



WINCHESTER MASTER PLAN 2030

PHASE I EXISTING CONDITIONS

REPORT

This report prepared for the Master Plan Steering Committee (MPSC) details the findings of Phase I of the Winchester Master Plan 2030 Existing Conditions analysis for the Town of Winchester, Massachusetts.

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Chapter 3: Economic Development

Introduction

The economic conditions in a town are primarily driven by household income sources, the commercial and industrial base a community can attract and retain, and the uses a community chooses to allow on its land. The economies of each community then comprise a larger regional marketplace, where cities and towns are connected by a population and employment pool, an interrelated set of industries, and similar labor and trade characteristics. Economic regions are usually defined by similar development patterns, utility connections, and a shared system of roads, bridges, waterways, and in some cases public transportation.

The term “economic development” is often understood to mean the physical development of commercial and industrial space in a community. In fact, true economic development supports the improvement of the town and the people who live there. The economy of Winchester is comprised of many components that influence the decisions businesses make when choosing a location, including the town’s labor force, tax structure, access to transportation, ease of doing business, housing stock, public utilities, school quality, and amenities. The overall development of the town’s charm compared to regional competitors is also a way of attracting new business and increasing economic growth.

Trends and Challenges

- Winchester’s high housing costs results in much of the workforce being imported from other communities.
- An active effort to attract new employers can help diversify the existing employment base. This effort should align existing resident wants with current and future business and consumer needs, particularly in the North Main Street area.
- The recent expansion of Winchester Hospital at 620 Washington Street, and its continued presence in the community is a major asset. However, the potential consolidation of Winchester Hospital into the Beth Israel Deaconess Health System may adversely impact local employment.

Winchester has been successful in attracting and cultivating highly educated residents creating a community with great human and financial capital. Amenities like the thriving Town Center, multi-modal connectivity to the Greater Boston region via highways and public transit, and a mixture of residential, retail, office, and industrial uses can be attractive to businesses. Building upon these foundational elements will help Winchester attract and sustain businesses in commercial and industrial districts.

In Massachusetts, local governments depend heavily on property taxes for their operating revenue and pay close attention to how their tax base is structured. Some commercial and industrial uses are less service-intensive for local governments to support compared to other types of land uses. Zoning areas of the community for business and commercial use is one strategy to support business development. Other strategies include tax incentives, infrastructure extensions, and other public/private partnership arrangements. The Master Plan will help identify Winchester’s strengths and weaknesses and look for opportunities to bolster economic development efforts.

Inventory of Existing Conditions

LABOR FORCE

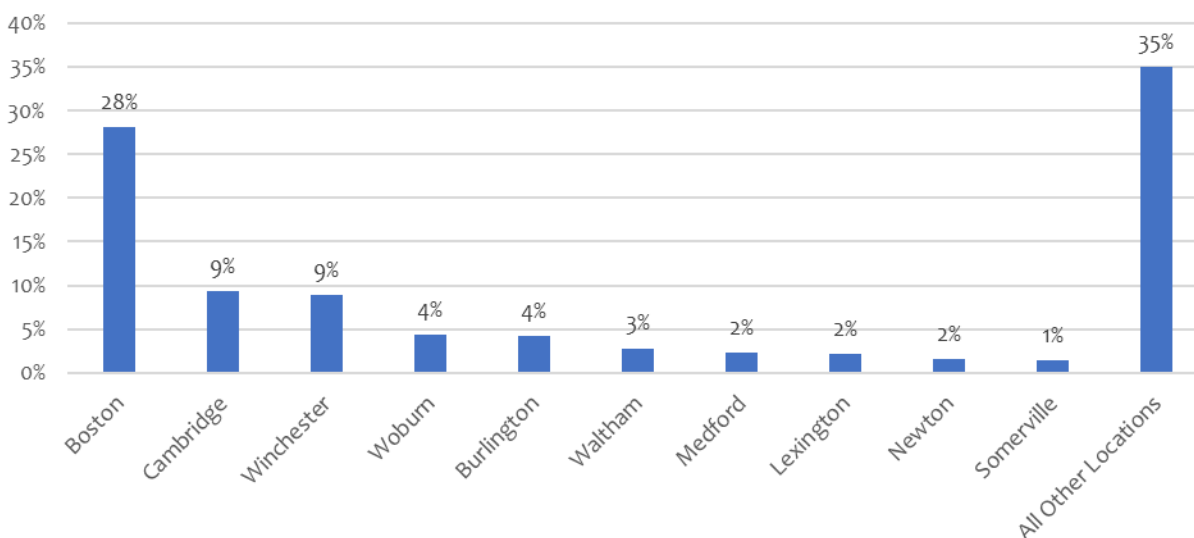
Labor force includes all residents over the age of 16 who are either currently employed or actively seeking employment. In 2017, Winchester's labor force included 11,083 people with a remarkably low unemployment rate of 2.7 percent. This is one percentage point lower than the unemployment rate for Massachusetts (3.7 percent).³⁸ The labor force in Winchester is extremely well educated, with 74 percent of residents having a bachelor's degree or higher, as compared to Middlesex County with 53 percent.³⁹

Table X. Labor Force Characteristics, 2018⁴⁰

	2017 Labor Force	2017 Labor Force - Employed	2017 Labor Force - Unemployed	Unemployment Rate
Winchester	11,083	10,784	299	2.7%
Middlesex County	885,208	858,240	26,967	3.1%
Massachusetts	3,657,425	3,521,425	135,975	3.7%

About 91 percent of Winchester's labor force travels outside of town for employment while 9 percent live and work in Winchester. The most common out-of-town employment destinations for Winchester residents are Boston (28 percent) and Cambridge (9 percent).⁴¹ These destinations offer employment opportunities that tend to be both high-paying and high-skilled. Commute times for Winchester residents closely match that of the county and state. About 58 percent of Winchester residents spend between fifteen- and forty-five-minutes traveling to work.⁴²

Graph X. Employment Destinations of Winchester Residents, 2015⁴³



³⁸ Executive Office of Workforce and Labor Development (EOWLD). "Labor Force and Unemployment Data", July 2018.

