28	Traditional Times	653	7.20%	Midscale	Age 55+	Married Couples	Owner / SFDU	Some College	WC, BC, Farm	White
Country Comfort	Young Achievers	23	Greenbelt Sports	529	5.83%	Midscale	Age 25-54	Married Couples	Owner / SFDU	College	Prof, WC	White
Landed Gentry	Young Accumulators	20	Fast-Track Families	436	4.81%	Upscale	Age 25-54	Families w/Kids	Owner / SFDU	College	WC	White
Rustic Living	Striving Singles	56	Crossroads Villagers	357	3.94%	Downscale	Age <45	Married Couples	Owner / SFDU, Mobile	Elem. School, H.S.	WC, Service, BC, Farm	White
Middle America	Cautious Couples	38	Simple Pleasures	341	3.76%	LowerMid	Age 65+	Singles/Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC, Farm	White
Middle America	Striving Singles	42	Red, White and Blues	325	3.58%	LowerMid	Age 25-44	Married Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC	White
Country Comfort	Mainstream Families	33	Big Sky Families	321	3.54%	Midscale	Age 25-54	Families w/Kids	Owner / SFDU, Mobile	Some College	WC, BC, Farm	White
Rustic Living	Sustaining Seniors	55	Golden Ponds	318	3.51%	Downscale	Age 65+	Singles/Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC, Farm	White
Middle America	Cautious Couples	43	Heartlanders	301	3.32%	LowerMid	Age 45+	Married Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, BC, Farm	White
Rustic Living	Sustaining Seniors	57	Old Milltowns	298	3.29%	Downscale	Age 65+	Singles/Couples	Mix / SFDU, Mobile	Elem. School, H.S.	WC, Service, BC	White, Black
Middle America	Striving Singles	45	Blue Highways	241	2.66%	Downscale	Age 65+	Mostly Singles	Renter / SFDU, Hi-Rise Multi	H.S. Graduate	WC, Service, BC	White, Black
Rustic Living	Sustaining Seniors	58	Back Country Folks	240	2.65%	Downscale	Age 55+	Married Couples	Owner / SFDU, Mobile	Elem. School, H.S.	Service, BC, Farm	White, Black
Rustic Living	Sustaining Families	64	Bedrock America	236	2.60%	Downscale	Age <35	Families w/Kids	Mix / SFDU, Mobile	Elem. School, H.S.	Service, BC, Farm	White, Black, Hispanic
Middle America	Mainstream Families	51	Shotguns and Pickups	131	1.44%	LowerMid	Age 25-44	Families w/Kids	Owner / SFDU, Mobile	H.S. Graduate	WC, BC, Farm	White
Country Comfort	Mainstream Families	32	New Homesteaders	130	1.43%	Midscale	Age 25-44	Families w/Kids	Owner / SFDU, Mobile	Some College	WC, BC	White
Middle America	Mainstream Families	50	Kid Country, USA	74	0.82%	LowerMid	Age <45	Families w/Kids	Mix / SFDU, Mobile	Some College	WC, Service, BC, Farm	White, Hispanic
Landed Gentry	Accumulated Wealth	5	Country Squires	59	0.65%	Wealthy	Age 35-64	Families w/Kids	Owner / SFDU	College Grad.+	Exec, Prof, WC	White
Landed Gentry	Midlife Success	11	God's Country	58	0.64%	Upscale	Age 35-64	Married Couples	Owner / SFDU	College Grad.+	Exec, Prof, WC	White

Figure 17: Market Segmentation & descriptions for combined trade area. Source: Claritas, Inc. More detailed descriptions can be found at www.mybestsegments.com.

4   Wayfinding

In the most general sense, *wayfinding* is the process by which we navigate the world. Whether it is our daily commute or a journey to an unexplored locale, we rely on cues, habits, patterns, landmarks, and verbal and visual directions to establish and confirm a working knowledge of our environment.

In our auto-centric society, an extremely important wayfinding tool is road signage for motorists. This wayfinding project features a system of thirty-two signs designed to welcome and direct motorists throughout the greater Ware community. More specifically, this system directs people to key destinations of the following types: government; arts and culture; and parks and recreation. The system designates several districts, such as Downtown and the Ware Center Historic District, to make intelligible and reinforce the identity of unique places.

