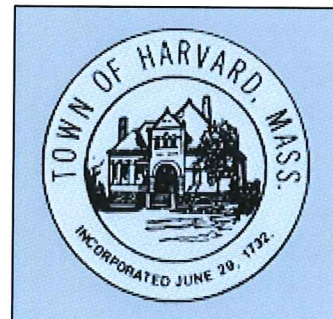


Business Conditions Assessment in C District

**Prepared by the Montachusett Regional Planning Commission
(MRPC)**

**under a Direct Local Technical Assistance (DLTA) grant from
the Massachusetts Department of Housing and Community
Development (DHCD)**

November, 2014



Business Conditions Assessment in C District

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Introduction

This report was prepared for the Town of Harvard by the Montachusett Regional Planning Commission under a District Local Technical Assistance (DLTA) Grant from the Massachusetts Department of Housing and Community Development. The report focuses on the area along Ayer Road (State Route 110/111), north of Route 2 and south of the Ayer Town Line, which is zoned for Commercial Use. This area is referred to as the “C District.” The Town of Harvard is reviewing current conditions in the district and is considering opportunities for commercial development. The information provided in this report is intended to provide background documentation and relevant data for the community as it examines its options for the C District and makes decisions about the future of the district. It is not the intent of this report to make specific recommendations about the future of the district. The Sections in this report correspond to the respective tasks identified in the DLTA project’s Scope of Services.

Section 1: Background Information

This section of the report provides a synopsis of recent documents pertaining to the C District. Included is a summary of permitted uses in the C District as specified in the Town of Harvard Protective Bylaw; documentation from the Town's current efforts to update its Master Plan, including results of the Master Plan Phase I Town Survey relevant to the C District and findings of the Master Plan Vision and Goals effort; and, a summary of a White Paper prepared by the Harvard Economic Development Committee which examines the feasibility of a grocery store in the C District. This material is intended to provide a summary of recent planning studies for people who may be unfamiliar with these efforts.

Summary of Town of Harvard Commercial District-Related Documents

Permitted Uses in Harvard Commercial Districts

Chapter 125, Article IV of the Harvard Protective Bylaw states the following intent of the C District:

The intent of the C District is to permit shopping and business services type land uses that meet the needs of the local community rather than the region, and to encourage uses that, when established, result in a traditional New England village form of development of appropriate scale, character, vernacular architecture, design, and detail. It is also the intent of the C District to provide for an array of uses consistent with the Master Plan adopted by the Planning Board, as may be amended, including opportunities for mixed use development, pedestrian interaction, and a vibrant village atmosphere.

Permitted uses within the district, definitions of which are cross-referenced to other sections of the Bylaw, include the following:

- Small-scale commercial uses
- Agricultural uses, conversion for multiple residence, earthmoving, institutional uses, and other off-site signs
- Single residence use (on lots as they existed February 1, 1972)
- Medium-scale commercial use (with some exceptions)
- Certain uses by Special Permit from the Planning Board including some medium-scale and large-scale commercial uses

Harvard Master Plan Phase I Documentation

Harvard is currently going through the update of their Master Plan. In support of this effort, the Town provided two documents that have been used as input to the plan update. These include the results of a community-wide survey which, among other topics, posed questions regarding respondent opinions on how the Town should plan for the future of the Commercial District. Included in the survey was an open-ended question asking respondent whether they had any other comments regarding the Commercial District. Information obtained through this survey was then used as input to the Harvard Master Plan Phase I report which presents the Visions and Goals of the Master Plan and proposed Strategies/Next Steps. One section of the chapter of this Plan presenting "Key Issues" for the Town discussed the Ayer Road Commercial District.

Key findings from these documents are presented below.

Harvard Master Plan Phase I Survey (March 3, 2012)

Survey results relevant to the Commercial District:

- 73.0% of respondents support commercial development if it increases tax revenue.
- 57.8% of respondents support increasing commercial development in the C-District only.

- 60.4% of respondents did not support commercial development Town-wide.
- 75.1% of respondents support a mix of uses (both residential and commercial) in the C-District.
- 87.4% of respondents felt commercial development in all parts of Town should reflect the Town's rural and historic character.
- 54.0% of respondents are concerned about traffic impacts of new development in the C-District.
- 65.6% of respondents are concerned about protection of natural resources, the watershed, and green spaces in the C-District.

190 responses were collected in response to the open-ended question, "Do you have any other comments regarding the Commercial District?" Given the range of opinions expressed, it would be difficult to generalize the results of this portion of the survey. While some respondents were opposed to the existence of the C-District, others felt growth in the District should be encouraged to generate additional tax revenues for the community. There were a number of comments which expressed a desire for some sort of grocery store and/or drug store in the District but little support for "big box" development. There was also general opposition to "strip development" and concern over potential traffic impacts (current and future). The survey summary noted that respondents living in the area where the C-District is located were least supportive of increasing commercial development in the district and also had greater concern over traffic impacts.

Master Plan Phase I: Vision and Goals (April, 2012)

The discussion of the Ayer Road Commercial District presented the following goals:

- Diversify Harvard's economy and tax base with an appropriate mix of residential and commercial development in the Commercial District.
- Work with existing and new businesses to attract commercial services that fit the town.
- Decrease barriers and increase incentives for attracting new business.
- Work with adjacent neighborhoods, town residents, and other stakeholders to facilitate planning and coordination prior to any permitting processes.
- Understand the relationship between economic development of the C-District and Devens, in terms of various factors such as transportation and circulation, conservation, and housing.

Based on results of the survey (described above) and a series of focus groups, the following Strategies/Next Steps were developed and presented in the Phase I report:

- Conduct a comprehensive analysis of the commercial district to determine the potential benefits and liabilities that could result from various levels of development. The analysis should consider impacts to tax revenues, housing, open space, service, community character and quality of life.
- Continue to attract commercial development on a property- by-property basis under existing zoning – modify zoning to include design standards that address community character, public realm, and connectivity.
- Promote village style cluster development that includes a mix of uses – focus on working collectively with property owners in strategic areas.

- Consider opportunities for infill development – working with existing commercial property owners to expand or modify development.

Grocery Store White Paper – Harvard Economic Development Committee (April 10, 2013)

This white paper documents the research conducted by the Harvard Economic Development Committee (EDC) to determine whether a grocery store could be located in the C-District in Harvard. According to the white paper, “The Committee wanted to determine if there are gaps between what grocery stores need and want on one hand, and Harvard’s place in the grocery store retail environment and what it can accommodate via the zoning regulations on the other hand.” The EDC’s research was intended to determine whether a grocery store would be feasible and, if not, what conditions would need to be to make it more feasible.

Some key findings from the white paper:

- Interviews with representatives of various super market chains found that they build full size stores of 40,000 to 50,000 sq. ft. but they can also build smaller stores (20,000 to 25,000 sq. ft.) for smaller markets. The smaller stores would need 140 parking spaces and approximately 4 acres of land.
- Grocery stores prefer to locate with other retail stores, particularly pharmacies.
- There are a number of examples of successful grocery stores in towns of similar size and demographics as Harvard, most notably the Hannaford’s in Townsend.
- Harvard’s current zoning bylaws limit the maximum size of a building in Harvard to 30,000 sq. feet, which could be a constraint if the grocery store were to locate in a building with a pharmacy which, typically, are between 7,000 and 12,000 sq. ft. Another constraint is the floor area ratio requirement which limits the size of the structure in relation to its lot size. Under current regulations but with an Ayer Road Village Special Permit (ARV-SP), a 30,000 sq. ft. building would require a 6.25 acre lot. Current zoning also has implications for the design of the building(s).

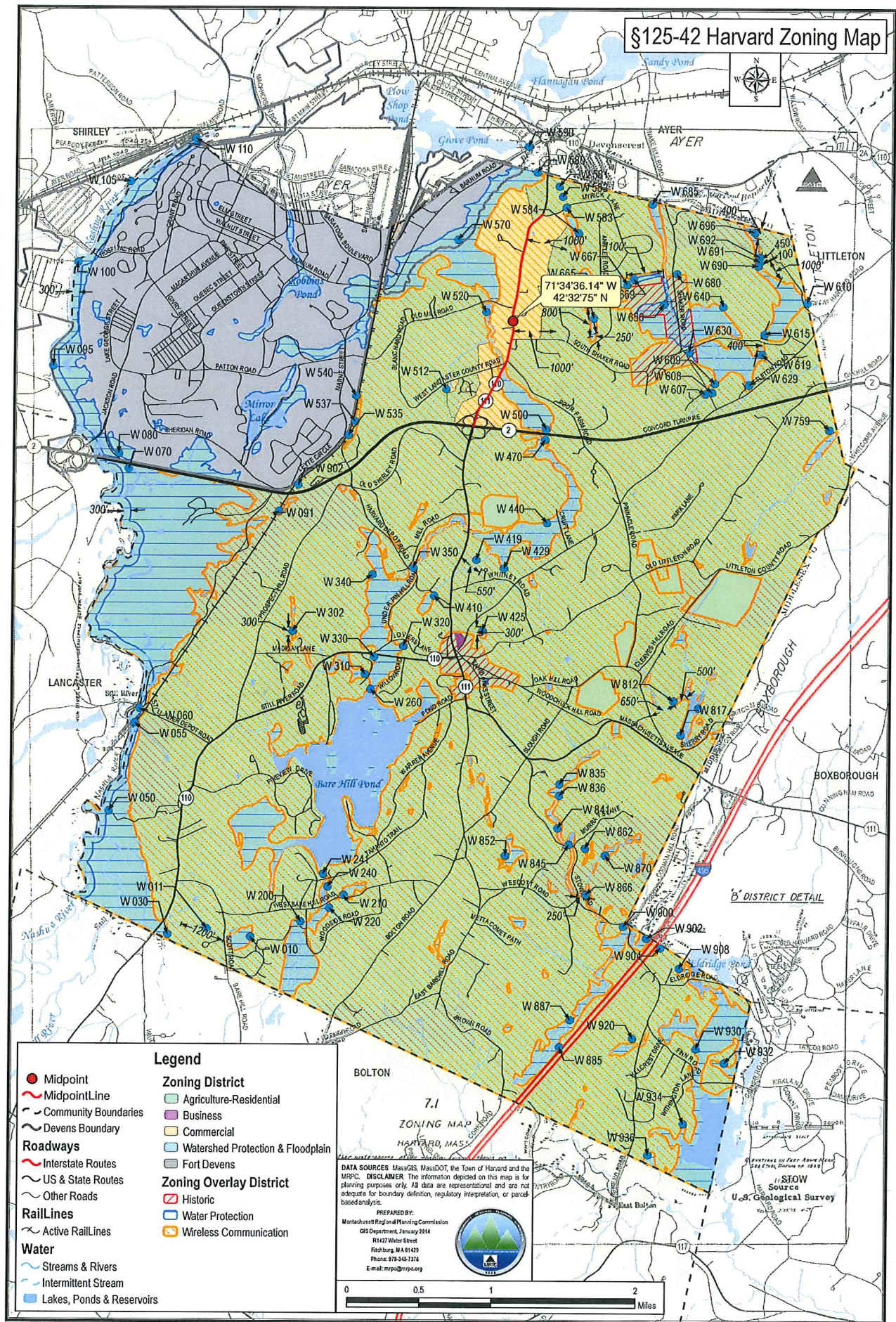
The white paper concludes with the following recommendations:

1. Because of how the presence of the Hannaford in Ayer affects the willingness of other stores to locate in Harvard, the Town should approach Hannaford to gain an understanding of their plans with respect to the Ayer store. Depending on what is learned, the Town should either work with Hannaford to facilitate a move to Harvard, or reach out to other grocery stores of interest to facilitate their location in the District.
2. Develop and issue a Request for Expressions of Interest (RFI) to land owners within the C District, the results of which would identify interested property owners and parcels, and development ideas that include a grocery store. The responses will assist the EDC in determining the level of development interest on the part of land owners and where possible locations are, and learning whether the practical application of the current regulations have the intended

results, and determining whether thinking “outside the box” yields interesting and workable ideas and solutions.

3. Develop and review hypothetical project schematics to determine whether a change to the detached retail development model currently reflected in the ARV-SP bylaw provision reflects residents’ preferences with regard to retail development design. Depending on the outcome of this exercise and the outcome of the other White Paper recommendations, the EDC and Planning Board should determine whether the ARV-SP bylaw provision should be amended, and whether the special permit should allow for a larger building if it contains a grocery store, so that a full-size store could locate in the C District.

§125-42 Harvard Zoning Map



Section 2: Ayer Development Plans and Business Analyst Online (BAO) Assessment

This section consists of two parts. The first is an email from Mr. David Mayer, the Town of Ayer's Director of Economic and Community Development, which provides information regarding development activity in Ayer which may have a bearing on development in the C District. Of particular importance is the effort to develop a 6.2 acre parcel east of Route 110/111 just north of the Ayer/Harvard Town Line. The owner of this property is reportedly interested in developing a "big box" grocery or drug store on the site.

The second part of this section presents the results of the Business Analyst Online assessment of the C District. To assess the retail market potential as an aspect of commercial economic development for the Harvard Commercial District, an analysis was conducted using the Esri Business Analysis Online (Esri-BAO) analytic tool. This tool was developed to provide a "snapshot" of retail market supply and demand within a given study area. It provides an analysis of consumer spending to show market demand or retail potential and an examination of business revenues or retail sales to show market supply.

The database used for this analysis includes the latest market statistics for Retail Trade and Food Services and Drinking Places (the retail market), utilizing data from the 2007 Census of Retail Trade and Consumer Expenditure Surveys (2011 and 2012) from the Bureau of Labor Statistics. Retail sales data also incorporates 2014 business data from Dun & Bradstreet. Consumer spending data is drawn from the Bureau of Labor Statistics' annual Consumer Expenditure Surveys and the Census of Retail Trade which is then adjusted by Esri based on demographic profiles specific to the given study area. This provides for improved differentiation of spending, particularly in smaller markets where distinctions can be difficult to measure and for big-ticket items where consumer preferences are more pronounced.

The database reflects geographic inventories and boundary definitions such as block groups, tracts, and counties based on 2010 Census geography, enabling the analysis to be applied at a finer level than the overall community. In this case, the analysis was conducted for drive time radii of 10-, 20-, and 30-minutes from Ayer Road in Harvard, using 262 Ayer Road (roughly the midpoint of the Commercial District) as the central point of origin (shown in the attached map). Dollar estimates of supply and demand are presented in the North American Industry Classification System (NAICS) which defines 27 industry groups in the Retail Trade sector as well as four industry groups within the Food Services and Drinking Places subsector.

By comparing supply and demand, the analysis is also able to estimate a Leakage/Surplus Factor which provides a measure of the balance between the volume of supply (retail sales) generated by retail industry and demand (spending by households or retail potential) within the same industry. "Leakage" in an area represents a condition where a market's supply is less than its demand. In this case, retailers outside the area are fulfilling demand for retail products from area consumers and demand is "leaking" out of the trade area. Surplus represents a condition where the area's supply exceeds the area's demand. In this case, retailers are attracting shoppers that reside outside of the trade area, so there is a surplus in market supply. This information can be used in a variety of ways, but one aspect of its use is

as a *potential* indication of retail opportunity in instances where the leakage factor is high. Caution must be used in interpreting results however, taking into account the size of the market, the type of commodities involved, the extent of the overall regional market and the location and relative strength of competitive retail markets.

As indicated above, the BAO tables present the results of the retail market analysis for the areas with a radius of 10-, 20-, and 30-minutes of drive times from the center of the study area. This includes a summary of current businesses by SIC and NAICS classification, disposable income of population within these areas, and the Retail MarketPlace Profile. The first set of rows in the MarketPlace Profile indicate total demand and supply by major industry categories (retail, food & drink, and retail and food & drink combined). Looking at all industries combined within the 10-minute drive time radius, there is a total demand of \$390.4 million for retail and food & drink by the market within 10-minutes from the study area but only \$158.5 million in goods supplied by the 164 businesses represented in the market. This means that there is "leakage" of approximately \$232.0 million spent by Study Area consumers for goods purchased outside of the study area. Looking at specific industries, only the categories of Lawn & Garden Equipment & Supply Stores and Beer, Wine & Liquor Stores are shown as providing a surplus within the 10-minute drive time radius of the Study Area. In terms of total magnitude, Automobile Dealers, Grocery Stores, and Health & Personal Care Stores are the categories showing the greatest leakage in dollar value, although Shoe Stores and Special Food Services show the greater leakage "factor" based on the percentage of goods actually sold within the Study Area. Whether these industry categories represent opportunities for development and investment within the Study Area would require further investigation, taking into account the type and magnitude of industry under consideration and the location of competitive businesses within proximity to the Town of Harvard.

Samuel Lawton

From: David Maher <dmaher@ayer.ma.us>
Sent: Friday, November 14, 2014 10:32 AM
To: Samuel Lawton
Subject: FW: Ayer Economic Development
Attachments: MAXANT 3 parcel 1p 4_11_14.pdf

Mr. Lawton: Here is some information about the available properties and activity in Ayer in and around the Harvard Town line. The property attached abuts the town lines.

Also in that area:

- 1) A former Kentucky Fried is being remodeled to become a new Taco Bell
- 2) The current Wendy's is slated to be taken down and completely remodeled (new building)
- 3) New convenience/gas location for Alltown up on Littleton Rd next to the Gervais Ford dealership
- 4) With the announcement of Hannaford moving from our local grocery store, the owner Paul D'Geronimo is going to be very active about upgrading and updating that retail/commercial site to hopefully lure some other big box retailers to our area much the same Mr. Chapman is doing for the Ayer Rd. property.

I think these are all the current projects that we discussed if I missed any let me know and I'll add that into this email as well.

David Maher
Director, Economic and Community Development
Town of Ayer
978-772-8206

From: Duncan@northeast-re.com [<mailto:Duncan@northeast-re.com>]
Sent: Thursday, August 14, 2014 2:18 PM
To: David Maher
Cc: Steve Marsden
Subject: Ayer Economic Development

David,
Good to catch up this AM....

I will keep you posted on the latest offer on the three Maxant parcels totaling 6.2 ac at 26-28 Harvard Rd. Site plan attached....

Any referrals to other Ayer owner's that you think Northeast could help out, we appreciate you thinking of Northeast.

Call/contact with any questions.

Regards, Duncan

Duncan Chapman
Northeast Real Estate Solutions, Inc.
131 Littleton Rd, Harvard, MA 01451
1-978-621-1290 ***** www.northeast-re.com



1. The undersigned hereby certifies that the information provided in the attached documents is true and correct to the best of their knowledge and belief.

2. The undersigned hereby certifies that the information provided in the attached documents is true and correct to the best of their knowledge and belief.

3. The undersigned hereby certifies that the information provided in the attached documents is true and correct to the best of their knowledge and belief.