³⁹ ACS 2012-2016, Table B15003, 2018

⁴⁰ EOWLD, Labor Force and Unemployment Data, 2018

⁴¹ U.S. Census Bureau, OnTheMap, 2018

⁴² U.S. Census Bureau, American Community Survey, 2012-2016, Table B08303, Average Journey to Work, 2018

⁴³ OTM, 2018

EMPLOYMENT BASE

Employment base includes all wage and salary jobs reported by public and private sector employers. Winchester's employment base is 8,091 jobs, with a majority of employment in the healthcare and social assistance industries, construction, and retail. Over the last ten years, the total number of jobs in Winchester has decreased by about 7 percent.⁴⁴ The industry sectors which experienced the **largest percent decline** are *Transportation and Warehousing* (65 jobs and a 69 percent decrease), *Professional and Technical Services* (203 jobs and a 42 percent decrease), and *Real Estate and Rental and Leasing* (106 jobs and a 35 percent decrease). The *Health Care and Social Assistance* sector experienced the largest loss of jobs (284 jobs or nearly 8 percent of the sector's workforce). This significant job loss in *Health Care and Social Assistance* can be attributed to the merger of Winchester Hospital with Lahey Health in 2014—which resulted in cost reduction and workforce restructuring.

Industry sectors with the largest employment increases were *Accommodation and Food Services* (141 jobs and a 59 percent increase) and *Construction* (203 jobs and a 31 percent increase). Expansion in *Construction* employment can be attributed to the overall recovery in the residential and commercial real estate market while the revitalization of the town center and the addition of new restaurants and service establishments likely contributed to the significant growth in the *Accommodation and Food Services* industry.

Winchester is a net-exporter of workers, meaning there are fewer jobs (3,800) than resident workers to fill them.

This helps explain why a high percentage of residents (91 percent) work outside of Winchester. Some of this can be explained by looking at the sectors in which Winchester residents work in versus the employment sectors of the businesses that are in Winchester. Table X compares the industry of employment for resident workers to the types of jobs located in Winchester. Where the ratio of jobs to workers is higher than 1.0, that employment sector is a net-importer of jobs to the community—there are more jobs than there are resident workers. Where the ratio is less than 1.0, there are more resident workers employed by that industry than there are jobs in Winchester.

⁴⁴ Massachusetts Executive Office of Labor and Workforce Development. ES-202, 2008-2017.

Table X. Ratio of Jobs in Winchester to Resident Workers in Winchester by Industry⁴⁵

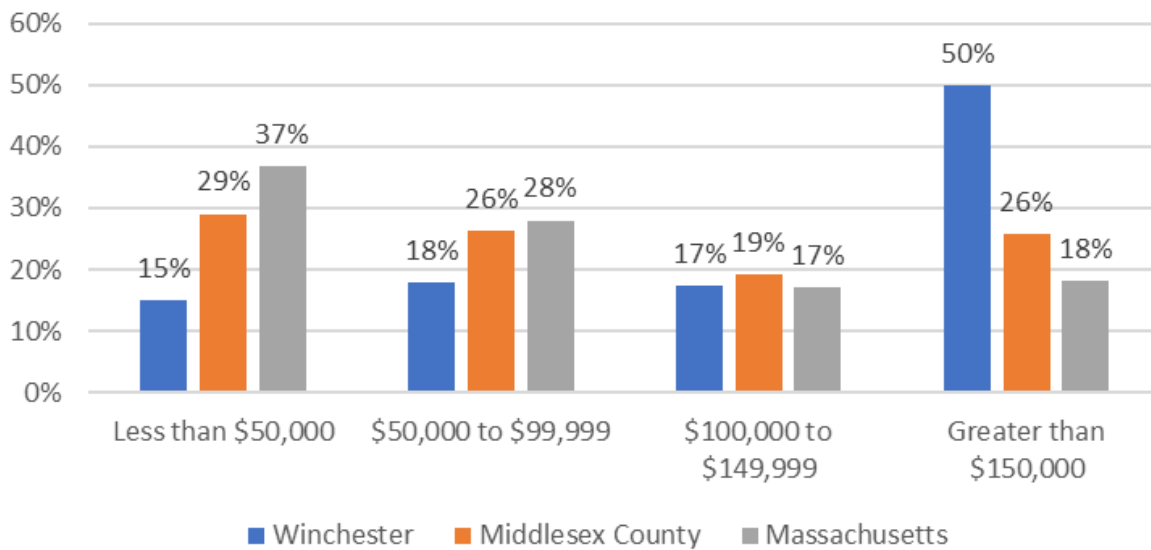
Industry Sector	Jobs in Winchester	Resident Workers in Winchester	Ratio of Jobs to Workers
Agriculture, forestry, fishing and hunting, and mining	0	41	0.00
Construction	867	344	2.52
Manufacturing	161	1,043	0.15
Wholesale trade	68	226	0.30
Retail trade	532	593	0.90
Transportation and warehousing, and utilities	29	241	0.12
Information	82	392	0.21
Finance and insurance, and real estate and rental and leasing	434	1,546	0.28
Professional, scientific, and management, and administrative and waste management services	661	2,535	0.26
Educational services, and health care and social assistance	3,399	2,945	1.15
Arts, entertainment, and recreation, and accommodation and food services	641	422	1.52
Other services, except public administration	304	367	0.83
Public administration	0	304	0.00
Total	7,178⁴⁶	10,999	0.65

The majority of industry sectors in Winchester are net-exporters of labor. Construction; arts, entertainment, and recreation, and accommodation and food services; and educational services, and healthcare and social assistance are the only net-importer industries. Winchester residents tend to work in industry sectors that are higher paying and located in other communities. This mismatch between jobs in Winchester and residents is stark given the differences in earning potential between the two groups. It is worth noting there are some agriculture-related jobs at Wright-Locke Farm that are not shown in the table above. It is possible EOLWD classifies them under a different employment category.

⁴⁵ Employment and Wages (ES-202), 2017, ACS 2012-2016, C24030, and RKG Associates

⁴⁶ One of the challenges with employment data for Winchester is the suppression of public administration jobs due to the Town being the only employer in that NAICS sector. EOLWD suppresses data in communities where there are fewer than three employers in a NAICS industry sector. In Winchester a total of 913 jobs are suppressed due to preserving the confidentiality of employers, therefore total jobs shown at the industry level do not match total jobs in Winchester.

