

Initial Data Review

Amesbury Downtown & Lower Millyard District

Data for Discussion

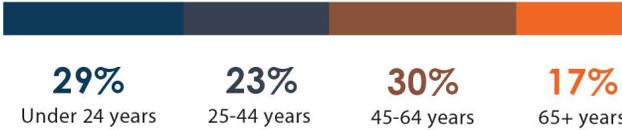
January 2022

Household Resilience

Basic Community Profile

Age Distribution

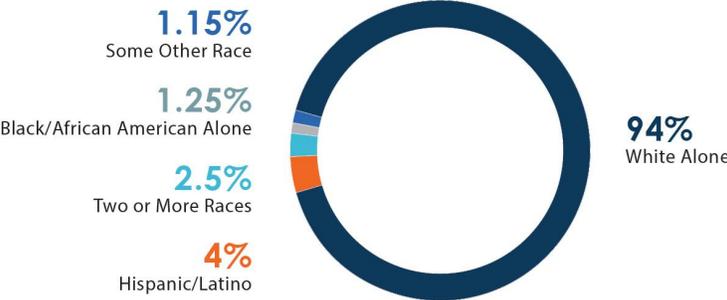
Nearly 30% of Amesbury’s population is under 25 years old, second only to the population between 45 and 64 years old. Roughly 20% of households with children are led by single mothers - slightly below the national average of 23%.



ACS Enhanced Data, Baseline January 2021

Race and Ethnicity

The majority of Amesbury’s population, 94%, identifies as white. While there is variability in socioeconomic status of the city’s majority population, Amesbury’s BIPOC community faces socioeconomic disparities relating to health insurance and homeownership.



ACS Enhanced Data, Baseline January 2021; races and ethnicities shown above represent above 1% of the population.

Average Residence

Amesbury maintains a fairly stable mix of homeowner and renter households. Roughly 68% of residents are homeowners and 32% are renters. The average residence of homeowners is 16.2 years, just over double the average length of residence for renters.



ACS Enhanced Data, Baseline January 2021

Household Economy

Cost-Burdened Households

Nearly 35% of Amesbury’s households are cost-burdened, indicating that households spend 30% or more of their gross income on housing costs. Even prior to COVID-19’s impact on the household economy, 29% of homeowner households were cost-burdened, compared to nearly 63% of renter households.

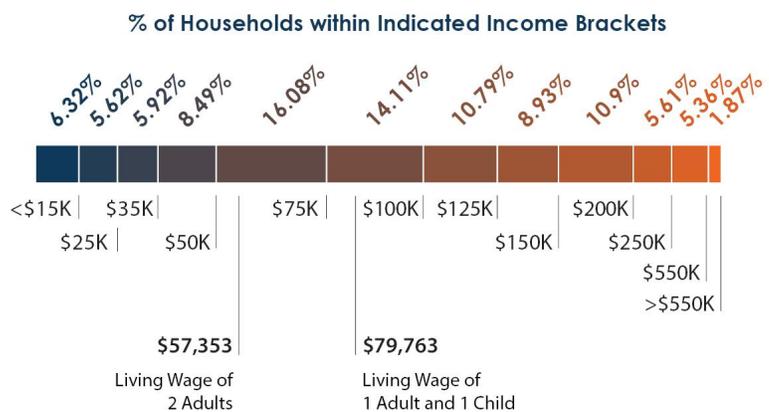
% of Income Spent on Housing Costs	Percent of Housing Units	Percent of Owner Occupied Housing Units	Percent of Renter Occupied Housing Units
Less than 20%	34.8%	42.9%	22.3%
20 - 29%	30.7%	30.1%	43.2%
30% or more	34.5%	29.1%	62.9%

ACS Enhanced Data, Baseline January 2021

Household Income

Just over 6% of households in Amesbury live below the poverty line. However, many households in Amesbury do not make above the living wage, estimated by MIT and defined as the income needed to meet minimum standards of living given local costs. Over a quarter of local residents in two-person (two adult), households do not make a living wage. Further, in a two-person household of one adult and one child, over 43% of residents do not make a living wage.

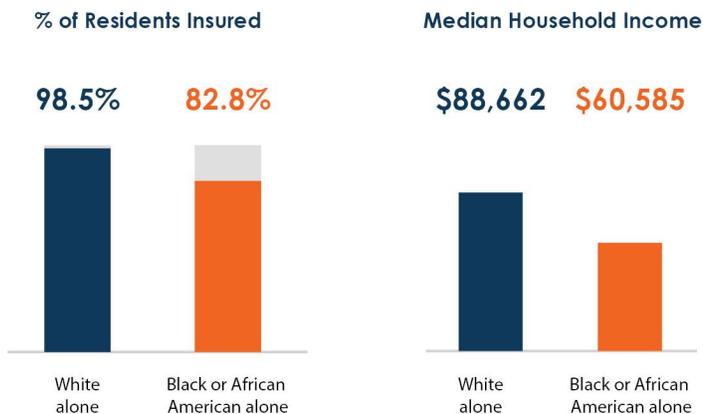
As might be expected based on cost-burdened housing estimates, this inability to make the living wage falls disproportionately on Amesbury’s renting population. Renter households in Amesbury have a median household income of 43,601 dollars — below the living wage of a household with 1 adult and 1 child in Essex County as well as that of two adults living in Essex County — whereas owner-occupied households have a median household income of 108,690 dollars.



ACS Enhanced Data, Baseline January 2021; Glasmeier, Amy K. Living Wage Calculator. 2020. Massachusetts Institute of Technology. Livingwage.mit.edu, Essex County.
 *Living wage of 1 adult and 1 child exceeds that of 2 adults due to higher childcare, housing, and medical costs as estimated by MIT

Health Insurance

Health insurance plays a key role in household stability. Prior to the economic shock caused by the pandemic, Amesbury faced health insurance coverage disparities. Although nearly 100% of white residents had health insurance coverage, only 83% of Black or African American households were insured — magnified by disparities in median household income. With many residents receiving health insurance through their employers, high rates of unemployment during the COVID-19 pandemic period may have further eroded household stability, particularly for Amesbury’s Black/African American residents.



United States Census Bureau 2019: ACS 5-Year Estimates, <https://data.census.gov/cedsci/table?t=Health%20Insurance&g=1600000US2501260&tid=ACST5Y2019.S2701>