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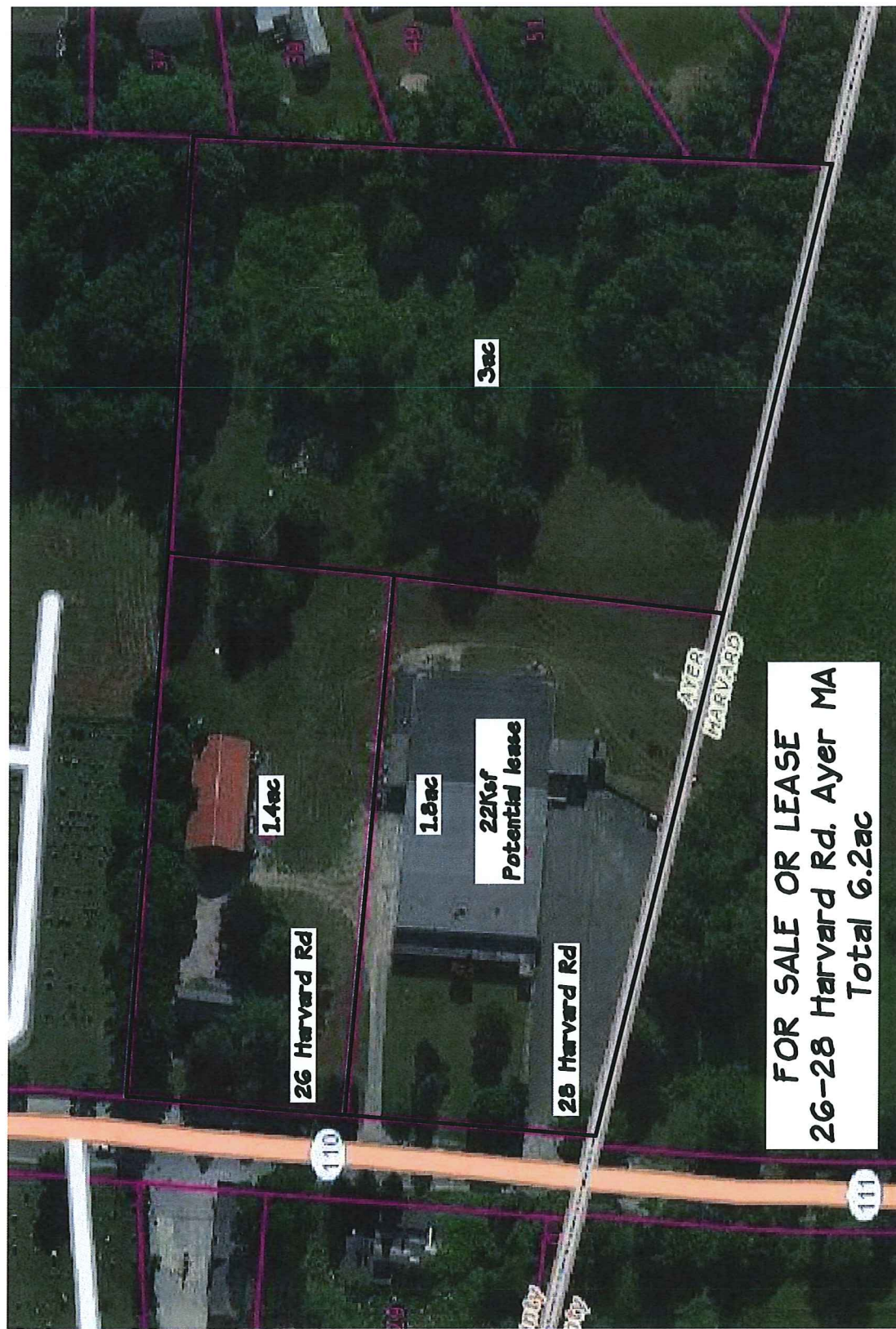
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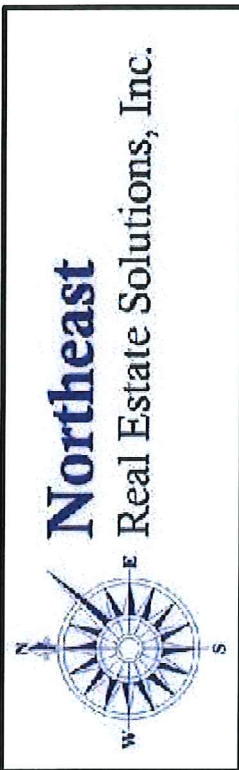
16. The undersigned hereby certifies that the information provided in the attached documents is true and correct to the best of their knowledge and belief.

17. The undersigned hereby certifies that the information provided in the attached documents is true and correct to the best of their knowledge and belief.



FOR SALE OR LEASE
26-28 Harvard Rd. Ayer MA
Total 6.2ac

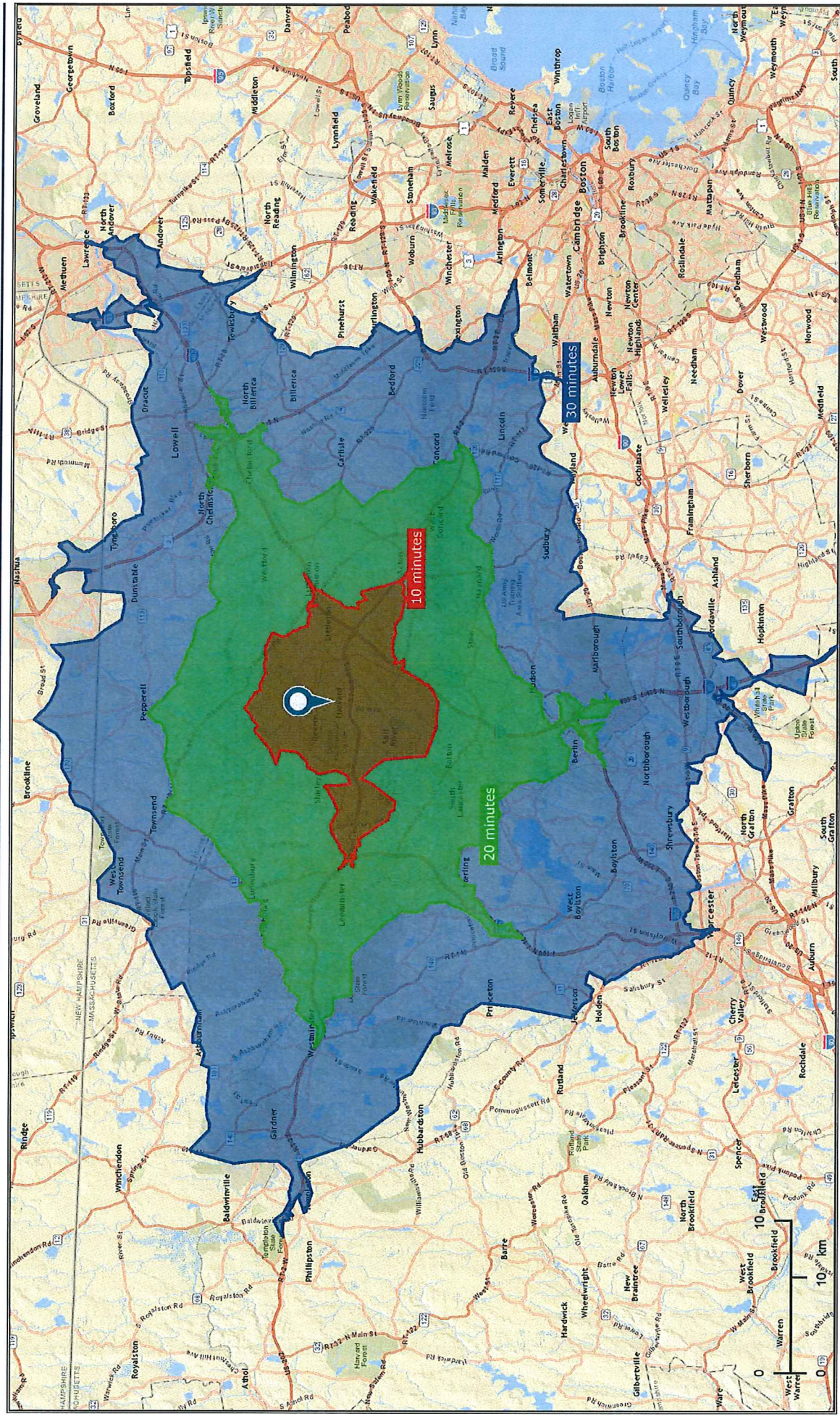
Prepared for: **MAXANT Industries**
28 Harvard Rd
AYER, MA





Harvard Commercial District: 10, 20, and 30 minute Drive Times

Prepared by MRPC



August 14, 2014

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Business Summary

Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Times: 10, 20, 30 minute radii

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

Data for all businesses in area

	10 minute		20 minute		30 minute	
Total Businesses:		2,365		20,973		63,813
Total Employees:		22,534		143,166		474,508
Total Residential Population:		26,391		246,989		818,763
Employee/Residential Population Ratio:		0.85:1		0.58:1		0.58:1

by SIC Codes	Employees		Employees		Employees		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture & Mining	78	3.3%	258	1.1%	542	2.6%	1,474	2.3%
Construction	180	7.6%	1,152	5.1%	1,738	8.3%	5,480	8.6%
Manufacturing	152	6.4%	8,979	39.8%	959	4.6%	33,774	23.6%
Transportation	51	2.2%	338	1.5%	368	1.8%	2,655	4.2%
Communication	19	0.8%	403	1.8%	172	0.8%	1,187	1.9%
Utility	12	0.5%	151	0.7%	80	0.4%	514	0.8%
Wholesale Trade	97	4.1%	956	4.2%	738	3.5%	2,280	3.6%
Retail Trade Summary	222	9.4%	1,454	6.5%	2,380	11.3%	7,019	11.0%
Home Improvement	14	0.6%	103	0.5%	128	0.6%	346	0.5%
General Merchandise Stores	5	0.2%	154	0.7%	58	0.3%	183	0.3%
Food Stores	31	1.3%	305	1.4%	286	1.4%	873	1.4%
Auto Dealers, Gas Stations, Auto Aftermarket	24	1.0%	161	0.7%	210	1.0%	648	1.0%
Apparel & Accessory Stores	10	0.4%	38	0.2%	149	0.7%	465	0.7%
Furniture & Home Furnishings	22	0.9%	68	0.3%	226	1.1%	665	1.0%
Eating & Drinking Places	42	1.8%	342	1.5%	549	2.6%	1,719	2.7%
Miscellaneous Retail	74	3.1%	283	1.3%	774	3.7%	2,120	3.3%
Finance, Insurance, Real Estate Summary	164	6.9%	512	2.3%	1,524	7.3%	4,774	7.5%
Banks, Savings & Lending Institutions	21	0.9%	118	0.5%	168	0.8%	479	0.8%
Securities Brokers	8	0.3%	14	0.1%	94	0.4%	289	0.5%
Insurance Carriers & Agents	14	0.6%	36	0.2%	160	0.8%	533	0.8%
Real Estate, Holding, Other Investment Offices	121	5.1%	344	1.5%	1,101	5.2%	3,474	5.4%
Services Summary	1,031	43.6%	6,045	26.8%	9,602	45.8%	29,201	45.8%
Hotels & Lodging	9	0.4%	135	0.6%	55	0.3%	174	0.3%
Automotive Services	37	1.6%	143	0.6%	379	1.8%	1,182	1.7%
Motion Pictures & Amusements	46	1.9%	356	1.6%	455	2.2%	2,825	2.0%
Health Services	79	3.3%	843	3.7%	930	4.4%	7,772	5.4%
Legal Services	28	1.2%	71	0.3%	339	1.6%	1,036	1.6%
Education Institutions & Libraries	42	1.8%	1,004	4.5%	348	1.7%	8,455	5.9%
Other Services	791	33.4%	3,493	15.5%	7,097	33.8%	21,559	33.8%
Government	58	2.5%	2,285	10.1%	240	1.1%	7,321	5.1%
Unclassified Establishments	301	12.7%	1	0.0%	2,632	12.5%	8,237	12.9%
Totals	2,365	100.0%	22,534	100.0%	20,973	100.0%	63,813	100.0%

Source: Copyright 2014 Dun & Bradstreet, Inc. All rights reserved. Esri Total Residential Population forecasts for 2014.



Business Summary

Harvard Commercial District

262 Ayer Rd, Harvard, Massachusetts, 01451

Drive Times: 10, 20, 30 minute radii

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

by NAICS Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	35	1.5%	71	0.3%	197	0.9%	544	0.4%	468	0.7%	1,458	0.3%
Mining	1	0.0%	4	0.0%	9	0.0%	55	0.0%	28	0.0%	218	0.0%
Utilities	5	0.2%	86	0.4%	28	0.1%	322	0.2%	102	0.2%	2,502	0.5%
Construction	187	7.9%	1,167	5.2%	1,799	8.6%	6,940	4.8%	5,665	8.9%	21,534	4.5%
Manufacturing	147	6.2%	8,979	39.8%	931	4.4%	33,494	23.4%	2,604	4.1%	80,780	17.0%
Wholesale Trade	97	4.1%	956	4.2%	735	3.5%	7,470	5.2%	2,268	3.6%	22,072	4.7%
Retail Trade	177	7.5%	1,099	4.9%	1,794	8.6%	15,515	10.8%	5,206	8.2%	45,814	9.7%
Motor Vehicle & Parts Dealers	17	0.7%	113	0.5%	150	0.7%	829	0.6%	451	0.7%	3,093	0.7%
Furniture & Home Furnishings Stores	13	0.5%	45	0.2%	99	0.5%	433	0.3%	317	0.5%	1,547	0.3%
Electronics & Appliance Stores	9	0.4%	45	0.2%	121	0.6%	682	0.5%	329	0.5%	1,799	0.4%
Bldg Material & Garden Equipment & Supplies Dealers	14	0.6%	103	0.5%	128	0.6%	1,351	0.9%	342	0.5%	3,986	0.8%
Food & Beverage Stores	31	1.3%	320	1.4%	300	1.4%	4,429	3.1%	913	1.4%	11,973	2.5%
Health & Personal Care Stores	7	0.3%	62	0.3%	112	0.5%	1,275	0.9%	353	0.6%	3,728	0.8%
Gasoline Stations	8	0.3%	47	0.2%	61	0.3%	307	0.2%	204	0.3%	1,005	0.2%
Clothing & Clothing Accessories Stores	13	0.5%	42	0.2%	196	0.9%	1,244	0.9%	593	0.9%	3,443	0.7%
Sport Goods, Hobby, Book, & Music Stores	19	0.8%	39	0.2%	155	0.7%	719	0.5%	394	0.6%	1,972	0.4%
General Merchandise Stores	5	0.2%	154	0.7%	58	0.3%	2,484	1.7%	183	0.3%	7,943	1.7%
Miscellaneous Store Retailers	31	1.3%	83	0.4%	334	1.6%	1,228	0.9%	897	1.4%	3,542	0.7%
Nonstore Retailers	11	0.5%	44	0.2%	80	0.4%	535	0.4%	229	0.4%	1,783	0.4%
Transportation & Warehousing	45	1.9%	294	1.3%	311	1.5%	2,220	1.6%	1,061	1.7%	11,648	2.5%
Information	58	2.5%	909	4.0%	500	2.4%	5,284	3.7%	1,434	2.2%	17,971	3.8%
Finance & Insurance	66	2.8%	211	0.9%	563	3.2%	3,752	2.6%	2,048	3.2%	13,342	2.8%
Central Bank/Credit Intermediation & Related Activities	25	1.1%	123	0.5%	201	1.0%	2,030	1.4%	571	0.9%	6,170	1.3%
Securities, Commodity Contracts & Other Financial	22	0.9%	41	0.2%	258	1.2%	684	0.5%	808	1.3%	2,768	0.6%
Insurance Carriers & Related Activities; Funds, Trusts &	19	0.8%	47	0.2%	204	1.0%	1,038	0.7%	669	1.0%	4,405	0.9%
Real Estate, Rental & Leasing	96	4.1%	300	1.3%	864	4.1%	3,363	2.3%	2,749	4.3%	11,092	2.3%
Professional, Scientific & Tech Services	344	14.5%	2,072	9.2%	2,982	14.2%	14,308	10.0%	8,780	13.8%	54,829	11.6%
Legal Services	30	1.3%	74	0.3%	348	1.7%	1,050	0.7%	1,056	1.7%	3,041	0.6%
Management of Companies & Enterprises	7	0.3%	14	0.1%	69	0.3%	164	0.1%	179	0.3%	411	0.1%
Administrative & Support & Waste Management & Remediation	317	13.4%	651	2.9%	2,835	13.5%	8,329	5.8%	8,769	13.7%	27,568	5.8%
Educational Services	48	2.0%	991	4.4%	429	2.0%	8,453	5.9%	1,320	2.1%	41,048	8.7%
Health Care & Social Assistance	115	4.9%	1,119	5.0%	1,282	6.1%	10,816	7.6%	4,072	6.4%	38,026	8.0%
Arts, Entertainment & Recreation	41	1.7%	360	1.6%	337	1.6%	2,534	1.8%	1,033	1.6%	6,280	1.3%
Accommodation & Food Services	51	2.2%	477	2.1%	605	2.9%	6,523	4.6%	1,911	3.0%	22,026	4.6%
Accommodation	9	0.4%	135	0.6%	53	0.3%	1,139	0.8%	171	0.3%	4,117	0.9%
Food Services & Drinking Places	42	1.8%	342	1.5%	552	2.6%	5,383	3.8%	1,739	2.7%	17,909	3.8%
Other Services (except Public Administration)	167	7.1%	489	2.2%	1,727	8.2%	5,504	3.8%	5,106	8.0%	18,433	3.9%
Automotive Repair & Maintenance	32	1.4%	125	0.6%	331	1.6%	975	0.7%	901	1.4%	2,911	0.6%
Public Administration	58	2.5%	2,285	10.1%	241	1.1%	7,429	5.2%	771	1.2%	37,245	7.8%
Unclassified Establishments	301	12.7%	1	0.0%	2,632	12.5%	146	0.1%	8,237	12.9%	213	0.0%
Total	2,365	100.0%	22,534	100.0%	20,973	100.0%	143,166	100.0%	63,813	100.0%	474,508	100.0%

Source: Copyright 2014 Dun & Bradstreet, Inc. All rights reserved. Esri Total Residential Population forecasts for 2014.



Disposable Income Profile

Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 10 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

	Census 2010	2014	2019	2014-2019 Change	2014-2019 Annual Rate
Population	25,641	26,391	27,320	929	0.69%
Median Age	40.6	41.4	41.7	0.3	0.14%
Households	9,023	9,284	9,670	386	0.82%
Average Household Size	2.53	2.52	2.52	0.00	0.00%

2014 Households by Disposable Income	Number	Percent
Total	9,284	100.0%
<\$15,000	860	9.3%
\$15,000-\$24,999	579	6.2%
\$25,000-\$34,999	721	7.8%
\$35,000-\$49,999	1,046	11.3%
\$50,000-\$74,999	1,527	16.4%
\$75,000-\$99,999	1,294	13.9%
\$100,000-\$149,999	2,022	21.8%
\$150,000-\$199,999	689	7.4%
\$200,000+	546	5.9%
Median Disposable Income	\$72,948	
Average Disposable Income	\$89,360	

2014 Disposable Income by Age of Householder	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	148	910	1,429	2,496	2,204	1,233	864
<\$15,000	24	71	70	126	212	159	199
\$15,000-\$24,999	13	54	77	95	117	106	116
\$25,000-\$34,999	18	107	96	141	148	90	122
\$35,000-\$49,999	26	137	170	183	184	202	145
\$50,000-\$74,999	40	234	289	294	329	217	124
\$75,000-\$99,999	20	138	208	427	311	149	41
\$100,000-\$149,999	6	130	339	722	539	197	89
\$150,000-\$199,999	1	31	114	284	183	64	12
\$200,000+	0	8	67	225	181	49	16
Median Disposable Income	\$44,877	\$56,595	\$76,164	\$98,646	\$82,399	\$55,065	\$34,459
Average Disposable Income	\$49,054	\$67,261	\$91,052	\$113,403	\$101,792	\$75,593	\$50,808

Data Note: Disposable Income is after-tax household income. Disposable income forecasts are based on the Current Population Survey, U.S. Census Bureau. Detail may not sum to totals due to rounding

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.