Graph X. Household Incomes, 2016⁴⁷



Based on the Massachusetts Executive Office of Labor and Workforce Development's ES-202 data, the average weekly wages for an individual employed in Winchester rose by 1 percent—from \$1,124 in 2008 to \$1,140 in 2017, translating into a yearly income of \$59,280.⁴⁸ Based on the average income data, those working in Winchester tend not to live in the community. The median household income for Winchester residents is significantly higher at \$149,321 and is more than double the state median of \$70,954.⁴⁹ Of all households in Winchester, nearly 50 percent have incomes greater than \$150,000 per year. This figure is substantially higher than the county (26 percent) and state (18 percent). Higher household incomes in a community influence housing choice, transportation choice, and spending potential for local businesses.

LOCATION QUOTIENTS

Location quotients compare employment by industry in two or more geographic areas. The location quotient is a ratio of the percentage of an industry's employment in one geography to that of a larger comparison geography. It can point out which industries can gain a larger share of the employment base and indicate when a community may be heavily reliant on one or two industry sectors and should seek to diversify its employment base. In some cases, a high location quotient may indicate a specialty area in the local economy such as tourism and hospitality or agriculture if those industry sectors play a prominent role in the community. The comparison geography used for Winchester was Middlesex County.⁵⁰ If the ratio falls between 0.90 and 1.10, then the proportion of jobs is very similar in both geographies. If the ratio is less than 0.90, then that industry sector is thought to be under-represented in the local economy. Conversely, a ratio greater than 1.10 can show a specialty within the local economy as compared to the larger geography.

⁴⁷ ACS 2012-2016

⁴⁸ Massachusetts Executive Office of Labor and Workforce Development. ES-202, 2008-2017. Wages inflation adjusted.

⁴⁹ U.S. Census Bureau, American Community Survey, 2012-2016, Table B19013, Median Household Income in the Past 12 Months, 2018.

⁵⁰ Middlesex County was deemed an appropriate comparator geography due to the number of towns like Winchester.

Table X. Winchester Location Quotient Compared to Middlesex County, 2017⁵¹

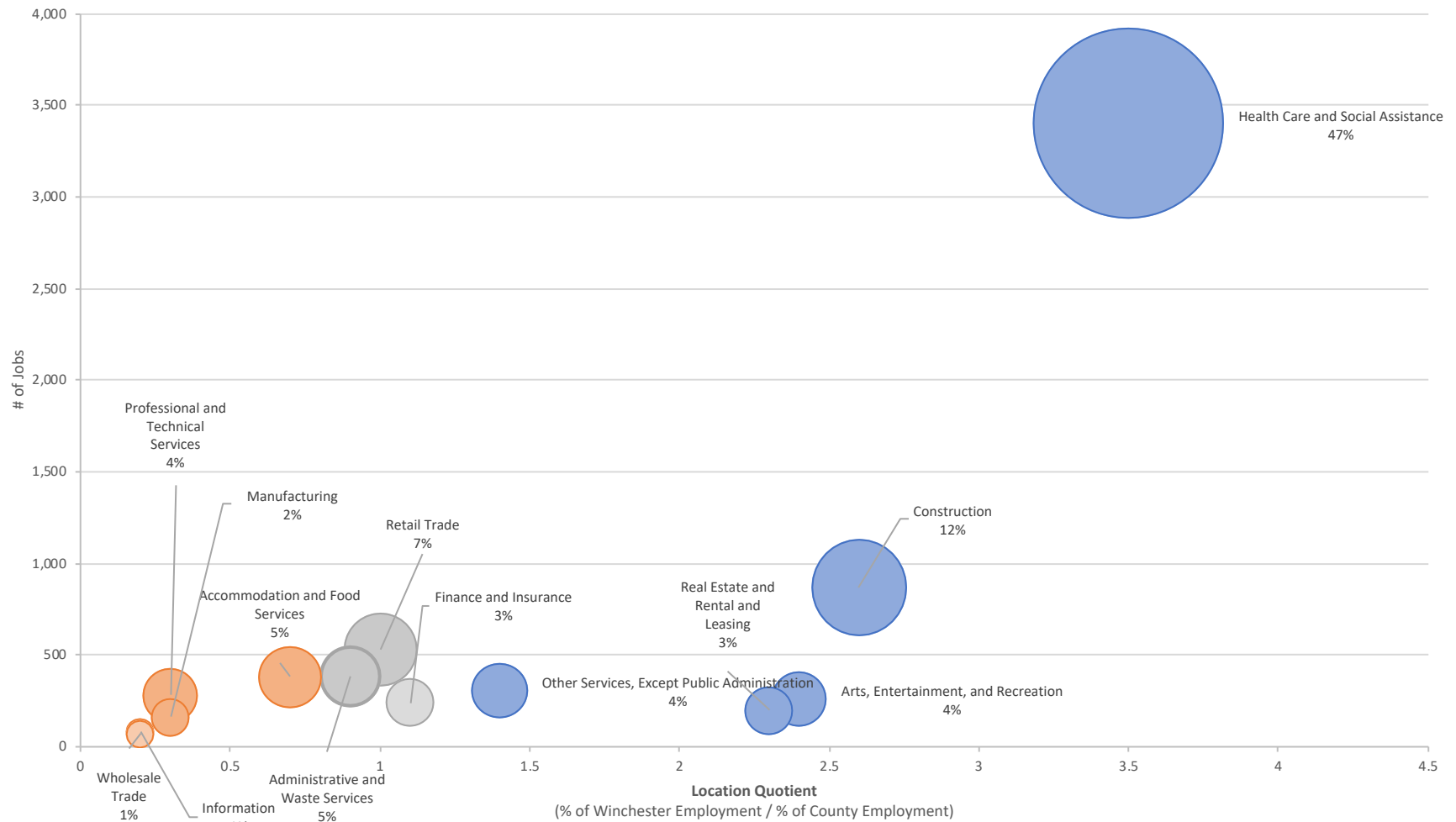
NAICS Industries	Jobs	Percent of Jobs	Location Quotient
62 - Health Care and Social Assistance	3,399	47%	3.5
23 - Construction	867	12%	2.6
71 - Arts, Entertainment, and Recreation	260	4%	2.4
53 - Real Estate and Rental and Leasing	196	3%	2.3
81 - Other Services, Except Public Administration	304	4%	1.4
52 - Finance and Insurance	238	3%	1.1
56 - Administrative and Waste Services	382	5%	0.9
44-45 - Retail Trade	532	7%	0.9
72 - Accommodation and Food Services	381	5%	0.7
31-33 - Manufacturing	161	2%	0.3
54 - Professional and Technical Services	279	4%	0.3
42 - Wholesale Trade	68	1%	0.2
51 - Information	82	1%	0.2
48-49 - Transportation and Warehousing	29	0%	0.2

Winchester has concentrations in construction; health care and social assistance; arts and entertainment; real estate and other services (as shown in Table X below). Health care and social assistance make up the greatest share of local employment with nearly 3,399 jobs (47 percent of total employment).⁵²

⁵¹ Employment and Wages Report (ES-202), 2018, and RKG Associates, Inc.