Resident Occupational Profile

Education

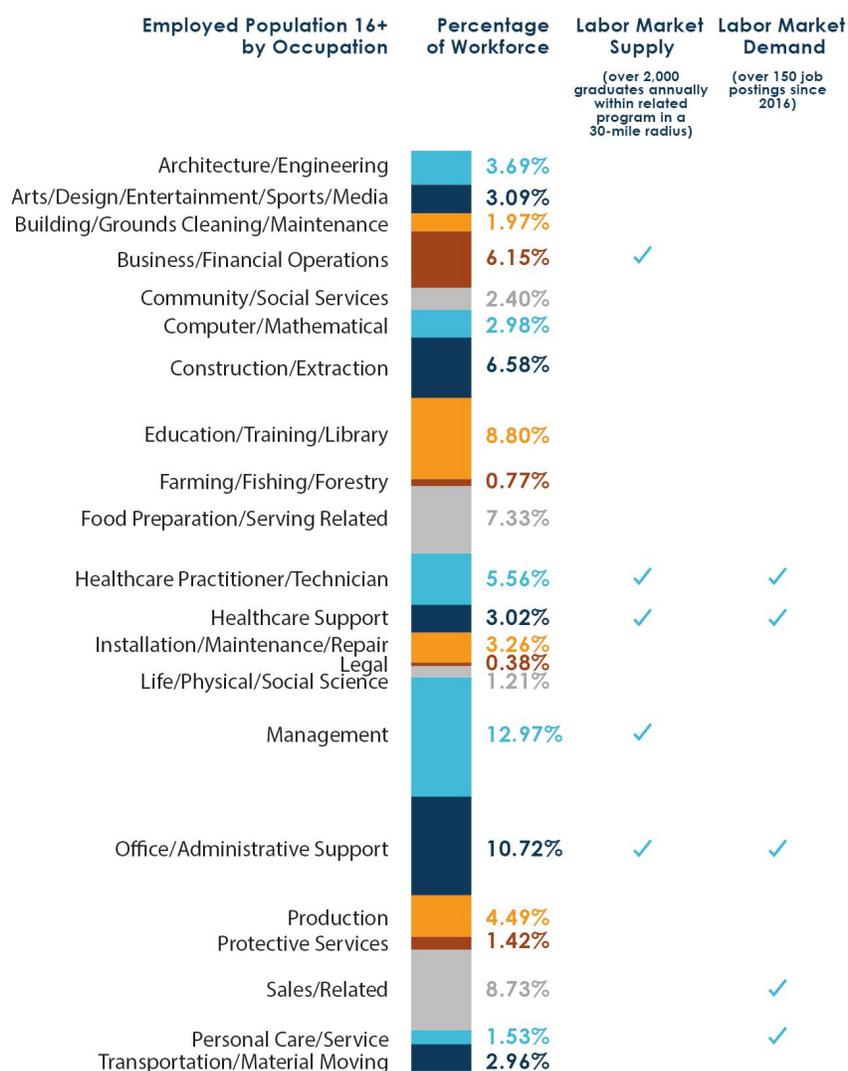
Amesbury residents vary in educational attainment with a quarter of the population holding a GED and another quarter holding a Bachelor’s Degree. Amesbury residents have significantly higher educational attainment than residents county-wide. Just over 16% of Essex County residents hold a bachelor’s degree or higher, significantly lower than the roughly 40% of Amesbury residents holding a bachelor’s degree or higher. Although most jobs postings in the greater Amesbury labor market do not list required educational attainment, a majority of those that do, require a GED or Bachelor’s degree - matching and capitalizing on the City’s educational attainment.

Education Level	Number of Postings	% of Total Job Listings	Amesbury Educational Attainment
No Education Listed	5,495	64%	--
High school or GED	1,477	17%	26.62%
Associate's degree	613	7%	8.51%
Bachelor's degree	1,025	12%	23.90%
Master's degree	427	5%	13.77%
Ph.D. or professional degree	111	1%	2.47%

EMSI Burning Glass, Job Postings Analysis, 2016-2021; ACS Enhanced Data, Baseline January 2021.

Job Postings Analysis

Beyond Amesbury's existing labor supply, within a 30-mile radius of the city the top programs among college graduates include business, management, marketing, and related support services; health professions and related programs; education; engineering; and psychology. These programs correspond to several of the most popular job postings in the region of Amesbury over the past 5 years — specifically registered nurses, childcare workers, home health and personal care aides, and physical therapists — as well as Amesbury's most common occupations. This data does not include self-employed workers who consist of nearly 10% of Amesbury's population and will be critical to the expansion of the Lower Millyard.



Source: EMSI Burning Glass, Job Postings Analysis, 2016-2021; ACS Enhanced Data, Baseline January 2021.

COVID-19: A Local Economy Stress Test (2020-2021)

Employment Vulnerability

Throughout the COVID-19 pandemic, Amesbury faced unemployment rates below that of Essex County with the exception of April 2020. The peak in unemployment, at 16.6%, occurred in April of 2020 under mandatory business closing orders as COVID-19 began to spread throughout New England. Following the conclusion of business closing orders in June-July 2020, Amesbury's unemployment rate returned in August 2020 to just over one percentage point higher than that of January 2020, having thereby nearly recovered to pre-COVID levels. This indicates considerable resilience in Amesbury's labor market and business activity in the face of an acute shock to the local, regional, and national economy if and when income support to households, payroll liquidity support to small businesses (e.g., Paycheck Protection Program loans), and Federal Reserve Bank interest rate support at the macroeconomic level is provided by federal and state governments. The COVID-19 experience does not provide evidence of local economic resilience and vulnerability in the context of an economic shock event without such mitigating supports.

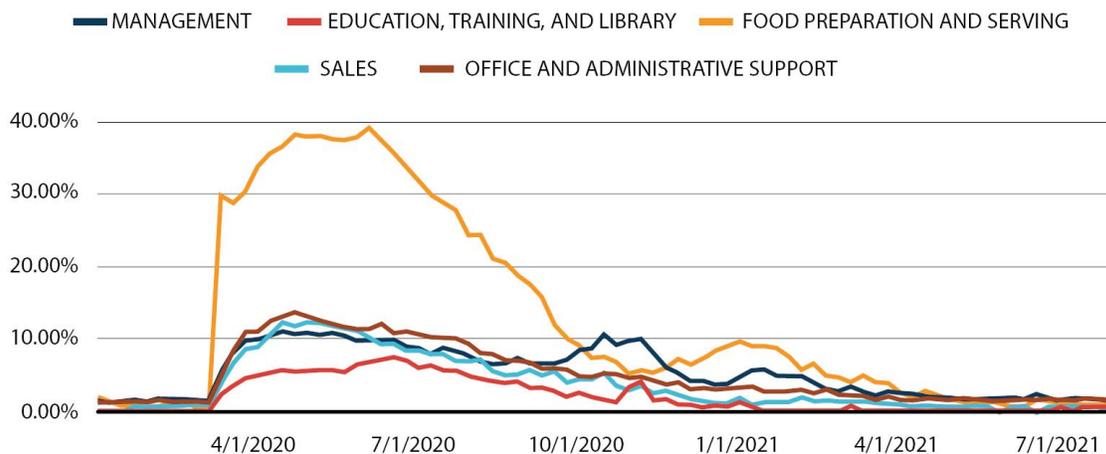
	Month	Amesbury Rate	Essex County Rate
2020	January	2.9%	3.4%
	February	2.7%	3.1%
	March	2.8%	3.1%
	April	16.6%	16.3%
	May	15.1%	15.4%
	June	13.5%	14.8%
	July	8.7%	10.1%
	August	7.4%	9.1%
	September	7.1%	8.9%
	October	6.6%	8.1%
	November	6.3%	7.7%
	December	5.7%	7.3%
2021	January	6.6%	7.5%
	February	6%	7.3%
	March	5.2%	6.6%
	April	4.5%	5.9%
	May	3.9%	5%
	June	4.3%	5.4%
	July	4.7%	5.7%
	August	4.3%	5.4%

State of Massachusetts Department of Unemployment Assistance, Economic Research Department, Labor Market Information, City of Amesbury, updated October 2021* Cells highlighted in yellow indicate where Amesbury's unemployment rate exceeded that of Essex County and Massachusetts

Occupational Employment Vulnerability

Amesbury's top 5 occupations faced varying unemployment levels - with most facing peak unemployment in the spring of 2020. Following the initial peak in unemployment across all major occupational categories, as the first wave of COVID-19 arrived in New England, there were secondary peaks in Management occupations in November-December 2020 and in Food Preparation and Serving occupations in December 2020-February 2021. That latter peak in food services industry unemployment occurred coincident with Amesbury's peak in COVID-19 cases in January 2021. Although that peak was far below the nearly 40% unemployment level in food services during mandatory lockdowns in the spring of 2020, this second peak occurred nearly a year into measures taken by businesses to adapt to the COVID shock. Therefore, the secondary 10% spike in unemployment suggests remaining vulnerabilities in this important area of downtown Amesbury business activity, which represented 19% of the total downtown retail and food services trade in the pre-COVID period. As food services businesses make a substantial contribution to local resident quality of life (i.e., residential attractiveness) as well as for local business employees (i.e., business location attractiveness) and as part of destination visits and shopping trips (i.e., visitor attractiveness), understanding the current status of food services businesses and mechanisms available to renew and increase their resilience will be an important factor for any strategy for the Downtown/Lower Millyard District.