August 14, 2014



Disposable Income Profile

Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 20 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

	Census 2010	2014	2019	2014-2019 Change	2014-2019 Annual Rate
Population	240,153	246,989	257,043	10,054	0.80%
Median Age	41.3	42.2	42.7	0.5	0.24%
Households	91,133	94,036	98,046	4,010	0.84%
Average Household Size	2.55	2.54	2.54	0.00	0.00%

2014 Households by Disposable Income	Number	Percent
Total	94,036	100.0%
<\$15,000	9,331	9.9%
\$15,000-\$24,999	7,325	7.8%
\$25,000-\$34,999	8,254	8.8%
\$35,000-\$49,999	11,747	12.5%
\$50,000-\$74,999	15,908	16.9%
\$75,000-\$99,999	12,842	13.7%
\$100,000-\$149,999	18,353	19.5%
\$150,000-\$199,999	5,741	6.1%
\$200,000+	4,536	4.8%
Median Disposable Income	\$64,118	
Average Disposable Income	\$82,293	

2014 Disposable Income by Age of Householder	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	1,936	9,995	15,307	23,170	21,026	12,545	10,056
<\$15,000	459	1,208	905	1,203	1,769	1,535	2,253
\$15,000-\$24,999	297	806	897	1,023	1,303	1,355	1,644
\$25,000-\$34,999	286	1,155	1,139	1,549	1,634	940	1,551
\$35,000-\$49,999	275	1,500	1,905	1,940	1,982	2,318	1,825
\$50,000-\$74,999	357	2,344	3,017	2,960	3,477	2,433	1,318
\$75,000-\$99,999	189	1,356	2,378	4,001	3,172	1,355	391
\$100,000-\$149,999	56	1,220	3,404	6,417	4,814	1,649	793
\$150,000-\$199,999	16	308	1,040	2,277	1,441	541	117
\$200,000+	0	99	621	1,800	1,434	419	163
Median Disposable Income	\$31,763	\$52,279	\$72,554	\$91,568	\$77,062	\$50,840	\$31,629
Average Disposable Income	\$40,465	\$62,245	\$86,518	\$106,824	\$95,336	\$69,760	\$46,557

Data Note: Disposable Income is after-tax household income. Disposable income forecasts are based on the Current Population Survey, U.S. Census Bureau. Detail may not sum to totals due to rounding

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.

August 14, 2014



Disposable Income Profile

Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 30 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

	Census 2010	2014	2019	2014-2019 Change	2014-2019 Annual Rate
Population	804,571	818,763	845,615	26,852	0.65%
Median Age	40.0	40.8	41.2	0.4	0.20%
Households	302,799	309,233	319,977	10,744	0.69%
Average Household Size	2.58	2.57	2.57	0.00	0.00%

2014 Households by Disposable Income	Number	Percent
Total	309,233	100.0%
<\$15,000	33,906	11.0%
\$15,000-\$24,999	25,561	8.3%
\$25,000-\$34,999	29,885	9.7%
\$35,000-\$49,999	41,532	13.4%
\$50,000-\$74,999	53,991	17.5%
\$75,000-\$99,999	40,993	13.3%
\$100,000-\$149,999	53,329	17.2%
\$150,000-\$199,999	16,815	5.4%
\$200,000+	13,222	4.3%
Median Disposable Income	\$58,709	
Average Disposable Income	\$77,472	

2014 Disposable Income by Age of Householder	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	7,790	38,232	53,170	72,657	65,111	39,385	32,888
<\$15,000	1,981	5,301	3,592	4,566	6,259	4,996	7,211
\$15,000-\$24,999	1,191	3,247	3,408	3,513	4,326	4,554	5,322
\$25,000-\$34,999	1,295	4,840	4,296	5,377	5,693	3,083	5,300
\$35,000-\$49,999	1,096	5,973	7,385	6,979	6,681	7,282	6,135
\$50,000-\$74,999	1,293	8,572	10,842	10,112	11,095	7,726	4,351
\$75,000-\$99,999	689	4,884	8,098	12,334	9,697	4,084	1,208
\$100,000-\$149,999	188	4,060	10,341	18,343	13,203	4,761	2,434
\$150,000-\$199,999	55	1,012	3,254	6,382	4,086	1,637	389
\$200,000+	3	343	1,952	5,052	4,071	1,262	540
Median Disposable Income	\$29,758	\$49,170	\$66,130	\$84,782	\$70,452	\$49,366	\$31,721
Average Disposable Income	\$38,383	\$58,727	\$81,867	\$100,665	\$90,111	\$67,771	\$46,294

Data Note: Disposable Income is after-tax household income. Disposable income forecasts are based on the Current Population Survey, U.S. Census Bureau. Detail may not sum to totals due to rounding.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.

August 14, 2014



Retail MarketPlace Profile

Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 10 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

Summary Demographics

2013 Population	25,753
2013 Households	9,108
2013 Median Disposable Income	\$69,174
2013 Per Capita Income	\$44,723

Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$390,430,229	\$158,459,714	\$231,970,515	42.3	164
Total Retail Trade	44-45	\$350,408,377	\$138,230,027	\$212,178,350	43.4	136
Total Food & Drink	722	\$40,021,853	\$20,229,687	\$19,792,166	32.8	27

Industry Group

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$65,790,275	\$30,206,430	\$35,583,845	37.1	13
Automobile Dealers	4411	\$56,882,680	\$25,374,233	\$31,508,447	38.3	5
Other Motor Vehicle Dealers	4412	\$3,920,812	\$740,774	\$3,180,038	68	2
Auto Parts, Accessories & Tire Stores	4413	\$4,986,783	\$4,091,423	\$895,360	9.9	7
Furniture & Home Furnishings Stores	442	\$9,320,207	\$5,202,009	\$4,118,198	28.4	10
Furniture Stores	4421	\$4,511,622	\$1,299,910	\$3,211,712	55.3	5
Home Furnishings Stores	4422	\$4,808,586	\$3,902,100	\$906,486	10.4	5
Electronics & Appliance Stores	443	\$12,542,265	\$2,676,750	\$9,865,515	64.8	5
Bldg Materials, Garden Equip. & Supply Stores	444	\$12,663,237	\$5,473,989	\$7,189,248	39.6	10
Bldg Material & Supplies Dealers	4441	\$11,125,118	\$3,031,497	\$8,093,621	57.2	8
Lawn & Garden Equip & Supply Stores	4442	\$1,538,119	\$2,442,492	-\$904,373	-22.7	3
Food & Beverage Stores	445	\$67,728,055	\$41,650,622	\$26,077,433	23.8	20
Grocery Stores	4451	\$57,138,111	\$30,210,226	\$26,927,885	30.8	11
Specialty Food Stores	4452	\$2,887,982	\$1,066,843	\$1,821,139	46.0	5
Beer, Wine & Liquor Stores	4453	\$7,701,962	\$10,373,553	-\$2,671,591	-14.8	4
Health & Personal Care Stores	446,4461	\$37,782,745	\$7,169,687	\$30,613,058	68.1	6
Gasoline Stations	447,4471	\$33,466,268	\$9,399,940	\$24,066,328	56.1	6
Clothing & Clothing Accessories Stores	448	\$26,755,148	\$6,138,483	\$20,616,665	62.7	13
Clothing Stores	4481	\$19,601,991	\$5,568,105	\$14,033,886	55.8	10
Shoe Stores	4482	\$3,536,477	\$0	\$3,536,477	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$3,616,681	\$570,378	\$3,046,303	72.8	3
Sporting Goods, Hobby, Book & Music Stores	451	\$10,467,383	\$1,856,075	\$8,611,308	69.9	14
Sporting Goods/Hobby/Musical Instr Stores	4511	\$8,501,167	\$1,632,073	\$6,869,094	67.8	13
Book, Periodical & Music Stores	4512	\$1,966,216	\$224,002	\$1,742,214	79.5	2
General Merchandise Stores	452	\$40,495,341	\$15,686,213	\$24,809,128	44.2	3
Department Stores Excluding Leased Depts.	4521	\$22,758,270	\$13,574,480	\$9,183,790	25.3	1
Other General Merchandise Stores	4529	\$17,737,072	\$2,111,733	\$15,625,339	78.7	2
Miscellaneous Store Retailers	453	\$9,460,257	\$3,490,984	\$5,969,273	46.1	24
Florists	4531	\$761,413	\$385,197	\$376,216	32.8	3
Office Supplies, Stationery & Gift Stores	4532	\$3,422,353	\$231,043	\$3,191,310	87.4	4
Used Merchandise Stores	4533	\$1,567,393	\$1,095,916	\$471,477	17.7	6
Other Miscellaneous Store Retailers	4539	\$3,709,097	\$1,778,828	\$1,930,269	35.2	12
Nonstore Retailers	454	\$23,937,194	\$9,278,846	\$14,658,348	44.1	11
Electronic Shopping & Mail-Order Houses	4541	\$16,907,389	\$3,171,436	\$13,735,953	68.4	2
Vending Machine Operators	4542	\$569,206	\$455,233	\$113,973	11.1	3
Direct Selling Establishments	4543	\$6,460,599	\$5,652,177	\$808,422	6.7	7
Food Services & Drinking Places	722	\$40,021,853	\$20,229,687	\$19,792,166	32.8	27
Full-Service Restaurants	7221	\$21,121,565	\$10,088,455	\$11,033,110	35.4	9
Limited-Service Eating Places	7222	\$15,674,616	\$9,294,560	\$6,380,056	25.6	15
Special Food Services	7223	\$2,087,213	\$0	\$2,087,213	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$1,138,458	\$839,567	\$298,891	15.1	3

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

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August 14, 2014

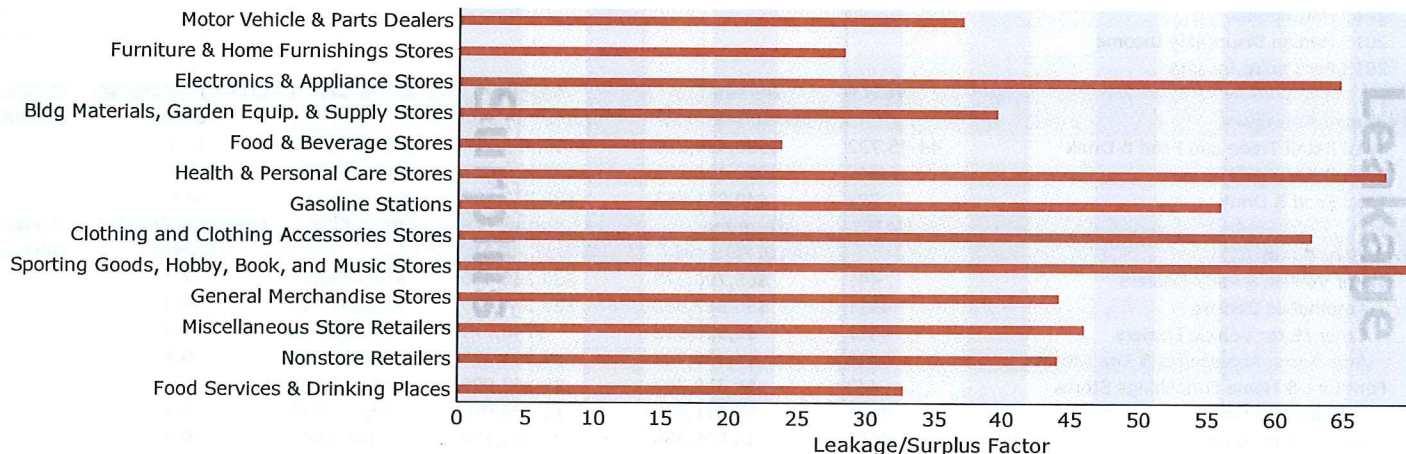


Retail MarketPlace Profile

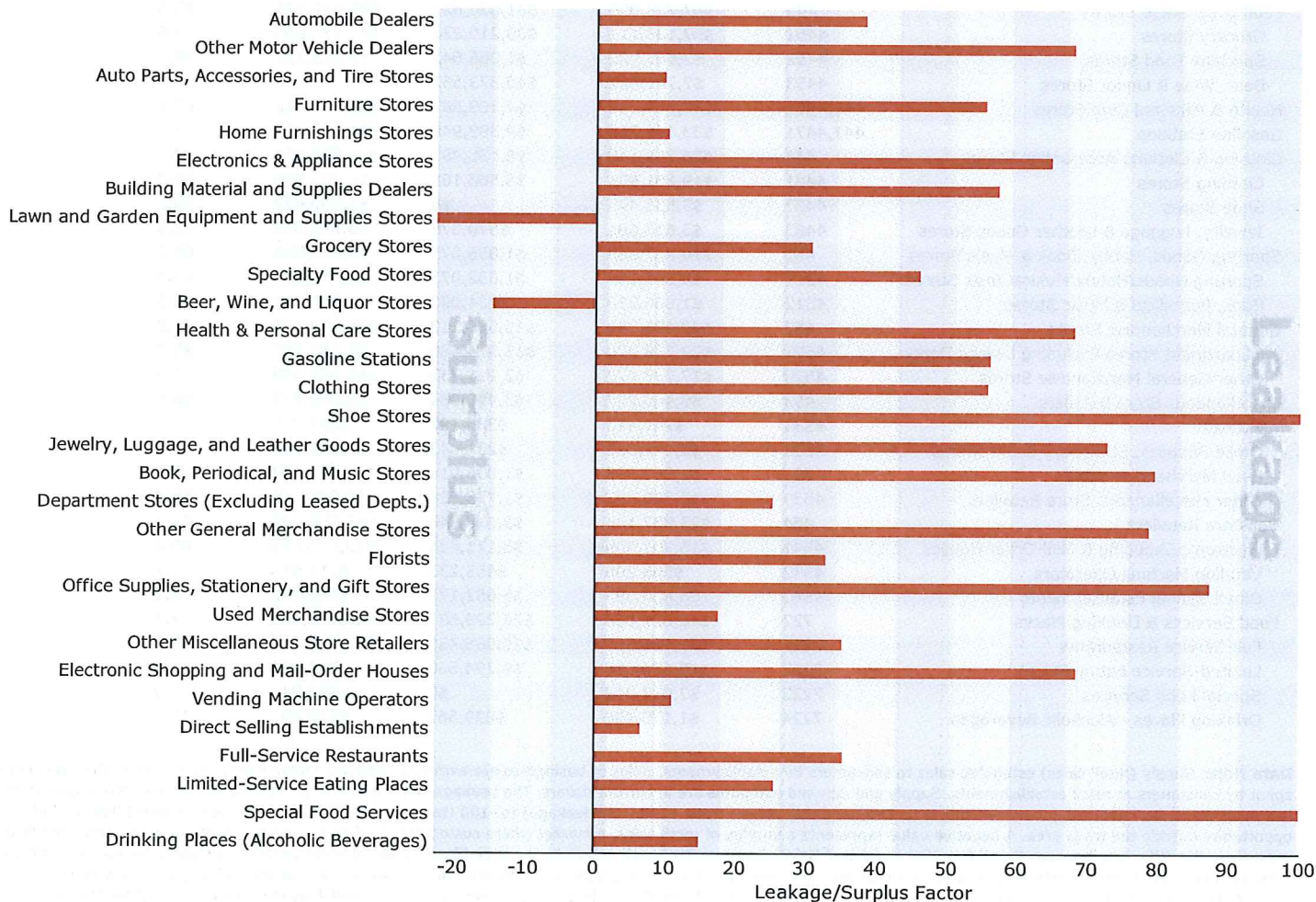
Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 10 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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August 14, 2014



Retail MarketPlace Profile

Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 20 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

Summary Demographics

2013 Population	242,315
2013 Households	92,260
2013 Median Disposable Income	\$61,213
2013 Per Capita Income	\$41,820

Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$3,723,182,139	\$2,898,788,468	\$824,393,671	12.4	1,969
Total Retail Trade	44-45	\$3,343,105,790	\$2,629,161,198	\$713,944,592	12.0	1,624
Total Food & Drink	722	\$380,076,349	\$269,627,270	\$110,449,079	17.0	345

Industry Group

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$628,701,563	\$345,635,855	\$283,065,708	29.1	130
Automobile Dealers	4411	\$544,547,886	\$311,639,173	\$232,908,713	27.2	59
Other Motor Vehicle Dealers	4412	\$36,756,127	\$6,418,144	\$30,337,983	70	20
Auto Parts, Accessories & Tire Stores	4413	\$47,397,550	\$27,578,537	\$19,819,013	26.4	51
Furniture & Home Furnishings Stores	442	\$88,119,334	\$66,327,208	\$21,792,126	14.1	98
Furniture Stores	4421	\$42,863,121	\$37,401,622	\$5,461,499	6.8	39
Home Furnishings Stores	4422	\$45,256,213	\$28,925,586	\$16,330,627	22.0	59
Electronics & Appliance Stores	443	\$119,432,172	\$61,201,814	\$58,230,358	32.2	92
Bldg Materials, Garden Equip. & Supply Stores	444	\$117,685,917	\$103,175,363	\$14,510,554	6.6	130
Bldg Material & Supplies Dealers	4441	\$103,025,116	\$85,146,090	\$17,879,026	9.5	105
Lawn & Garden Equip & Supply Stores	4442	\$14,660,801	\$18,029,272	-\$3,368,471	-10.3	25
Food & Beverage Stores	445	\$648,702,857	\$618,517,303	\$30,185,554	2.4	233
Grocery Stores	4451	\$547,815,522	\$520,395,636	\$27,419,886	2.6	124
Specialty Food Stores	4452	\$27,665,285	\$25,767,119	\$1,898,166	3.6	61
Beer, Wine & Liquor Stores	4453	\$73,222,050	\$72,354,548	\$867,502	0.6	48
Health & Personal Care Stores	446,4461	\$360,894,172	\$164,791,552	\$196,102,620	37.3	110
Gasoline Stations	447,4471	\$322,354,388	\$292,082,430	\$30,271,958	4.9	71
Clothing & Clothing Accessories Stores	448	\$253,243,158	\$200,014,729	\$53,228,429	11.7	183
Clothing Stores	4481	\$185,748,626	\$164,383,402	\$21,365,224	6.1	127
Shoe Stores	4482	\$33,618,425	\$20,958,004	\$12,660,421	23.2	15
Jewelry, Luggage & Leather Goods Stores	4483	\$33,876,107	\$14,673,323	\$19,202,784	39.6	41
Sporting Goods, Hobby, Book & Music Stores	451	\$99,786,015	\$102,105,704	-\$2,319,689	-1.1	147
Sporting Goods/Hobby/Musical Instr Stores	4511	\$81,020,206	\$82,790,330	-\$1,770,124	-1.1	117
Book, Periodical & Music Stores	4512	\$18,765,809	\$19,315,375	-\$549,566	-1.4	30
General Merchandise Stores	452	\$386,724,911	\$470,048,672	-\$83,323,761	-9.7	50
Department Stores Excluding Leased Depts.	4521	\$216,819,462	\$292,891,955	-\$76,072,493	-14.9	26
Other General Merchandise Stores	4529	\$169,905,449	\$177,156,716	-\$7,251,267	-2.1	24
Miscellaneous Store Retailers	453	\$90,173,562	\$93,232,252	-\$3,058,690	-1.7	308
Florists	4531	\$7,185,261	\$4,224,522	\$2,960,739	25.9	28
Office Supplies, Stationery & Gift Stores	4532	\$32,595,898	\$27,041,176	\$5,554,722	9.3	79
Used Merchandise Stores	4533	\$14,844,710	\$11,934,301	\$2,910,409	10.9	58
Other Miscellaneous Store Retailers	4539	\$35,547,693	\$50,032,253	-\$14,484,560	-16.9	143
Nonstore Retailers	454	\$227,287,740	\$112,028,318	\$115,259,422	34.0	71
Electronic Shopping & Mail-Order Houses	4541	\$161,254,341	\$26,809,637	\$134,444,704	71.5	16
Vending Machine Operators	4542	\$5,451,619	\$2,557,327	\$2,894,292	36.1	9
Direct Selling Establishments	4543	\$60,581,780	\$82,661,354	-\$22,079,574	-15.4	46
Food Services & Drinking Places	722	\$380,076,349	\$269,627,270	\$110,449,079	17.0	345
Full-Service Restaurants	7221	\$200,444,880	\$147,033,076	\$53,411,804	15.4	134
Limited-Service Eating Places	7222	\$149,134,347	\$111,189,361	\$37,944,986	14.6	162
Special Food Services	7223	\$19,778,924	\$5,035,170	\$14,743,754	59.4	13
Drinking Places - Alcoholic Beverages	7224	\$10,718,199	\$6,369,662	\$4,348,537	25.4	36