⁵² Employment and Wages Report (ES-202), 2018, and RKG Associates, Inc.

Graph X. Winchester Employment Distribution, 2017⁵³



Less than 0.90	Between 0.90 and 1.10	Greater than 1.10
Under-represented: local economy offers fewer jobs	Proportional: the same number of jobs are offered in both areas	Specialist: Local economy offers more jobs

⁵³ Employment and Wages Report (ES-202), 2018, RKG Associates, Inc., and JM Goldson community preservation + planning

EXISTING EMPLOYERS

Winchester Hospital, founded in 1912, is the town's largest employer—employing nearly 2,500 people, including 816 physicians.⁵⁴ The six-acre complex services many of Boston's northwest suburbs. In its location on Highland Avenue, the hospital is surrounded by residential development, which constrains expansion.

Winchester Hospital recently expanded to a new 62,000-square-foot multi-use facility at 620 Washington Street, bounded by Calvary Cemetery and Davidson Park. The building accommodates a variety of patient needs including oncology and surgical suites. Given the development constraints on the main hospital grounds, this new facility enables Winchester Hospital to expand and draw more employees to Winchester—particularly high-paid specialists, such as doctors and nurses.

After Winchester Hospital, construction; retail; and administrative and waste services are the industries with the largest employment. Of the 867 construction-related jobs, the largest employer is John Moriarty & Associates, a construction management firm with operations across New England and beyond and is located in the town center. Of the 382 administrative and waste service jobs, DCS Service, Inc. is the largest employer (365 employees). They provide custom janitorial and building maintenance services.

Of the 532 retail jobs, Stop & Shop is one of the largest employers. The 32,000 square foot grocery store is located at the intersection of Skillings Road and Main Street on a 2.2-acre lot.⁵⁵ Stop & Shop offers residents of Winchester and beyond, a place to shop for everyday goods. The grocery store offers both full-time and part-time positions. Another large retailer is Mahoney's Garden Center located on Cambridge Street which also offers a mix of both full-time and part-time positions. Despite being the third



Winchester Hospital. RKG, 2018



620 Washington Street. RKG, 2018

⁵⁴ <http://www.winchesterhospital.org/about-us>

⁵⁵ MassGIS, 2018

largest employment industry, retail trade jobs are not considered to be one of the highest paying industries.⁵⁶ Based on average wages in these sectors, workers have significant difficulty in securing economically attainable housing options in Winchester—which is why they tend to reside outside of Winchester.

QUALITY OF LIFE

Winchester offers key quality-of-life amenities, such as the excellent school system, open space and recreational opportunities, and a thriving town center with retail, restaurants, and entertainment. Winchester’s proximity to Boston, two MBTA Commuter Rail stations (Winchester Center and Wedgemere Station) along the Lowell Line, and access to major highways, such as Interstate 93, Route 3, and Route 38, provide many options for workers to access jobs in the Great Boston area.

Employees commuting into Winchester from Boston or farther north can choose to take the commuter rail. Connections can also be made to the MBTA bus system that runs through parts of Winchester. Winchester’s rising cost of housing and lack of affordable housing options for their workforce may lead some businesses to look at surrounding communities.

PROPERTY TAX POLICIES

Winchester’s residential property assessments make up 96 percent of the tax base, while commercial, industrial, and personal property make up 4 percent. Winchester has a different tax rate for residential and commercial based on how water and sewer costs are distributed across the two land use categories. Technically, the tax rate is the same with the only difference being the water and sewer costs passed along as a portion of the tax bill.

Table X: Tax Rate and Tax Base Trends⁵⁷

Town	Property Tax Rates		% Change FY10-FY18		Avg. Single-Family Home Value (FY2017)	Avg. Property Tax Bill (FY2017)	% Change Property Tax Bill FY10-FY17
	Res.	C/I/P	Res.	C/I/P			
Winchester	\$12.11	\$11.45	6%	6%	\$972,776	\$11,946	36%

Increases in commercial development can help contribute towards diversifying the existing tax base. Given the current make up of property taxes is overwhelmingly residential, even a large increase in the commercial base will have a marginal impact.

Table X: Total Building Square Footage by Land Use Type⁵⁸

Use	Building Area (SF)
Residential	20,732,721
Commercial	1,472,571
Tax-Exempt	1,593,580
Total	23,798,872

⁵⁶ Employment and Wages Report (ES-202), 2018, and RKG Associates, Inc.

⁵⁷ Massachusetts Department of Revenue, Division of Local Services, Municipal Databank/Local Aid Section Tax Rates by Class, 2018. RKG Associates

⁵⁸ Town of Winchester Assessor’s Data, 2018.

To shift the commercial tax base 1 percent, it would require 241,000 square feet of new commercial development at an average assessed value of \$300 per square feet.

In a community with a single tax rate and high residential property values, it is more likely that additional commercial development would help reduce future tax increases on residential properties rather than lower their tax burden. Residential assessed values are unlikely to decrease, and the singular tax rate is also unlikely to decrease, therefore additional commercial development will only help shift some of the burden of increased town costs from residential to commercial. Nevertheless, increasing the commercial base through development can help attract new businesses and jobs which result in local spending and lending support to local businesses. Attracting a greater number of employers to the area is one possible approach toward increasing commercial property taxes and diversifying the tax base.

COMMERCIAL AND INDUSTRIAL DISTRICTS

Across Winchester there are three areas that can be described as commercial centers: (1) Winchester Town Center, (2) North Main Street, and (3) Holton and Cross Street industrial areas. These areas have a mix of commercial, industrial, and residential uses—and have the potential to catalyze economic activity and increase the existing tax base. In addition to the larger commercial districts and corridors, there are strategic redevelopment sites like the parcel at Swanton Street and Washington Street that could serve as a neighborhood commercial anchor if redeveloped.

Winchester Town Center

The 47-acre Town Center draws both residents and visitors to its vibrant mix of retail, restaurants, personal services, offices, civic and institutional buildings, and open spaces. The area benefits from a walkable and coordinated streetscape, and active first floor frontage with very little vacancy. Additional benefits include the Winchester Center MBTA Commuter Rail stop—making the Town Center accessible by transit.



