

Economic Development Overview

Brockton Campello Neighborhood

MAY 2023

Agenda

What types of jobs are here in Brockton?

How are Brockton residents fairing in the current economy?

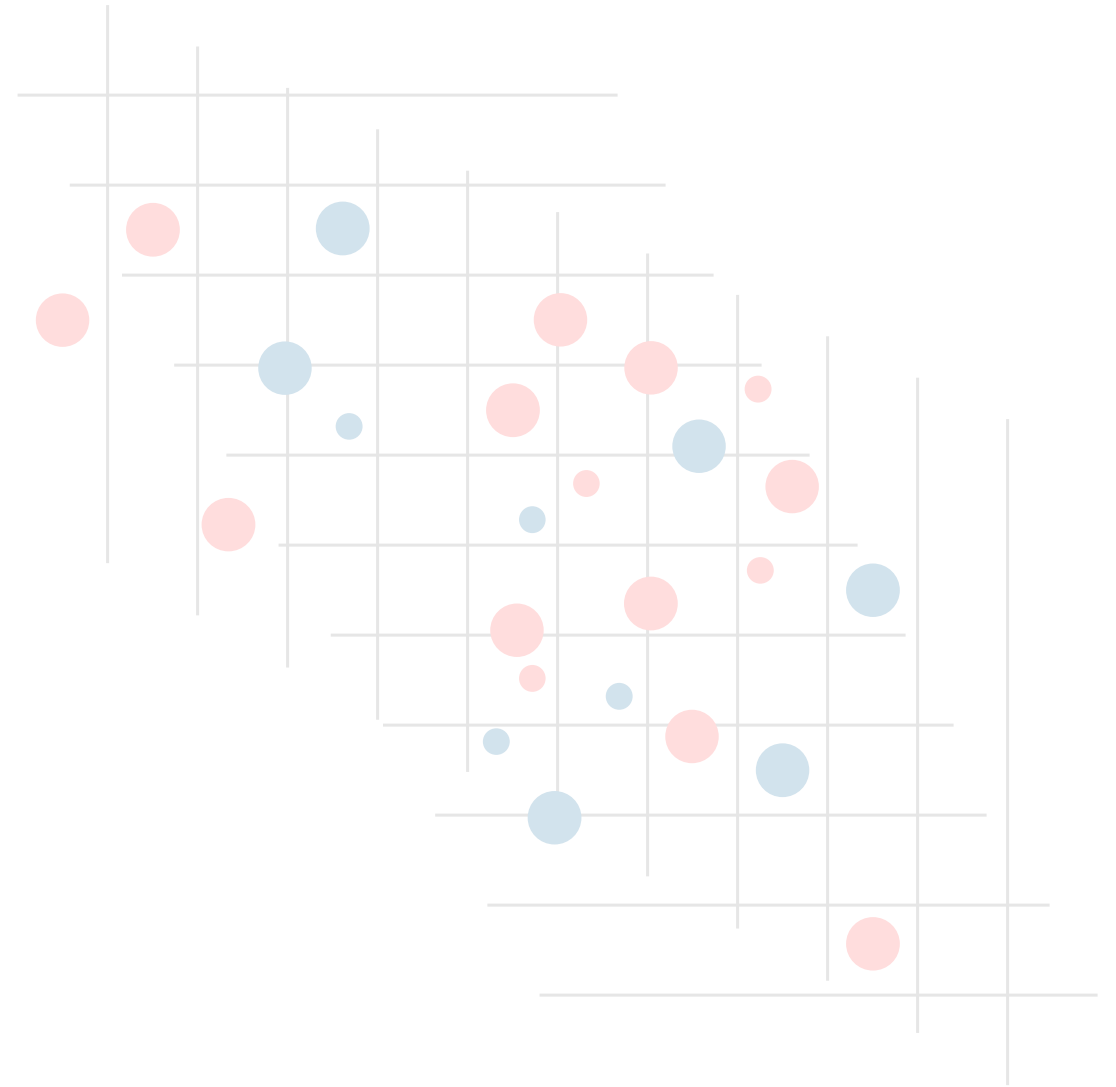
What types uses and businesses make up Campello?

What kinds of economic benefits are they contributing?

How might Campello's opportunities be shaped by regional market trends?

How can we share this information with residents and get feedback on economic opportunities for Campello?

What types of jobs are here in Brockton?



Top Industry Sectors**Top 10 Highest Employed Industry Sectors**

Brockton MA 2023:1 (Non-Government Sectors)

Description	2023 Jobs	Avg. Earnings Per Job	COL* Adjusted Total Current Earnings
Hospitals	4,624	\$88,761	\$68,968
Ambulatory Health Care Services	3,185	\$87,662	\$68,114
Food Services and Drinking Places	1,776	\$31,319	\$24,335
Administrative and Support Services	1,479	\$45,306	\$35,203
Food and Beverage Stores	1,442	\$37,532	\$29,163
Nursing and Residential Care Facilities	1,315	\$60,705	\$47,168
Social Assistance	1,197	\$44,519	\$34,591
Motor Vehicle and Parts Dealers	1,051	\$88,571	\$68,820
Specialty Trade Contractors	1,037	\$102,125	\$79,351
Management of Companies and Enterprises	902	\$164,023	\$127,446

Source: Lightcast Q1 2023 (3-Digit NAICS)

Note: * Cost of Living

Based on Q1 2023 labor force statistics, the health care, food service, motor vehicle and specialty contracting sectors are the highest employed industry sectors in Brockton.

Factoring in the cost of living median annual earnings for these sectors range from \$25,000 - \$127,446.

Top Industry Sectors**Top 10 Highest Employed Industry Sectors**

Brockton MA 2023:1 (Non-Government Sectors)

Description	2023 Jobs	Avg. Earnings Per Job	COL* Adjusted Total Current Earnings
General Medical and Surgical Hospitals	4,563	\$88,536	\$68,793
Restaurants and Other Eating Places	1,743	\$31,230	\$24,266
Supermarkets and Other Grocery (except Convenience) Stores	1,071	\$37,062	\$28,797
Offices of Physicians	930	\$131,856	\$102,452
Management of Companies and Enterprises	902	\$164,023	\$127,446
Temporary Help Services	892	\$35,954	\$27,937
Nursing Care Facilities (Skilled Nursing Facilities)	841	\$65,394	\$50,811
Home Health Care Services	751	\$63,622	\$49,434
New Car Dealers	551	\$115,297	\$89,586
Couriers and Express Delivery Services	515	\$55,843	\$43,390

Source: Lightcast Q1 2023 (5-Digit NAICS)

Note: * Cost of Living

Looking deeper at the 5-digit level, health care, food retail and vehicle service-related industries are the dominant employment sectors in Brockton.

Top Occupation Categories

Top 10 Highest Employed Occupation Categories

Brockton MA 2023:1 (Non-Government Sectors)

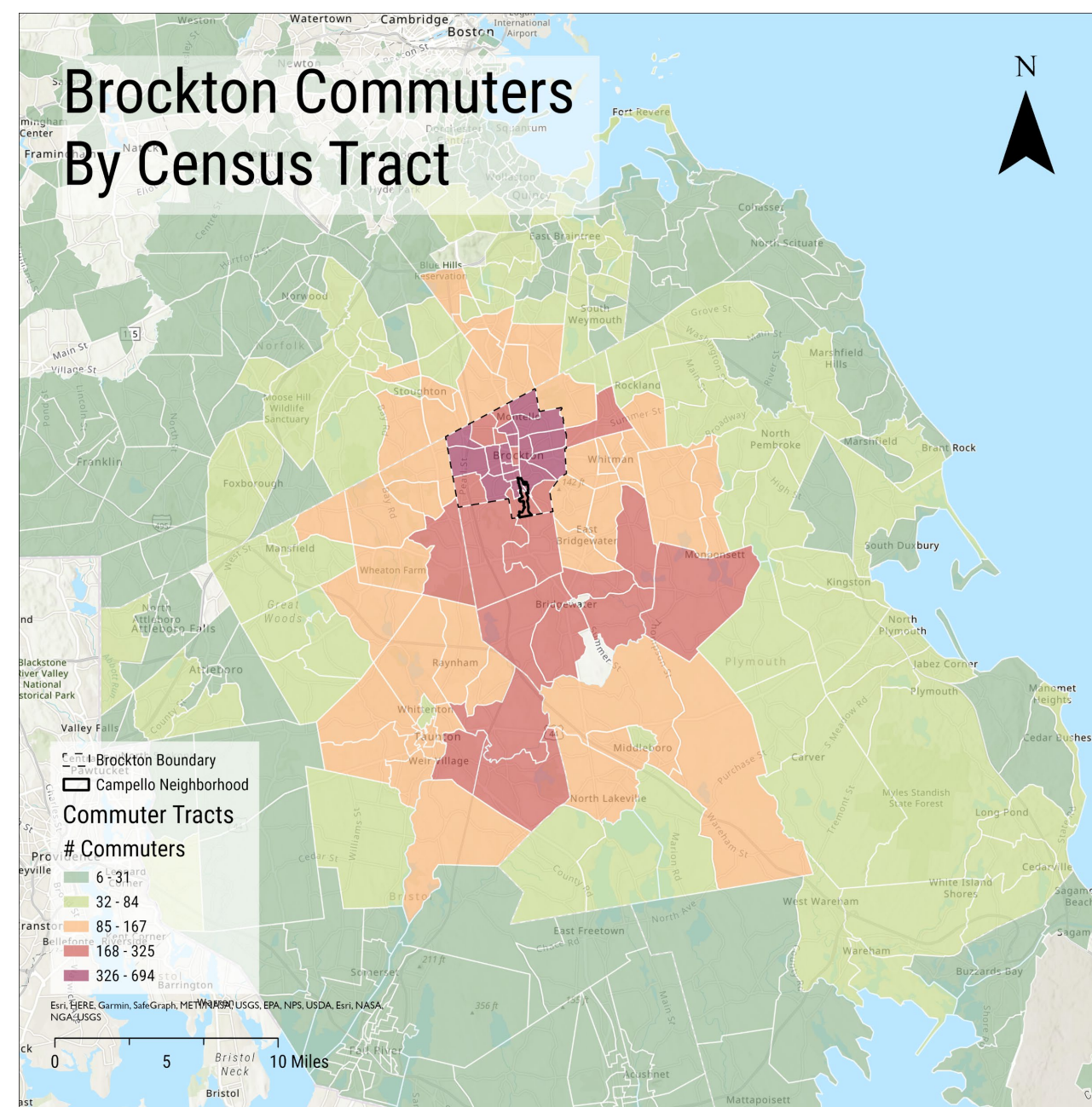
Description	Median Annual Earnings	COL* Adjusted Median Annual Earnings	2023 Jobs	2010 - 2023 Change	2010 - 2023 % Change
Registered Nurses	\$85,456	\$66,400	1,877	391	26%
Retail Salespersons	\$28,519	\$22,159	1,167	(252)	(18%)
Cashiers	\$28,182	\$21,897	1,044	33	3%
General and Operations Managers	\$114,598	\$89,043	894	519	139%
Home Health and Personal Care Aides	\$35,374	\$27,485	869	438	102%
Nursing Assistants	\$35,409	\$27,513	756	9	1%
Laborers and Freight, Stock, and Material Movers, Hand	\$33,321	\$25,890	577	188	48%
Fast Food and Counter Workers	\$28,167	\$21,886	556	112	25%
Stockers and Order Fillers	\$28,967	\$22,507	552	(54)	(9%)
Customer Service Representatives	\$40,581	\$31,531	521	126	32%

Occupational data indicate that the top registered nurses, retail salespersons, and cashiers are the three most common occupations in Brockton.