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

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August 14, 2014

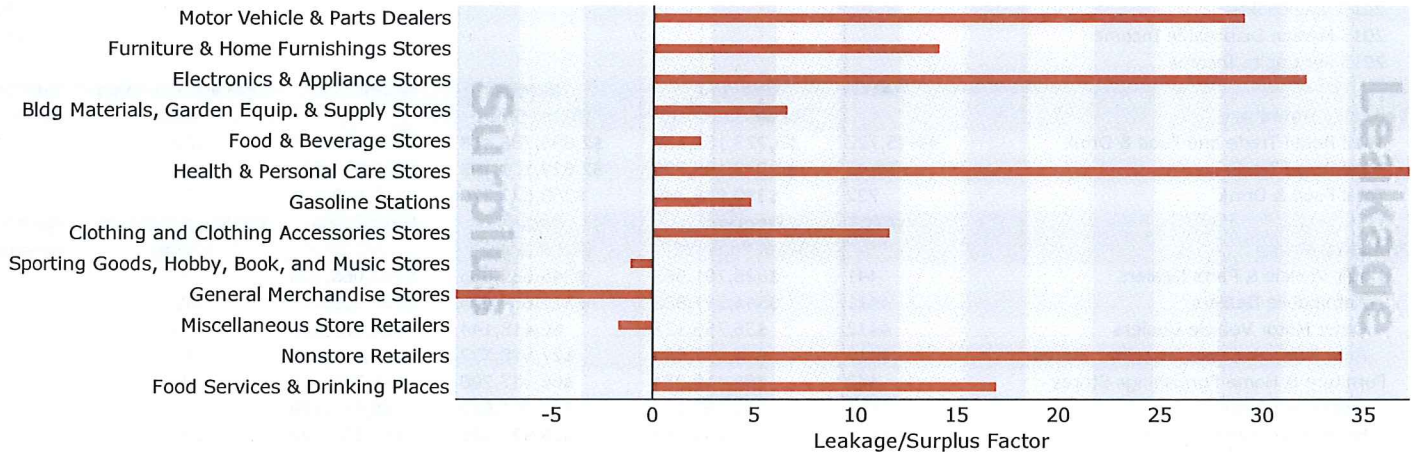


Retail MarketPlace Profile

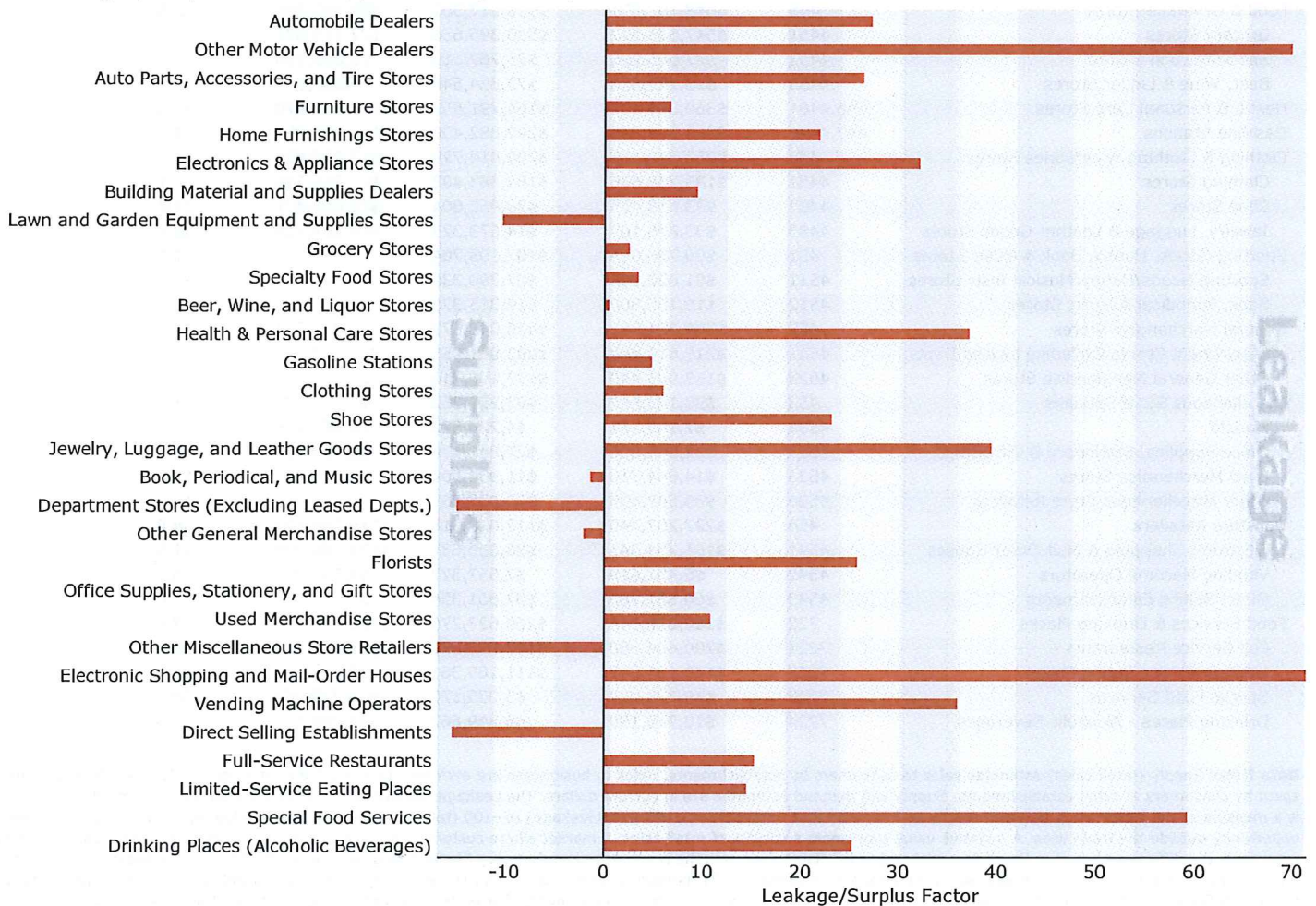
Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 20 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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August 14, 2014



Retail MarketPlace Profile

Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 30 minute radius

Prepared by MRPC
Latitude: 42.53505
Longitude: -71.57639

Summary Demographics

2013 Population	811,325
2013 Households	306,426
2013 Median Disposable Income	\$56,313
2013 Per Capita Income	\$39,004

Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$11,648,188,789	\$9,347,178,103	\$2,301,010,686	11.0	5,726
Total Retail Trade	44-45	\$10,454,638,086	\$8,422,134,329	\$2,032,503,757	10.8	4,647
Total Food & Drink	722	\$1,193,550,704	\$925,043,774	\$268,506,930	12.7	1,079

Industry Group

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$1,962,574,922	\$1,524,646,191	\$437,928,731	12.6	365
Automobile Dealers	4411	\$1,700,186,454	\$1,403,014,214	\$297,172,240	9.6	175
Other Motor Vehicle Dealers	4412	\$114,265,106	\$35,123,478	\$79,141,628	53	53
Auto Parts, Accessories & Tire Stores	4413	\$148,123,363	\$86,508,499	\$61,614,864	26.3	137
Furniture & Home Furnishings Stores	442	\$274,718,865	\$190,947,595	\$83,771,270	18.0	279
Furniture Stores	4421	\$133,802,989	\$123,730,533	\$10,072,456	3.9	100
Home Furnishings Stores	4422	\$140,915,875	\$67,217,062	\$73,698,813	35.4	179
Electronics & Appliance Stores	443	\$371,227,469	\$190,824,887	\$180,402,582	32.1	278
Bldg Materials, Garden Equip. & Supply Stores	444	\$364,926,569	\$312,141,897	\$52,784,672	7.8	327
Bldg Material & Supplies Dealers	4441	\$319,873,878	\$270,542,230	\$49,331,648	8.4	271
Lawn & Garden Equip & Supply Stores	4442	\$45,052,691	\$41,599,668	\$3,453,023	4.0	56
Food & Beverage Stores	445	\$2,032,610,758	\$1,987,593,786	\$45,016,972	1.1	693
Grocery Stores	4451	\$1,720,820,012	\$1,715,878,144	\$4,941,868	0.1	376
Specialty Food Stores	4452	\$86,119,292	\$57,445,595	\$28,673,697	20.0	187
Beer, Wine & Liquor Stores	4453	\$225,671,453	\$214,270,048	\$11,401,405	2.6	130
Health & Personal Care Stores	446,4461	\$1,118,828,835	\$692,971,623	\$425,857,212	23.5	314
Gasoline Stations	447,4471	\$1,010,766,657	\$704,850,434	\$305,916,223	17.8	205
Clothing & Clothing Accessories Stores	448	\$790,717,723	\$491,814,435	\$298,903,288	23.3	544
Clothing Stores	4481	\$579,560,650	\$354,375,946	\$225,184,704	24.1	372
Shoe Stores	4482	\$105,946,543	\$62,201,796	\$43,744,747	26.0	47
Jewelry, Luggage & Leather Goods Stores	4483	\$105,210,530	\$75,236,693	\$29,973,837	16.6	125
Sporting Goods, Hobby, Book & Music Stores	451	\$312,861,756	\$259,666,692	\$53,195,064	9.3	393
Sporting Goods/Hobby/Musical Instr Stores	4511	\$253,981,362	\$202,689,855	\$51,291,507	11.2	313
Book, Periodical & Music Stores	4512	\$58,880,394	\$56,976,837	\$1,903,557	1.6	80
General Merchandise Stores	452	\$1,221,959,593	\$1,248,757,323	-\$26,797,730	-1.1	162
Department Stores Excluding Leased Depts.	4521	\$680,373,982	\$751,515,299	-\$71,141,317	-5.0	72
Other General Merchandise Stores	4529	\$541,585,611	\$497,242,024	\$44,343,587	4.3	89
Miscellaneous Store Retailers	453	\$281,343,495	\$240,397,420	\$40,946,075	7.8	870
Florists	4531	\$22,007,564	\$13,625,588	\$8,381,976	23.5	92
Office Supplies, Stationery & Gift Stores	4532	\$101,233,793	\$84,602,013	\$16,631,780	8.9	208
Used Merchandise Stores	4533	\$46,241,942	\$32,696,438	\$13,545,504	17.2	149
Other Miscellaneous Store Retailers	4539	\$111,860,195	\$109,473,381	\$2,386,814	1.1	420
Nonstore Retailers	454	\$712,101,444	\$577,522,045	\$134,579,399	10.4	217
Electronic Shopping & Mail-Order Houses	4541	\$505,774,982	\$362,756,612	\$143,018,370	16.5	42
Vending Machine Operators	4542	\$17,083,002	\$8,124,508	\$8,958,494	35.5	39
Direct Selling Establishments	4543	\$189,243,460	\$206,640,925	-\$17,397,465	-4.4	137
Food Services & Drinking Places	722	\$1,193,550,704	\$925,043,774	\$268,506,930	12.7	1,079
Full-Service Restaurants	7221	\$628,399,695	\$455,767,468	\$172,632,227	15.9	425
Limited-Service Eating Places	7222	\$468,899,699	\$413,157,432	\$55,742,267	6.3	499
Special Food Services	7223	\$61,634,987	\$38,553,060	\$23,081,927	23.0	62
Drinking Places - Alcoholic Beverages	7224	\$34,616,322	\$17,565,815	\$17,050,507	32.7	94

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

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August 14, 2014

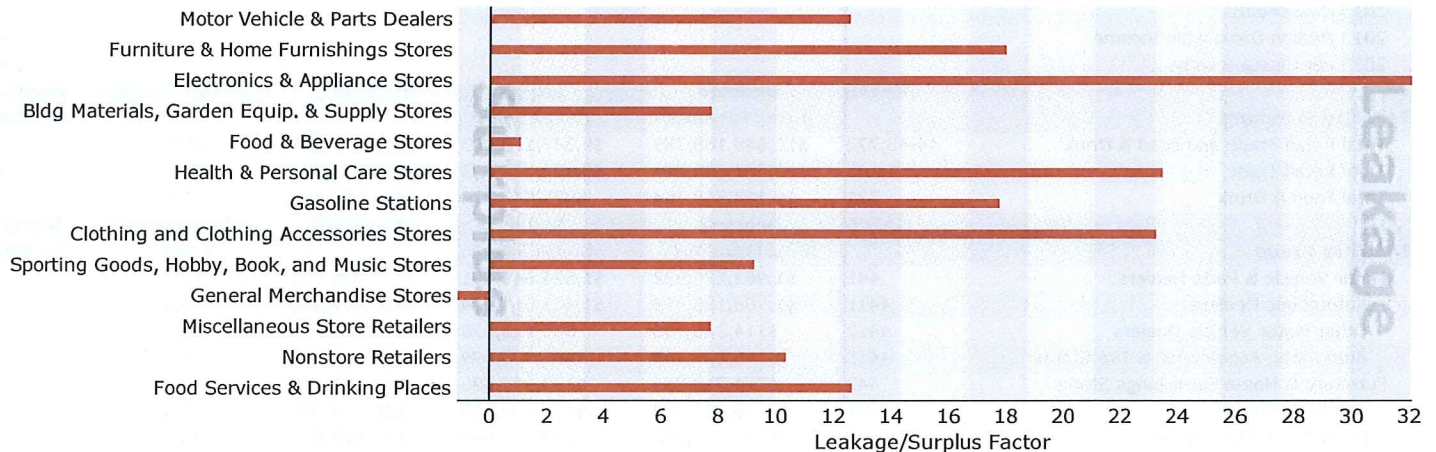


Retail MarketPlace Profile

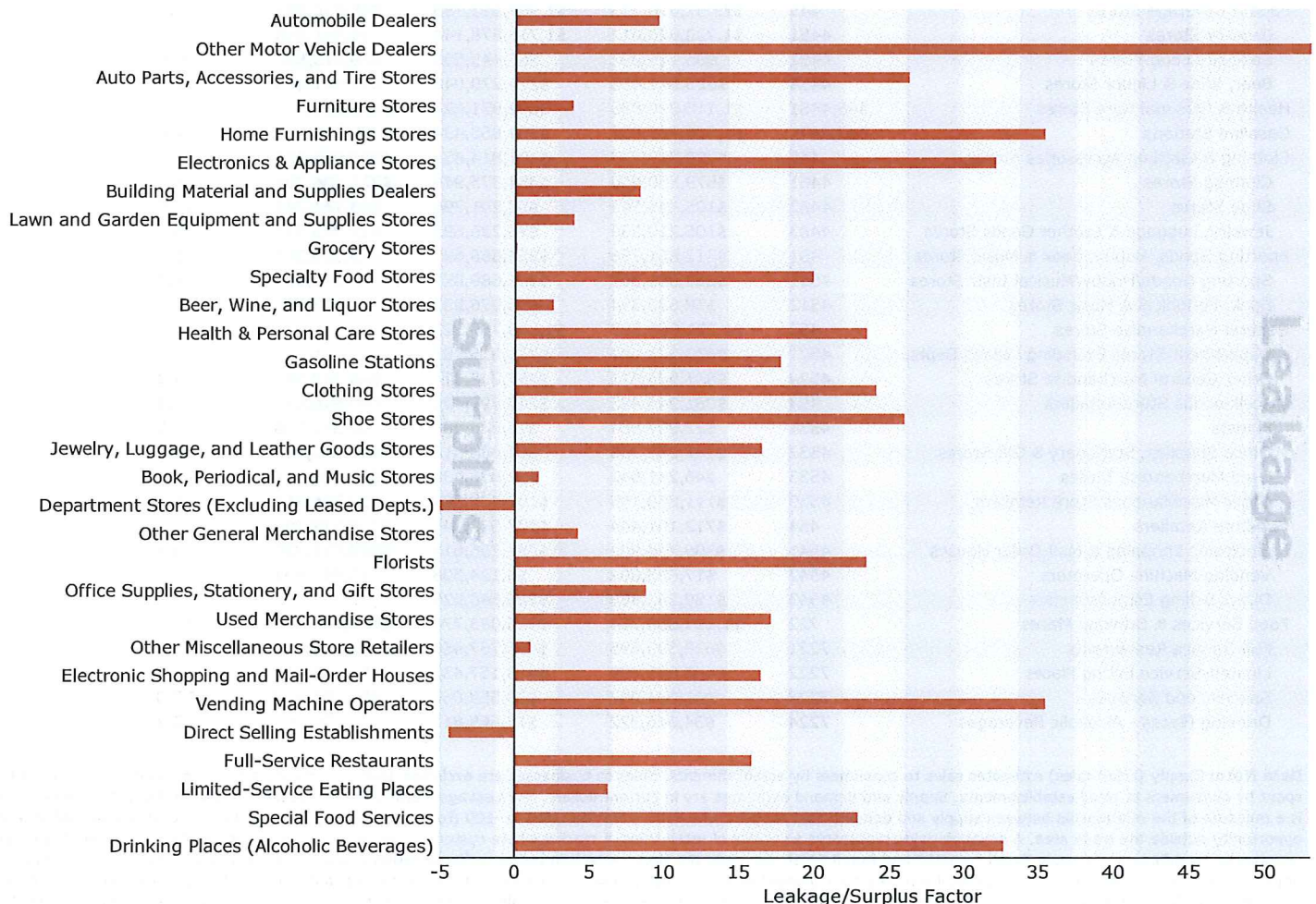
Harvard Commercial District
262 Ayer Rd, Harvard, Massachusetts, 01451
Drive Time: 30 minute radius

Prepared by MRPC
Latitude: 42.53505
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Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