Winchester Town Center. RKG, 2018

The Town has also made the conscious decision to locate many civic and institutional buildings in this area. Buildings in the Center house Town Hall, the Library, the Middle and High Schools, Lincoln Elementary School, Public Safety Building, and the Jenks Center. These amenities draw vehicular and pedestrian traffic that creates added activity in the district and helps local businesses. These buildings also bring in large daytime employment base to help the Center thrive. The geography of the Town Center is bounded by Wedgewood, Judkins, and Mill Ponds. These water features create natural boundaries for the district and provide open spaces, walkways, and natural features that complement the buildings and streetscape.



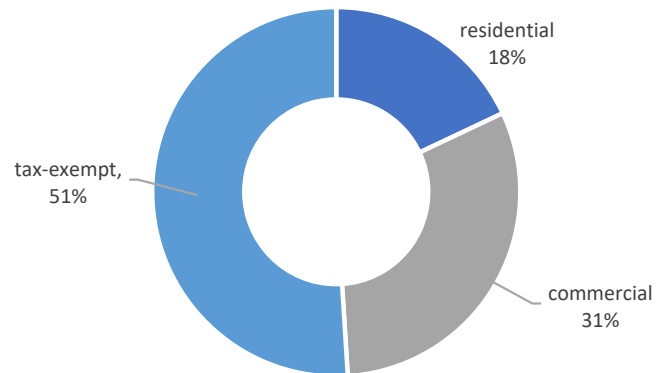
Winchester Town Center. JM Goldson, 2018

Existing land use data shows many of the parcels are used to support commercial activity in mostly single- and two-story structures. There are also a considerable number of single-family and multi-family residential structures around Wedge Pond, providing easy access to the Town Center and the Winchester Center MBTA Station.

The east side of the Town Center has many tax-exempt uses as these parcels house local governmental offices, churches, and school facilities. The existing land use composition in the Town Center area is 18 percent residential, 31 percent commercial, and 51 percent tax-exempt. While the tax-exempt properties take away from potential tax generating development, these uses are integral to the civic life of

Winchester and bring concentration of daytime activity to the Center that may otherwise not exist. The land use map on the following page details information about the Town Center.

Graph X: Winchester Town Center: Land use Composition

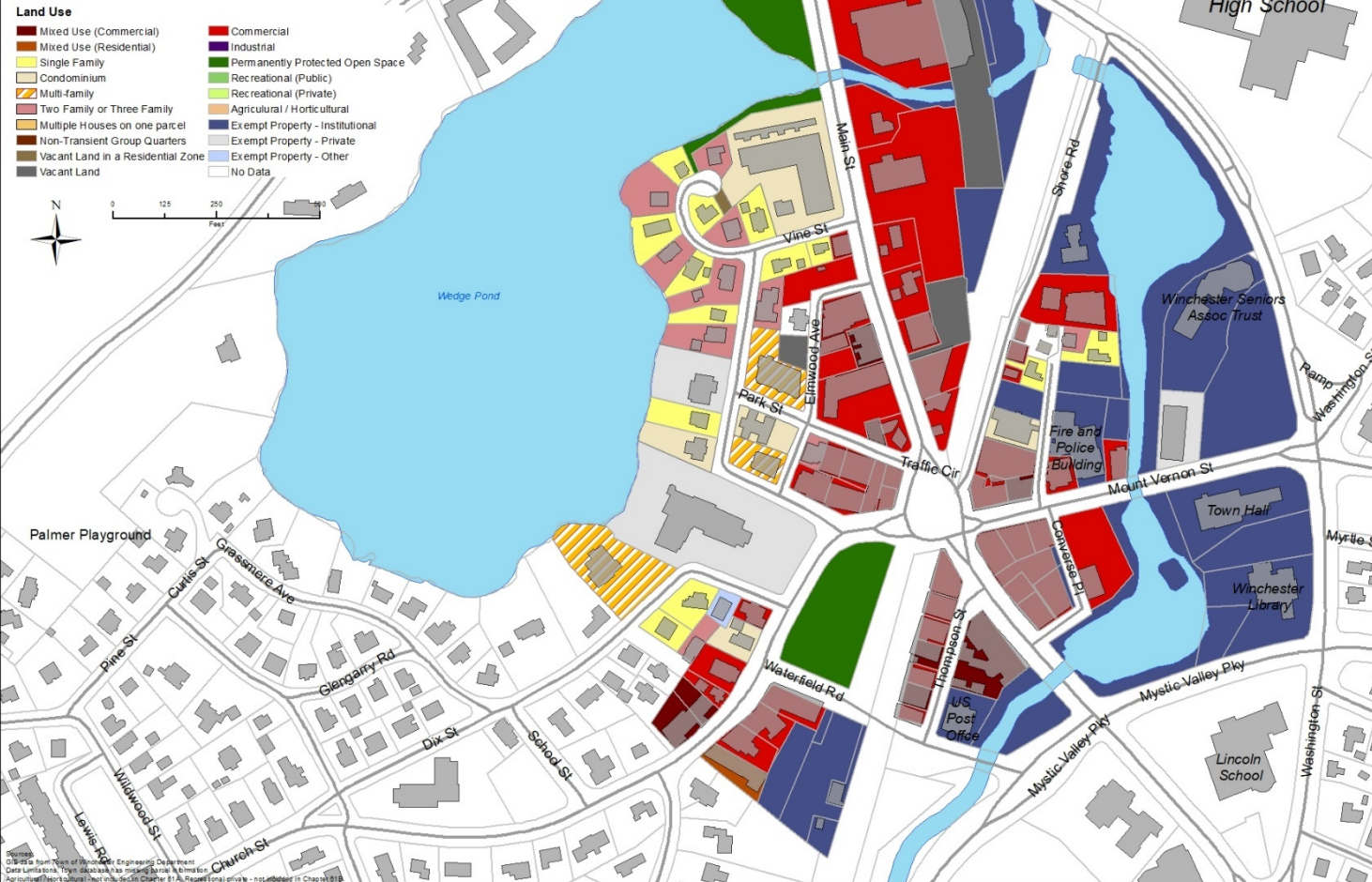


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Winchester Master Plan Existing Conditions: Winchester Center Map

Prepared by RKG Associates

11/1/18



Winchester Town Center Land Use Map. RKG, 2018

North Main Street

The three-quarter-mile North Main Street commercial corridor stretches from Skillings Road to the Woburn border. This stretch of Main Street is a mix of commercial and residential buildings—but does not have the same walkability, streetscape consistency, and built form as the Town Center. Many of the commercial buildings are low-rise by design and have small offices and retail storefronts. Fast food and fast casual restaurants can be found up and down North Main Street including establishments like Dunkin Donuts, Domino's Pizza, Andrea's Pizza, Sakura Japanese, Gloria's Pizzeria, and Burger King. These businesses tend to be housed in single-use structures that are set back from the street and have large parking lots and drive-thrus for customers. The built form along North Main Street lends itself to an auto-oriented corridor, and not an extension of the Town Center.