Occupational Unemployment Among the Top 5 Occupations in Amesbury

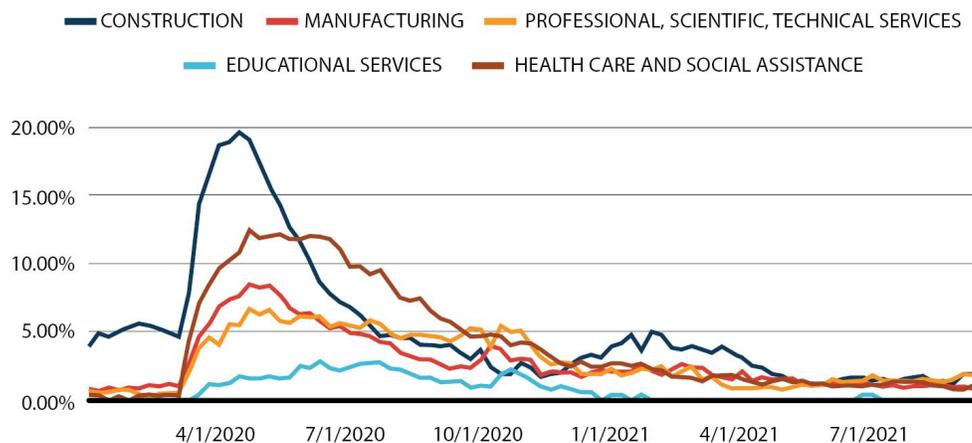


State of Massachusetts Department of Unemployment Assistance, Economic Research Department, Labor Market Information, City of Amesbury, updated October 2021, not seasonally adjusted; Enhanced ACS Data, baseline January 2021.

Industry Employment Vulnerability

Like occupational unemployment rates, Amesbury's five dominant industries each saw a peak in unemployment rates during the first COVID-19 shock to the regional and national economy in the spring of 2020. However, when COVID-19 cases peaked in Amesbury in January 2021 only construction saw a secondary increase in unemployment, albeit only to the 5% level. This level of unemployment in Q1-2021 is equivalent to that indicated for Q1-2020 prior to the COVID-19 shock. Therefore, since available local-level unemployment rates are not seasonally adjusted, the indicated Q1-2021 spike in construction's unemployment rates likely only indicates a typical winter season reduction in business activity given a similar increase in the construction industry's unemployment during the winter months of pre-COVID seasons. The figure may even indicate an increase in normal seasonal employment reflecting increased COVID period expenditures on home improvements. These figures, across industries, may indicate substantial resilience in the industry in the face of shocks that 1) are accompanied by the provision of government income and payroll supports and 2) increase the attractiveness of residential locations outside of major urban centers.

Industry Unemployment Among Amesbury's Top 5 Industries

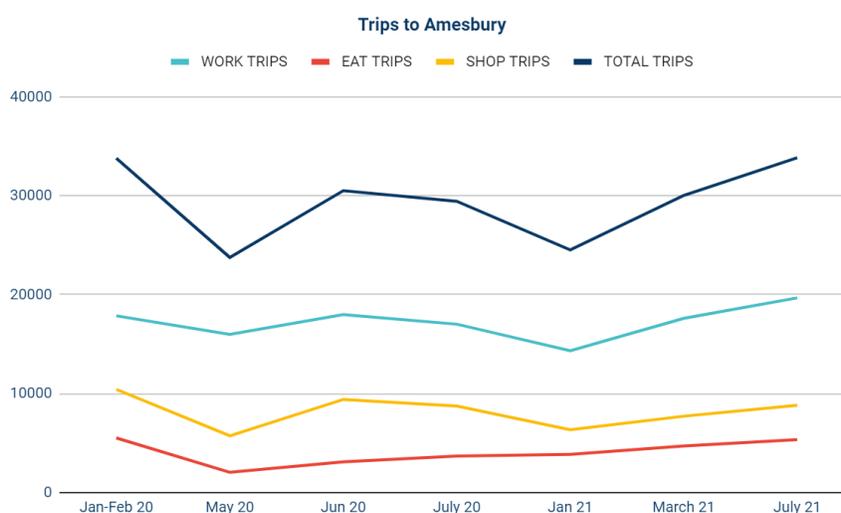


State of Massachusetts Department of Unemployment Assistance, Economic Research Department, Labor Market Information, City of Amesbury, updated October 2021, not seasonally adjusted; United States Census Bureau 2019 ACS 5-year estimates, <https://data.census.gov/cedsci/table?t=Industry&g=1600000US2501260&tid=ACST5Y2019.S2404>

Amesbury as a Destination

The economic stress test Amesbury has experienced throughout the COVID-19 pandemic impacted trips to, from, and within Amesbury for a variety of purposes. Shutdowns of businesses and other places of work for extended periods of time, and shifting to remote work led to decreases in trips to Amesbury for work, but also for shopping and eating employees may have made before or after work. As Amesbury looks to become a greater destination in Essex County, understanding what efforts the City has taken previously and can continue to take to become an even more attractive destination for both regular workday and weekend visits by reliable visitor groups of visitors is key.

The data in this section outlines trips within Amesbury as well as trips from municipalities whose residents, since 2020, made the most trips to Amesbury. We use the data on average trips in January-February 2020 as a pre-COVID baseline to help us understand how trips have changed during the pandemic, and for June-July 2020 as a baseline for re-opening or return-to-new-normal trends. Ideally, this data would use two pre-COVID baselines: one for the 2019 summer season and one for the 2020 winter season, recognizing that travel patterns differ by season, but access to the detailed trip data used—derived from a large sample of cell phone location changes—begins in January 2020.