Source: Lightcast Q1 2023 (5-Digit SOC)

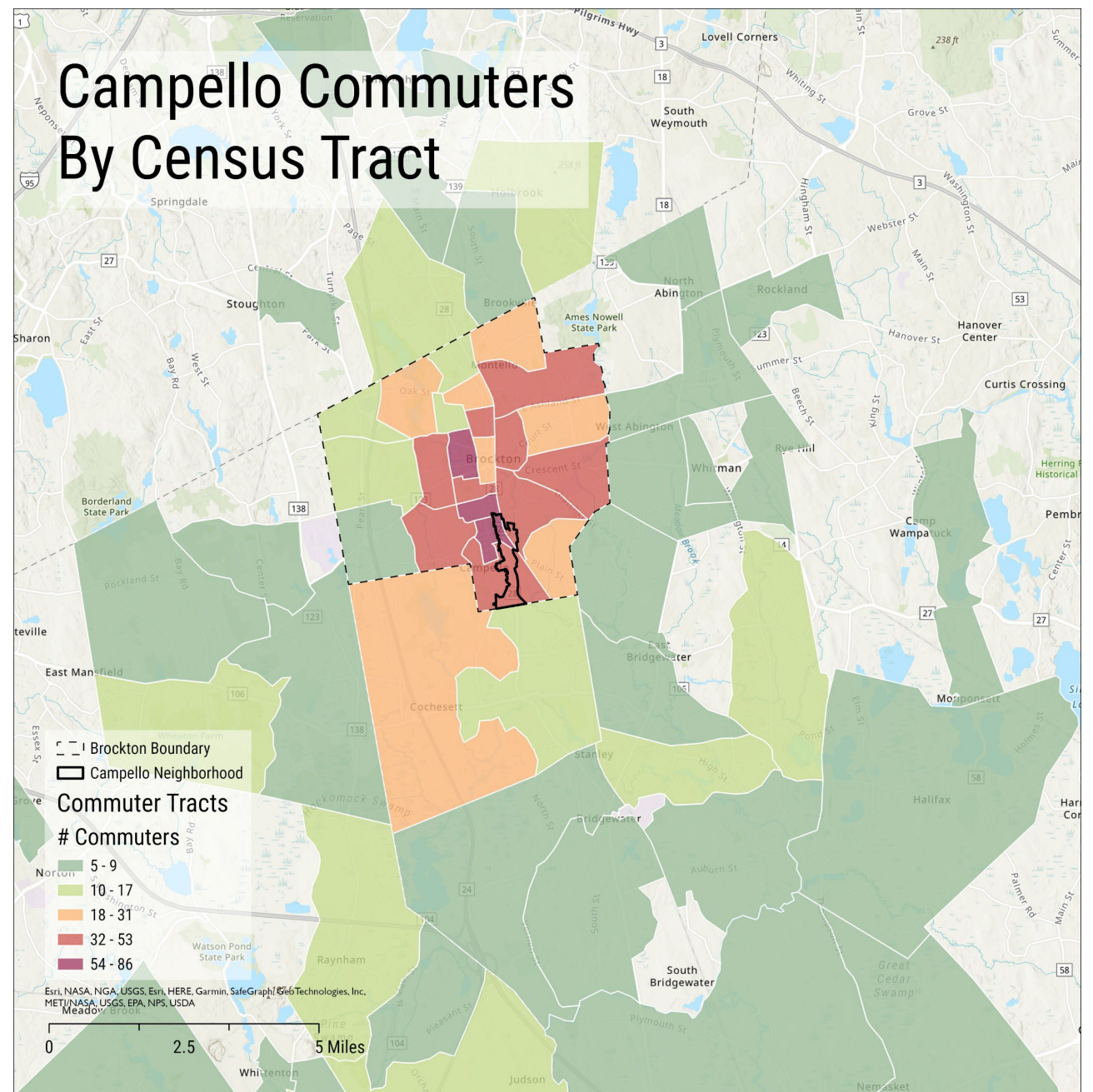
Note: * Cost of Living

For people who work in Brockton, high concentrations of commuters come from within Brockton or from neighboring communities such as Easton, Bridgewater, Abington, Halifax and Hanson.



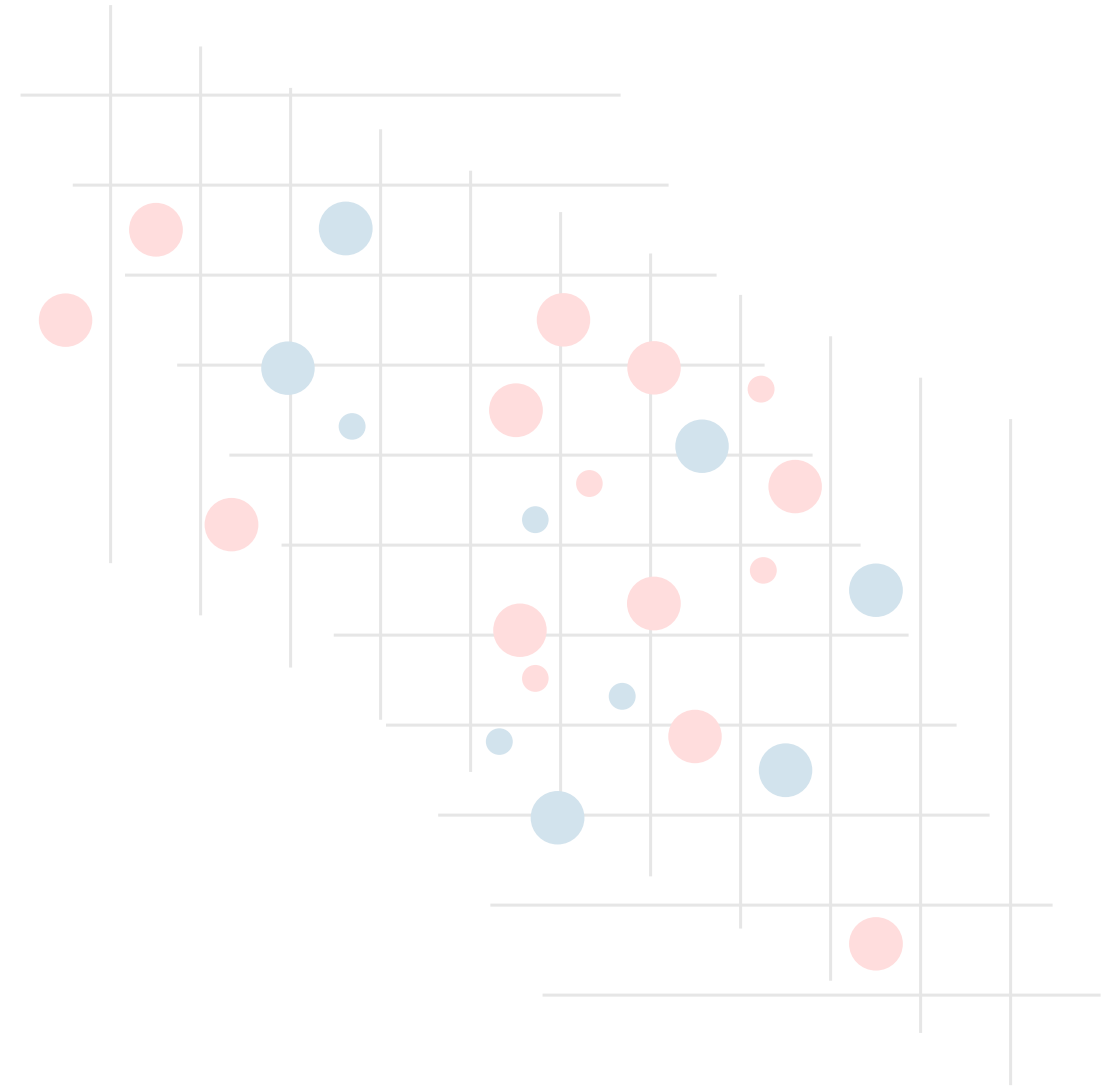
Source: US Census Bureau LODES 2020

For people who work within the Campello study area, most workers commute from other neighborhoods across Brockton or from neighboring communities.



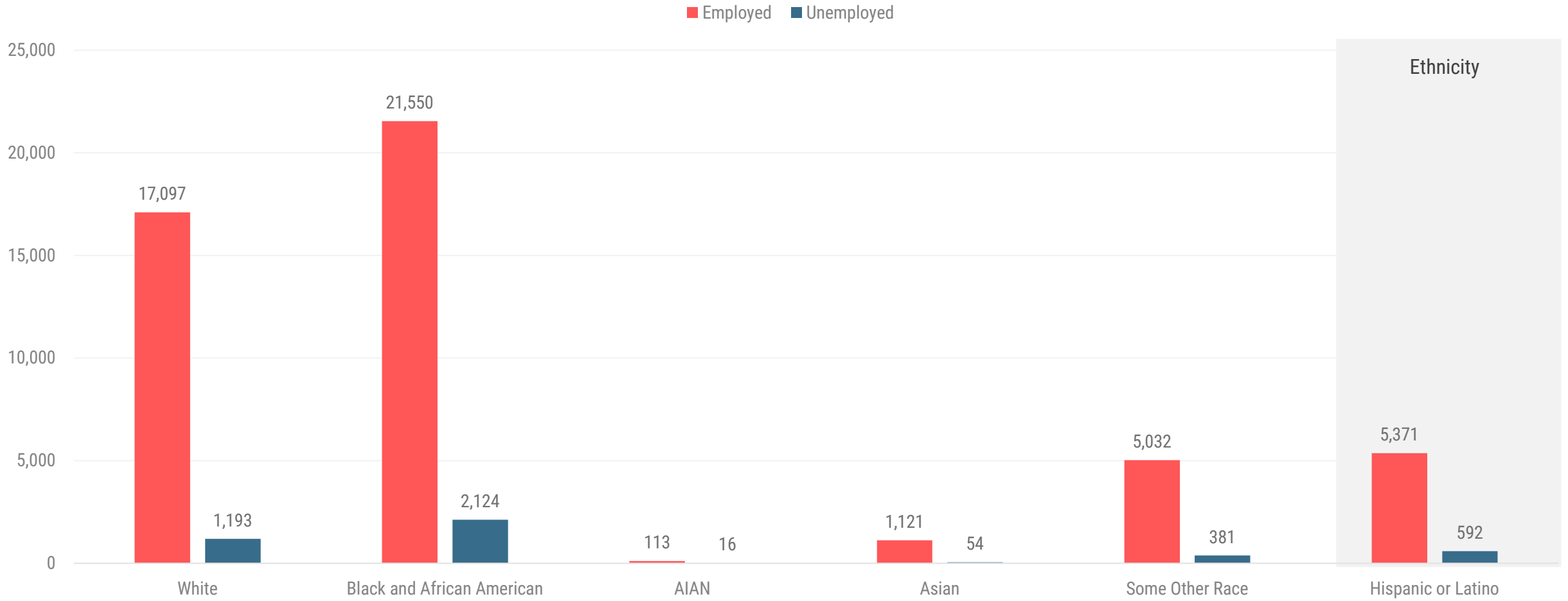
Source: US Census Bureau LODES 2020

How are Brockton residents fairing in the current economy?



Labor Force by Race & Ethnicity

Brockton's total labor force consists of 54,600 residents. The majority of Brockton's labor force consists of Black and African American workers (43%) followed by White (33%) and Hispanic/Latino (11%) workers.