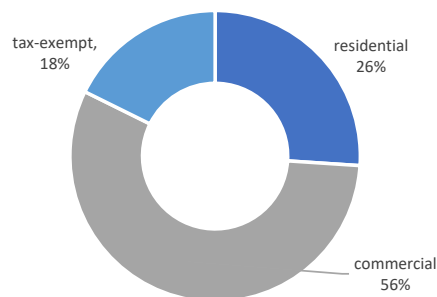


North Main Street. RKG, 2018

In addition to these restaurants, there are small offices, medical spaces, auto repair shops, and some small retail spaces. Two modern medical office buildings, 955 and 1021 Main Street, support the hospital, bringing employees and patrons to North Main Street who may also visit other businesses and restaurants in this area. Winchester Hospital also owns and operates the medical office facility at 1021 Main Street on the south side of Cross Street.

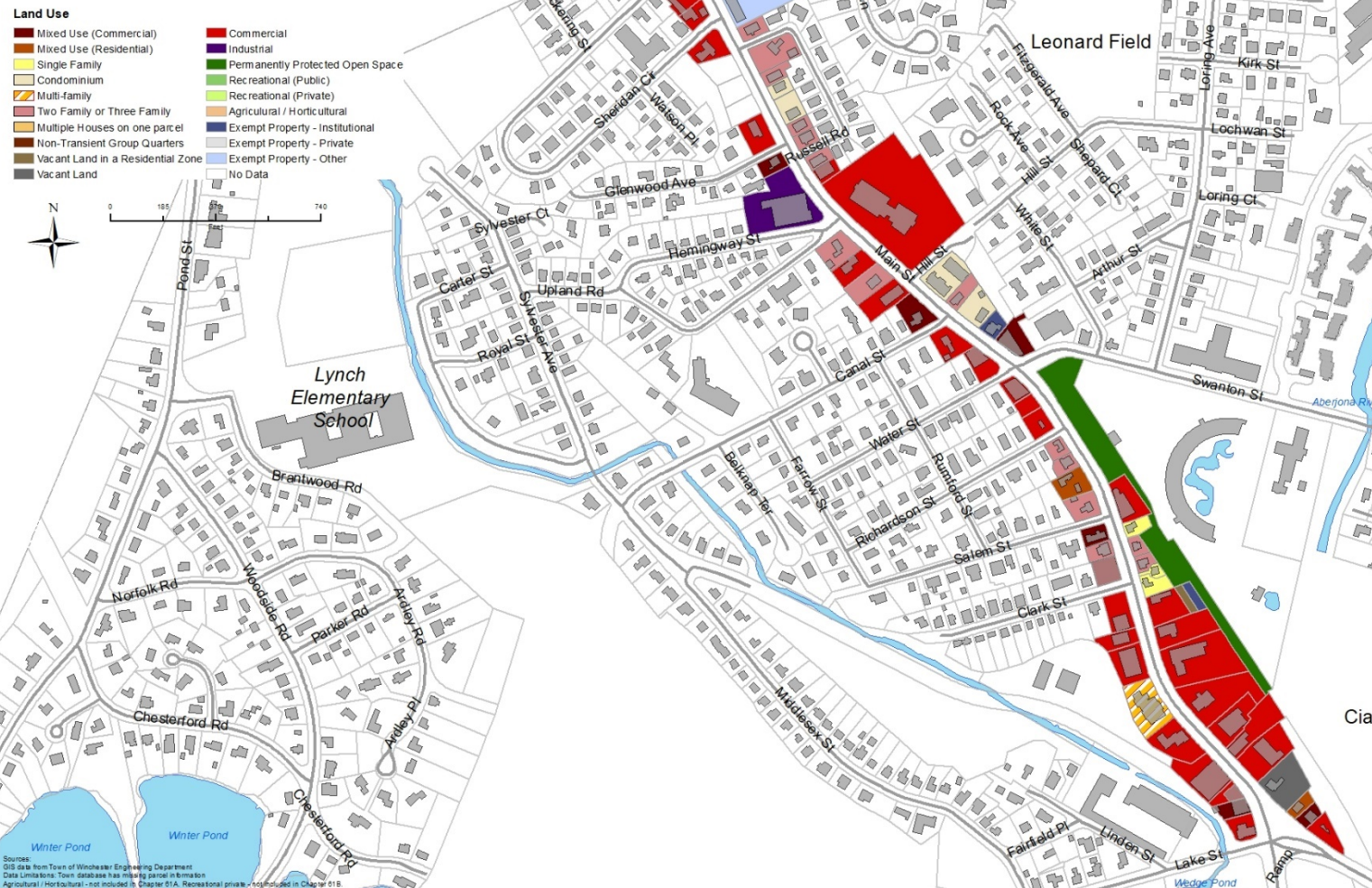
The North Main Street area also includes single- and multi-family housing spread throughout the corridor, which helps break up the commercial feel of the corridor but creates land use conflicts between commercial and residential uses. The Parkview Condominiums is currently the largest concentration of multi-family housing along Main Street. New multi-family housing is currently under construction at 846 Main Street. The North Main Street area has a much more diversified land use composition compared to Winchester Center—25 percent of the land is used for residential, 54 percent for commercial, 4 percent for industrial, and 17 percent for tax-exempt uses.