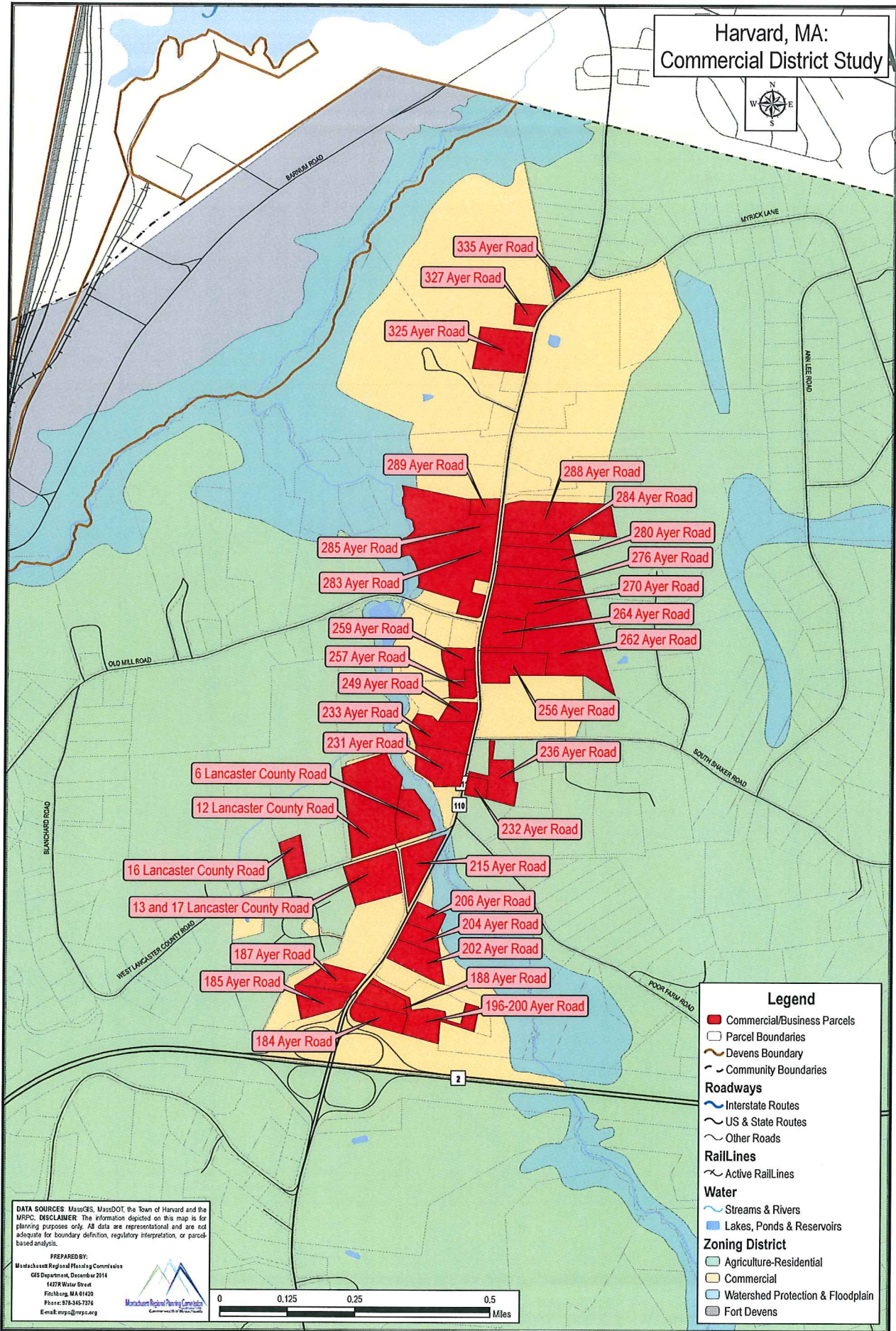
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August 14, 2014

Section 3: Map of Commercial Properties in the C District

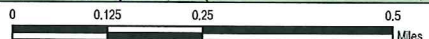
This section provides a map of the C District indicating the addresses of commercial within the district. MRPC prepared this map from a review of Town Assessor records and observations made during the parking survey conducted on September 4, 2014. For a complete list of businesses identified during the parking survey according to addresses shown in the following map, refer to the Parking Survey data presented in Section 4.

Harvard, MA: Commercial District Study



DATA SOURCES: MassGIS, MassDOT, the Town of Harvard and the MPO. DISCLAIMER: The information depicted on this map is for planning purposes only. All data are representational and are not adequate for boundary definition, regulatory interpretation, or parcel-based analysis.

PREPARED BY:
Massachusetts Regional Planning Commission
GIS Department, December 2014
14778 Water Street
Fitchburg, MA 01420
Phone: 978-345-7376
Email: mrc@mrpc.org



Section 4: Parking Survey, Assessment Information, and Traffic Counts

This section presents the results of a “windshield” survey of parking supply and demand within the C District, conducted late morning to midday on Thursday, September 4, 2014. The purpose of the survey was to quantify available parking supply at each commercial property within the C District and tabulate the number of spaces occupied at each location. It should be noted that, in some cases, the number of available spaces at certain locations was estimated due to a lack of visible striping delineating defined parking spaces. In addition to observing parking supply and utilization, the names of individual businesses at each property were recorded based on external signage and, in some cases, observation of building directories. Overall, 1,035 parking spaces were identified within the C District, of which 361 spaces, or 34.9 percent, were occupied at the time of observation.

The second part of this section presents a summary of tax assessment information available from the Town of Harvard’s Assessors Office, for properties within the C District. This includes address, owner, acreage and building area, use, and tax assessment value.

The third part of this section presents recent traffic counts for Ayer Road in the C District. This includes a table showing recent counts throughout Harvard compiled by the Town Planner from data provided by the Massachusetts Highway Department (MHD) and two recent counts conducted by MRPC which have not yet been entered in the MHD database.

HARVARD MA COMMERCIAL DISTRICT PARKING SURVEY: SEPTEMBER 4, 2014

Street Address	Identified Businesses	# of Parking Spaces	# of Spaces Occupied	Date of Survey	Time
184 Ayer Road	Bresco Tax Accountant	15	3	9/4/2014	10:54
	Resnahan Corp				
	1st Choice Realty				
188 Ayer Road	Dunkin Donuts	42	15	9/4/2014	10:57
	Harvard Dry Cleaners				
	The Catalano Companies				
196-200 Ayer Road	Umass Memorial Harvard Primary Care	188	78	9/4/2014	11:00
	DCS Corporation				
	LD Rousseau Inc.				
	Maugel Architects				
	Authentic Leadership Institute				
	Vacant Space				
204 Ayer Road	Harvard Lanes	35	2	9/4/2014	11:08
206 Ayer Road	MCO & Industrial	21	9	9/4/2014	11:10
	Albert Barbieri				
	Nico Poulas Insurance				
	Moses & Assoc. Architects				
	Ray Lyons Attorney				
256 Ayer Road	Stone's Power Equipment Co	4	2	9/4/2014	11:12
270 Ayer Road	Nancy Catalini Chew Attorney	45	9	9/4/2014	11:12
	Nancy Washington Accountant				
	Higgins Insurance				
276 Ayer Road	Murphy Insurance	12	5	9/4/2014	11:15
280 Ayer Road	Hatch Jennings Inc	40	28	9/4/2014	11:17
	Solar Design Associates				
	South Coast Development LLC				
	Harvard Theraputic Massage				
284 Ayer Road	CPA	6	3	9/4/2014	11:19
327 Ayer Road	Doe Orchards		4	9/4/2014	11:25
325 Ayer Road	Anthony Corey Neckwear	76	32	9/4/2014	11:30
	A Tech Investigation				
	Body Lines Pilates				
	Chapin & Associates				
	ENSR International				
	Harvard Machinery				
	India Overseas Traders				
	John Reedy CPA				
	Whole Earth Landscape				
	Siam Pepper Thai Cuisine				
	Wellsley Theraputics at Harvard				
289 Ayer Road	Harvard Outdoor Power Equipmen	9	5	9/4/2014	11:31
285 Ayer Road	Sorrento's Brick Oven Pizza	80	20	9/4/2014	11:32
	The Grape Vine				
	Team Realty				
	Harvard Academy of Dance				
	Premerica Financial Services				

	Seeds of Faith Community Church				
	Koko Fit Club				
283 Ayer Road	Rollstone Bank & Trust	25	3	9/4/2014	11:35
259 Ayer Road	Harvard Pet Care Center	13	5	9/4/2014	11:37
	Vet Clinic				
	Kennel				
	Daycare				
	Grooming				
	Vacant Space				
257 Ayer Road	Terry Anelons Chiropractic	30	16	9/4/2014	11:39
	Reddy Family Dental				
	Life Managements Associates				
	Wellness Massage				
249 Ayer Road	Office space	32	15	9/4/2014	11:43
233 Ayer Road	Jeffrey Resnick DPM	99	20	9/4/2014	11:46
	Craig Gustason MD				
	Envision				
	Carol Savage MD				
	Authentic Leadership Institute				
231 Ayer Road	Acton Medical	53	21	9/4/2014	11:48
	Pizza Bella				
215 Ayer Road	Post Office	30	10	9/4/2014	12:00
187 Ayer Road	Vacant Space	8			12:02
185 Ayer Road	Vacant Space	6			12:03
6 Lancaster County Road	Certica Solutions	54	17	9/4/2014	11:54
	Berwind				
	Digital Promo Network				
	Redignes EHS				
12 Lancaster County Road	Renaissance Corporation	75	31	9/4/2014	11:56
	RXI				
16 Lancaster County Road	Concord Hillside Medical	37	8	9/4/2014	11:59
	Harvard Vanguard Medical				

Total **1035** **361**
% Occupied at time of survey **34.9%**

Note: Inventory of available spaces for various sites was approximate in many cases due to lack of striping.

ASSESSORS DATABASE: HARVARD COMMERCIAL DISTRICT PROPERTIES

OWNER	PARCEL ID	ADDRESS	ACRES	FRONTAGE	BUILDING AREA	CURRENT USE	FY09 VALUE (\$000)		
							LAND	BUILDING	TOTAL FY09 TAXES
Doe	1/2	329 Ayer Rd.	63.01	110'	Shed/Barn only	Orchards/61A	47		47 643.58
Jonathan & Lawrence Doe	1/3	327 Ayer Rd	1.01	240'	2,474 s.f.	SFR	166	237	403 5,465.05
LIT Harvard Appleworks LP	1/4	325 Ayer Rd	4.71	401'	84,012 s.f.	Office Building	436	2,498	2,934 39,835.71
Berwind	1/5	309 Ayer Rd	53.71	30'	3,338 s.f.	SFR/Agriculture-61A	238	320	558 7,580.45
Lombardelli/Martinez	4/30	313 Ayer Rd	0.98	215'	3,874 s.f.	2 Family Residence	164	298	462 6,272.91
Brown/Briggs	4/29	307 Ayer Rd	1.51	220'	3,856 s.f.	SFR	190	457	647 8,786.15
Berwind	4/28	297 Ayer Rd	10.83	319'	Vacant Land	N/A	367		367 4,977.60
Hirsch	4/27	295 Ayer Rd	13.41	306'	829 s.f.	SFR	434	73	507 6,879.83
O'Malley	4/26	289 Ayer Rd	1.01	150'	4,000 s.f.	Store-Harvard Outdoor Power Equip	229	152	381 5,175.83
Hirsch	4/25	285 Ayer Rd	26.11	889'	3,000/17,220 s.f.	Bank, Strip Mall	652	1,284	1,936 26,289.20 2 Bldgs
Hirsch	4/24	275 Ayer Rd	0.41	129'	1,199 s.f.	SFR	123	52	175 2,234.90
Johnston	4/23	6 Old Mill Rd	1.21	120'	1,056 s.f.	SFR	226	114	340 4,611.00
Unknown	4/21		5.51	Landlocked					0
Pleasant Properties	4/52	Old Mill Rd	7.51	235'	N/A	Vacant Land	330		330 4,480.65
Pleasant Properties	4/52.1	Old Mill Rd	1.51	210'	N/A	Vacant Land	225		225 3,059.06
Pleasant Properties	4/52.2	261 Ayer Rd	1.51	428'	N/A	Vacant Land	263		263 3,566.22
Pleasant Properties	4/53	Old Mill Rd	1.01	Landlocked	N/A	Unbuildable Land	7		7 92.32
Kelleher	4/51	259 Ayer Rd	2.01	170'	13,026 s.f.	Kennel/Vet Office	275	524	799 10,847.25
Foxglove Hsng Assoc LTD Prtshp	4/49.2.1	253 Ayer Rd	3.21	50'	24,572 s.f.	Affordable Apartments	305	1,291	1,596 21,804.48
TAPB Realty Trust	4/49.2.2	257 Ayer Rd	1.28	253'	6,581 s.f.	Office Building	253	661	914 12,405.97
Blanchard House Nom Tr	4.49.1	249 Ayer Rd		213'	Condo Main			1,774	1,774 0
Blanchard Realty Tr	4A/49.1	249 Ayer Unit 101		n/a	725 s.f.	Office Condo			0 1,554.66
Blanchard Realty Tr	4B/49.1	249 Ayer Unit 102		n/a	2,020 s.f.	Office Condo			0 4,177.87
Marjorie C Tr	4C/49.1	249 Ayer Unit 201		n/a	480 s.f.	Office Condo			0 1,029.19

Marjorie C Tr Roberta & Richard French	4D/49.1	249 Ayer Unit 202	n/a		450 s.f.	Office Condo	0
203 Blanchard House Nominee Tr	4E/49.1	249 Ayer Unit 203	n/a		625 s.f.	Office Condo	0
Blanchard Realty Tr	4F/49.1	249 Ayer Unit 204	n/a		1,185 s.f.	Office Condo	0
MJDJ Realty Tr	4G/49.1	249 Ayer Unit 205	n/a		580 s.f.	Office Condo	0
Cosgrave	4H/49.1	249 Ayer Unit 206	n/a		585 s.f.	Office Condo	0
Vaccaro	4I/49.1	249 Ayer Unit 301	n/a		802 s.f.	Office Condo	0
AA Whiting Realty Tr	4J/49.1	249 Ayer Unit 302	n/a		910 s.f.	Office Condo	0
Mendola	4K/49.1	249 Ayer Unit 303	n/a		625 s.f.	Office Condo	0
Blanchard House 304 LLC	4L/49.1	249 Ayer Unit 304	n/a		1,200 s.f.	Office Condo	0
B & H Realty Tr	4M/49.1	249 Ayer Unit 305	n/a		610 s.f.	Office Condo	0
Keating	4N/49.1	249 Ayer Unit 306	n/a		510 s.f.	Office Condo	0
Shaker Pl Rity Tr	4/48.1	233 Ayer Rd	3.69	300'	11,200 s.f.	Office Building	921
Jill Realty Trust	4/48.2	231 Ayer Rd	3.76	350'	8,076 s.f.	Office Building	588
12 Lancaster County LLC	8/22.2	.16 Lancaster Cnty Rd		509'	5,600 s.f.	Professional Condo	864
12 Lancaster County LLC	8/22.1	12 Lancaster Cnty Rd	see 8/22.2		16,044 s.f.	Professional Condo	1,698
Bowers Brook Place	8/48.3.1	6 Lancaster Cnty Rd	3.35	355'	10,128 s.f.	Office Building	980
Town of Harvard	4/48.3.4	Lancaster Cnty Rd	19.04	367'	N/A	Vacant Land	134
Harvard Associates	8/61	215 Ayer Rd	3.06	813'	6,033 s.f.	Post Office	1,337
Town of Harvard	8/62.4	Lancaster Cnty Rd	5.05	549'	N/A	Vacant Land	339
Russo	8/62.2	Ayer	11.03	892'	N/A	Vacant Land	501
Brown	8/60	187 Ayer Rd	2.2	250'	4,800 s.f.	Office Building	86
Holmes	8/59	185 Ayer Rd	2.7	215'	3,506 s.f.	Office/Apartments	134
Corliss Rev Tr	8/41	184 Ayer Rd	2.27	218'	3,242 s.f.	Office Building	282
Samanthas Rity LLC	8/40.1	188 Ayer Rd	1.86	221'	8,124 s.f.	Office Building	272
Wheeler Rity Tr	8/40	196 Ayer Rd	2.92	52'	4,448 s.f.	Comm Warehouse	298
Wheeler Rity Tr	8/40.3	198 Ayer Rd	3.98	52'	N/A	Vacant Land	325
Harvard Office Park LLC	8/40.2	200 Ayer Rd	3.83	206'	16,580 s.f.	Professional Bldg	321
Bare Hill Pond Tr-unbuildable land	8/39	202 Ayer Rd	3.01	197'	5,700 s.f.	Construction	51
A&N Corp	8/38	204 Ayer Rd	1.61	200'	10,080 s.f.	Bowling	265
206 Ayer RD Condo	8/37	206 Ayer Rd		209'	Condo Main		863
Giagle Realty Tr	8/1037	208 Ayer Unit 1	n/a	n/a	735 s.f.	Office Condo	0
2-3 206 Ayer Rd Realty Tr	8/2037	206 Ayer Unit 2	n/a	n/a	939 s.f.	Office Condo	0

2-3 206 Ayer Rd Realty Tr	8/3037	206 Ayer Unit 3	n/a	917 s.f.	Office Condo	0	1,966.05
Olde Harvard Realty Tr	8/4037	206 Ayer Unit 4	n/a	735 s.f.	Office Condo	0	1,575.02
Olde Harvard Realty Tr	8/5037	206 Ayer Unit 5	n/a	1,288 s.f.	Office Condo	0	2,760.35
Olde Harvard Realty Tr	8/6037	206 Ayer Unit 6	n/a	906 s.f.	Office Condo	0	1,941.62
Town Conservation	8/36	208 Ayer Rd	511'	N/A	Vacant Land	0	0
Stone Realty Trust	5/70	260 Ayer Rd	529'	N/A	Forest/Ch61	3	38.01
Stone	4/41	256 Ayer Rd	389'	1,966 & 6,086 s.f.	Comm/SFR	150	6,103.19
Callahan Realty Tr	4/40	262 Ayer Rd	80'	2,180 & 1,664 s.f.	Vacant	88	7,345.55
Callahan Rity TR II	4/39	264 Ayer Rd	306'	1,784 & 1,440 s.f.	Auto Shop	122	5,615.75
Harvard Condo Trust	4/38	270 Ayer Rd	326'	Condo Main		443	0
Washington	4/38.1	270 Ayer Unit 1	n/a	2,159 s.f.	Office Condo	0	2,463.00
Barnum Point Realty Tr	4/38.2	270 Ayer Unit 2	n/a	1,679 s.f.	Office Condo	0	2,042.09
McNiff	4/38.3	270 Ayer Unit 3	n/a	352 s.f.	Office Condo	0	463
Higgins	4/38.4	270 Ayer Unit 4	n/a	847 s.f.	Office Condo	0	1,052.28
D.Francis Murphy Insurance Agency Inc.	4/37	276 Ayer Rd	201'	2,643 s.f.	Office Building	160	6,404.61
Jensam Rity LLC	4/36	280 Ayer Rd	200'	14,076 s.f.	Office Building	1,082	18,957.23
Alexander	4/35	284 Ayer Rd	121'	2,096 s.f.	Office Building	49	4,353.02
Yusuf	4/34	288 Ayer Rd	277'	1,984 s.f.	SFR	180	6,562.12
Town Conservation	5/80	290 Ayer Rd	58'	N/A	Vacant Land	0	0
Myer	5/78	292 Ayer Rd	41'	1,712 s.f.	SFR	168	6,319.07
Gokey and Quinn	4/33	294 Ayer Rd	315'	6,000 s.f.	Auto Repair	12	3,440.59
West & Poltras	4/32.1	304 Ayer Rd	283'	2,003 s.f.	SFR	215	8,165.64
McCarthy Rity Trust	5/79	306 Ayer Rd	83'	1,872 s.f.	SFR & Ch61	190	6,923.29
Watson	4/31	310 Ayer Rd	315'	4,320 s.f.	SFR	410	8,720.98
LTI Harvard Orchard LP	2/74	320 Ayer Rd	453'	2,179 s.f.	SFR	150	10,392.39
Hannigan	2/73	6 Myrick Ln	356'	2,701 s.f.	2 Family House	310	16,192.80
						14,589	526,999.22
						24,682	39,271
							477.57