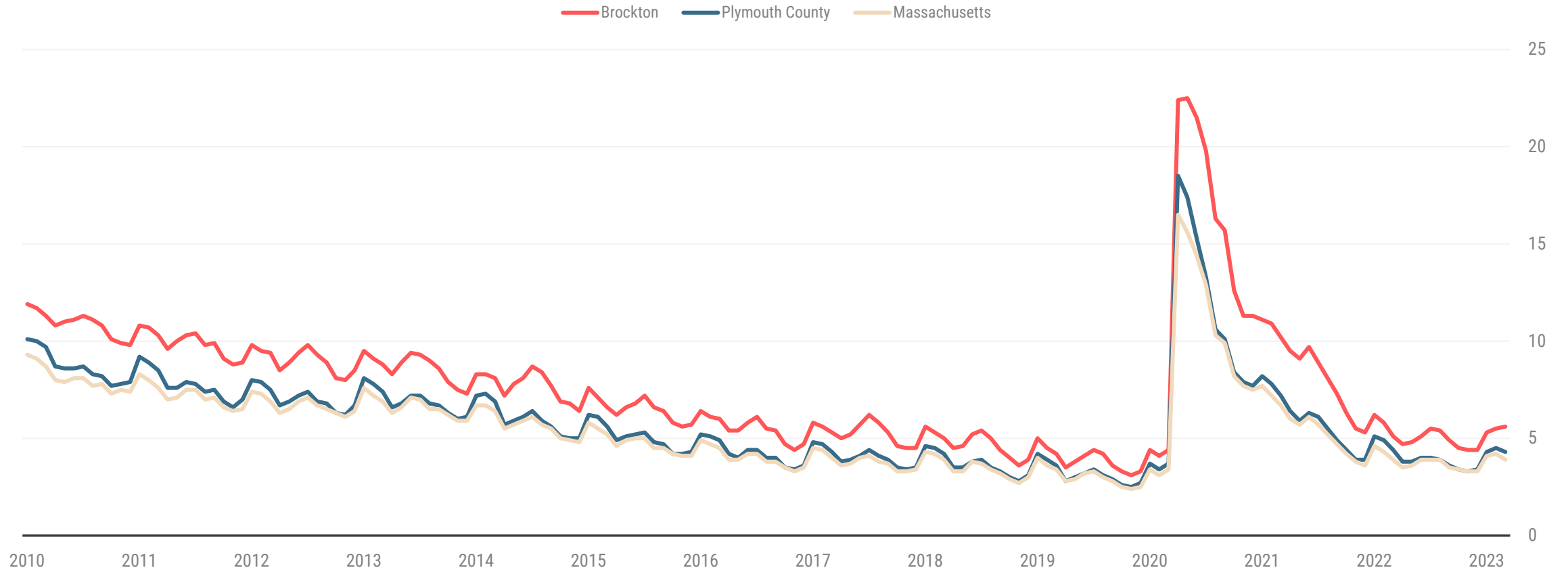


Source: ACS 5-Year Estimates 2021

Unemployment Rate

Brockton's unemployment rate has tracked slightly above the county and state levels for over a decade.

Figure: ES 202 Unemployment Rates 2010 – March 2023

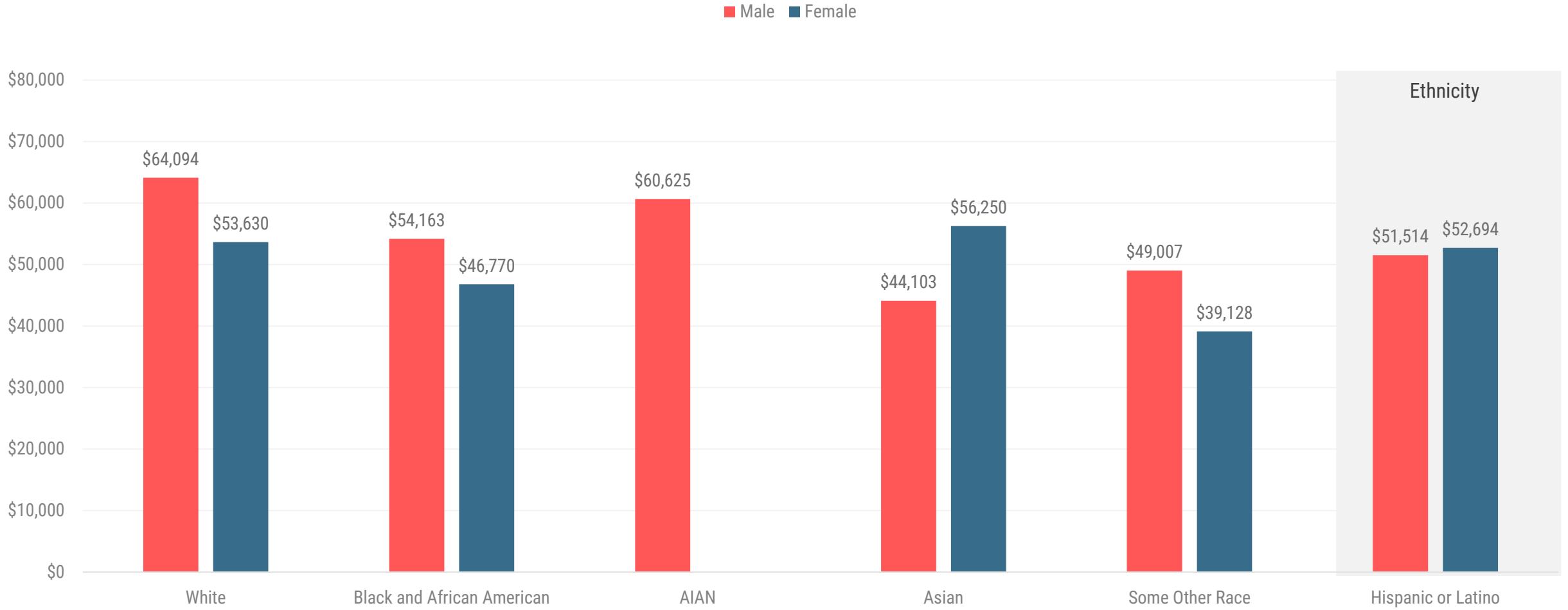


Source: Massachusetts Department of Economic Research

Labor Force by Race & Ethnicity

White workers have the highest median earnings in the past 12 months (in 2021 inflation-adjusted dollars).

Figure: Bars represent the median earnings in the past 12-months for workers living in Brockton who worked full-time, year-round

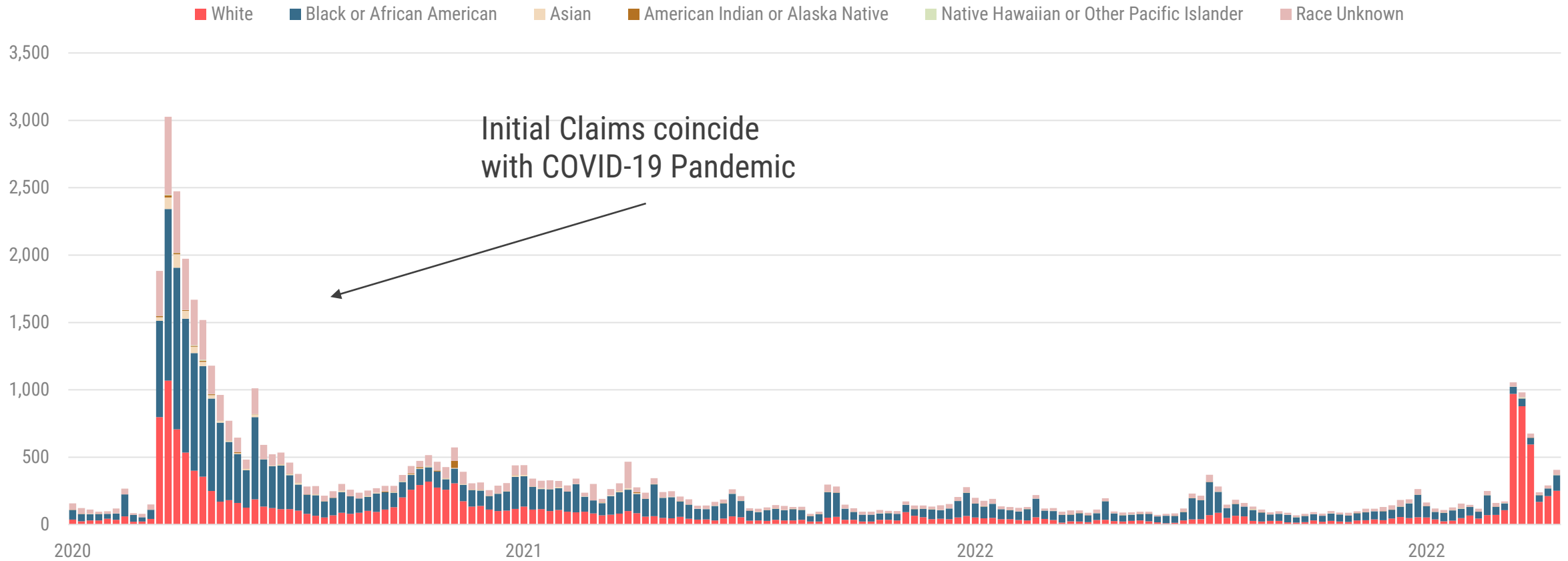


Source: ACS 5-Year Estimates 2021

Unemployment Claims

Black and African American Brockton workers were most impacted by the COVID-19 Pandemic. Recent months have seen an uptick in White unemployment claims.

Figure: Brockton Initial Weekly Unemployment Claims Data 2020 - 2023

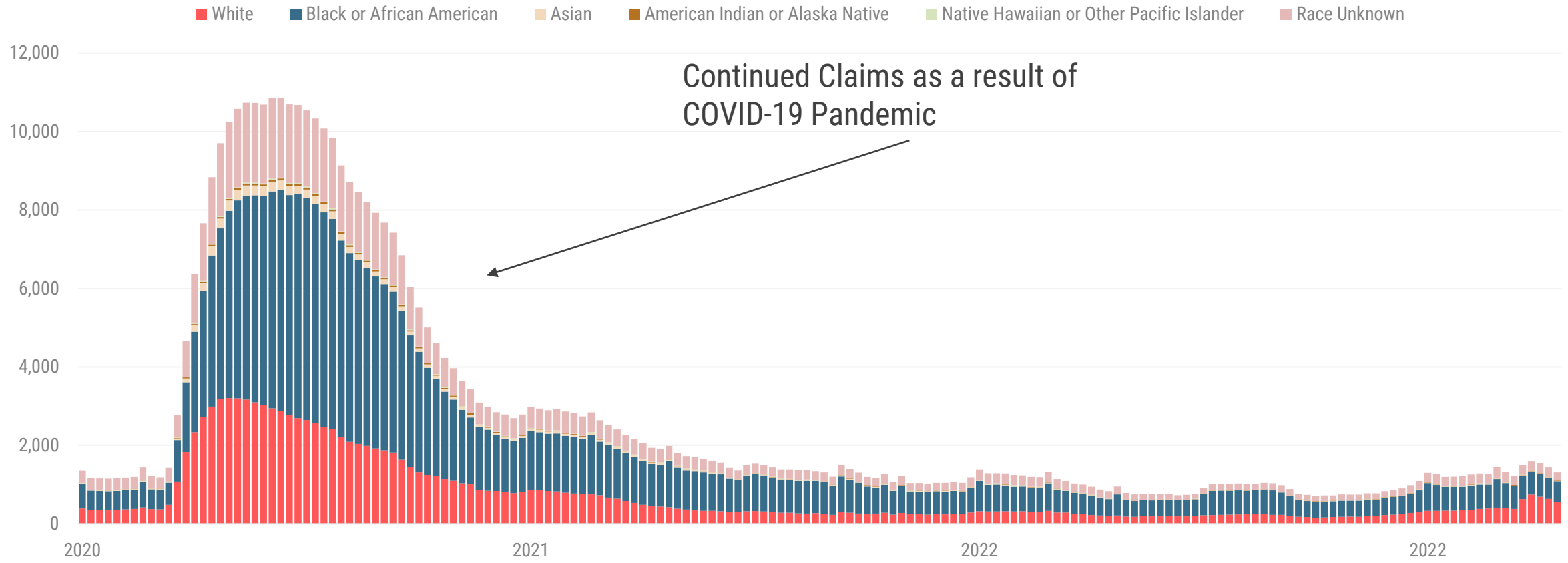


Source: Massachusetts Department of Economic Research

Unemployment Claims

The majority of continued unemployment claims were Brockton's Black and African American workers as a result of the COVID-19 pandemic.