The wayfinding plan for Ware was developed through an interactive, iterative process that provided multiple opportunities for stakeholder input and participation. The Arnett Muldrow team kicked off the project by facilitating a meeting in which stakeholders nominated dozens of visitor-oriented destinations to be included in the wayfinding system. The consultants mapped these destinations and analyzed major traffic routes to understand key decision points for motorists and to develop a tentative hierarchy of locations and districts to guide the development process. The consultants then conducted a driving tour of Ware, using Google Maps software to create a draft sign schedule that they posted online and made accessible to stakeholders. In the ensuing months, the team conducted a second stakeholder meeting where they presented the draft sign schedule and preliminary design work for the system. Stakeholder feedback from this meeting led to further refinements to the system. The process concluded with the development of graphic renderings, suggested materials, and cost estimates for the project. The Ware wayfinding plan also includes recommendations for ongoing management and maintenance of the signage system.

Figure 18: Example of Locations and Sign Designs included in Wayfinding Appendix.

Directional Trailblazer

Parking

District Gateway

Mass DOT Route

SOUTH   WEST
32   9

Ware Schools

Ware Center Meeting House

Quabbin Resevoir

Public Parking

Ware Millyards

Church Street Historic District

National Register Historic District

District Marker

Welcome to Ware

Monumental Gateway

Figure 19: Wayfinding System.

The final wayfinding plan is available as an appendix to this report.

Federal Wayfinding Policy

The primary guide to wayfinding system development is the *Manual on Uniform Traffic Control Devices* (2009, 2012; hereafter *MUTCD*) published by the Federal Highway Administration. *MUTCD* Section 2D.50 outlines the basic criteria for design and materials of community wayfinding signs. In part, it describes community wayfinding signs as "part of a coordinated and continuous system of signs that direct tourists and other road users to key civic, cultural, visitor, and recreational attractions and other destinations" within an urbanized or identifiable area. In general, wayfinding signs are to be regarded as having a lower priority than other guide or regulatory signs; therefore, the final placement of wayfinding signs is contingent upon the location other road signs (Section 2A.16.9-10). The *MUTCD* includes regulations regarding the number and type of destinations that can be included on wayfinding signs, as well as standards for coloring, retroreflectivity, and legibility.

5   Business Development Plan

This section presents a work plan for the Town of Ware, the Ware Business & Civic Association and their partners to create a stronger business environment in the community while also targeting new investment.   The recommendations are based on the ongoing stakeholder input, as well as the findings of the comprehensive market analysis. These strategies are in addition to the Ware Community Vision, Branding and Marketing Recommendations, and Wayfinding Strategy presented in other sections of this report and its appendices.

The actions below are based on five core strategic areas that have been identified through community engagement and market research.

- **Business Recruitment & Retention**
- **Downtown Revitalization**
- **Market Position**
- **Partnerships**

5.1   Business Recruitment & Retention

Goal: Ware and its partners will focus on an improved business environment that offers a user-friendly atmosphere for existing businesses, while also targeting new investment from needed businesses.

First Steps – 2015

- ***Recruit commercial businesses based on quantified potential identified in market analysis:*** This market analysis identifies a number of retail and business needs based on current trade patterns. Ware has the potential to meet the retail demand of its trade areas, and any business recruitment should complement regional offerings.   Current demand shows upwards of 83,979 square feet of commercial space needed in Ware, with key opportunities being restaurants, building supplies, general merchandise, furniture & home furnishings, and several other categories.

- ***Make market research readily available to all existing and potential businesses:*** The market analysis provides data that will be relevant to existing and potential business owners, as well as developers and property owners. The information included in this report should be actively distributed to all interested parties including businesses, realtors and economic development agencies. The WB&CA in particular should provide this market research to anyone who needs it. For example, a potential business could use this as part of their business plan when they are seeking financing.

- ***Create an available properties database:*** The market analysis provides the data for local demand that would support specific types of businesses. In order to realize this potential, the WB&CA should build an available properties database of all vacant space (not simply entire buildings) in downtown. It should include key data such as square footage, location, zoning, utilities, price, rental rates, etc. Much like a county economic development authority that promotes individual buildings or sites, these opportunities should be readily available on the web, in print, and in the hands of local real estate professionals.

- *Focus on becoming more "business-friendly":* A number of stakeholders, business, and property owners stated during the engagement process that it is a challenge to do business with the Town of Ware. Specifically, it was mentioned that the Town almost discourages business with aggressive permitting and fees, and overly strict codes. Moreover, it was mentioned that town departments are often unavailable to the customer, nor do they communicate between departments so it is a challenge for any business owner to navigate the system. While these complaints are heard often in other communities, the frequency of these comments suggested that it may be more than simply perception. Similarly, it is understood that the Town has limited resources, but there appears to be a need to create more positive interactions with its customers. It is our recommendation that the Town focuses on becoming more accommodating for businesses:

  - o Awareness. Quite often, businesses simply don't know what is expected of them. It is recommended that Ware create a simple **Guide to Doing Business**, which includes contact information and general requirements for business licensing, code requirements, zoning, utilities, etc. This pamphlet could be made available on the web, as handouts in town hall, or distributed by Town partners (WB&CA, QHCOC, etc).