BOLD = 1000' limit from Ayer Road

SFR = Single Family Residence

Traffic Change on State Numbered Routes

Road	Location	Year	Count	% Annual Change
Still River Road (Rt. 110)	At Bolton TL	2012	2,425	-2%
		2011	2,477	27%
		2010	1,946	-1%
		2009	1,974	-1%
		2008	2,000	
Concord Turnpike (Rt. 2)	At Littleton TL	2013	46,771	2%
		2012	45,692	0%
		2011	45,569	-3%
		2010	47,100	-3%
		2009	48,540	
Mass. Ave. (Rt. 111)	At Boxborough TL	2008	4,600	1%
		2004	4,500	
Mass. Ave. (Rt. 111)	E. of Bolton Road	2010	2,900	5%
		2006	2,400	
Ayer Road (Rt. 110/111)	N. of Still River Road	2012	4,000	-5%
		2008	4,900	0%
		2004	4,900	
Ayer Road (Rt. 110/111)	S. of Depot Road	2011	5,900	1%
		2008	5,800	3%
		2004	5,200	
Ayer Road (Rt. 110/111)	N. of Depot Road	2011	5,700	2%
		2008	5,700	0%
		2004	5,400	
Ayer Road (Rt. 110/111)	S. of Route 2 (Exit 38)	2010	7,000	13%
		2009	6,200	-2%
		2006	6,600	
Ayer Road (Rt. 110/111)	N. of Route 2 (Exit 38)	2010	12,500	2%
		2009	12,300	-5%
		2006	14,500	
Ayer Road (Rt. 110/111)	At Ayer TL	2013	12,217	0%
		2010	12,100	0%
		2006	12,100	-5%
		2004	14,000	

Montachusett Regional Planning Commission

Page 1

Community: Harvard
Street: Ayer Road (Rt 110 & 111)
Location: At Ayer TL
Functional Class: R-2

1427R Water Street
Fitchburg, MA 01420
Tel: (978) 345-7376 Email: mrpc@mrpc.org

Site Code: 1252013480
Station ID:

Latitude: 0' 0.000 Undefined

Start Time	24-Jul-13 Wed	Northbound	Southbound	Combined Total	
12:00 AM		29	39	68	■
01:00		12	25	37	■
02:00		11	12	23	■
03:00		24	26	50	■
04:00		37	45	82	■
05:00		103	143	246	■
06:00		286	335	621	■
07:00		417	520	937	■
08:00		519	467	986	■
09:00		417	379	796	■
10:00		399	360	759	■
11:00		442	333	775	■
12:00 PM		448	353	801	■
01:00		425	392	817	■
02:00		495	405	900	■
03:00		545	448	993	■
04:00		569	474	1043	■
05:00		617	422	1039	■
06:00		474	303	777	■
07:00		339	210	549	■
08:00		222	181	403	■
09:00		149	115	264	■
10:00		99	71	170	■
11:00		85	50	135	■
Total		7163	6108		
Percent		54.0%	46.0%		
Grand Total		7163	6108		
Percentage		54.0%	46.0%		
ADT		ADT 13,234		AADT 13,234	

Montachusett Regional Planning Commission

Page 1

Community: Harvard
 Street: Ayer Rd (Rt 110/111)
 Location: N. of Rt 2 (Exit 38)
 Functional Class: R-2

1427R Water Street
 Fitchburg, MA 01420
 Tel: (978) 345-7376 Email: mrpc@mrpc.org

Site Code: 1252013484
 Station ID:

Latitude: 0' 0.000 Undefined

Start Time	24-Jul-13 Wed	Northbound	Southbound	Combined Total	
12:00 AM		32	32	64	■
01:00		7	32	39	■
02:00		10	12	22	■
03:00		17	32	49	■
04:00		36	46	82	■
05:00		77	164	241	■
06:00		257	375	632	■
07:00		406	552	958	■
08:00		495	514	1009	■
09:00		375	492	867	■
10:00		348	440	788	■
11:00		413	448	861	■
12:00 PM		449	407	856	■
01:00		459	390	849	■
02:00		466	472	938	■
03:00		529	524	1053	■
04:00		543	536	1079	■
05:00		614	522	1136	■
06:00		474	355	829	■
07:00		329	266	595	■
08:00		236	216	452	■
09:00		158	142	300	■
10:00		119	77	196	■
11:00		63	60	123	■
Total		6912	7106		
Percent		49.3%	50.7%		
Grand Total		6912	7106		
Percentage		49.3%	50.7%		

ADT

ADT 13,878

AADT 13,878

Section 5: Surveys of Business and Property Owners

To better understand business conditions and issues in the C District, surveys were conducted of the District's business and property owners. These surveys were conducted as mail-back surveys (stamped return envelope provided) with an option to use an online survey tool, Survey Monkey, as an alternative means of responding.¹ The surveys which were posted on Survey Monkey contained the identical questions as the mail-back surveys. Results of all surveys were then compiled into Survey Monkey, which facilitated the tabulation and reporting of results. These results are provided in the following pages.

A total of 154 surveys were mailed out, 107 to business owners and 47 to property owners. The mailing lists for these surveys were developed by Harvard's Town Planner in collaboration with the consultant engaged by the Town to develop the Economic Development element of the Town's Master Plan update. A total of 32 surveys were returned, 17 from business owners and 15 from property owners. 14 surveys were returned as undeliverable. In total, the return rate was 21 percent of all surveys mailed, 16 percent from business owners and 32 percent from property owners. Accounting for the undeliverable surveys, the total return rate was 23 percent.²

Users of the survey results can draw their own conclusions from the data. However, some general observations can be made. In the Business Owners Survey, there was a sense that Harvard is overall a "great" community with a good location for business and home to work commuting. On the other hand, Harvard has a "limited" population on which to draw customers. A number of respondents felt a grocery store, more restaurants, and a pharmacy would help promote economic growth in town. Some respondents also noted that the lack of town water and sewer in the C District limits opportunity for development. The Property Owners Survey also revealed a high regard for Harvard's location as a "good location for business," a "central location for customers/clients," and "close to home." Similar to the business owners, some property owners also felt municipal water and sewer could improve the business climate in the C District, also noting the lack of high speed internet service. Similar to business owners, some property owners also felt the town should pursue a grocery or food store and restaurants with a liquor license.

¹ SurveyMonkey is an online survey development cloud based company. SurveyMonkey provides free, customizable surveys, as well as a suite of paid back-end programs that include data analysis, sample selection, bias elimination, and data representation tools.

² The typical response rate for *external* surveys (e.g. customer satisfaction surveys, as opposed to *internal* surveys such as employee surveys) is 10 to 15 percent according to SurveyGizmo, an online survey software company.

Business Owners Survey - Town of Harvard

Q1 In your opinion, what are the advantages and disadvantages of owning a business in Harvard?

Answered: 15 Skipped: 2

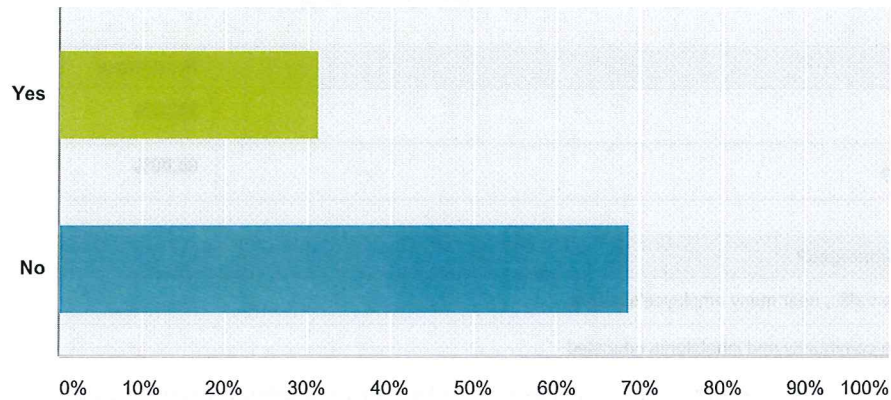
Answer Choices	Responses
Advantages?	93.33% 14
Disadvantages?	60.00% 9

#	Advantages?	Date
1	little traffic, near many employee's homes	10/23/2014 10:01 AM
2	nice community and inhabitants educated	10/23/2014 8:31 AM
3	fantastic artisitic community, very little competition, close knit community, willing to help small business	10/23/2014 8:24 AM
4	working close to my home and my school; idyllic surroundings easy access to Rte 2/495	10/23/2014 8:18 AM
5	great community clients	10/23/2014 8:08 AM
6	affluent clientele	10/23/2014 8:05 AM
7	customer base is very knowledgeable, customer base is fair, focused and a wonderful base for our insurance agency	10/23/2014 7:57 AM
8	location	10/23/2014 7:51 AM
9	great police department, safe area	10/23/2014 7:42 AM
10	distance to Boston	10/20/2014 10:40 AM
11	good location with access to both rte 495 and rte 2	10/20/2014 10:34 AM
12	small town atmosphere, network of people	10/20/2014 10:30 AM
13	local to home	10/20/2014 10:25 AM
14	Serving the community	10/6/2014 9:42 AM
#	Disadvantages?	Date
1	no/limited services, weak internet service, my customers think this is the boondocks	10/23/2014 10:01 AM
2	very little foot traffic, few venues for advertising, difficult to promote through the school district - PTO sponsorship is very expensive	10/23/2014 8:24 AM
3	limited population to find customers, no office supply store few restaraunts, post office closes at 4:30	10/23/2014 8:18 AM
4	lack of other supportive businesses	10/23/2014 8:05 AM
5	taxes	10/23/2014 7:51 AM
6	state and local regulations	10/23/2014 7:42 AM
7	no restaurants close by (far)	10/20/2014 10:40 AM
8	lack of municipal sewer, sign bylaws are too restrictive	10/20/2014 10:34 AM
9	no town sewer	10/20/2014 10:21 AM

Business Owners Survey - Town of Harvard

Q2 Do you have plans to expand your business?

Answered: 16 Skipped: 1

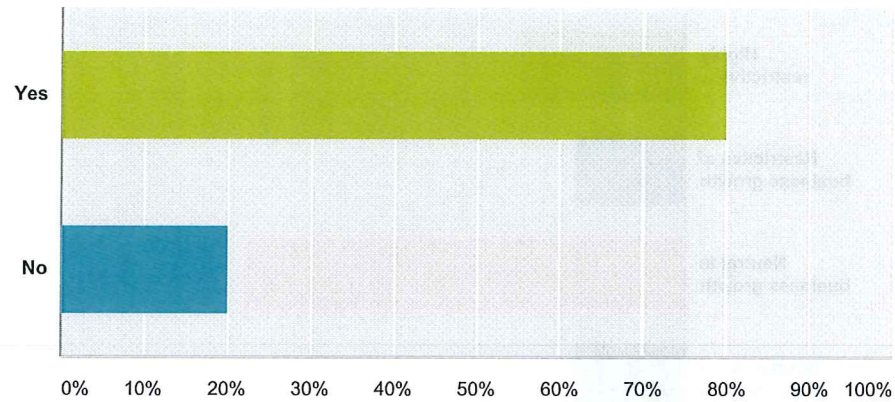


Answer Choices	Responses
Yes	31.25% 5
No	68.75% 11
Total	16

Business Owners Survey - Town of Harvard

Q3 If yes, do you plan on expanding in Harvard?

Answered: 5 Skipped: 12



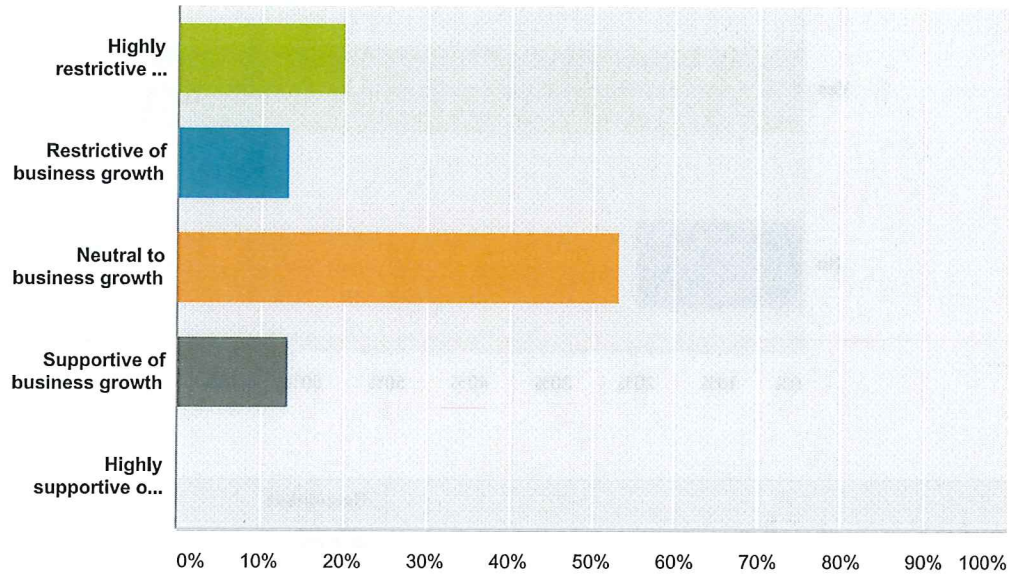
Answer Choices	Responses
Yes	80.00% 4
No	20.00% 1
Total	5

#	Comments	Date
1	there is no incentive to expand here, the rents are high	10/23/2014 10:01 AM
2	only if possible, would need larger property	10/23/2014 8:05 AM
3	Possibly in about 5 years	10/6/2014 9:43 AM

Business Owners Survey - Town of Harvard

Q4 Would you say that Harvard's regulations for business are:

Answered: 15 Skipped: 2

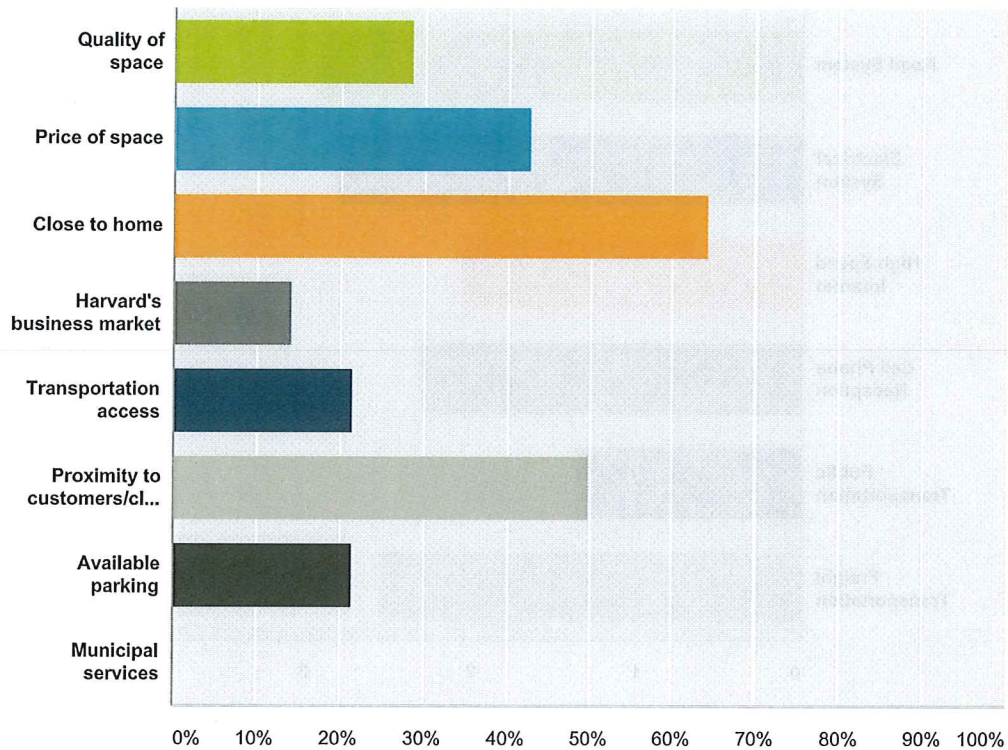


Answer Choices	Responses	
Highly restrictive of business growth	20.00%	3
Restrictive of business growth	13.33%	2
Neutral to business growth	53.33%	8
Supportive of business growth	13.33%	2
Highly supportive of business growth	0.00%	0
Total Respondents: 15		

Business Owners Survey - Town of Harvard

Q5 What features attracted you to locate your business in Harvard?

Answered: 14 Skipped: 3



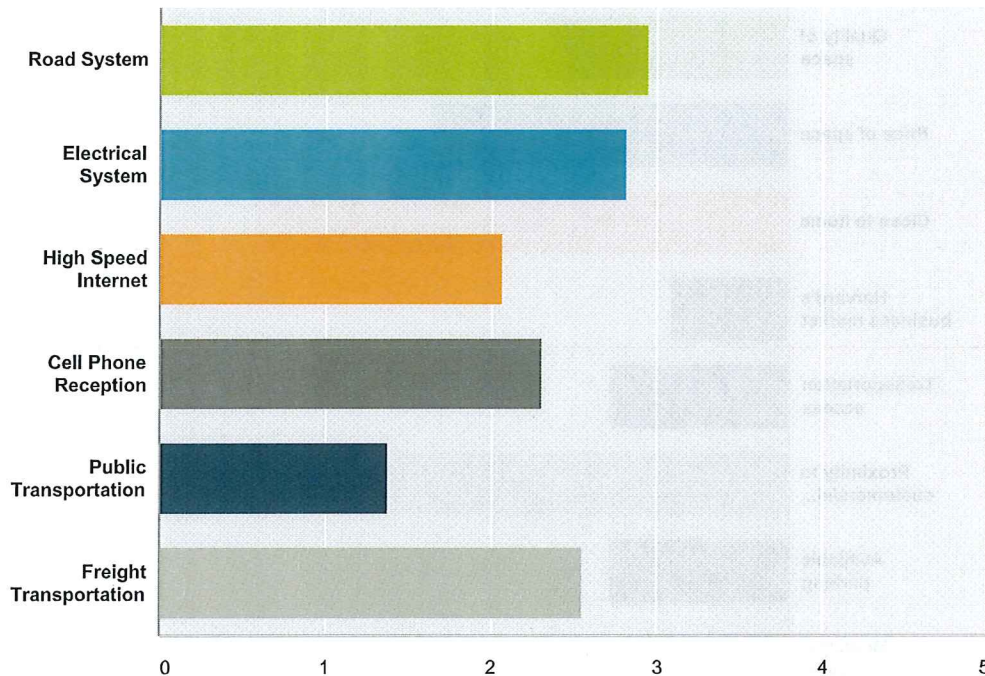
Answer Choices	Responses
Quality of space	28.57% 4
Price of space	42.86% 6
Close to home	64.29% 9
Harvard's business market	14.29% 2
Transportation access	21.43% 3
Proximity to customers/clients	50.00% 7
Available parking	21.43% 3
Municipal services	0.00% 0
Total Respondents: 14	

#	Other (please specify)	Date
1	proximity to my home	10/20/2014 12:55 PM
2	highway access	10/20/2014 10:38 AM

Business Owners Survey - Town of Harvard

Q6 Please rate the adequacy of public infrastructure along Ayer Road

Answered: 16 Skipped: 1



	Poor	Fair	Good	Excellent	Total	Average Rating
Road System	6.25% 1	18.75% 3	50.00% 8	25.00% 4	16	2.94
Electrical System	0.00% 0	25.00% 4	68.75% 11	6.25% 1	16	2.81
High Speed Internet	33.33% 5	26.67% 4	40.00% 6	0.00% 0	15	2.07
Cell Phone Reception	18.75% 3	31.25% 5	50.00% 8	0.00% 0	16	2.31
Public Transportation	69.23% 9	23.08% 3	7.69% 1	0.00% 0	13	1.38
Freight Transportation	0.00% 0	45.45% 5	54.55% 6	0.00% 0	11	2.55