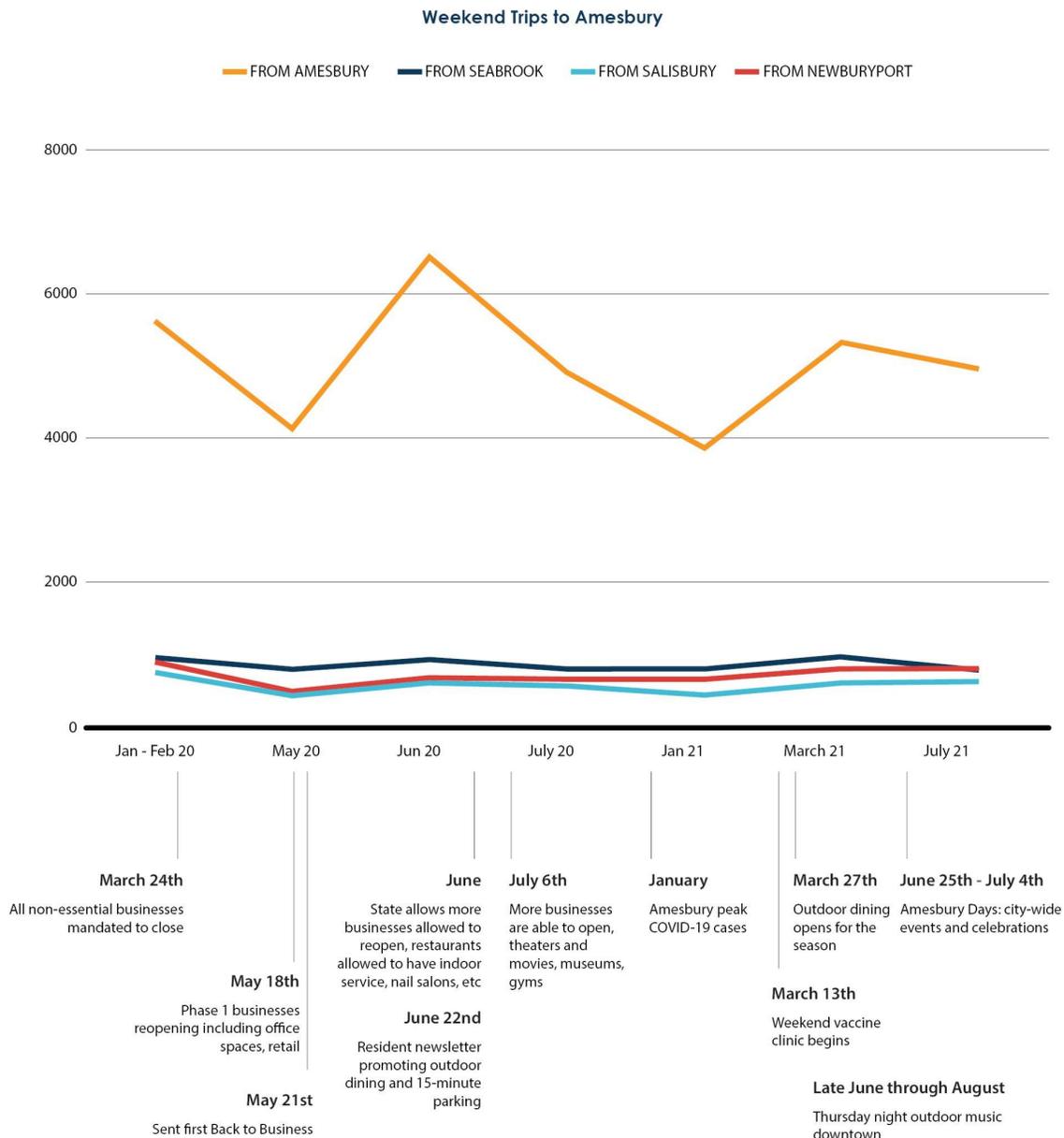


Amesbury as a Weekend and Weekday Destination

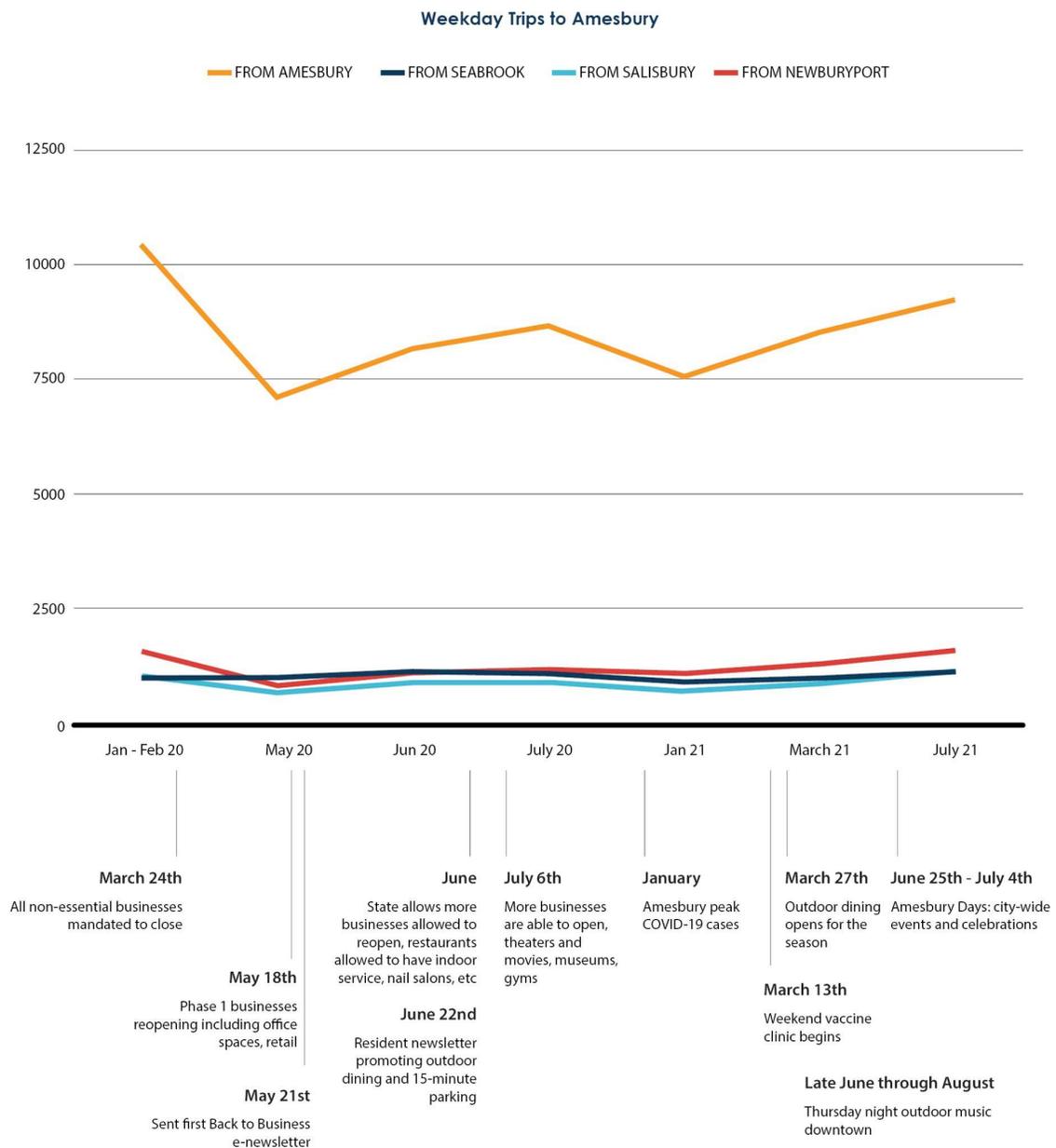
The graphs below present weekend and weekday trip data to Amesbury and a series of key events and promotional activities that may have impacted trips to Amesbury, which include statewide reopenings, Amesbury's peak in COVID-19 cases, and promotional efforts led by the City. The trips indicated originated in Amesbury, Salisbury, Newburyport, and Seabrook since the highest trip counts before and during the pandemic originated in those three municipalities.

Weekend trips to Amesbury reached their highest levels during the studied period in June-July of 2020, during the first reopening from the March-May 2020 COVID-19 lockdowns, and began to rise significantly again in March of 2021. Although these travel recoveries were mostly driven

by local Amesbury residents making local trips, trips from Seabrook, Salisbury, and Newburyport — three of the most popular origins for trips to Amesbury since 2020 — also contributed to a rise in trips to Amesbury. These two moments in time correspond with a series of efforts from City and State officials. In June and July of 2020, the state of Massachusetts allowed more businesses to reopen including indoor dining, gyms, movie theaters. Simultaneously, Amesbury launched a series of promotional efforts around this time including the Back to Business e-newsletter and the resident newsletter. In March of 2021, outdoor dining reopened and vaccine clinics began in Amesbury.