  - o Customer Service. A number of strategies could include customer-service training, citizen satisfaction surveys, and employee rewards for positive interactions. Most importantly, Town employees should adopt a spirit of customer service.

  - o Interdepartmental Communication. With multiple departments, it is often a challenge for each employee to understand a customer's needs outside of his or her respective department. The Town can consider an annual, internal workshop of relevant employees to discuss the entire business approval/permitting process.

- *Coordinate small-business development programming:* Work with the Western Regional Office of the Massachusetts Small Business Development Center (SBDC), Quaboag Valley Community Development Corporation (QVCDC), Quaboag Valley Business Assistance Corporation (QVBAC) and the Quaboag Hills Chamber of Commerce (QHCC) to connect existing businesses and future entrepreneurs with business development programming. This could include training for business planning, networking, mentoring, and marketing. Most businesses simply don't know these services exist, or the services aren't tailored to the specific needs of the local business owners. The WB&CA can serve as the conduit between the business and small business support systems to promote and design training programs.

Next Steps – 2016-2017

- *Asset-based recruitment - Outdoor Recreation:* The market research shows current demand for new business, but other potential businesses may arise out of opportunities to tap into a larger market. With the Quabbin Reservoir, Ware River, Rail Trail, and all other recreational assets, Ware can and should position itself as the base camp for outdoor adventure. One way to do this is by recruiting outdoor businesses such as an outfitter, watercraft, bike shops, fishing gear and tackle, hunting supplies, etc. The Town and

WB&CA should seek out these potential businesses, help them find locations to start their business, and potentially offer small incentives to help them get started.

- **Asset-based recruitment – Creative Enterprise:** Similarly, the Town of Ware has historically been the cultural hub of the larger region. In recent years, businesses like Workshop 13 have opened up and seen a great deal of success, as well as presenting a need for more creative offerings. Like outdoor recreation, The Town and WB&CA should seek out creative people and businesses such as art studios/galleries, music store/venue, microbrewery, etc.

- **Conduct lodging study and recruit hotel:** The Town of Ware is challenged in that it doesn't have single lodging establishment within town, with most being over a half hour away in smaller communities. Whether it's a business traveler, a potential employee being recruited to the Hospital or Country Bank, or simply someone coming to Ware to visit a friend, that individual must stay far outside the community, likely spending their travel dollars in those other places. Central Massachusetts Tourism, in partnership with the Quaboag Hills Chamber, should commission a feasibility study for lodging. If a hotel is needed, a promotional package should be pulled together and regional hoteliers should be approached to gauge interest in investing in Ware.

- **Recruit key needs such as college satellite facility, shared office space business, and childcare facility:** These three uses were listed as critical needs throughout stakeholder and community engagement. The WB&CA has been working collaborative with other partners to establish the need for and recruit a college satellite facility in Ware. These efforts should continue while also expanding to a childcare facility, or a coworking space for small businesses.

  Shared coworking facilities are sometimes developed by public business development entities, but have become more popular as a private business. Unlike a traditional incubator, these businesses have multiple private office spaces for rent, or even a communal or café-like environment. All users would have access to phones, high speed internet, copy, and mail services. An entrepreneur or small business can rent space on a monthly or annual basis, or even rent meeting space as needed. Sometimes these businesses are done in conjunction with another for-profit business, such as a café or coffee shop. The WB&CA can seek out a property owner of vacant space in town and can gauge interest in starting a coworking space.

- **Sponsor annual business summits:** The WB&CA should sponsor annual business summits where employers, small businesses, and providers are gathered together. The purpose of the short workshop should simply be for the businesses to communicate their challenges and needs, and for the providers to inform what services are available.   For example, a local business may mention their desire to expand and need of a suitable space. Or, the QVCDC in partnership with the SBDC may update small businesses as to what services they can patronize.

Final Steps – 2018-2020

- ***Update market analysis and refocus recruitment strategies:*** Over time, market opportunities within Ware will change, particularly as its partners focus on economic development and business recruitment outlined in this plan. It is therefore recommended that the community update the market research every five years, and revisit the recommendations in this plan based on those new findings.

- ***Create incentives for new and existing businesses:*** Ware has limited resources from which to build incentives, but there are a number of potential enticements that could be created over time, particularly as Ware's tax base grows. These incentives could be small in scale ($500 and up) and could include business license abatement, meals tax abatement, marketing assistance. Any incentive should be tied to desired, needed businesses with active business plans. If the town does not have a Local Option Meals Excise, it should consider establishing one. These monies could be used to help pay for a number of recommendations in this plan.