Figure: Brockton Continued Weekly Unemployment Claims Data 2020 - 2023



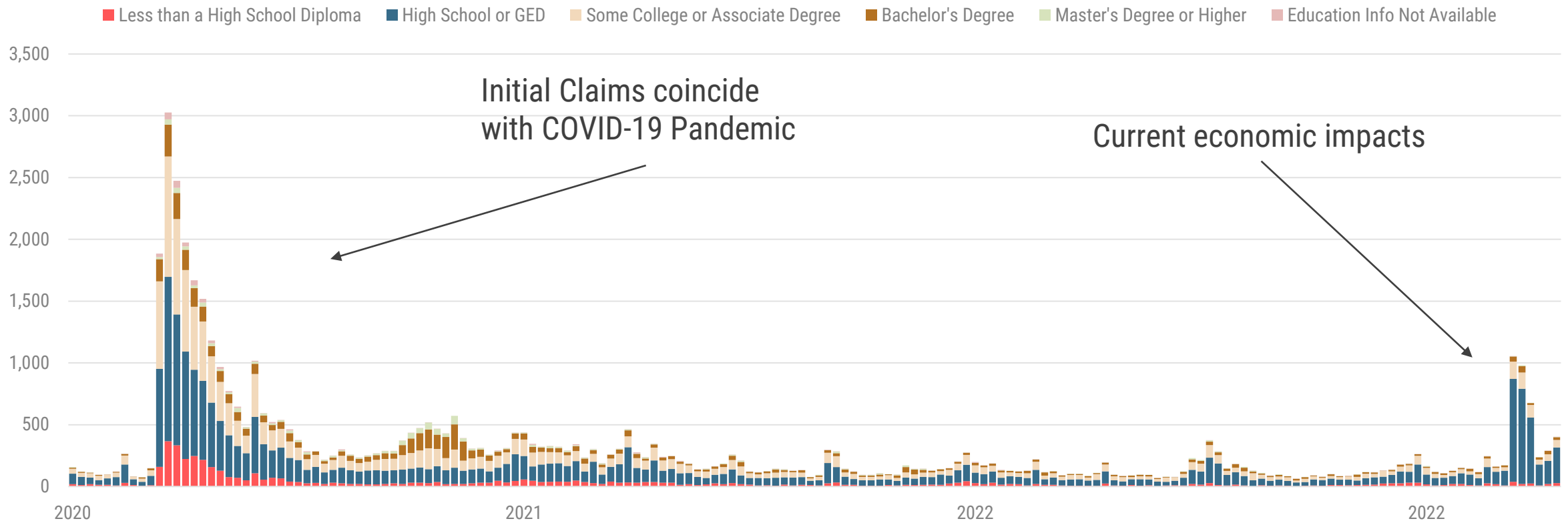
Source: Massachusetts Department of Economic Research



Unemployment Claims

Brockton workers with an educational attainment level of high school or less were most impacted by the pandemic. In recent months, Brockton has seen an uptick in unemployment claims as a result of current economic conditions.

Figure: Brockton Continued Wee

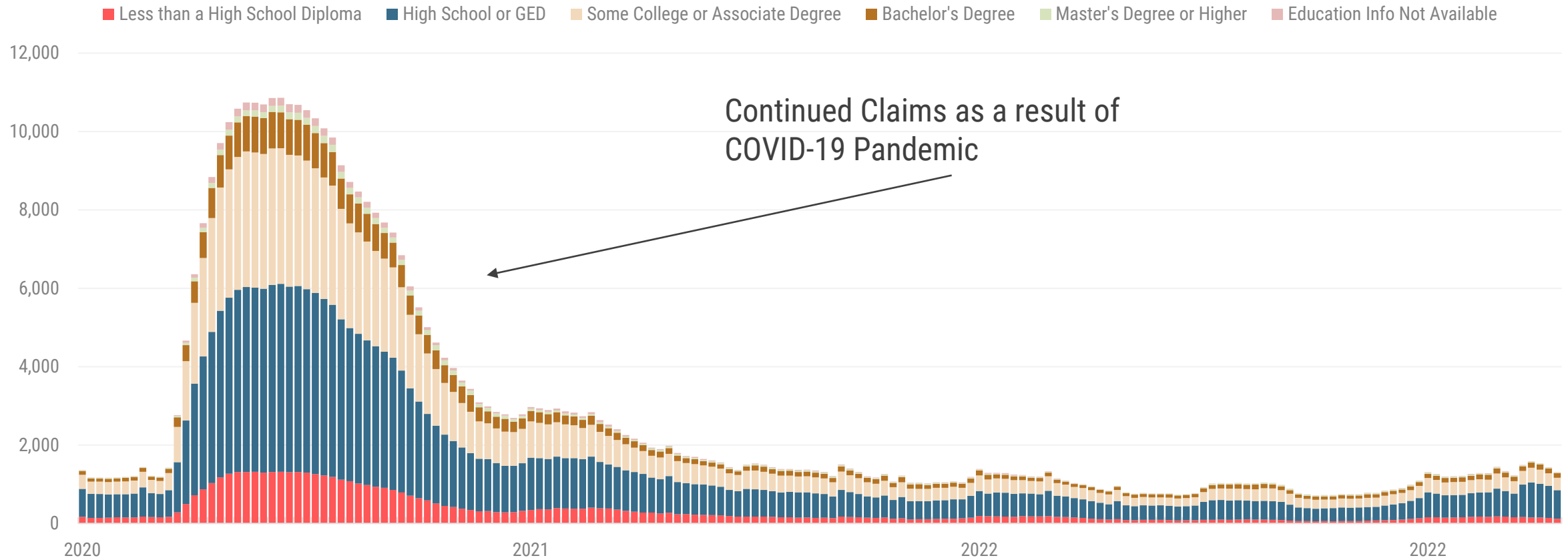


Source: Massachusetts Department of Economic Research

Unemployment Claims

The majority of continued unemployment claims were a result of the COVID-19 pandemic. Workers with a high school degree or less saw the highest continued unemployment claims in the year following the pandemic.

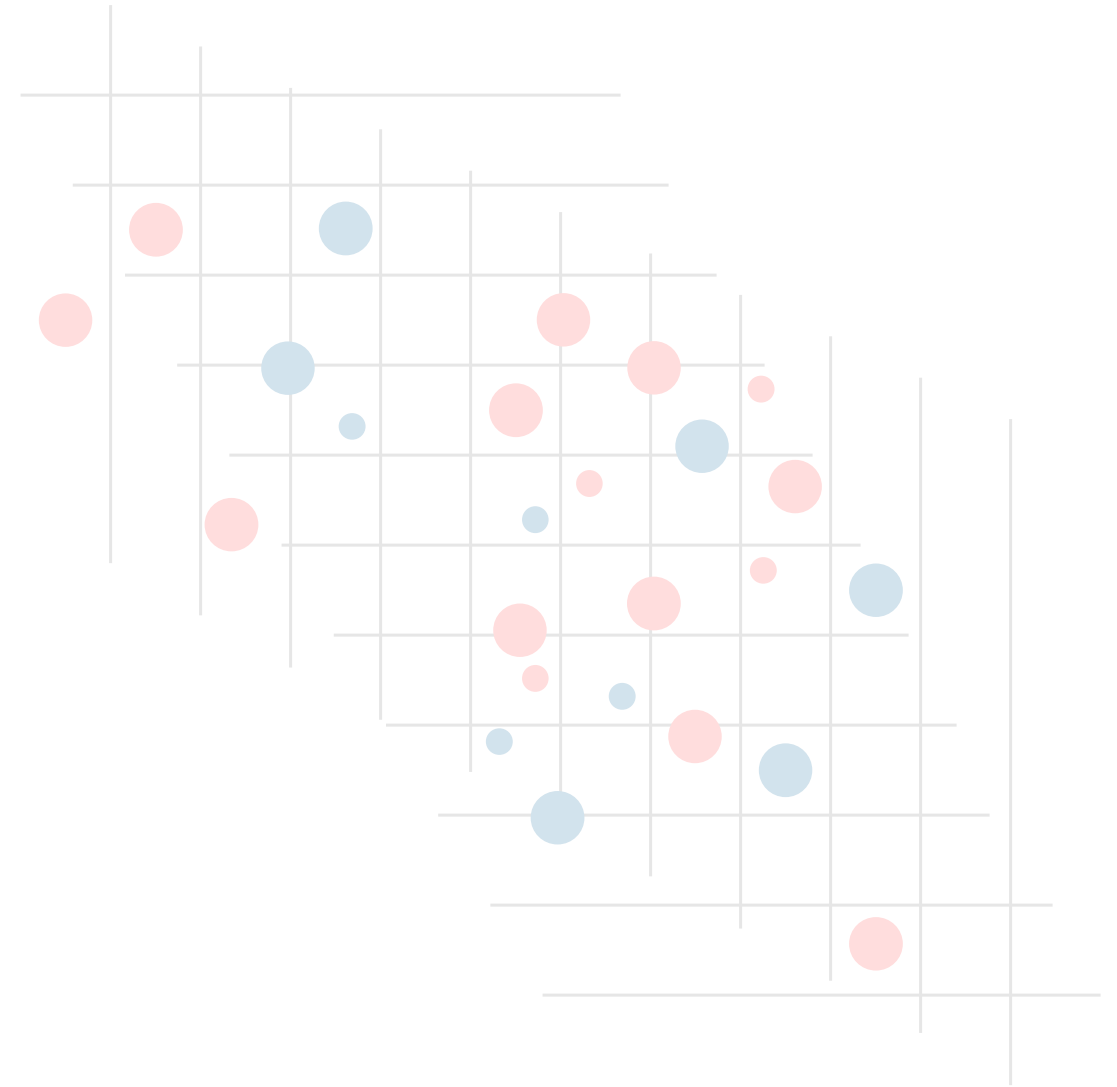
Figure: Brockton Continued Weekly Unemployment



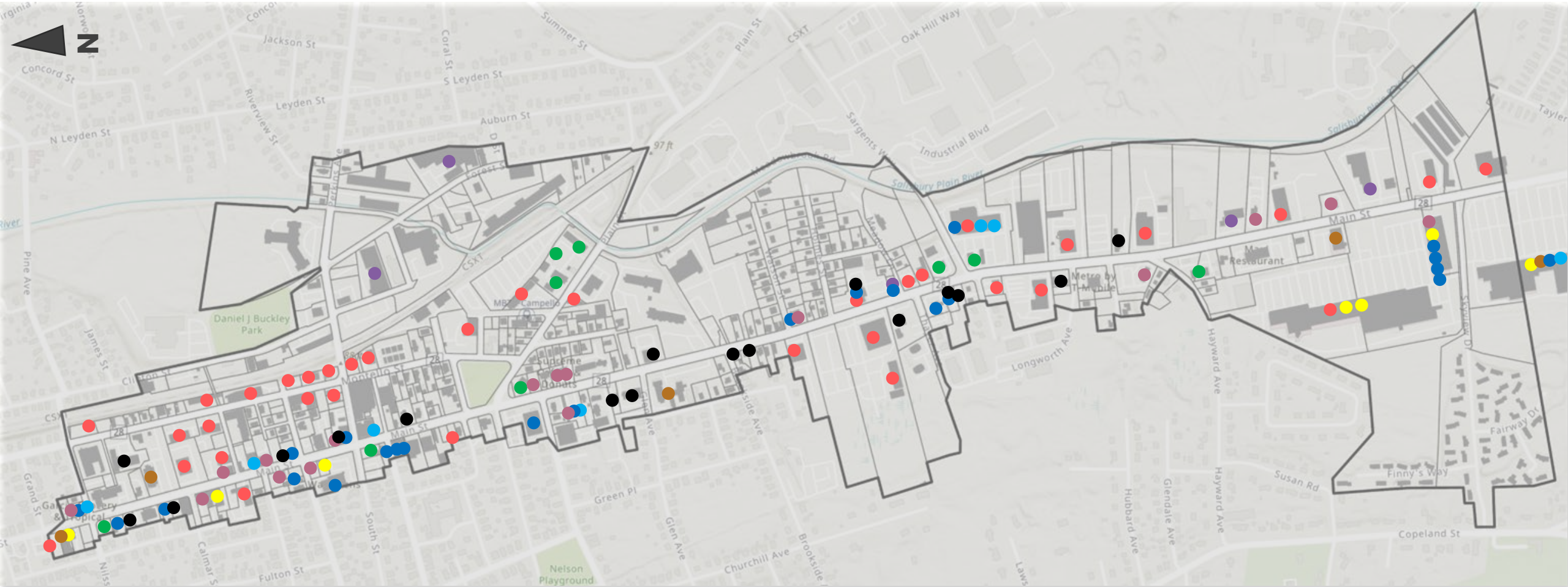
Source: Massachusetts Department of Economic Research

What types uses and businesses make up Campello?