Graph X: North Main Street Commercial Corridor: Land use Composition



Winchester Master Plan Existing Conditions: North Main Street Map

Prepared by RKG Associates
11/1/18

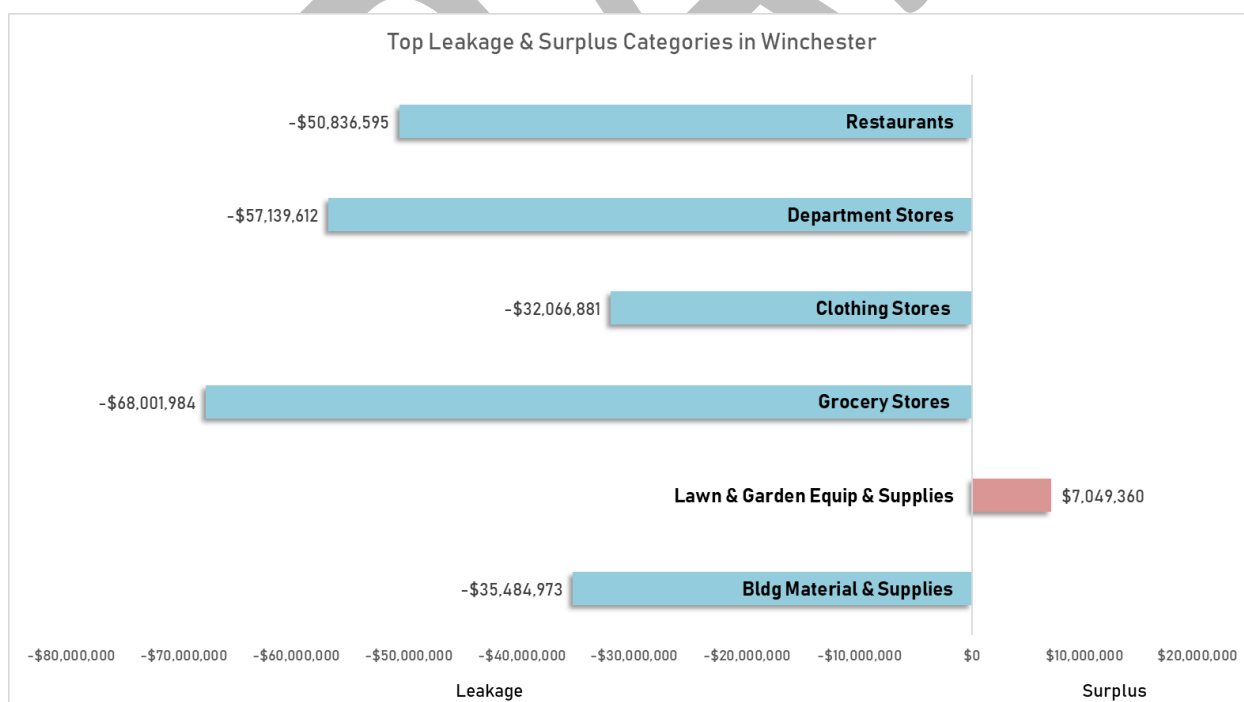


North Main Street Retail Analysis

To better understand potential retail opportunities along North Main Street, a retail gap analysis was undertaken for all of Winchester.⁵⁹ A retail gap analysis looks at household spending across all major retail categories for a given location to identify categories where retail sales either exceed local spending (surplus) or retail sales fall below local spending (leakage). Retail categories experiencing leakage means households in Winchester are leaving the town to spend money in these categories. Either these types of stores do not exist in Winchester, the products offered in these categories do not match consumer needs/demands, or it may be easier to travel to other stores in nearby communities. Leakage is often viewed as a potential opportunity for expanding the retail offerings of existing businesses or an opportunity to attract new retailers to the community.

In Winchester, there is substantial retail leakage across multiple categories due to the minimal retail offerings in town and the extremely high annual household spending potential on retail, dining, and drinking. For example, the average Winchester household has a potential spending capacity of \$64,800 per year across all retail categories compared to the average U.S. household which is closer to \$25,000 to \$30,000 per year. Winchester does not currently have enough businesses (or the existing merchandise mix does not meet consumer preferences) across many of the major retail categories to absorb the spending capacity that exists. Therefore, many residents look to businesses outside the community to fulfill their needs. Graph X highlights the top retail leakage and surplus categories in Winchester. Across the ten major retail categories, Winchester is only drawing a surplus on lawn and garden supply stores. All other retail categories show substantial leakage.

Graph X: Top Retail Opportunities in Winchester

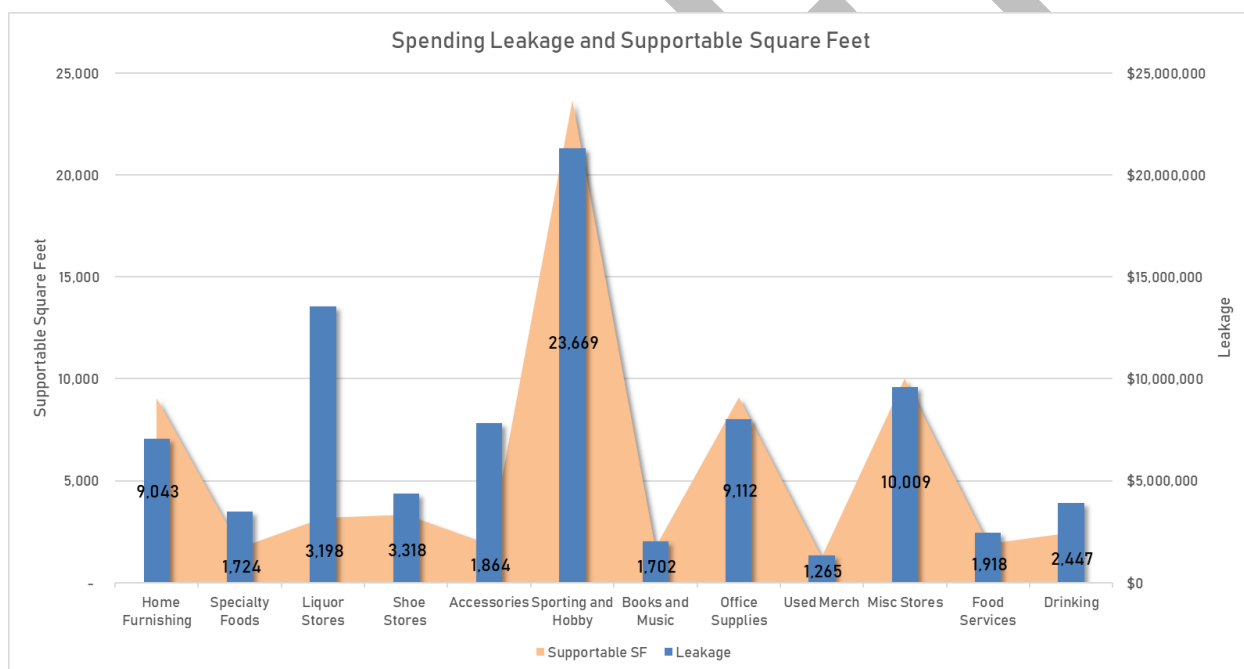


⁵⁹ The retail analysis was completed using the entire town as the trade area to determine where Winchester residents are spending their money compared to the retail offerings in Winchester.