5.2 Downtown Revitalization

A successful downtown is *critical* to economic development and growth in the community, whether it a potential employer that is looking to begin an operation somewhere within the community, an existing business trying to recruit a new professional, or simply enhancing the quality of life of residents.   Conventional commercial corridors like West Street are very important to a community, but a downtown is the heart and soul of a community and the hub of commerce, culture, and activity. Even in downtown Ware's current state, our market research showed that its businesses have a broader overall customer base. It is therefore important for the Ware community to refocus its efforts on creating a vibrant downtown.

It is recommended that the Town and WB&CA contact the Massachusetts Downtown Initiative (MDI) to learn about downtown revitalization, technical and financial assistance.

Goal: Ware and its partners will pursue the revitalization of downtown, making it a clean and attractive, walkable destination with vibrant events and activities, restoring it as the active center of the greater Ware community.

First Steps – 2015

• ***Recruit business and activities that will bring <u>activity</u> into downtown:*** A great example of this is the Ware Fall Fest. That event brings hundreds of people into downtown to congregate, be entertained, eat great food, and learn about town businesses. While in downtown, these people spend money at local businesses and restaurants.   While recruitment of business is important, recruitment of *activity* is most important early on. Planning other small recurring events, establishing a Farmers Market in the public parking area across from Town Hall, and recruiting restaurants can all bring activity into downtown, which will spill over into additional downtown commerce.

• ***Focus on improving public spaces:*** While there are a number of private properties in downtown Ware that need maintenance and care, the same can be said for public spaces. In the fall of 2014, there was a grassroots effort led by Country Bank and Baystate Mary Lane Hospital to clean up the public rights of way in the community. The response from business and citizens was not only grateful, but also created a positive buzz. The Town should continue these efforts establishing a regular schedule of trash cleanup and weed removal. It should also look to improve downtown's current lighting, and ensure parking areas are clean and safe.   Another way to create an immediate positive perception of downtown, is to install banners on light poles throughout the downtown.
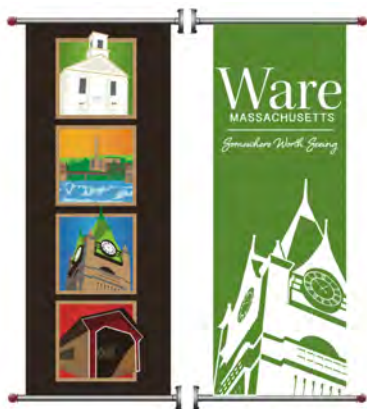

Figure 20: Banner designs using new Brand.

- ***Create Ware Ambassadors program to help market the Town:*** The Town should designate a team of community leaders to spread the message about opportunities for growth in Ware. These ambassadors would be well versed on various talking points about Ware's character, economic profile, and investment opportunities, and would share Ware's story whenever participating in any regional economic discussions.

  The team can have a secondary mission of scouting and visiting regional retailers and developers to encourage them to consider investment or expansion opportunities in Ware. They can then connect these potential investors with those in the community that might provide further assistance.

- ***Adopt a revitalization strategy that focuses on preservation of character and architecture found in downtown:*** Downtown Ware and the Millyard are unique historic districts with great architecture and built environment. It is important that Ware's revitalization strategy be rooted on historic preservation and the protection of these resources. They are what make downtown unique, attractive, and a desirable place to invest. This should primarily be a dedication to preservation, but if needed, could be extended to creating design guidelines for preservation.

- ***Continue the efforts of the WB&CA property utilization committee:*** This committee has, among other tasks, engaged property owners in discussions on the utilization of their spaces. This communication is critical, and it is this committee that can guide the revitalization of downtown, focusing on many of the recommendations of this downtown section.

Next Steps – 2016-2017

- ***Pursue a master plan that will include Downtown and the Millyard:*** It is recommended that, much like this project, the Town pursue a downtown master plan that focuses on physical improvements to infrastructure, public spaces, and private development. It should be market-based using this report as a foundation, while also addressing urban design. Among other things, it may also address community character tools such as form-based codes, as well as assessing existing regulations and their impact on the success of businesses. The Town would likely engage a multi-disciplinary master planning team to collaborate.

Figure 21: Downtown Master Plan in Picayune Mississippi.

- ***Develop places for the younger resident:***   In order for Ware to be a sustainable community over time, it needs to be a place where a young professional or family would want to live. Several younger stakeholders were engaged in the process, and stated a need for places for them to gather and connect. This could be a small coffee shop with live music, or regular events such as an Alive After Five gathering with music and drinks.   Other communities have had great success in reengaging younger people with similar activities.