What kinds of economic benefits are they contributing?



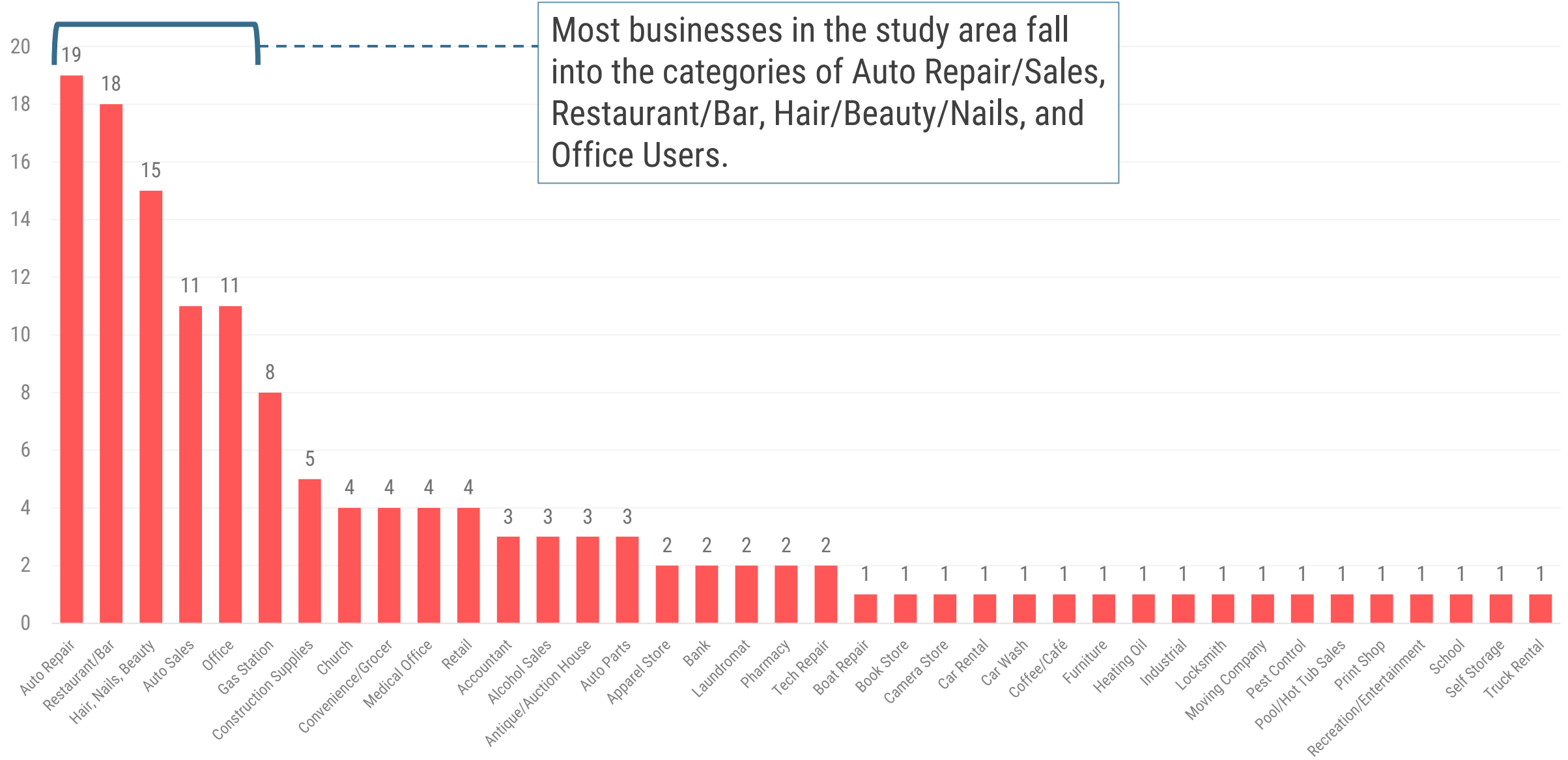
Campello Neighborhood Businesses



Businesses Categories

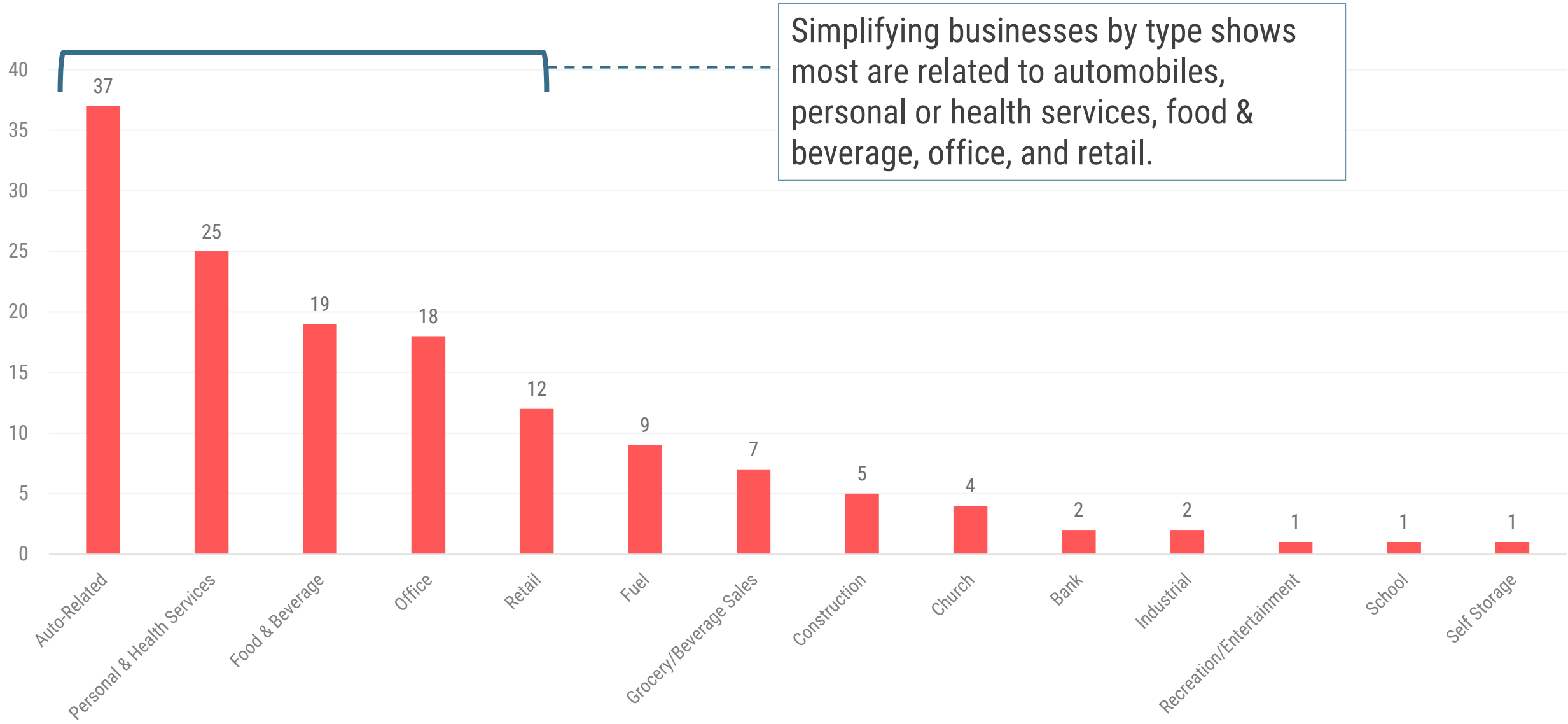
- Auto-Related
- Personal & Health Services
- Food & Beverage
- Office
- Retail
- Fuel
- Grocery/Beverage Sales
- Construction
- Churches

Campello Neighborhood Businesses



Most businesses in the study area fall into the categories of Auto Repair/Sales, Restaurant/Bar, Hair/Beauty/Nails, and Office Users.

Campello Neighborhood Businesses



Campello Neighborhood Businesses

The Campello neighborhood has a wide variety of businesses that fall within the Other Services NAICS category.

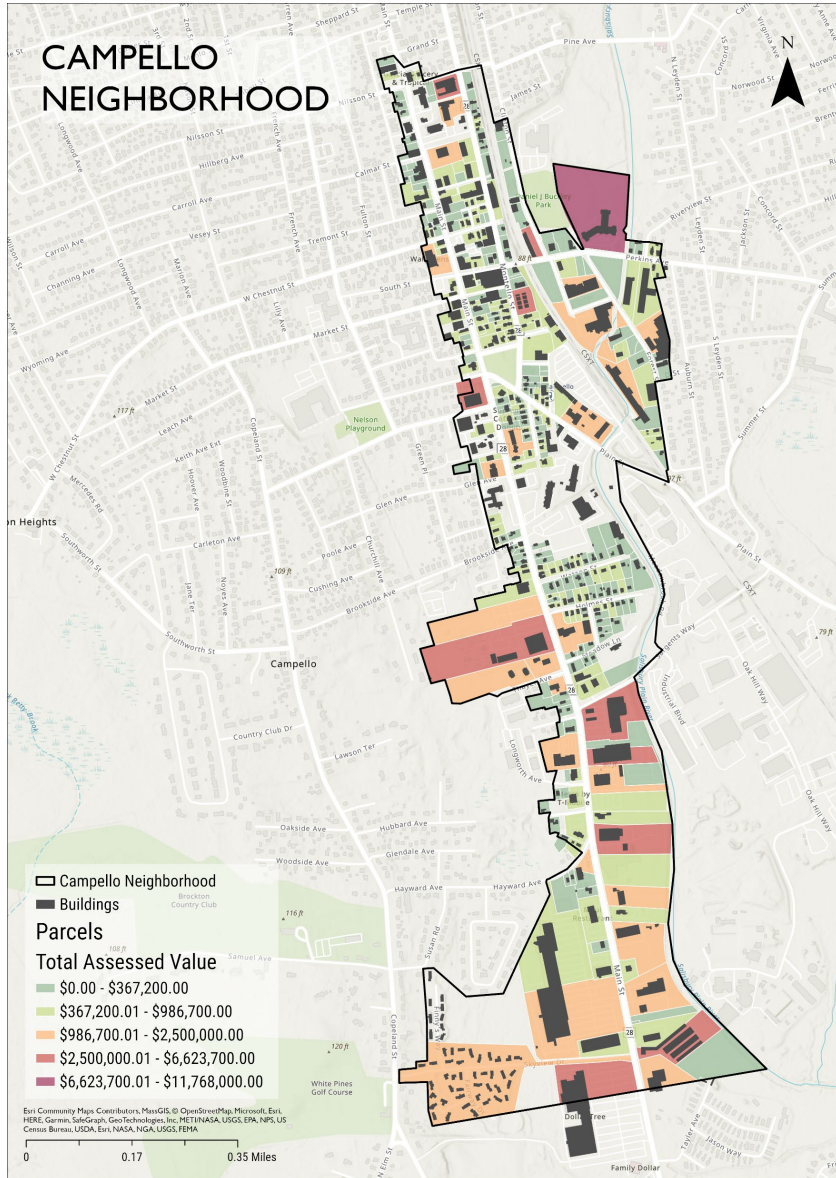
These businesses include:

- Repair and Maintenance businesses such as:
 - auto repair
 - car washes
 - home and electronic repair maintenance
- Personal Care and Laundry services such as:
 - barbers
 - beauty salons
 - laundromats

Industry (2-Digit NAICS)	Employees
Other Service excluding Public Admin	262
HealthCare/Social Assist	238
Retail Trade	172
Accommodation/Food Service	123
Transportation/Warehouse	111
Prof/Scientific/Tech Service	94
Wholesale Trade	59
Admin/Support/Waste Mgmt	57
Construction	54
Finance/Insurance	38
Educational Services	37
Real Estate/Rent/Leasing	27
Public Administration	27
Manufacturing	22
Unclassified Establishments	15
Information	13
Arts/Entertainment/Rec	7
Mgmt of Comp/Enterprises	2
Totals	1,358