#	Comments for "Road System"	Date
1	high rate of speed trucks	10/20/2014 10:31 AM
#	Comments for "Electrical System"	Date
1	phone version poor	10/20/2014 10:31 AM
#	Comments for "High Speed Internet"	Date
1	utilities don't care	10/23/2014 10:03 AM
2	desperately need better phone and internet	10/23/2014 8:08 AM

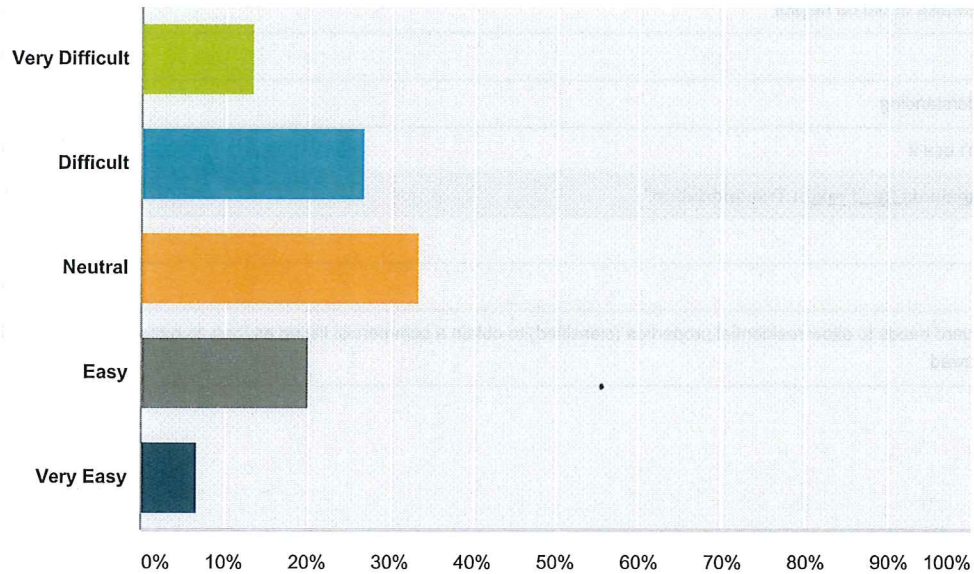
Business Owners Survey - Town of Harvard

#	Comments for "Cell Phone Reception"	Date
1	Verizon poor signal	10/23/2014 8:29 AM
2	280 Ayer Road	10/20/2014 10:38 AM
#	Comments for "Public Transportation"	Date
1	n/a	10/23/2014 8:29 AM
2	sidewalks would be helpful	10/23/2014 8:21 AM
3	?	10/23/2014 8:11 AM
4	understanding	10/20/2014 12:55 PM
5	don't use it	10/20/2014 10:38 AM
#	Comments for "Freight Transportation"	Date
1	n/a	10/23/2014 8:21 AM
2	?	10/23/2014 8:11 AM
3	harvard needs to allow residential properties (classified) to obtain a commercial listing as long as rules are followed	10/20/2014 10:26 AM

Business Owners Survey - Town of Harvard

Q7 How difficult is it for you as a business owner in Harvard to find employees suitable for your business?

Answered: 15 Skipped: 2



Answer Choices	Responses
Very Difficult	13.33% 2
Difficult	26.67% 4
Neutral	33.33% 5
Easy	20.00% 3
Very Easy	6.67% 1
Total	15

Business Owners Survey - Town of Harvard

Q8 How many employees do you currently have?

Answered: 14 Skipped: 3

#	Responses	Date
1	5	10/23/2014 10:03 AM
2	5	10/23/2014 8:34 AM
3	3	10/23/2014 8:29 AM
4	1	10/23/2014 8:21 AM
5	4	10/23/2014 8:11 AM
6	8-10	10/23/2014 8:08 AM
7	7	10/23/2014 8:03 AM
8	7 in Harvard, 27 over all locations	10/23/2014 8:00 AM
9	6	10/23/2014 7:50 AM
10	1	10/20/2014 12:55 PM
11	4	10/20/2014 10:38 AM
12	2	10/20/2014 10:31 AM
13	2	10/20/2014 10:23 AM
14	5 employees and a rotation of doctors in the Harvard office	10/6/2014 9:46 AM

Business Owners Survey - Town of Harvard

Q9 Do you have any concerns or comments about workforce availability or capability?

Answered: 11 Skipped: 6

#	Responses	Date
1	no	10/23/2014 8:34 AM
2	we are specialized business and thus require experienced, professional teachers - finding staff that we trust and will suit our needs will always be a challenge for us - it is the nature of our business	10/23/2014 8:29 AM
3	no, there are a lot of highly educated people to hire	10/23/2014 8:21 AM
4	no	10/23/2014 8:11 AM
5	unique to my business, very few skilled workers and no training available	10/23/2014 8:08 AM
6	no	10/23/2014 8:03 AM
7	no concern about capability, only concern is the young folks dont realize what a wonderful place it is and what a great provider of economic income	10/23/2014 8:00 AM
8	no skills	10/23/2014 7:52 AM
9	no	10/20/2014 12:55 PM
10	\$22 per month	10/20/2014 10:31 AM
11	none	10/20/2014 10:23 AM

Business Owners Survey - Town of Harvard

Q10 What is your office or facility rent per square foot? (please specify per month or per year)

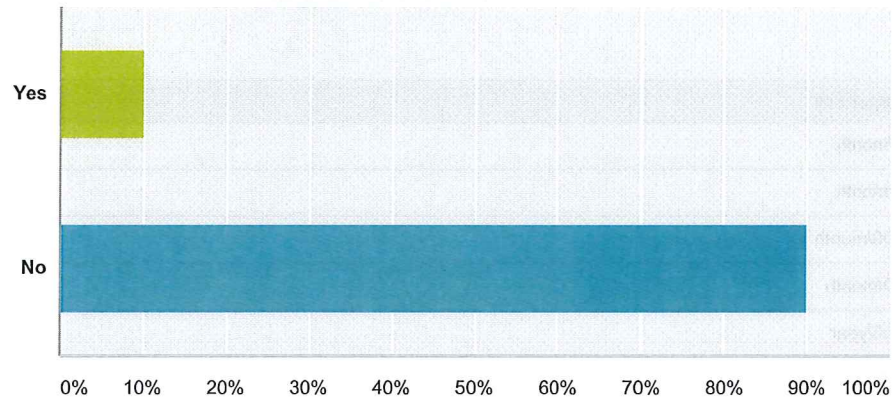
Answered: 11 Skipped: 6

#	Responses	Date
1	15/month	10/23/2014 10:03 AM
2	15/month	10/23/2014 8:34 AM
3	1600/month	10/23/2014 8:29 AM
4	420/month	10/23/2014 8:21 AM
5	1950/year	10/23/2014 8:11 AM
6	1.20/month	10/23/2014 8:08 AM
7	live on own property	10/23/2014 8:00 AM
8	\$8	10/23/2014 7:50 AM
9	\$15	10/20/2014 12:55 PM
10	\$14 per year	10/20/2014 10:38 AM
11	\$12 per year	10/20/2014 10:23 AM

Business Owners Survey - Town of Harvard

Q11 Does your rent include operating expenses, i.e. triple net?

Answered: 10 Skipped: 7



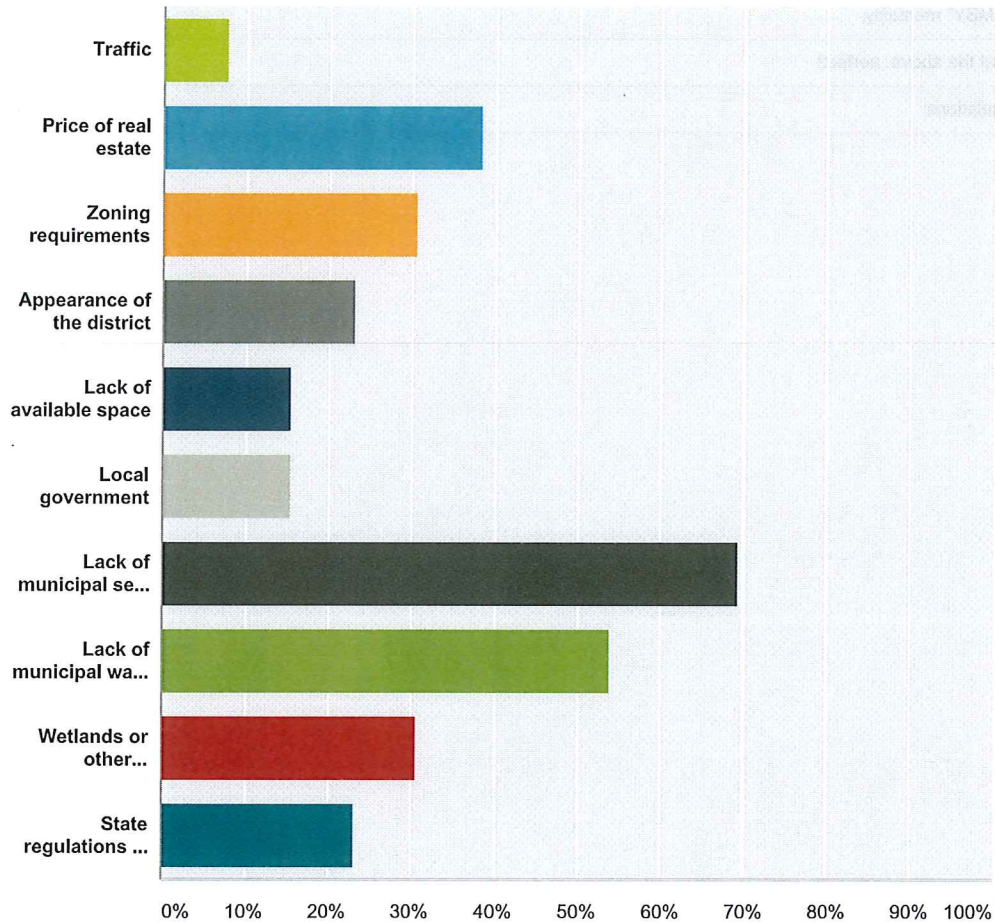
Answer Choices	Responses
Yes	10.00% 1
No	90.00% 9
Total	10

#	Other (please specify)	Date
	There are no responses.	

Business Owners Survey - Town of Harvard

Q12 What factors do you believe hinder economic growth along Ayer Road?

Answered: 13 Skipped: 4



Answer Choices	Responses	
Traffic	7.69%	1
Price of real estate	38.46%	5
Zoning requirements	30.77%	4
Appearance of the district	23.08%	3
Lack of available space	15.38%	2
Local government	15.38%	2
Lack of municipal sewer system	69.23%	9
Lack of municipal water supply	53.85%	7
Wetlands or other environmental factors	30.77%	4

Business Owners Survey - Town of Harvard

State regulations or policies	23.08%	3
Total Respondents: 13		

#	Other (please specify)	Date
1	"NIMBY" mentality	10/23/2014 10:03 AM
2	all of the above, perfect!	10/23/2014 8:03 AM
3	regulations	10/23/2014 7:50 AM

Business Owners Survey - Town of Harvard

Q13 Do you have any ideas to improve the business climate in Harvard's Commercial District?

Answered: 8 Skipped: 9

#	Responses	Date
1	There is still no critical mass to initiate growth. Any time a larger business appears on the horizon the population starts to lose its collective mind.	10/23/2014 10:03 AM
2	I strongly feel that the rent prices in Harvard are very inflated, especially for such a small town. I do believe that lowering real estate prices would greatly improve the business climate.	10/23/2014 8:29 AM
3	sidewalks, authentication	10/23/2014 8:21 AM
4	Harvard has come quite a great distance in the last 10 years all public officials are very easy to work with	10/23/2014 8:00 AM
5	water service, sewage service, internet (fios)	10/23/2014 7:50 AM
6	permit more sit down restaurants	10/20/2014 12:55 PM
7	need sewer and water. plenty of traffic and that is a good thing!	10/20/2014 10:38 AM
8	town water/sewer. its that easy	10/20/2014 10:23 AM

Business Owners Survey - Town of Harvard

Q14 What businesses, services or industries do you think Harvard's Economic Development Committee should pursue to promote economic growth in Town?

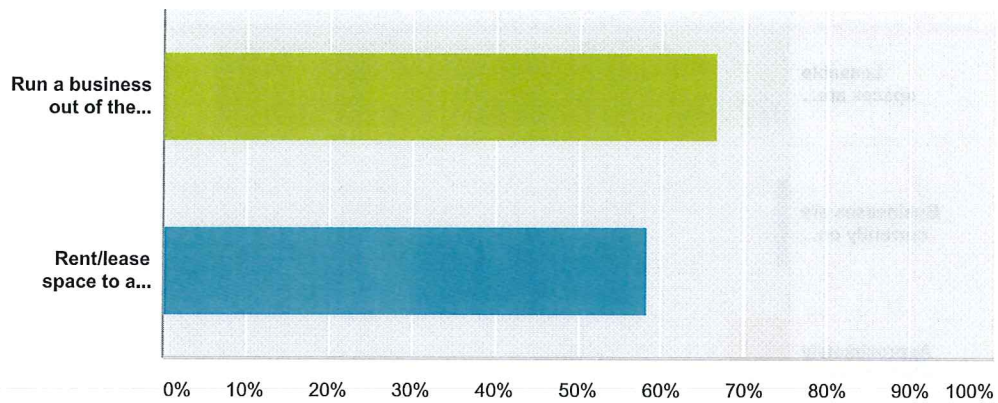
Answered: 11 Skipped: 6

#	Responses	Date
1	a grocery store	10/23/2014 10:03 AM
2	convenience store (with greater variety than Harvard General Store), grocery store, clothing store	10/23/2014 8:29 AM
3	restaraunt, small pharmacy (like the one in Acton), small business	10/23/2014 8:21 AM
4	main retail plaza looks like crap. not enough restaurants in town	10/23/2014 8:08 AM
5	everything anyone would want is within a 10 minute drive of Harvard. Why spoil a unique town/landscape with more commercial blight.	10/23/2014 8:03 AM
6	Businesses that add locality to the community fill a need and are of the finest scale	10/23/2014 8:00 AM
7	retail	10/23/2014 7:52 AM
8	mid size supermarket; CVS; nice restaurant with liquor license	10/23/2014 7:50 AM
9	keep taxes in line with surrounding communities	10/20/2014 12:55 PM
10	gas station with a modern convenience store grocery store	10/20/2014 10:38 AM
11	Whole Foods Market	10/20/2014 10:31 AM

Property Owners -Town of Harvard

Q1 Do you...?

Answered: 12 Skipped: 3

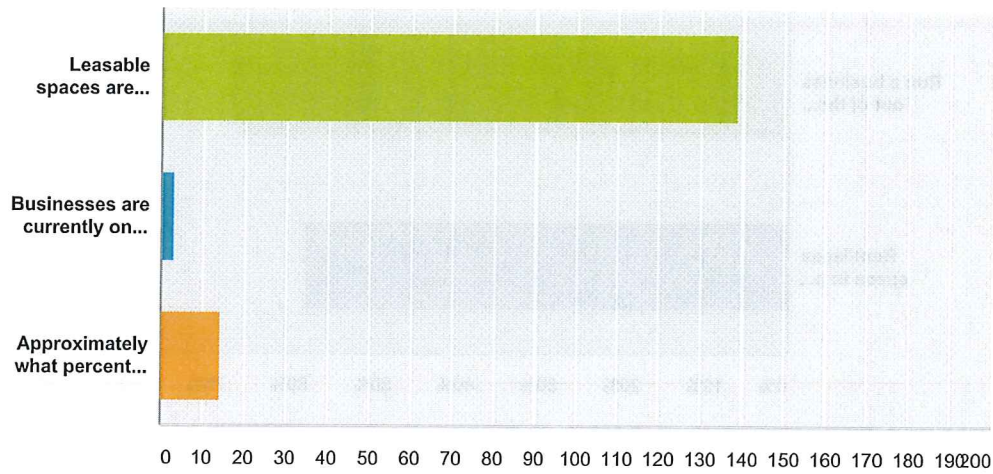


Answer Choices	Responses	
Run a business out of the property	66.67%	8
Rent/lease space to a business on the property	58.33%	7
Total Respondents: 12		

Property Owners -Town of Harvard

Q2 How many...?

Answered: 13 Skipped: 2



Answer Choices	Average Number	Total Number	Responses
Leasable spaces are currently on the property or in the building?	139	1,662	12
Businesses are currently on the property or in the building?	3	37	13
Approximately what percentage of the property or building is currently vacant?	14	185	13
Total Respondents: 13			

#	Leasable spaces are currently on the property or in the building?	Date
1	1	10/23/2014 9:57 AM
2	4	10/23/2014 9:54 AM
3	1	10/23/2014 9:50 AM
4	1600	10/23/2014 9:47 AM
5	32	10/23/2014 9:45 AM
6	1	10/23/2014 9:42 AM
7	4	10/23/2014 9:35 AM
8	3	10/23/2014 9:30 AM
9	1	10/23/2014 9:22 AM
10	4	10/23/2014 9:21 AM
11	5	10/9/2014 11:27 AM
12	6	10/5/2014 8:39 PM
#	Businesses are currently on the property or in the building?	Date
1	0	10/23/2014 9:57 AM
2	3	10/23/2014 9:54 AM
3	1	10/23/2014 9:50 AM

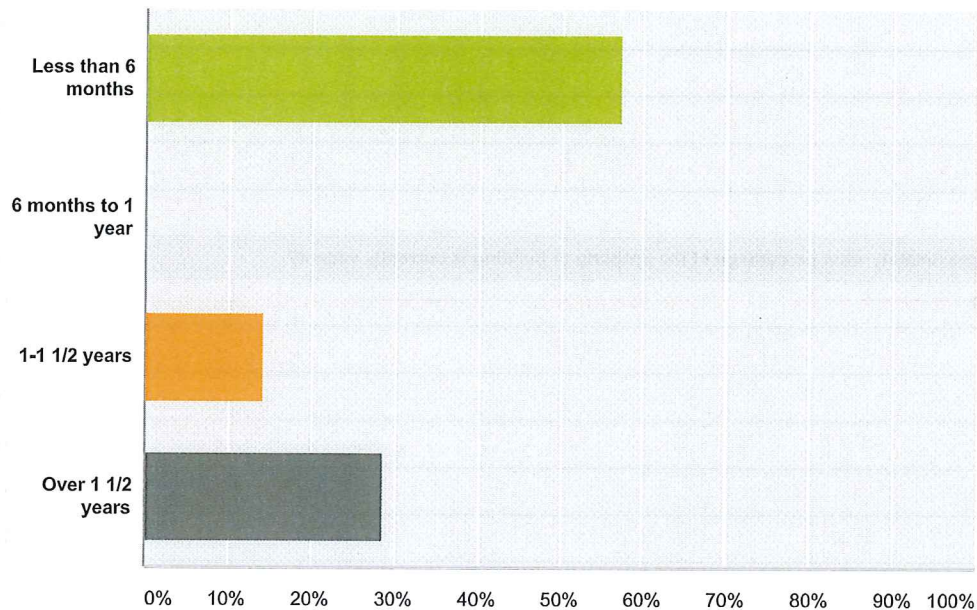
Property Owners -Town of Harvard

4	1	10/23/2014 9:47 AM
5	11	10/23/2014 9:45 AM
6	1	10/23/2014 9:42 AM
7	4	10/23/2014 9:35 AM
8	3	10/23/2014 9:30 AM
9	1	10/23/2014 9:28 AM
10	1	10/23/2014 9:22 AM
11	2	10/23/2014 9:21 AM
12	4	10/9/2014 11:27 AM
13	5	10/5/2014 8:39 PM
#	Approximately what percentage of the property or building is currently vacant?	Date
1	100	10/23/2014 9:57 AM
2	15	10/23/2014 9:54 AM
3	0	10/23/2014 9:50 AM
4	0	10/23/2014 9:47 AM
5	20	10/23/2014 9:45 AM
6	0	10/23/2014 9:42 AM
7	0	10/23/2014 9:35 AM
8	0	10/23/2014 9:30 AM
9	0	10/23/2014 9:28 AM
10	0	10/23/2014 9:22 AM
11	30	10/23/2014 9:21 AM
12	0	10/9/2014 11:27 AM
13	20	10/5/2014 8:39 PM

Property Owners -Town of Harvard

Q3 If you rent or lease space on the property or in your building, how long is the space typically vacant between tenants?