- ***Work with the owners to cooperatively market the former Friendly's property:*** This building sits in the most prominent location in downtown and its redevelopment can potentially create an anchor and catalyst to ongoing downtown revitalization. The Town and WB&CA should work with the property owner to develop a plan to recruit a business to that specific site.

- ***Inform regional real estate professionals about downtown investment:*** Economic development does not occur without marketing and promotion. In the case of downtown Ware, we cannot assume that area realtors know what properties are available for lease or purchase. The property utilization committee should identify regional real estate professionals (not just those in Ware) and make sure that they are getting up to date information on investment opportunities in downtown, primarily through the available property database and property sheets.

Final Steps – 2018-2020

- ***As part of the Downtown Master plan, look to create a centralized event space in downtown:*** Downtown Ware is relatively small, and other than the small public parking area across from Town Hall, there is no designated gathering space. Having a location to stage events and activities can be important part of downtown revitalization. As the downtown master plan mentioned previously proceeds, it should address a new, larger public space.

- ***Develop physical connections to outdoor resources:*** Also as part of the downtown master plan, improved physical connections to the rail trail, Ware River, and Grenville Park should be made.

- ***Create branded gateway signage into downtown and the Millyard:*** As recommended in the wayfinding strategy that is part of this plan, pole-mounted gateway signs should be created at key entrances to downtown and the Millyard. The Millyard currently has signage, but it is way too small and difficult to see, particularly by motorists.

5.3   Market Position

Marketing recommendations are presented in detail in the Branding appendix of this report. This section expands on these recommendations, focusing on creating a unified market position to promote Ware.

Goal: Ware will create a "brand identity" and build a comprehensive toolbox to communicate and promote itself to its citizens, future businesses, new residents, and its partners.

First Steps – 2015

- *Adopt a Ware Brand as consistent, comprehensive marketing system:* A brand is a consistent and connected system that a community uses to communicate and promote itself to its various target markets, whether that be local residents needing to know what recreational programming exists, or a prospective business who may be looking at the community as a place to invest. A comprehensive marketing brand contains several elements including color palette, typography, iconography and marketing message. Ware's brand was created as a part of this project and is included in detail in the Branding appendix.

Figure 22: Ware destination brand identity.

Brand Statement – We Are Ware, MA

We are a town with a unique and storied history, beginning with our Native American ancestors, whose salmon fishing weirs on our river gave us our name. Incorporated in 1775, we grew up around the historic Ware Center Meeting House that provided us both a place for worship and a hall for conducting town meetings. The building stands as one of the most important rural structures in Massachusetts, and a testament to our early resolve to build a thriving community. We are a mill town whose textile factories lined the Ware River and brought prosperity and growth to our small village. While the mills have closed, the sturdy buildings stand today in our Millyard as a reminder of our industrial past and resilient character.

Today we are an economic and cultural center, a place where unique businesses and historic churches serve a large rural region. We are the front door to the Pioneer Valley, known for its beautiful landscapes of picturesque meadows, rolling hills, and traditional New England villages. We are also a community of pioneers and innovators, with businesses like the American Athletic Shoe Company, Kanzaki Paper, and Country Bank, who provide products and services to our citizens, our Country, and the global market.

This is a community of active places and people, where residents enjoy a lifestyle defined by youth sports, lively events, and spirited gatherings. This is a place where a healthy lifestyle is afforded through the exceptional care at the Baystate Mary Lane Hospital, the outdoor opportunities of the pastoral Grenville Park, or the active options of the rail trail and our local parks.

This is the basecamp for the outdoor enthusiast, as the Quabbin Reservoir and its tributaries provide our people with a diversity of experiences ranging from pleasant views and vistas of our natural resources and wildlife, to more vigorous adventures such as hiking, biking, boating, and fishing.

We are a place where our citizens are becoming more aware of the quality of life our community affords, a place where we are building a new success story every day. Whether it is the quality of our schools system or our growing Arts Center, we are learning more each day about the things we sometimes take for granted. Though the grassroots efforts of organizations like the Ware Business and Civic Association, we can communicate the exceptional quality of life defined by our schools that are cultivating young minds, our hospital that is providing a level of care second to none, our town which gives us a safe place to live and work, and our businesses that offer all of the products and amenities we need.

We are resilient, where the motto of "the town that can't be licked" is ingrained in our history and culture.

We are dedicated, and our independent spirit thrives in our local businesses, cultural anchors, and citizens.