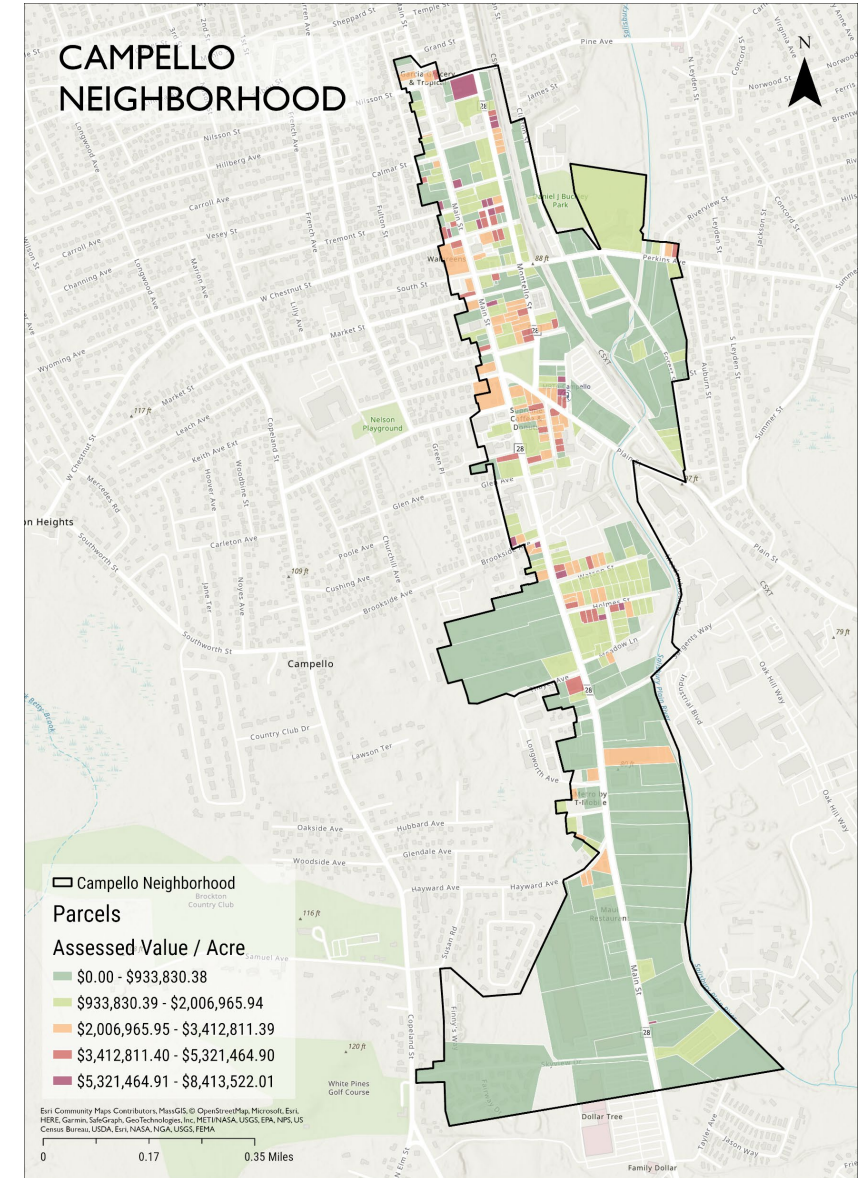
Source: ESRI Business Analyst 2022

Campello Neighborhood Assessed Values



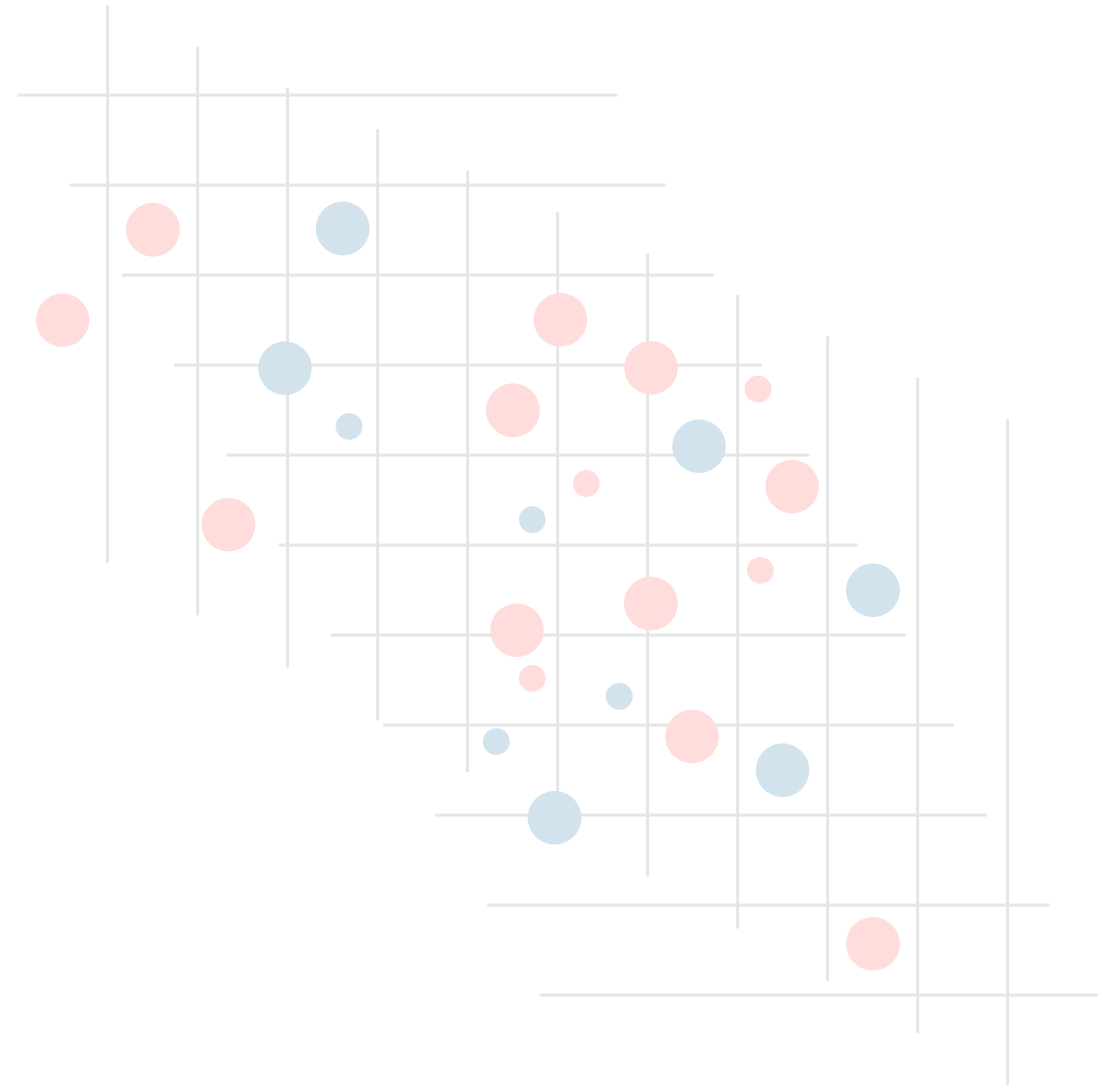
In the Campello study area, assessed values per acre vary widely

Parcels with the highest assessed value per acre are indicated in **dark red**; most of which are residential uses.



Source: MassGIS, Brockton Assessment Database, Total Assessed Value Excluding Exempt Properties

How might Campello's opportunities be shaped by regional market trends?

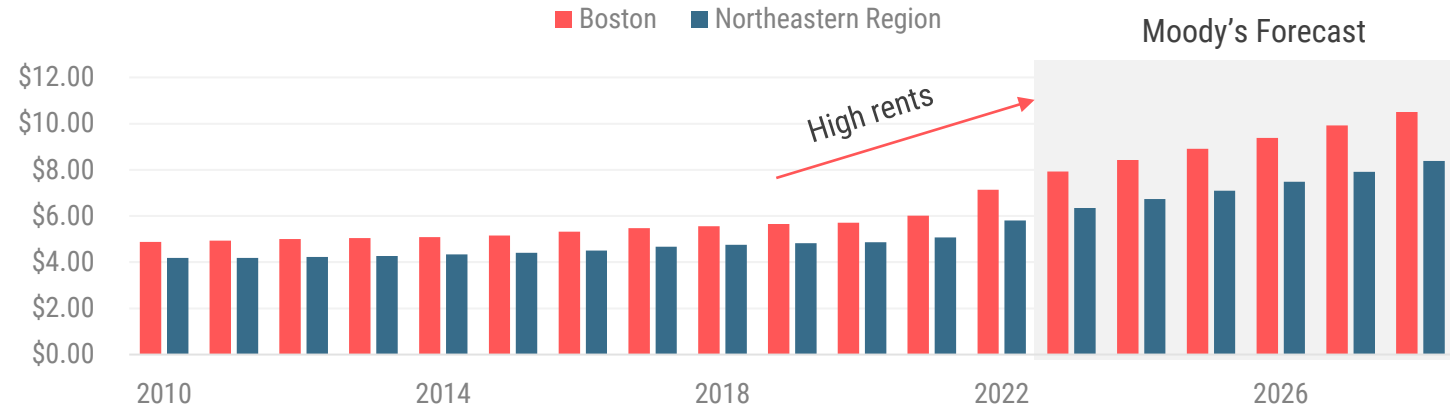


Industrial CRE Market

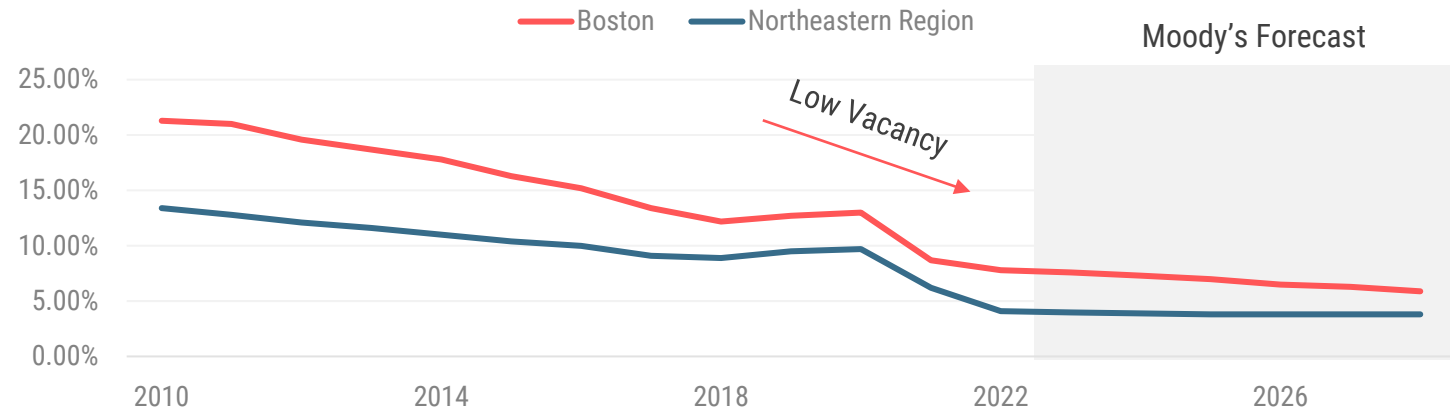
The Boston Metro industrial market, which includes **Brockton**, has experienced a slow down in demand in recent quarters but over the past decade industrial demand in the Boston metro has exceeded that of the broader Northeast region.

For Brockton, which lies within the Boston metro market, industrial space has performed better when compared to other markets across New England and Massachusetts.

Asking rents for industrial space in the Boston metro area have outpaced rents in the Northeast region.



Demand for industrial space has driven vacancy down across the Northeast region including the Boston.