Weekday trips to Amesbury spiked in July of 2020 and as of the summer of 2021 were also on an upward trajectory with increases in trips within Amesbury as well as to Amesbury from Seabrook, Salisbury, and Newburyport. The July 2020 spike coincided with statewide business reopenings as well as the aforementioned promotional efforts led by the City of Amesbury. The gradual increase in trips over the course of 2021 coincides with a series of statewide and City-led efforts. Across the state, March marked the reopening of outdoor dining and the beginning of vaccination efforts that only continued throughout 2021. Simultaneously, the City continued promotional efforts started in the summer of 2020 and launched further efforts in June-July 2021 including Amesbury days and Thursday night outdoor music downtown.



Competing Destinations

Although the data at our disposal does not include pre-COVID summer trip counts to understand how summer of 2020 compared to a pre-COVID summer, the 2020 trip counts are used below as a baseline to understand recovery between 2020 and 2021. The table below outlines the percentage change in eating and shopping trips on weekdays and weekends from a series of locations — with Newburyport and Seabrook selected given the high traffic between Amesbury and the two municipalities before and during the COVID pandemic and their competition with Amesbury as different kinds of local shopping and eating destinations.

Between the summer of 2020 and the summer of 2021, eating trips to Amesbury made a strong recovery both on weekdays and weekends capturing an especially higher number of trips from Newburyport in the summer of 2021 than in the summer of 2020. Restaurants across the United States took a significant hit during the pandemic due to social distancing requirements, leading restaurants to adopt creative outdoor dining and takeout approaches. Amesbury restaurants showed resilience with significant increases in eating trips as the pandemic progressed not only from local residents, but across the greater Amesbury region including competing destinations. Nonetheless, as noted below, employment in Amesbury's food services industry establishments did not fully recover from the initial 2020 COVID-19 shock.

Shopping trips made less of a rebound from the summer of 2020. Both weekday and weekend shopping trips from locations in Amesbury as well as Seabrook declined in July 2021 relative to the June-July 2020 period. However, total weekday shopping trips, as well as shopping trips from Newburyport, continued to increase through July 2021. With increased access to vaccines and a shift from work from home to hybrid or in-person work trips to Amesbury, it does appear that the City has been able to capitalize on greater foot traffic with total weekday shopping trips increasing. The summer of 2020 saw a significant increase in local shopping trips made by Amesbury residents, coinciding with citywide shop local promotional efforts. Finding ways to continue these efforts with a focus on shoppers in Amesbury and in Newburyport, and potentially Seabrook in spite of the sales tax advantage may have a significant impact on local shopping trips in the future.

	Weekend		Weekday	
	Change in Eating Trips Summer 2020 to Summer 2021	Change in Shopping Trips Summer 2020 to Summer 2021	Change in Eating Trips Summer 2020 to Summer 2021	Change in Shopping Trips Summer 2020 to Summer 2021
From Amesbury	16.82%	-21.31%	46.14%	-11.60%
From Newburyport	75.00%	3.61%	100.00%	16.27%
From Seabrook	8.51%	-8.46%	37.33%	-11.43%
From Anywhere	56.91%	-2.57%	57.72%	16.88%

COVID Period Changes in Downtown Small Business Sales: Strength/Weaknesses

The COVID period has put downtown Amesbury small business through their own stress and adaptability test. Added to the continuing shift in retailing towards online purchasing and home delivery, COVID-19 restricted public gathering and business operations in ways that might otherwise be evidenced during extreme weather, flooding, or other natural events that reduce downtown business access.

The below figure indicates estimated impacts on a full range of retail and food services areas over the period of Q2-2020 until Q3-2021. Across Massachusetts and the U.S., the most severe retail sector impacts of COVID restrictions were felt in the areas of travel and hospitality, and restaurants. However, restaurants and food service providers throughout the U.S. responded by adopting take-out and home delivery solutions. Downtown Amesbury restaurants showed such resilience, increasing sales during the COVID period in response to increased local and non-resident food services demand (A).



Another cluster of retail areas (B) also exhibited resilience. Downtown retailers in building materials and garden supplies, health and personal care goods, beer and wine, and food and groceries increased sales during the COVID period even as local demand remained at pre-COVID levels or increased only slightly.

In the area of clothing and accessories, and in particular women's and family clothing, both downtown sales and local demand declined (C). (Downtown Amesbury offered minimal supply of men's clothing prior to COVID-19.) This is of course attributable to two nationwide aspects of the COVID period economy: reduced need for in-office and social gathering attire, and increased online retailing of clothing.

Another cluster of retail areas (D) showed less resilience, exhibiting reduced sales in spite of increased local demand. These include furniture & home furnishings, electronics & appliance stores, jewelry stores, hobby & musical instrument stores, used merchandise stores, and pet stores. Excepting perhaps used merchandise (eBay aside), these retail goods areas have also faced sustained online retail competition, which likely increased during the COVID period. However, many small retailers of such goods nationwide have also supplemented their local storefront sales via online platforms such as Amazon and Etsy, if not also through bespoke websites. Therefore, reduced sales by these downtown retailers may reflect the slow adoption of online sales channels, potentially meriting a collective response. Additionally, since these categories of goods are often associated with recreational, experience-oriented destination shopping trips, reduced COVID period sales despite increased demand suggests the need to design Downtown/Lower Millyard promotion and programming (e.g., festivals, markets, special sales offerings, and other events) in ways that prevent and mitigate conditions that reduce access and social gathering.

On a dollar basis, the largest estimated shifts in reduced downtown sales relative to changing local area demand were in the following areas:

In the food services and drinking places area (NAICS 722), local demand dropped to an estimated 89% of pre-COVID levels, but local restaurants and other eating/drinking places increase sales 110%, representing an increase of \$268,000 in sales to residents outside of the downtown area.

Downtown beer, wine, and liquor shops (NAICS 4453) faced an increased downtown resident demand that was 110% of pre-COVID levels but increased sales by 131% of pre-COVID levels, representing an increase of \$51,000 in sales to non-downtown residents.

Conversely, in the area of sporting goods, hobby, musical instrument stores (NAICS 4511), local demand increased to 114% of pre-COVID levels, but local sales declined to 32% of pre-COVID levels, resulting in a leakage of downtown resident demand in a goods area that previously had a \$136,000 sales surplus to non-downtown residents.

Sizing Manufacturer-Maker-Retail Opportunity at District Scale

A key factor of competitiveness for specialized, local manufacturing and maker economies is the unique potential to develop cost-effective and ‘sticky’ access to local and regional buyers. The development of reliable ‘buy-local’ purchasing and customer loyalty arrangements allows local producers to efficiently capture margins that would otherwise accrue to larger wholesale and retail (including online) businesses.

Buy-local economic development strategies involve the establishment of producer-wholesaler-retailer businesses or business alliances that are supported by the municipality and local business and civic organizations through local and regional buy-local branding and marketing, local public markets and events (e.g., tours, festivals), online marketing and sales to niche consumer groups, and local shopper loyalty programs and mechanisms (e.g., local money schemes). When local purchasing arrangements involve the attraction of destination visits in or adjacent to downtowns (e.g., to maker/artisan studio buildings, or to markets), these visits also increase the awareness and sales of local retail and food services businesses, which may also serve as sales outlets for locally produced items.

Such manufacturing-maker-retailer economies contribute to local and regional economic resilience in the face of supply chain disruptions in the broader economy, and differentiate local economic positioning from the geographic hubs of large retail chains and platforms.

The below figure indicates areas of wholesale and retail market potential for further coordinated local producer, maker, and retailer development within the context of a strategy for the Downtown/Lower Millyard as an integrated central economic district.