We are striving, as evidenced by our school system, town, and community partners who are building a better quality of life for our citizens.

We are committed, as our efforts to revitalize and improve our community are being realized on a daily basis.

We Are Ware, Massachusetts: Somewhere Worth Seeing

- **Extend brand to organizations and events:** Using the graphic elements of the primary brand identity, create connected identities for the various organizations and events that exist in Ware.

Figure 23: Brand Extension Logos.

- **Implement the marketing recommendations included in the branding and marketing strategy:** Utilize the graphic recommendations in the Branding report to begin to promote Ware as a Place Worth Seeing.

- **Market Position for Investment:** Ware's marketing message for targeting investment should be positioning Ware as the commercial and active center of Central Massachusetts, and the cultural hub for a large rural area.

- **Market Position for Outdoors:** Ware and its partners should position the Ware community as the basecamp for the Quabbin and the unlimited outdoor adventure that it affords.

- ***Market Position for locals:*** A community must also market to its local residents. In Ware's case this should include creating a positive message and promoting Ware's quality of life, its success stories, and its vision.

- ***Create citywide branded wayfinding system:*** A hierarchical system of signage will direct visitors and residents to civic, cultural, and recreational resources. A typical wayfinding system utilizes a community's marketing brand graphics and includes gateways, vehicular and pedestrian directional signage, street banners, district & parking signs, building markers, and informational kiosks. Wayfinding recommendations are included in the wayfinding appendix of this report.

Next Steps – 2016-2017

- ***Create testimonial ads for key area employers:*** Ware employers have located here for various reasons. Whether it is access to the river, workforce, or quality of life, each business has chosen to invest in the Ware area. As part of its recruitment efforts, Ware can create testimonial ads for area employers such as Kanzaki, American Shoe, Country Bank, or Baystate Mary Lane Hospital to promote the Town as a place to invest.

- ***Create property sheets for key investment sites:*** The database of available properties mentioned earlier can be used to rank key sites with the greatest development potential. These sites can be highlighted on individual property sheets that can be distributed on the web, mailed to target prospects, or included in a business recruitment package.

Final Steps – 2018-2020

- ***Complete citywide branded wayfinding system:*** Due to planning and costs, wayfinding systems are generally implemented in phases. Ware is fortunate to have resources where it can begin the installation of its signage early on, with its completion occurring within the next five years.

5.4 Partnerships

No community can accomplish a broad based planning effort on its own. Fortunately, there are a number of organizations that play a role in business development and support in the Ware community. These partners should be on the same page with respect to business development, marketing, planning, and implementation, and particularly each entity's specific roles for pursuing economic growth. These entities include but are not limited to:

- Town of Ware   - Ware Business & Civic Association

- Quaboag Hills Chamber of Commerce   - Quaboag Valley Community Dev. Corp.

- East Quabbin Land Trust   - Quaboag Valley Business Assistance Corp.

- Ware Public Schools   - Ware Historical Society

- Central Massachusetts Tourism   - Western Massachusetts SBDC

Each entity should be an active partner in the future growth and development of the Ware Community.

Goal: Ware and its partners start a collaborative effort to implement this plan, defining clear roles and responsibilities, and proactively planning for Ware's future.

First Steps – 2015

- ***Establish a universal change of mindset in the community.*** During the stakeholder engagement process, it was apparent that many residents have a negative self-image of the community where the live. Even with all of the successes that have occurred in recent time, these citizens cannot get past the business that closed, or school choice, or public housing, etc. It is difficult for these residents to not only understand that communities like Ware have accomplished community revitalization, but also not understanding that Ware residents *deserve* a vibrant community. More importantly, some of these stakeholders are ones that *must* be engaged and working towards positive change in the community. If a community leader does not believe Ware is a good place to invest, the chances of attracting that new business are slim. If a resident asks a newcomer, "Why would you want to live here?", that is perpetuating a negative perception of the community.

  This mindset <u>must </u>change. A positive message can be controlled by marketing Ware as a place, and the leadership and stakeholders of this community must approach each effort and project with a positive focus. If they do not, particularly in the public realm, they should be called to task about pride of community. Each partner and implementer of this plan should carry a positive attitude about Ware in everything that they do for the community. In fact, they should carry a copy of the brand statement with them wherever they go. Other places have done it, and Ware *deserves* it.

- ***Sponsor a community revitalization summit where all partners come together:*** In conjunction with the Ware community Master Plan, the first implementation task to be completed in this plan should be to assemble representatives from Ware's partners to share plan recommendations, and assign responsible parties for accomplishing individual tasks. The master plan steering committee can serve as the host of this meeting, while using the Strategy Board in the next section as the framework from which to assign tasks.