Source: Moody's REIS 2023, JLL Research

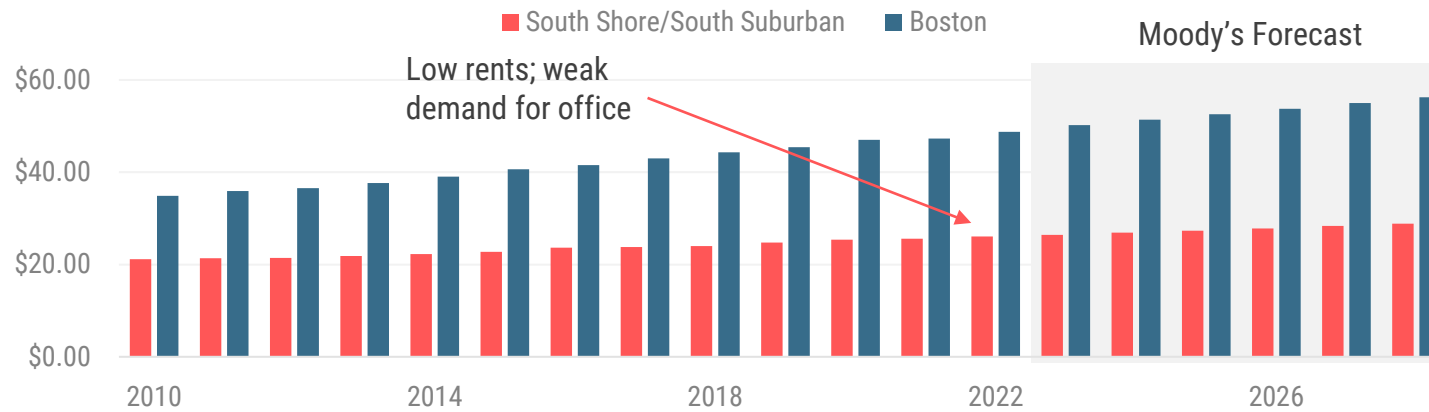


Brockton is in the South Shore/South Suburban office submarket. Since the pandemic office space vacancy has come down but is projected to trend upward as more leases for existing office space lapse.

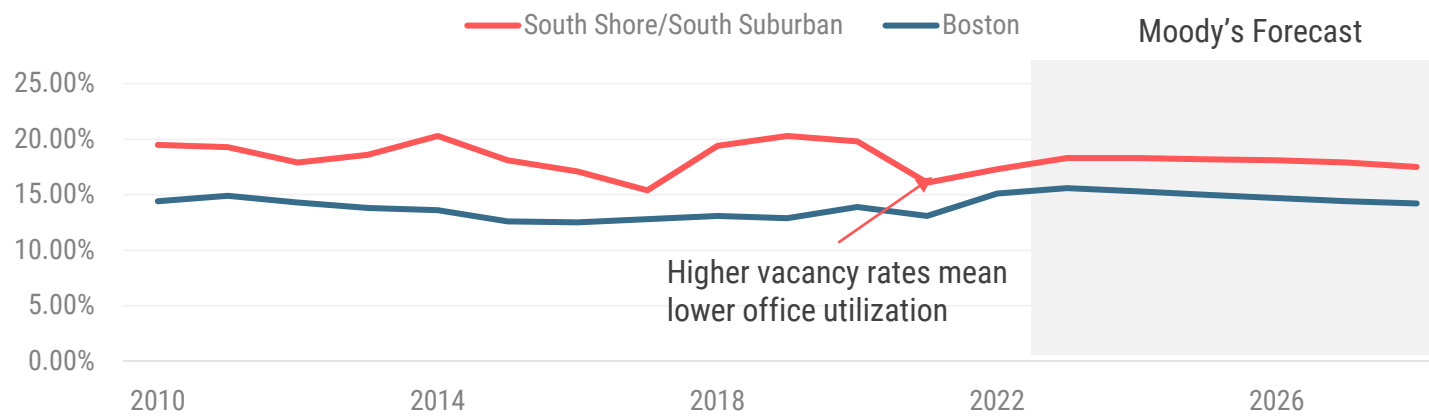
Lower asking rents and higher vacancy for office space in the South Shore/South Suburban submarket may suggest lower demand for office space.

There may be demand in the neighborhood for smaller scale professional or medical office space, but it is unlikely to attract larger scale corporate office users.

South Shore/South Suburban office rents fall well below the Boston Metro. Growth in the sector has been very slow over the past decade.



Office vacancy in the South Shore/South Suburban submarket has remained above vacancies in the Boston Metro.



Source: Moody's REIS 2023

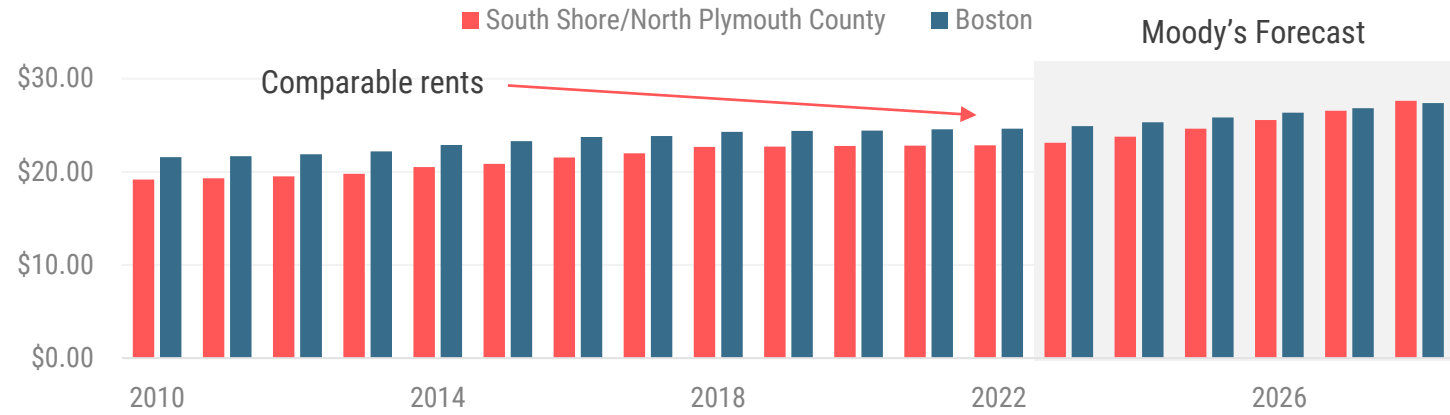
Retail CRE Market

With 6.6 million square feet, amounting to 17.4% of the total metro inventory, the South Shore/North Plymouth County submarket (which Brockton is located), is the **second largest** of the seven distinct Boston submarkets.

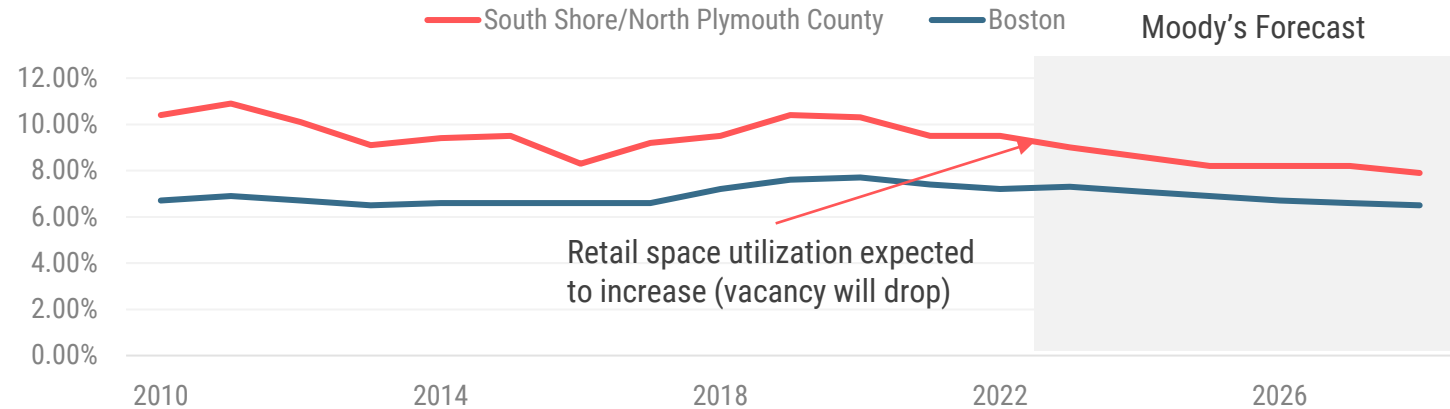
The South Shore/North Plymouth retail market has comparable asking rents to Boston metro and is forecasted to close that gap even further in the coming years. Vacancy is also expected to decrease post-COVID.

For the neighborhood, this means retail may be a viable use for consideration depending on local spending power, customer base, and demand.

Asking rents in the South Shore/North Plymouth County submarket have tracked closely with Boston metro retail rents.



Retail vacancy has tracked higher in the South Shore/North Plymouth submarket compared to the Boston metro market.



Source: Moody's REIS 2023

The Campello Neighborhood Retail Market Study Area exhibits the following characteristics:

- A population of approximately 42,702 persons.
- An estimated 14,895 households.
- A median household disposable income of \$50,809.
- An estimated annual household spending demand for selected retail purchases of approximately \$21,218 per household.
- This translates to an annual spending demand of \$316.04M.

2-Mile Radius from 24 Holmes Street

Source: ESRI/STDB and RKG



Retail Gap Analysis**The Campello Neighborhood Retail Market Study Area exhibits the following characteristics:**

- Approximately 178 retail establishments.
- A high concentration of:
 - Grocery/specialty food/beer/wine outlets.
 - Apparel and accessory stores.
 - Dining and drinking.
- Varying average store sizes ranging from 10,504 SF for building and hardware to 994 SF for dining and drinking.
- Varying average store sales ranging from \$3.77M for health and RX to \$422,300 for dining and drinking establishments.

Retail Market Area Metrics

Source: ESRI/STDB and RKG

Retail Store Type	Store Count	Avg SF	Avg Sales/Store (\$1000s)
Furniture/Furnishings	3	5,226	\$1,293.5
Electronics	6	2,410	\$843.6
Building/Hardware	7	10,504	\$3,203.6
Grocery Related	32	2,627	\$1,852.4
Health/RX	8	5,801	\$3,770.5
Apparel/Accessories	24	1,361	\$411.8
Sports/Books/Music	4	2,348	\$610.4
General Merchandise	12	2,711	\$1,186.1
Specialty/Niche	16	9,485	\$2,430.5
Dining/Drinking	66	994	\$422.3

Retail Gap Analysis

Sales Leakage refers to the difference between the annual retail spending demand and the annual realized retail sales. For this 2-Mile radius:

- Annual demand is estimated at \$316.04M while annual sales are estimated at \$214.12M
- As a result, nearly \$96.43M in annual local household demand is not being captured by local merchants – or exported sales.
- This means that local households are shopping “outside” of the 2-Mile radius for many of their retail purchases.

Retail Gap Analysis – Sales Leakage

Source: ESRI/STDB and RKG

Retail Store Type	Avg HH Demand	Total Retail Demand (\$1000s)	Total Retail Sales (\$1000s)	Total Sales – Export/Import (\$1000s)
Furniture/Furnishings	\$770	\$11,463.3	\$3,880.6	(\$8,682.1)
Electronics	\$1,132	\$16,861.8	\$5,061.4	(\$11,800.4)
Building/Hardware	\$1,615	\$24,050.0	\$22,425.4	(\$1,624.6)
Grocery Related	\$5,448	\$81,154.4	\$59,276.4	(\$21,878.1)
Health/RX	\$1,748	\$26,033.5	\$30,163.6	\$4,130.1
Apparel/Accessories	\$2,005	\$7,464.5	\$9,882.3	(\$19,975.5)
Sports/Books/Music	\$1,060	\$15,787.9	\$2,441.6	(\$13,346.3)
General Merchandise	\$3,372	\$50,231.6	\$14,233.7	(\$29,410.6)
Specialty/Niche	\$1,053	\$15,680.6	\$38,887.8	\$23,207.2
Dining/Drinking	\$3,016	\$44,921.1	\$27,869.4	(\$17,051.7)
TOTALS	\$21,218	\$316,042.0	\$214,122.2	(\$96,432.1)

Retail Gap Analysis

A 10% recapture of the estimated sales leakage could translate to:

- A supportable demand for an additional 36,571 SF of retailing venues.
- Opportunities for new development (SF) may best be represented by a clustering and mix of Apparel and Accessory stores – noting the average store size, this could translate to 4 additional venues.
- Dining and drinking - noting the average store size this could also translate to 4 venues.
- Further capitalizing on the local are strength in specialty food stores.