The products that are least available to local consumers from retailers in Essex County, Greater Amesbury, and Amesbury are:

- Floor coverings
- Home furnishings
- Women’s clothing
- Men’s clothing
- Hobby products and musical instruments
- Selected electronics and appliances
- Hardware
- Jewelry
- Cosmetics and beauty supplies
- Luggage and leather goods
- Art

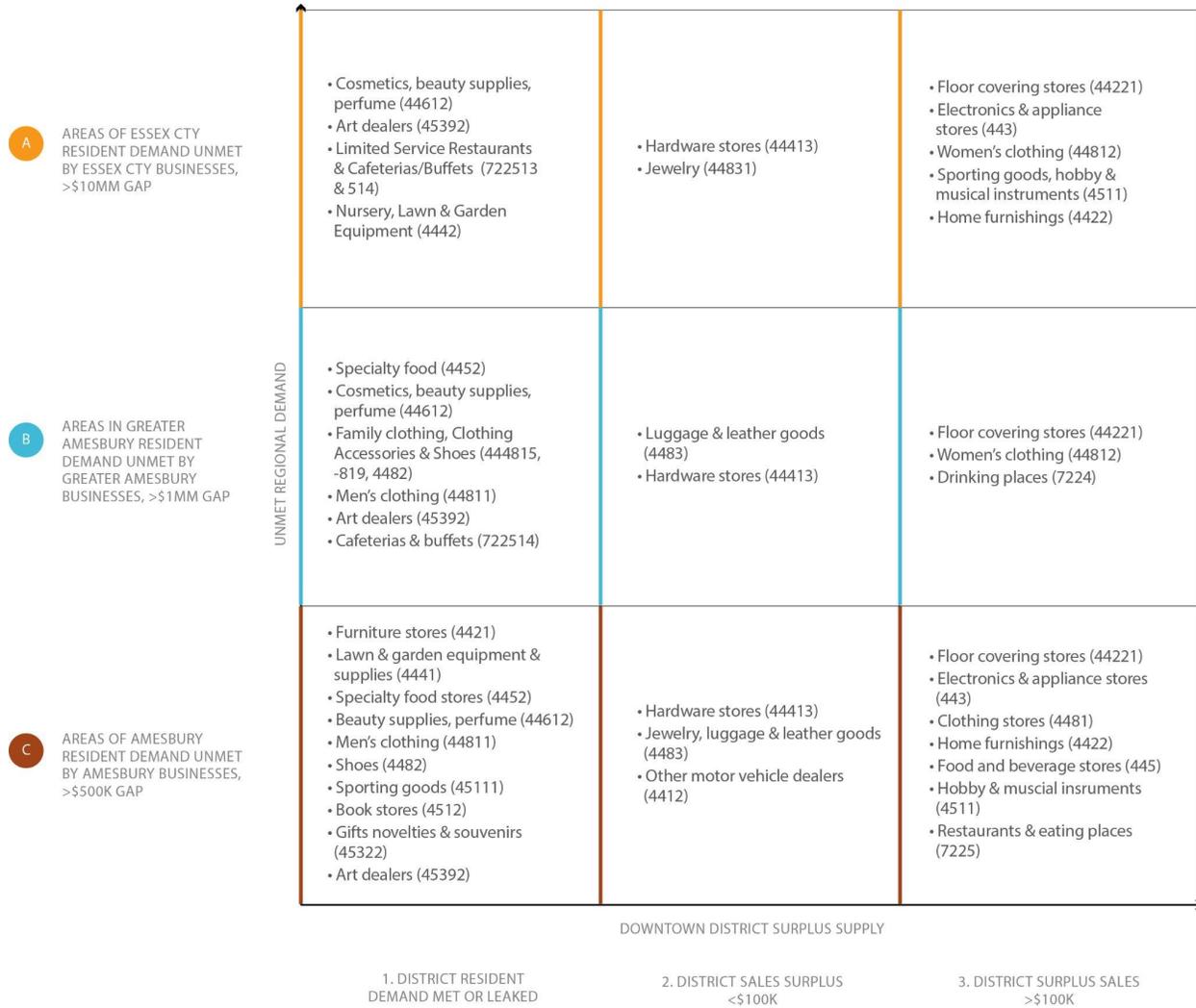
Most metro markets in the U.S. now host customized, artisanal or other specialized, smaller-scale production for local/regional consumers in each of the above product categories (excepting electronics).

When considering the viability of creating specific buy-local producer-wholesaler-retailer business opportunities in the Amesbury Downtown/Lower Millyard District, the following should be considered:

- Synergies between product areas. For instance, people making trips in search of home furnishings may also consider buying other home products, such as floor coverings and art, during the same trip.
- Synergies between shopping trips for different types of products and other visitation activities (e.g., combination of visits to craftsperson or artisan studios with meals, drinks, and other forms of tourism).
- The proximity of underserved buyers/consumers, considering shopping behaviors for different types of products, including competing online shopping items. For instance, consumers would typically make longer trips to search for bespoke items (e.g., art, jewelry, furniture) versus consumables or standardized, mass-produced items.

To understand the proximity of underserved consumers of the above product areas, the below figure indicates the potential opportunities at three scales:

- ❖ Amesbury Downtown/Lower Millyard District production opportunities to serve regional (i.e., Essex County) consumer demand that is undersupplied by Essex County businesses (row A)
- ❖ Amesbury Downtown/Lower Millyard District production opportunities to serve greater Amesbury consumer demand that is undersupplied by greater Amesbury businesses (row B)
- ❖ Amesbury Downtown/Lower Millyard District production opportunities to serve Amesbury consumer demand that is undersupplied by Amesbury businesses (row C)



Product areas that are undersupplied by retailers at multiple scales suggest a larger local producer opportunity. This is particularly the case for product areas where existing District retailers are already attracting outside customers (columns 2 & 3), suggesting patterns of shopping visitation to the District. Where retail sales to outside customers is greater than \$100,000 (column 3) there may be potential for an entirely new small retail business or market in the District.

Column 1 in the above figure indicates product areas that are undersupplied by businesses in the District to resident consumers of the District. The business and product areas listed in this column indicate potential opportunities to better meet the needs of District residents (thereby staving off the leakage of their own consumer expenditures) while also attracting regional customers on the basis of specialized local production and retail/shopping experiences.

Detailed Retail Snapshots

Local Retail Snapshot 1.1

LOCAL RETAIL SNAPSHOT 1.1

What kinds of retailers in the Downtown & Lower Millyard District are most filling the demand of Amesbury residents and establishments?

RETAIL & SERVICES AREAS	NAICS Code	TOTAL DISTRICT 2021 SALES	% OF AMESBURY DEMAND MET BY DISTRICT RETAILERS	AMESBURY DEMAND REMAINING UNSERVED BY DISTRICT RETAILERS
Sporting Goods, Hobby, Musical Instrument, and Book Stores	4511	\$309,699	9%	-3,090,143
Musical instrument and supplies stores	45114	\$124,340	46%	-144,534
Hobby, sewing, toy, and game stores	45112	\$185,359	23%	-622,796
Convenience stores	44512	\$170,743	9%	-1,797,245
Drinking places (alcoholic beverages)	7224	\$155,721	9%	-1,492,299
Electronics & Appliance Stores	443	\$388,124	8%	-4,372,613
Electronics stores	443142	\$388,124	10%	-3,383,774
Used merchandise stores	4533	\$91,481	8%	-1,053,226
Full-service restaurants	722511	\$1,342,878	7%	-17,708,403
Clothing & Clothing Accessories Stores	448	\$771,628	6%	-12,932,861
Women's clothing stores	44812	\$324,686	18%	-1,522,420
Family clothing stores	44814	\$375,697	7%	-5,338,575
Furniture & Home Furnishings Stores	442	\$492,377	6%	-7,357,691
Home furnishings stores, incl window treatments	4422	\$492,377	12%	-3,514,618
Floor covering stores	44221	\$170,349	8%	-1,916,124
Other miscellaneous store retailers	4539	\$249,017	6%	-4,023,529
Pet and pet supplies stores	45391	\$249,017	21%	-928,800

● Leakage

Local Retail Snapshot 1.2 (Part 1)

LOCAL RETAIL SNAPSHOT 1.2 (PART 1)

How well do retailers in the Downtown & Lower Millyard District serve the demand of Amesbury residents and establishments?