- ***The Town of Ware becomes more proactive in infrastructure improvements and business support:*** One constant with community revitalization is that the successful communities have plans with the full backing and support of local governments. The Town of Ware continues to be challenged with limited financial resources, but it can focus on proactive planning of infrastructure as well as seeking creative financing for needed upgrades, whether it is business improvement districts, District Improvement Financing (DIF), Tax Increment Financing (TIF), and creating public-private partnerships.

- ***Organize visits to successful communities:*** One of the best ways to learn about successful community revitalization process is to visit communities who have had success. The Town of Ware should coordinate quarterly trips for Town Leaders and Business Leadership to visit a successful community. The places that realized their potential are used to entertaining delegations from other communities, and are proud to share their stories.

Next Steps – 2016-2017

- ***Organize community cleanups.*** Ware can foster community pride by bringing its citizens together to collectively improve public areas such as parks, the riverfront, key corridors, and even downtown. These cleanups give the participant a sense of pride, but also build ownership in the planning effort.

- ***Sponsor community pride initiatives:*** Similarly, community pride can be built in more creative ways. Community gardens build pride of place and create an attractive and functional amenity for residents and members. Some communities have recognition programs for well-kept properties or storefronts. Others have created awards programs whereby a community leader or a local "hero" is recognized at Town Meetings, with a framed brand statement or other award.

- ***Partner with Ware Public Schools to provide environmental and outdoor recreation interpretation to area youth:*** With the Quabbin and Ware River and others, Ware has unlimited environmental resources of which the community can be proud, but that also can be used for recreation. Other communities have worked with the local school system to get the community more actively engaged in the town, its businesses and activities. In Ware's case, it can be with environmental and outdoor recreation interpretation. It could be programmed nature hikes, cycling education, river ecology classes, etc.

- ***Create a community newsletter.*** The town currently relies on its website to inform citizens of news items, community events, Town Meetings, etc. Users can subscribe to a feed of news, and the feed is updated on a consistent basis. This practical information should be supplemented by a monthly or quarterly newsletter that utilizes the community brand. The newsletter can be distributed via email, on the town's website, or in print in local businesses. The purpose would be to update residents on the implementation of this plan, but also share positive stories and successes.

Final Steps – 2019-2020

- ***Town continues to focus on securing grants, and funding for infrastructure improvements, special projects:*** The Town of Ware has limited financial resources to be able to accomplish projects. It must continue to focus on finding creative funding such as grants, business improvement districts, etc. The town should look to engage an area grants writer to consult with to pursue additional funding.

6   The Strategy Board

Projects and Initiatives

The attached "Strategy Board" summarizes all of the projects and recommendations included in the business development work plan shown above. The board should be used as a working document for benchmarking and ongoing evaluation of the implementation process. Each recommendation that is presented in brief on the strategy board is supported in detail in this report documentation.

Strategies

Each of the plan strategies is outlined in the strategy board. It is important to remember the ultimate development goals that each project supports. Each of these strategies is linked with one another, but failure to achieve one goal does not negate the ability to achieve others.

Responsibilities

Individual responsibilities should be assigned to the Town of Ware, the WB&CA or a partner agency. While an agency may be assigned lead role for implementation, each of these projects should be pursued through partnerships. As the plan progresses, the responsibilities should be reevaluated to determine where roles should change or shift.

Time Frames

The projects are divided into three time frames. The first series of projects are ones that should begin immediately. For the most part, these are simple projects that will be highly visible, have significant impact and should be completed within the plan's first year. The second set of projects is labeled next step projects. Some of these are more advanced projects while others may be continuations of projects that began during the demonstration period. The last series of recommendations are final steps. There are fewer projects in this list, but over time this category will continue to fill as priorities evolve.

The strategy board and its recommendations represent a "living document." As time goes by and implementation proceeds, some priorities will shift while new ones will arise. The implementation strategy board should be evaluated periodically, no less than annually. This evaluation process will allow for finished tasks to be indicated on the board, for responsibilities to be shifted between parties, and for time frames to be adjusted for individual projects.

Town of Ware, Massachusetts – Business Development Plan

Ware, Massachusetts is a vibrant and growing community where our citizens are proud of the town we call home. Our hometown is one where we meet at unique shops and businesses in our revitalized downtown, where a growing diverse economy is being cultivated, where we respect the land and enjoy unrivaled outdoor recreation opportunities, and where our government and its partners work together to provide efficient and up-to-date services for all of our citizens. We are committed to revitalize and improve our community.