It is unsurprising that Winchester is a net exporter of retail spending. Winchester is surrounded by communities, like Woburn, Burlington, Stoneham, and Reading, which offer larger shopping centers, big box stores, and regional malls—all within a short driving distance. There are, however, opportunities in Winchester’s commercial centers to recapture and retain some of the household spending capacity. Applying a conservative 25 percent recapture to the annual leakage amount of \$404.8 million yields a potential 275,000 square feet of supportable retail in Winchester. It is important to note that not all 275,000 square feet need become brand new square footage or new stores. A portion of the retail demand could be satisfied by existing retailers who may decide to expand or offer additional product lines within the footprint of their existing space.

When considering retail opportunities for North Main Street, not all retail categories and store types will be appropriate for this commercial corridor nor are there large-scale development sites to support retail power centers or big box retailers. Graph X shows the leakage and potential supportable square feet at a 25 percent recapture rate for retail categories which may be appropriate for North Main Street. The focus was placed on smaller local retail shops or chains that would fit the character of North Main Street under a mixed-use redevelopment scenario.

Graph X: Retail Opportunities for North Main Street



Retail opportunities such as smaller home furnishing stores; specialty food and beverage shops; shoes, jewelry, and other accessory stores; sporting and hobby shops; and food services and drinking establishments; would all fit within a neighborhood-oriented, locally-focused mixed-use redevelopment scenario. Since the analysis looked at retail spending and demand for all of Winchester, some of these retail opportunities could apply to Winchester Center or other smaller neighborhood redevelopment sites across the town.

Holton Street/Cross Street Areas

The 55-acre Holton Street/Cross Street areas are a mixture of commercial and industrial buildings in the north part of Winchester along the Woburn city line. These areas are generally bounded by MBTA Commuter Rail line, the Woburn city line, East Street, and Cross Street.

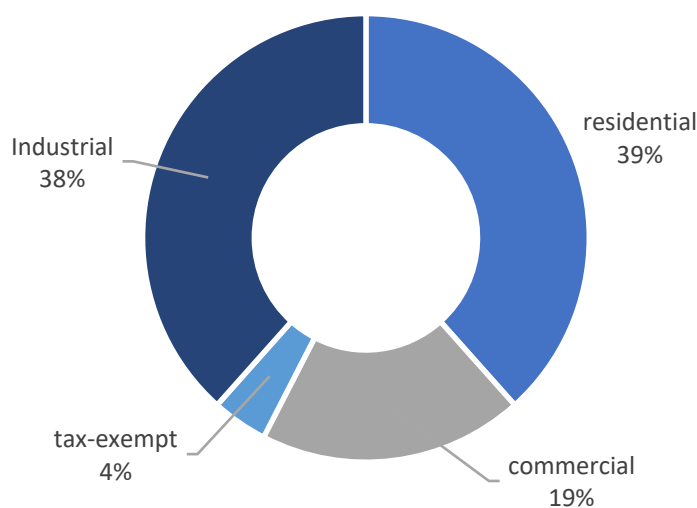
There are a mix of businesses housed in industrial-style buildings that can be accessed by a series of small public and private streets and ways. Atypical for an industrial park, there are several sports-related businesses including a swimming school, indoor tennis facility, and ballroom dancing studio, as well as more traditional industrial businesses like a printing facility, stone and granite dealer, and construction company. Industrial users typically require large single-story building footprints. This development pattern is evident in both industrial areas.



Holton Street Industrial Area. RKG, 2018

The map on the following page shows the varied mix of uses in these two industrial areas, as well as the large building footprints. The industrial use parcels are large and clustered in the northeast portion of the area. Scattered about the area are a few commercial-use parcels. There are also a fair number of single-family and multi-family units located between the two industrial parcels. The exiting land use in this area is 38 percent residential, 19 percent commercial, 38 percent industrial, and 4 percent tax-exempt.

Graph X: Holton Street/Cross Street Commercial Area: Land Use Composition



Prepared by RKG Associates
11/1/18



Conclusions

MIXED-USE DEVELOPMENT

Mixed-use development provides an opportunity to blend housing and commercial development to create active and vibrant spaces. Under current zoning, the General Business District (GBD2) allows mixed-use for buildings that include up to four residential units and the Center Business District allows residential over commercial by-right. As a development typology, mixed-use development can fill in the urban fabric, especially in North Main Street where existing buildings are low-rise and mostly single-use commercial. The Town may wish to revisit current zoning provisions along North Main Street to determine if there are barriers to mixed-use development and how those could be addressed over time.

BUSINESS DIVERSIFICATION AND ATTRACTION

The largest private employer is Winchester Hospital, now a part of Lahey Health. There are ongoing merger discussions between Lahey Health and Beth Israel Deaconess, which has the potential to create a substantially larger healthcare conglomerate. As the largest single employer, this merger could impact Winchester—and could negatively impact Winchester Hospital, if the nature of employees or the hospital's medical procedures changes. Presently, the hospital attracts highly skilled well-paid employees to work in Winchester, and these employees contribute to the local economy with their purchase of local goods and services.

For Winchester to ensure its economic sustainability long term, it will require the Town to think critically about business attraction, understand the Town's strengths and weaknesses, and accept development changes in certain areas of the community.

REVITALIZATION OF THE NORTH OF MAIN STREET AREA

Ideally, the North of Main Street corridor is ripe for redevelopment initiatives given the nature of existing business uses as compared to those which could potentially complement existing businesses in the Town Center. Many of the parcels are underutilized and low density. Seamlessly connecting North Main Street with the Town Center can help grow the overall number of commercial uses and establish a greater sense of place to the area.

Improvements to this corridor could increase the commercial tax base of Winchester—but would require residents to address their concerns of traffic and density. Attracting new development to the corridor may be difficult if there is not a consensus around potential uses—and viability would need to be examined in the context of the real estate marketplace.

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