RETAIL & SERVICES AREAS	NAICS Code	TOTAL DISTRICT 2021 SALES	% OF AMESBURY DEMAND MET BY DISTRICT RETAILERS	AMESBURY DEMAND REMAINING UNSERVED BY DISTRICT RETAILERS
Motor Vehicle and Parts Dealers				
Motor vehicle and parts dealers	441	\$1,445,658	2%	-60,336,808
Automobile dealers	4411	\$959,718	2%	-51,347,858
Other motor vehicle dealers	4412	\$225,428	6%	-3,358,767
	4413	\$260,510	4%	-5,630,185
Furniture and Home Furnishings Stores				
Furniture and home furnishings stores	442	\$492,377	6%	-7,357,691
Home furnishings stores	4422	\$492,377	12%	-3,514,618
Floor covering stores	44221	\$170,349	8%	-1,916,124
Other home furnishings stores, incl window treatments	44229	\$322,028	17%	-1,598,494
Electronics and Appliance Stores				
Electronics and appliance stores	443	\$388,124	8%	-4,372,613
Electronics stores	443142	\$388,124	10%	-3,383,774
Building Material and Garden Equipment and Supplies Dealers				
Building material and garden equipment and supplies dealers	444	\$379,565	1%	-26,185,819
Building material & supplies, incl hardware stores	4441	\$379,565	2%	-23,208,156
Lawn, garden center & garden equipment and supplies stores	4442	-	0%	-2,977,663
Food and Beverage Stores				
Food and beverage stores	445	\$2,334,014	4%	-49,871,310
Grocery stores	4451	\$2,143,125	5%	-44,649,356
Supermarkets and other grocery (except convenience) stores	44511	\$1,972,382	4%	-42,852,111
Convenience stores	44512	\$170,743	9%	-1,797,245
Specialty food stores	4452	-	0%	-1,317,053
Beer, wine, and liquor stores	4453	\$190,889	5%	-3,904,901
Health and Personal Care Stores				
Health and Personal Care Stores	446	\$512,097	2%	-20,308,569
Pharmacies and drug stores	44611	\$512,097	3%	-17,255,330
Cosmetics, beauty supplies, and perfume stores	44612	-	0%	-1,345,728
Gasoline Stations				
Gasoline stations	447	\$609,743	2%	-27,241,383
Clothing and Clothing Accessories Stores				
Clothing and clothing accessories stores	448	\$771,628	6%	-12,932,861
Clothing stores	4481	\$700,383	7%	-8,688,630
Women's clothing stores	44812	\$324,686	18%	-1,522,420
Family clothing stores	44814	\$375,697	7%	-5,338,575
Clothing accessories stores	44815	-	0%	-403,239

 Leakage

Local Retail Snapshot 1.2 (Part 2)

LOCAL RETAIL SNAPSHOT 1.2 (PART 2)

How well do retailers in the Downtown & Lower Millyard District serve the demand of Amesbury residents and establishments?

RETAIL & SERVICES AREAS	NAICS Code	TOTAL DISTRICT 2021 SALES	% OF AMESBURY DEMAND MET BY DISTRICT RETAILERS	AMESBURY DEMAND REMAINING UNSERVED BY DISTRICT RETAILERS
Other clothing stores	44819	-	0%	-759,043
Shoe stores	4482	-	0%	-2,161,679
Jewelry, luggage, and leather goods stores	4483	\$71,244	3%	-2,082,552
Jewelry stores	44831	\$71,244	4%	-1,879,461
Sporting Goods, Hobby, Musical Instrument, and Book Stores				
Sporting goods, hobby, musical instrument, and book stores	451	\$309,699	8%	-3,620,292
Sporting goods, hobby, and musical instrument stores	4511	\$309,699	9%	-3,090,143
Sporting goods stores	45111	-	0%	-2,077,668
Hobby, sewing, toy, and game stores	45112	\$185,359	23%	-622,796
Musical instrument and supplies stores	45114	\$124,340	46%	-144,534
Book stores and news dealers	4512	-	0%	-530,149
General merchandise stores				
General merchandise stores	452	\$1,298,062	3%	-44,029,793
Other general merchandise stores	4523	\$1,298,062	3%	-40,750,472
Miscellaneous Store Retailers				
Miscellaneous store retailers	453	\$340,497	5%	-6,994,998
Florists	4531	-	0%	-331,374
Office supplies, stationery, and gift stores	4532	-	0%	-1,586,868
Gift, novelty, and souvenir stores	45322	-	0%	-984,959
Used merchandise stores	4533	\$91,481	8%	-1,053,226
Pet and pet supplies stores	45391	\$249,017	21%	-928,800
Art dealers	45392	-	0%	-791,018
All other miscellaneous store retailers	45399	-	0%	-2,048,484
Food Services and Drinking Places				
Food services and drinking places	722	\$2,005,300	5%	-41,138,933
Drinking places (alcoholic beverages)	7224	\$155,721	9%	-1,492,299
Restaurants and other eating places	7225	\$1,849,578	5%	-36,683,784
Full-service restaurants	722511	\$1,342,878	7%	-17,708,403
Limited-service restaurants	722513	\$414,601	3%	-16,111,693
Cafeterias, grill buffets, and buffets	722514	-	0%	-420,778
Snack and non-alcoholic beverage bars	722515	\$92,101	4%	-2,442,908

 Leakage

Local Retail Snapshot 1.3 (Part 1)

The **LIVING WAGE** in Essex County for a single adult household is \$39,279. For a household of one parent with one child it is \$79,763.