Answered: 7 Skipped: 8



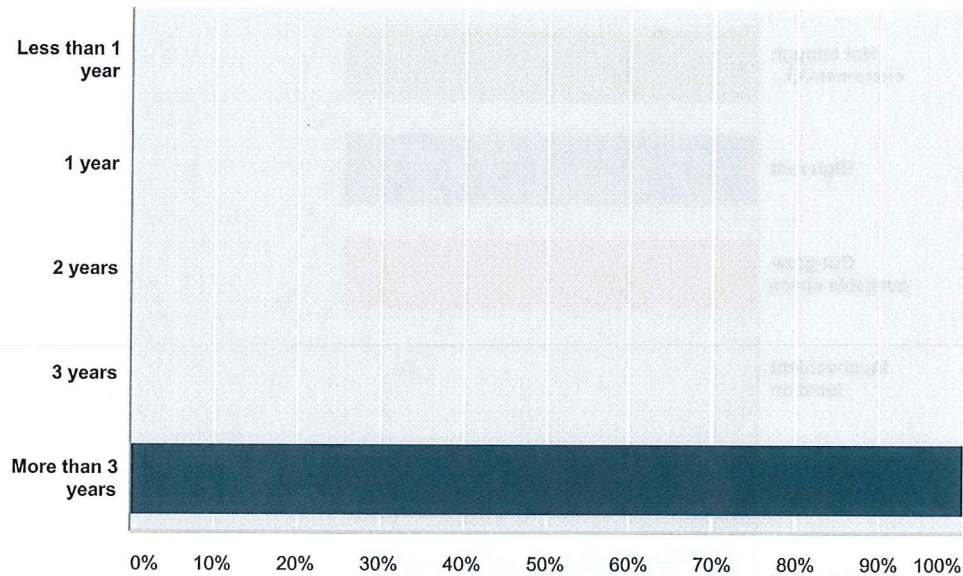
Answer Choices	Responses
Less than 6 months	57.14% 4
6 months to 1 year	0.00% 0
1-1 1/2 years	14.29% 1
Over 1 1/2 years	28.57% 2
Total Respondents: 7	

#	Comments	Date
1	vacant since 1/1/2013	10/23/2014 9:57 AM
2	never. long term USPS post office	10/23/2014 9:50 AM
3	until 2009 typical vacancies were nil	10/23/2014 9:45 AM
4	new rental but has never been vacant in 15 years	10/23/2014 9:42 AM
5	n/a	10/23/2014 9:28 AM
6	Don't have experience to answer	10/9/2014 11:27 AM

Property Owners -Town of Harvard

Q4 What is the typical length of time that tenants stay in your building?

Answered: 11 Skipped: 4



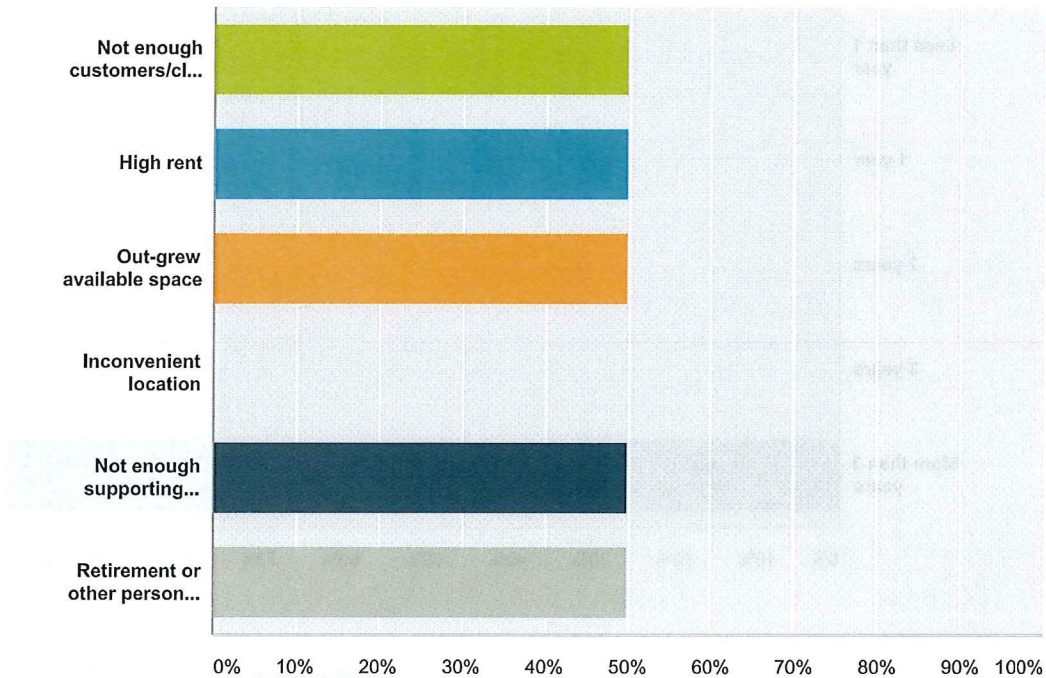
Answer Choices	Responses
Less than 1 year	0.00% 0
1 year	0.00% 0
2 years	0.00% 0
3 years	0.00% 0
More than 3 years	100.00% 11
Total	11

#	Comments	Date
1	20years	10/23/2014 9:50 AM
2	n/a	10/23/2014 9:47 AM
3	new rental has 5 year lease	10/23/2014 9:42 AM
4	n/a	10/23/2014 9:28 AM

Property Owners -Town of Harvard

Q5 If tenants stay for less than two years, for what reason do they typically leave?

Answered: 2 Skipped: 13



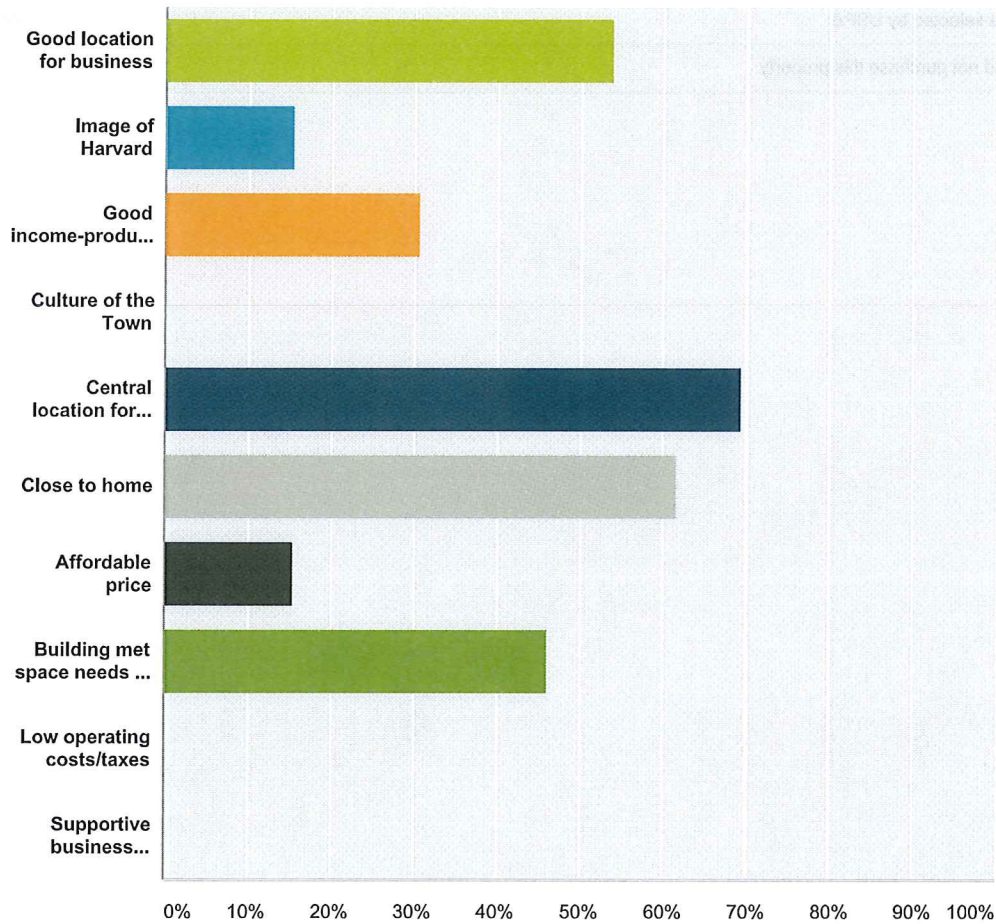
Answer Choices	Responses
Not enough customers/clients	50.00% 1
High rent	50.00% 1
Out-grew available space	50.00% 1
Inconvenient location	0.00% 0
Not enough supporting business	50.00% 1
Retirement or other personal reasons	50.00% 1
Total Respondents: 2	

#	Other (please specify)	Date
1	n/a	10/23/2014 9:47 AM

Property Owners -Town of Harvard

Q6 For what reasons did you purchase the property in Harvard's Commercial District? (check all that apply.)

Answered: 13 Skipped: 2



Answer Choices	Responses
Good location for business	53.85% 7
Image of Harvard	15.38% 2
Good income-producing property	30.77% 4
Culture of the Town	0.00% 0
Central location for customers/clients	69.23% 9
Close to home	61.54% 8
Affordable price	15.38% 2
Building met space needs for business	46.15% 6
Low operating costs/taxes	0.00% 0

Property Owners -Town of Harvard

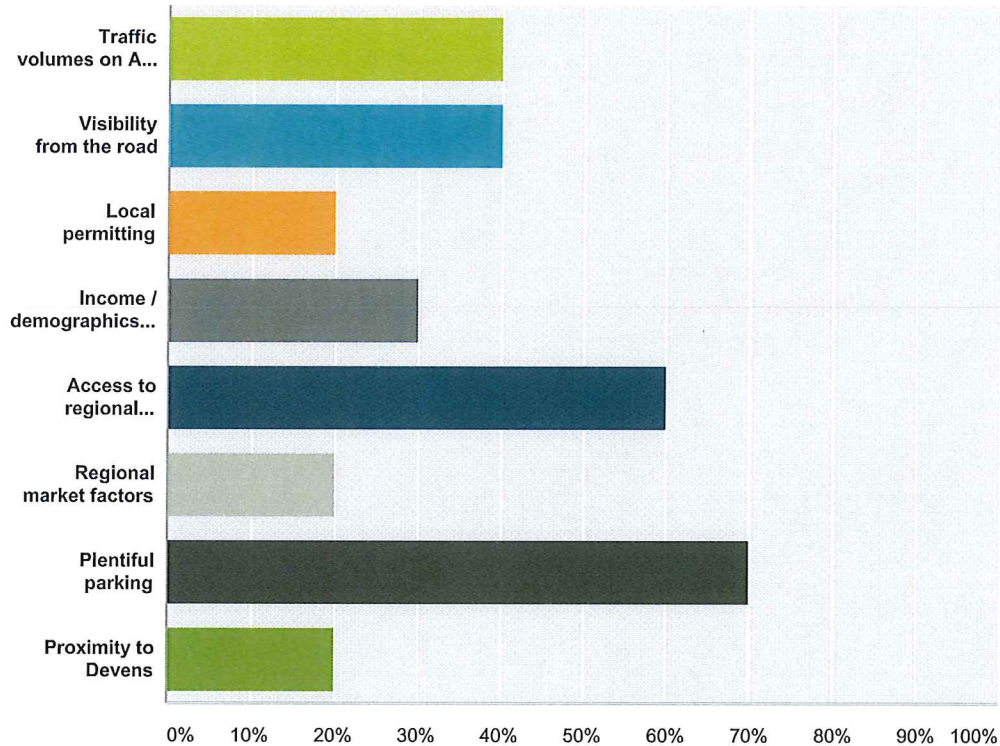
Supportive business community	0.00%	0
Total Respondents: 13		

#	Other (please specify)	Date
1	dad helped conceptualize and create commercial district in 1956	10/23/2014 9:57 AM
2	site selected by USPS	10/23/2014 9:50 AM
3	i did not purchase this property	10/23/2014 9:32 AM

Property Owners -Town of Harvard

Q7 If you lease space to tenants, what are the most important factors in filling the space in Harvard? (check all that apply.)

Answered: 10 Skipped: 5



Answer Choices	Responses
Traffic volumes on Ayer Road	40.00% 4
Visibility from the road	40.00% 4
Local permitting	20.00% 2
Income / demographics of the Town	30.00% 3
Access to regional highway network	60.00% 6
Regional market factors	20.00% 2
Plentiful parking	70.00% 7
Proximity to Devens	20.00% 2
Total Respondents: 10	

#	Other (please specify)	Date
1	location! location! location!	10/23/2014 9:57 AM
2	n/a	10/23/2014 9:47 AM

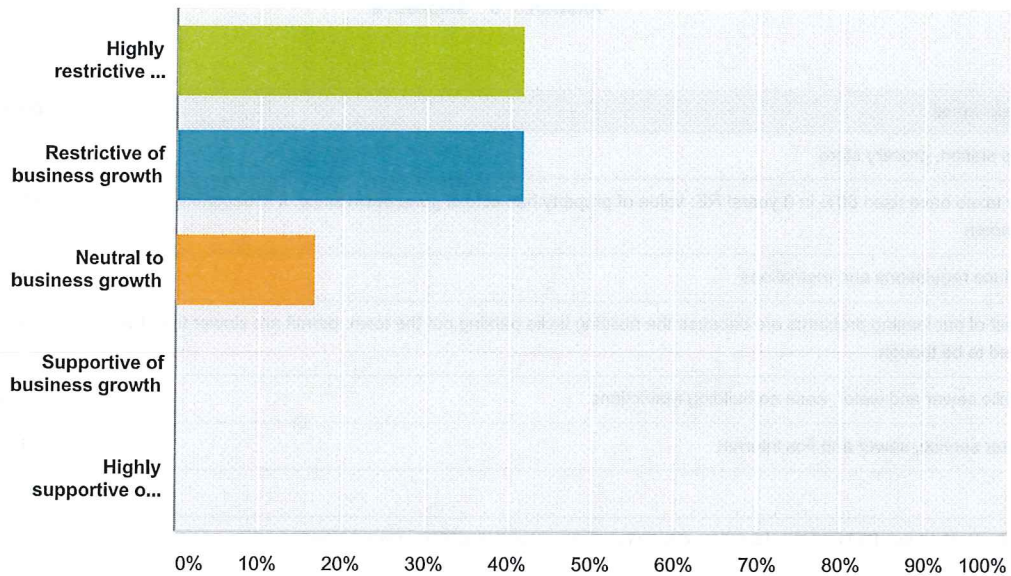
Property Owners -Town of Harvard

3	n/a	10/23/2014 9:28 AM
4	n/a	10/23/2014 9:22 AM

Property Owners -Town of Harvard

Q8 Would you say that Harvard's regulations for business are:

Answered: 12 Skipped: 3



Answer Choices	Responses
Highly restrictive of business growth	41.67% 5
Restrictive of business growth	41.67% 5
Neutral to business growth	16.67% 2
Supportive of business growth	0.00% 0
Highly supportive of business growth	0.00% 0
Total Respondents: 12	

#	Other (please specify)	Date
1	don't know	10/23/2014 9:57 AM
2	n/a	10/23/2014 9:50 AM

Property Owners -Town of Harvard

**Q9 Do you have any ideas to improve the
business climate in Harvard's Commercial
District?**

Answered: 9 Skipped: 6

#	Responses	Date
1	gas station, grocery store	10/23/2014 9:57 AM
2	my taxes have risen 80% in 8 years! RE: value of property has actual gone down since. it is becoming a grave concern	10/23/2014 9:54 AM
3	reduce regulations and restrictions	10/23/2014 9:47 AM
4	most of our leasing problems are because the building lacks parking not the town. permit are slower than they need to be though.	10/23/2014 9:45 AM
5	public sewer and water, ease on building restrictions	10/23/2014 9:42 AM
6	water service, sewer and fios internet	10/23/2014 9:35 AM
7	no	10/23/2014 9:32 AM
8	make businesses feel more welcome, not just something to put up with for tax revenue	10/23/2014 9:30 AM
9	Changes are needed to zoning regulations - i.e. permits needed for small building changes. Sign regulations are ridiculous. Town officials should openly advocate for some growth as lack of support is very damaging.	10/9/2014 11:27 AM

Q10 What businesses, services or industries do you think Harvard's Economic Development Committee should pursue to promote economic growth in Town?

Answered: 10 Skipped: 5

#	Responses	Date
1	i live "away" so i dont know	10/23/2014 9:57 AM
2	bring water and sewer to Ayer Road. Septic restricts dramatically what kind (especially medical) of business can occupy my vacant space!	10/23/2014 9:54 AM
3	tax breaks	10/23/2014 9:47 AM
4	sewer would make a big difference and clarity on the Ayer Road special permit zoning	10/23/2014 9:45 AM
5	more retail business	10/23/2014 9:42 AM
6	drug store, food store, restaurant with liquor	10/23/2014 9:35 AM
7	no comment	10/23/2014 9:32 AM
8	grocery store, restaurant with liquor license, boutique store	10/23/2014 9:30 AM
9	most any and many	10/23/2014 9:28 AM
10	I think this is totally the wrong approach that I have seen Harvard follow for years. We should try to be more welcoming and flexible with all businesses and see what the market will bring. In searching for specific businesses we want we consistently end up with nothing.	10/9/2014 11:27 AM

Property Owners -Town of Harvard

Q11 Do you have any comments about the services provided by the Town of Harvard?

Answered: 10 Skipped: 5

#	Responses	Date
1	no organized approaches to attracting businesses. Businesses are afraid of capricious town meeting results	10/23/2014 9:59 AM
2	see above	10/23/2014 9:54 AM
3	letting commercial north of Route 2 connect to Devens sewer plant would be good	10/23/2014 9:45 AM
4	winter snow removal on Ayer Road is poor	10/23/2014 9:42 AM
5	good police departmen	10/23/2014 9:35 AM
6	most of this survey does not apply to me or my property. the usable portion of my land always has and still is being farmed. i have no desire to see it developed. Stone Nominee Trust	10/23/2014 9:32 AM
7	unfriendly and uncooperative permitting process	10/23/2014 9:30 AM
8	generally - very good	10/23/2014 9:28 AM
9	anytime i have needed police services they have been right there	10/23/2014 9:21 AM
10	Fire department and police are excellent. Lack of water / sewer very serious problem. Zoning bylaw needs changes to remove water/sewer from bylaw and remove open space requirements from commercial district.	10/9/2014 11:27 AM