In any event, a recapture of sales leakage would represent additional opportunities for existing retail venues.

Retail Development Opportunities

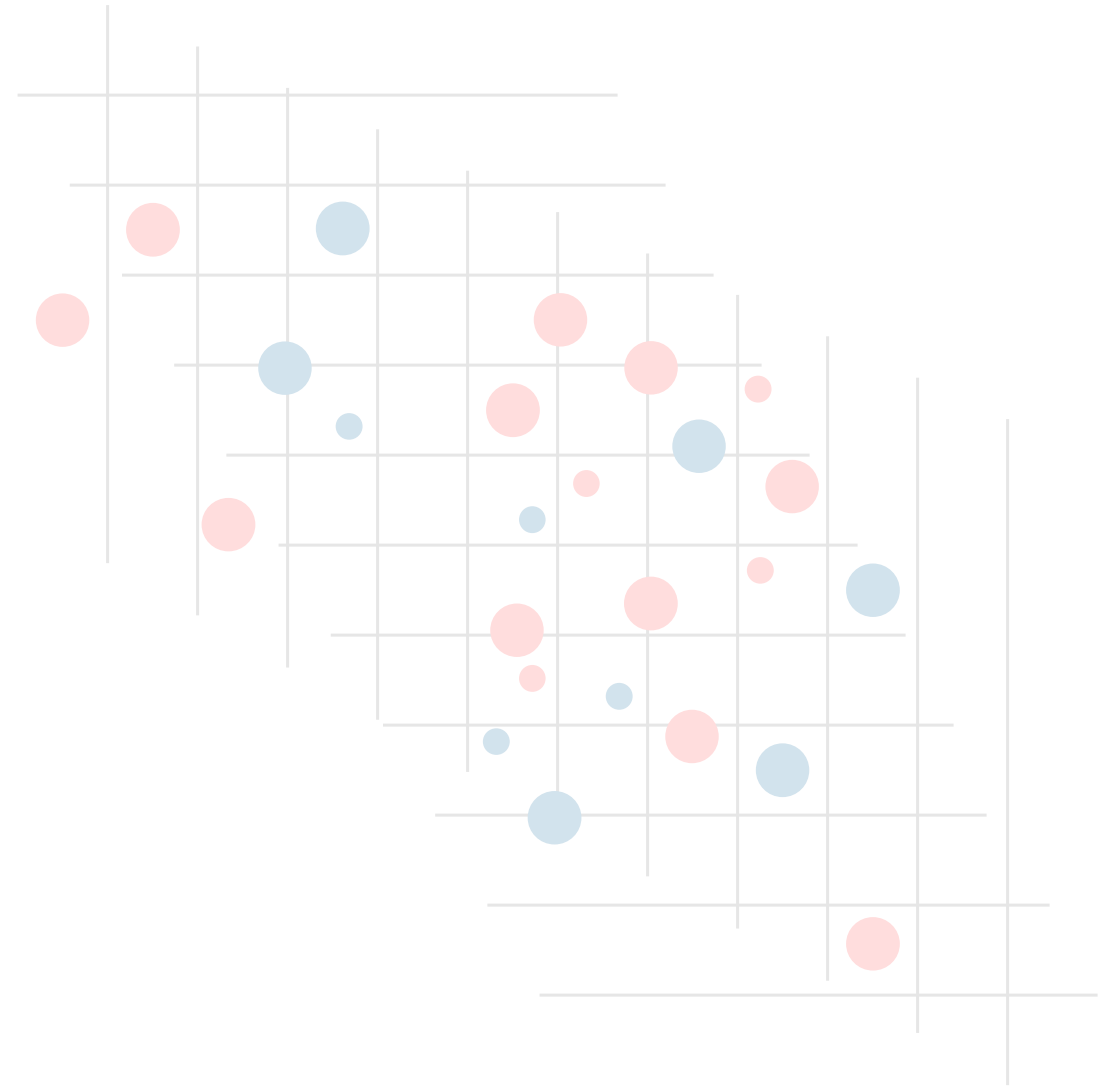
Source: ESRI/STDB and RKG

Retail Store Type	Avg Demand per HH	Total Sales – Export/Import (\$1000s)	Est. Supportable SF at 10% Recapture
Furniture/Furnishings	\$770	(\$8,682.1)	3,839
Electronics	\$1,132	(\$11,800.4)	3,372
Building/Hardware	\$1,615	(\$1,624.6)	646
Grocery Related	\$5,448	(\$21,878.1)	3,844
Health/RX	\$1,748	\$4,130.1	0
Apparel/Accessories	\$2,005	(\$19,975.5)	6,059
Sports/Books/Music	\$1,060	(\$13,346.3)	5,809
General Merchandise	\$3,372	(\$29,410.6)	5,999
Specialty/Niche	\$1,053	\$23,207.2	2,949
Dining/Drinking	\$3,016	(\$17,051.7)	4,054
TOTALS	\$21,218	(\$96,432.1)	36,571

Key Takeaways

- Brockton's employment and occupations are dominated by lower paying jobs, many of which are filled by Brockton residents.
- While unemployment has come back down from COVID levels, people of color and those with a high school diploma are still at an economic disadvantage.
- The Main Street and Montello Street corridors have over 150 businesses, but many are auto related or cater to health and beauty needs or personal services. They also tend to be concentrated and create blocks that are visually unappealing and not conducive to pedestrian activity.
- Most businesses in the corridor employ less than 10 people with the exception of the larger office, non-profit, and civic businesses.
- A majority of the parcels along the corridor have been developed at a low intensity and not generating the kind of economic return one might expect from a Main Street in a city.
- There are opportunities to bring new retail and restaurant activity to the corridor with a focus on clothing and apparel, groceries, dining and drinking, and small miscellaneous retailers.
- Vacant parcels, vacant storefronts, and large parking lots offer opportunities to bring in new development that could add residential, retail, restaurants, office uses, and other creative enterprises to the neighborhood.

How can we share this information with residents and get feedback on economic opportunities for Campello?



How do we share information with residents?

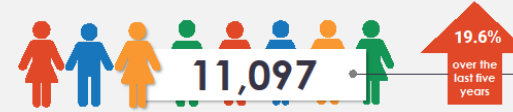
- Series of informational boards at each station with select data to inform their input.



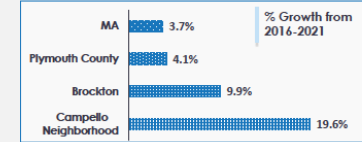
Demographics

Brockton Campello Neighborhood

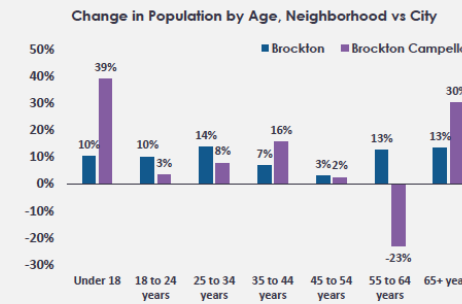
The Campello Neighborhood's population in 2021 was estimated at



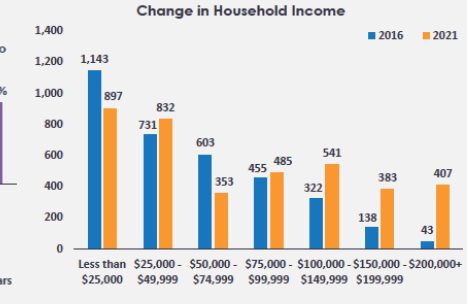
How does this compare?



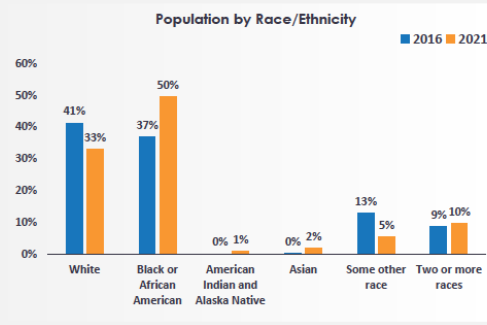
The Campello Neighborhood's 65+ and under 18 population have the highest proportional growth.



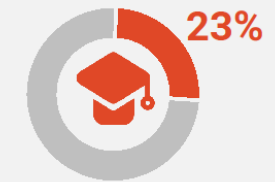
Household incomes are increasing in the Campello Neighborhood.



The Campello Neighborhood population has become more diverse as the neighborhood has grown.



Among all residents living in the Campello Neighborhood...



... have a Bachelor's Degree or higher.

Among all residents living in Brockton, 20% have a Bachelor's degree or higher.

Sources of Information
US Census ACS
Data (2016-2021)

<https://www.rkgassociates.com/>
mail@rkgassociates.com



Station 1: What types of commercial is missing or desired?

- Place dots indicating preferences, sticky notes to write in ideas that aren't on the board already.
- Paired with responses from the first workshop on land use, and information on what business types exist in the corridor today.

Why ask this?

- Informs the use table in the zoning ordinance.
- Informs strategies for how to attract these business types.



Station 2: Where should different types of economic activity occur?

- Place dots or pins on map where you would like to see types of commercial activity.
- Colors could indicate commercial types.
- Paired with retail opportunity/market opportunity data.

Why ask this?

- Informs the urban design framework for the corridor.
- Informs the zoning for the corridor (what should/could go where).



Station 3: What kinds of spaces or policy changes might drive future economic development and entrepreneurship?

- Place dots on ideas that would be supported by the neighborhood.
- Collect other ideas participants may have.
- Paired with field data, business information, employment.

Why ask this?

- Informs the urban design framework and the zoning.
- Helps identify strategies to increase business starts and remove barriers.

Examples might include:

- Small storefronts
- Shared space models
- Retail with manufacturing or packaging
- Coworking
- Residential with a commercial component in the neighborhood, support for home-based businesses
- Ex. incubators (commercial kitchens, co-working spaces, maker spaces, co-learning spaces)

Examples might include:

- Multi-lingual permitting guides; entrepreneur liaison at City Hall
- Funding and grant sources for small businesses
- Partnerships with landlords for low-rent spaces for 3-5 years
- Changing/easing the permitting process for certain business types
- Other examples from 2018 Visioning Report.

Station 4: What kinds of physical changes to the corridor would be desired to make the space more walkable, safe, attractive for businesses and visitors?

- Place dots on ideas that would be supported by the neighborhood.
- Collect other ideas participants may have.

Why ask this?

- Informs the urban design framework and the zoning.
- Helps identify strategies that could be implemented as beta tests or short-term tests in the neighborhood/corridor.

Examples might include:

- Outdoor dining
- Streetscape improvements
- Wall murals
- Public art
- Façade improvements/ storefront improvements
- Pocket parks or plazas
- Outdoor market spaces
- Parklets
- Events

Workshop

Station 5: Who can help implement the economic development vision for the neighborhood?

- Sticky notes to identify specific partners key to implementation.
- Collect other ideas participants may have.

Why ask this?

- Helps to build out the implementation component of the plan.
- Helps identify partnerships to implement the plan.

CHARLEMONT ECONOMIC DEVELOPMENT STRATEGY STATION 2: ECONOMIC ECOSYSTEM

Please use the sticky notes provided to indicate who you feel is important to Charlemont's economy, what role they play, and what role they should be playing. Stick the notes to the board when you are done.

BUSINESSES

GOVERNMENT

NON-PROFITS

REGIONAL ORGANIZATIONS

INDIVIDUALS

OTHERS

BROCKTON CAMPELLO NEIGHBORHOOD

May 2023