		Above Living Wage / Below Living Wage		LOCAL MARKET		REGIONAL MARKET
RETAIL & SERVICES AREAS	NAICS Code	AVERAGE RETAIL SALARY (Essex County)	AVERAGE MANUFACTURING SALARY (Essex County) Related to Retail Product Area	CITY OF AMESBURY DEMAND: Greater Amesbury Supply	GREATER AMESBURY DEMAND: Greater Amesbury Supply	ESSEX COUNTY DEMAND: Essex County Supply
				● Sales Surplus/ ● Demand Leakage	● Sales Surplus/ ● Demand Leakage	● Sales Surplus/ ● Demand Leakage
Motor Vehicle and Parts Dealers						
Motor vehicle and parts dealers	441	\$69,238		\$401,370,808	\$168,413,666	-\$734,933,006
Automobile dealers	4411	\$77,759		\$314,220,979	\$116,963,419	-\$841,022,722
Other motor vehicle dealers, including recreational vehicles	4412	\$66,420		\$30,447,196	\$16,761,748	\$11,055,729
Furniture and Home Furnishings Stores						
Furniture and home furnishings stores	442	\$41,985		\$43,136,562	\$11,904,316	\$105,781,886
Furniture stores	4421	\$55,102	\$60,770 (NAICS 337)	\$14,573,567	-\$598,226	\$77,353,676
Home furnishings stores	4422	\$36,831		\$28,562,995	\$12,502,542	\$28,428,209
Floor covering stores	44221	\$72,114	\$56,681 (NAICS 32198)	\$6,442,627	-\$2,088,300	\$50,028,493
Other home furnishings stores, incl window treatments	44229	\$27,236	\$60,770 (NAICS 337)	\$22,120,369	\$14,590,843	-\$21,600,284
Electronics and Appliance Stores						
Electronics and appliance stores	443	\$48,599	\$68,025 (NAICS 3352)	\$45,997,806	\$27,785,288	\$58,492,613
Electronics stores	443142	\$44,651		\$39,597,829	\$25,132,336	\$44,300,963
Building Material and Garden Equipment and Supplies Dealers						
Building material and garden equipment and supplies dealers	444	\$43,820		\$166,146,260	\$60,486,142	\$78,715,681
Building material & supplies, incl hardware stores	4441	\$44,298		\$149,882,421	\$56,073,960	\$45,574,601
Lawn, garden center & garden equipment and supplies stores	4442	\$41,211		\$16,263,839	\$4,412,182	\$33,141,080
Food and Beverage Stores						
Food and beverage stores	445	\$26,599		\$295,923,876	\$98,219,798	-\$361,817,122
Grocery stores	4451	\$26,187		\$234,635,980	\$58,141,636	-\$204,406,586
Supermarkets and other grocery (except convenience) stores	44511	\$26,437	\$52,356 (NAICS 311)	\$211,363,194	\$42,211,118	-\$151,956,074
Convenience stores	44512	\$22,927		\$23,272,786	\$15,930,518	-\$52,450,512
Specialty food stores	4452	\$27,056		\$3,553,637	-\$1,386,789	\$969,514
Beer, wine, and liquor stores	4453	\$31,899	\$34,046 (NAICS 3121)	\$57,734,258	\$41,464,950	-\$158,380,051
Health and Personal Care Stores						
Health and personal care stores	446	\$46,492	\$119,685 (NAICS 3254)	\$90,078,344	\$9,353,244	-\$285,703,614
Pharmacies and drug stores	44611	\$47,721		\$83,970,373	\$15,183,532	-\$329,434,502
Cosmetics, beauty supplies, and perfume stores	44612	\$28,931	\$84,819 (NAICS 325620)	-\$324,851	-\$5,560,249	\$21,200,895
Gasoline Stations						
Gasoline stations	447	\$35,178		\$106,901,538	\$6,107,524	\$413,056,008
Clothing and Clothing Accessories Stores						
Clothing and clothing accessories stores	448	\$23,892		\$44,677,646	-\$7,644,897	\$30,383,854
Clothing stores	4481	\$22,243		\$35,483,082	-\$394,609	-\$18,770,902
Men's clothing stores	44811	\$32,670	\$38,198 (NAICS 315)	-\$329,193	-\$1,883,702	-\$1,265,798
Women's clothing stores	44812	\$22,359		\$4,356,275	-\$2,752,124	\$13,611,276

Local Retail Snapshot 1.3 (Part 2)

The **LIVING WAGE** in Essex County for a single adult household is \$39,279. For a household of one parent with one child it is \$79,763.

RETAIL & SERVICES AREAS	NAICS Code	Above Living Wage / Below Living Wage		LOCAL MARKET		REGIONAL MARKET
		AVERAGE RETAIL SALARY (Essex County)	AVERAGE MANUFACTURING SALARY (Essex County) Related to Retail Product Area	CITY OF AMESBURY DEMAND: Greater Amesbury Supply	GREATER AMESBURY DEMAND: Greater Amesbury Supply	ESSEX COUNTY DEMAND: Essex County Supply
				● Sales Surplus/ ● Demand Leakage	● Sales Surplus/ ● Demand Leakage	● Sales Surplus/ ● Demand Leakage
Clothing accessories stores	44815	\$22,635	\$47,700	-\$403,239	-\$1,962,613	\$12,266,068
Other clothing stores	44819	\$28,416	(NAICS 3159)	\$1,200,711	-\$1,713,681	\$2,517,845
Shoe stores	4482	\$21,216	(NAICS 3162)	\$3,465,757	-\$4,588,595	\$17,651,532
Jewelry, luggage, and leather goods stores	4483	\$39,691	\$ 41,707	\$5,728,808	-\$2,661,693	\$31,503,224
Jewelry stores	44831	--	(NAICS 33991)	\$5,931,899	-\$1,685,003	\$24,067,531
Sporting Goods, Hobby, Musical Instrument, and Book Stores						
Sporting goods, hobby, musical instrument, and book stores	451	\$27,521		\$26,201,089	\$11,331,091	\$18,985,773
Sporting goods, hobby, and musical instrument stores	4511	\$27,961	\$142,634 (NAICS 33993)	\$20,076,100	\$7,242,294	\$16,654,747
Sporting goods stores	45111	\$30,598		\$9,760,978	\$1,921,575	\$9,388,544
Hobby, sewing, toy, and game stores	45112	\$19,609		\$7,511,220	\$4,458,242	\$5,669,310
Musical instrument and supplies stores	45114	--	\$60,327 (NAICS 33992)	\$1,589,759	\$596,184	\$3,861,912
Book stores and news dealers	4512	\$24,736	\$67,341 (NAICS 323)	\$6,124,989	\$4,088,797	\$2,331,026
General Merchandise Stores						
General merchandise stores	452	\$26,795		\$170,161,737	-\$1,633,378	\$1,006,830,628
Department stores	4522	\$25,246		\$1,733,993	-\$10,796,560	\$24,508,608
Other general merchandise stores	4523	\$32,273		\$168,427,744	\$9,163,182	\$982,322,021
Warehouse clubs and supercenters	452311	\$32,273		\$162,381,781	\$20,092,123	\$850,679,035
All other general merchandise stores	452319	\$32,273		\$6,045,963	-\$10,928,941	\$131,642,986
Miscellaneous Store Retailers						
Miscellaneous store retailers	453	\$33,984		\$51,047,500	\$23,005,665	\$39,913,854
Florists	4531	\$27,494		\$3,350,545	\$2,022,724	-\$7,195,635
Office supplies, stationery, and gift stores	4532	\$25,646		\$11,993,519	\$5,885,668	-\$8,762,120
Gift, novelty, and souvenir stores	45322	\$23,991		\$3,791,600	\$47,754	-\$327,724
Used merchandise stores	4533	\$39,279		\$7,008,839	\$2,606,233	-\$7,048,618
Other miscellaneous store retailers	4539	\$39,034		\$28,694,597	\$12,491,040	\$62,920,227
Pet and pet supplies stores	45391	\$35,430		\$16,670,428	\$12,209,284	-\$7,672,165
Art dealers	45392	\$28,245		-\$791,018	-\$3,882,675	\$28,213,813
All other miscellaneous store retailers	45399	--		\$12,590,644	\$4,922,376	\$31,617,570
Food Services and Drinking Places						
Food services and drinking places	722	\$25,400		\$200,727,914	\$33,603,288	-\$61,477,436
Drinking places (alcoholic beverages)	7224	\$21,732		\$3,965,240	-\$2,654,122	\$39,085,696
Restaurants and other eating places	7225	\$24,698		\$178,058,991	\$29,007,367	-\$77,558,350
Full-service restaurants	722511	\$26,815		\$93,061,469	\$19,018,261	-\$119,639,449
Limited-service restaurants	722513	\$22,635		\$67,524,966	\$3,887,637	\$142,235,472
Cafeterias, grill buffets, and buffets	722514	\$29,085		-\$420,778	-\$2,041,164	\$16,305,826
Snack and non-alcoholic beverage bars	722515	\$22,432		\$17,893,334	\$8,142,632	-\$116,460,198