Ware, MA — *Somewhere Worth Seeing*

Strategies	*First Steps: 2015*	*Next Steps: 2016-2017*	*Final Steps: 2018-2020*	*Goal*
Business Recruitment & Retention	▶ Recruit commercial businesses based on quantified potential identified in market analysis. ▶ Make market research readily available to all existing and potential businesses. ▶ Create available properties database. ▶ Focus on becoming more "business-friendly" – awareness of codes & requirements, easier permitting, improved public realm. ▶ Coordinate with Western Regional office of SBDC, QVCDC, and QHCC to program business support services & training.	▶ Asset-based recruitment: Diversify offerings targeting outdoor businesses such as outfitter, watercraft, bike shop, etc. ▶ Asset-based recruitment: Recruit creative people and businesses to complement Workshop 13 such as gallery, music, microbrewery. ▶ Conduct lodging study and recruit hotel. ▶ Identify locations for and work collaborative to recruit college satellite facility, create shared business space, recruit childcare facility. ▶ Sponsor annual business summits of small business, employers, providers.	▶ Update market research every five years. ▶ Create incentives for new and existing businesses such as business license abatement, micro-loans, small grants. Tie incentives to desired, needed businesses with active business plans. ▶ Create plan to improve the Millyard district infrastructure.	Ware and its partners will focus on an improved business environment that offers a user-friendly atmosphere for existing businesses, while also targeting new investment from needed businesses.
Downtown Revitalization	▶ Recruit business and activities that will bring activity into downtown – restaurants, events, farmers market, etc. ▶ Focus on improving public spaces – trash cleanup, lighting, banners, etc. ▶ Create Ware Ambassadors – recruitment team that focuses on positioning downtown for investment. ▶ Adopt a revitalization strategy that focuses on the preservation of character and architecture found in downtown. ▶ Continue efforts of WB&CA property utilization committee to guide revitalization, engage property owners	▶ Pursue a master plan to include Downtown and the Millyard. ▶ Develop places for the younger market – coffee shops, entertainment, etc. ▶ Work with the owners to cooperatively market the former Friendly's property. ▶ Work with and inform regional real estate professionals as to downtown investment opportunities.	▶ As part of the master planning process, look to create a centralized event space in downtown. ▶ Also as part of a master plan, develop physical connections of downtown to trails, Ware River, and Grenville Park. ▶ Create branded gateway signage in downtown.	Ware and its partners will pursue the revitalization of downtown, making it a clean and attractive, walkable destination with vibrant events and activities, restoring it as the active center of the greater Ware community.
Market Position	▶ Adopt a unified brand system and seamless marketing strategy to recruit customers and new investment. ▶ Extend brand to organizations and events. ▶ Implement the marketing recommendations included in the branding and marketing strategy. ▶ Market position for investment – Ware as center of Central Mass., cultural hub, etc. ▶ Market position for outdoors – position Ware as basecamp for Quabbin and unlimited outdoor adventure. ▶ Market position for locals – create a positive message, promoting quality of life, success stories, etc. ▶ Complete the branded wayfinding system directing visitors and locals to downtown and area destinations.	▶ Create testimonial ads highlighting local employers and businesses such as American Shoe, Kanzaki, etc. ▶ Create property sheets to market key investment sites. ▶ Create a business recruitment package including the market analysis, available properties, testimonials, etc.	▶ Complete citywide branded wayfinding system.	Ware will create a "brand identity" and build a comprehensive toolbox to communicate and promote itself to its citizens, future businesses, new residents, and its partners.
Partnerships	▶ Establish a universal change of mindset in the community – Ware residents deserve a vibrant community. ▶ Sponsor a community revitalization summit where all partners come together to determine lead roles in implementation. ▶ The Town of Ware becomes more proactive in infrastructure improvements, business support. ▶ Organize visits of Town & business leaders to look to successful communities.	▶ Organize community cleanups. ▶ Sponsor community pride initiatives such as community garden, awards program, etc. ▶ Partner with Ware Public Schools to provide environmental and outdoor recreation interpretation to area youth. ▶ Create newsletter (print/digital) geared towards town residents. Inform of town initiatives, celebrate successes, new businesses.	▶ Town continues to focus on securing grants, and funding for infrastructure improvements, special projects.	Ware and its partners start a collaborative effort to implement this plan, defining clear roles and responsibilities, and proactively planning for Ware's future.

♦ Town of Ware ■ WB&CA ✳ Quaboag Hills ■ Private Sector ✚ Merchants ★ QVCDC ✚ Central MA Tourism ✳ SBDC ⊗ Ware Public Schools ◆ Ware Historical Society ■ Other

NOTE: The bullets in this chart will be changed to the symbols at the bottom by the implementation steering committee.