# Framingham Master Plan

*Technical Memorandum*

To: Cecil Group and Town of Framingham
From: FXM Associates
Date: April 20, 2010

## Social and Economic Characteristics of the Target Planning Areas

This memorandum provides a comparison of selected population, housing, and economic characteristics of five geographic areas within the Town of Framingham. These areas are Downtown, Framingham Center, the Golden Triangle, Nobscot, and Saxonville. For planning purposes the study team identified an approximate central point (street intersections) for each area and developed comparative social and economic data and analyses for ½ and 1-mile radii of the central location. Appendix A of this memorandum contains maps showing the street intersections and geographic areas subsumed by each of the ½ and 1-mile areas covered. The purpose of this analysis is to identify salient social and economic features that distinguish each area and which can inform possible policy and regulatory actions to achieve goals and objectives for economic development.

## Population and Housing

Table 1 shows selected population and housing characteristics within each of the targeted planning areas as well as for the Town of Framingham overall.

### Table 1

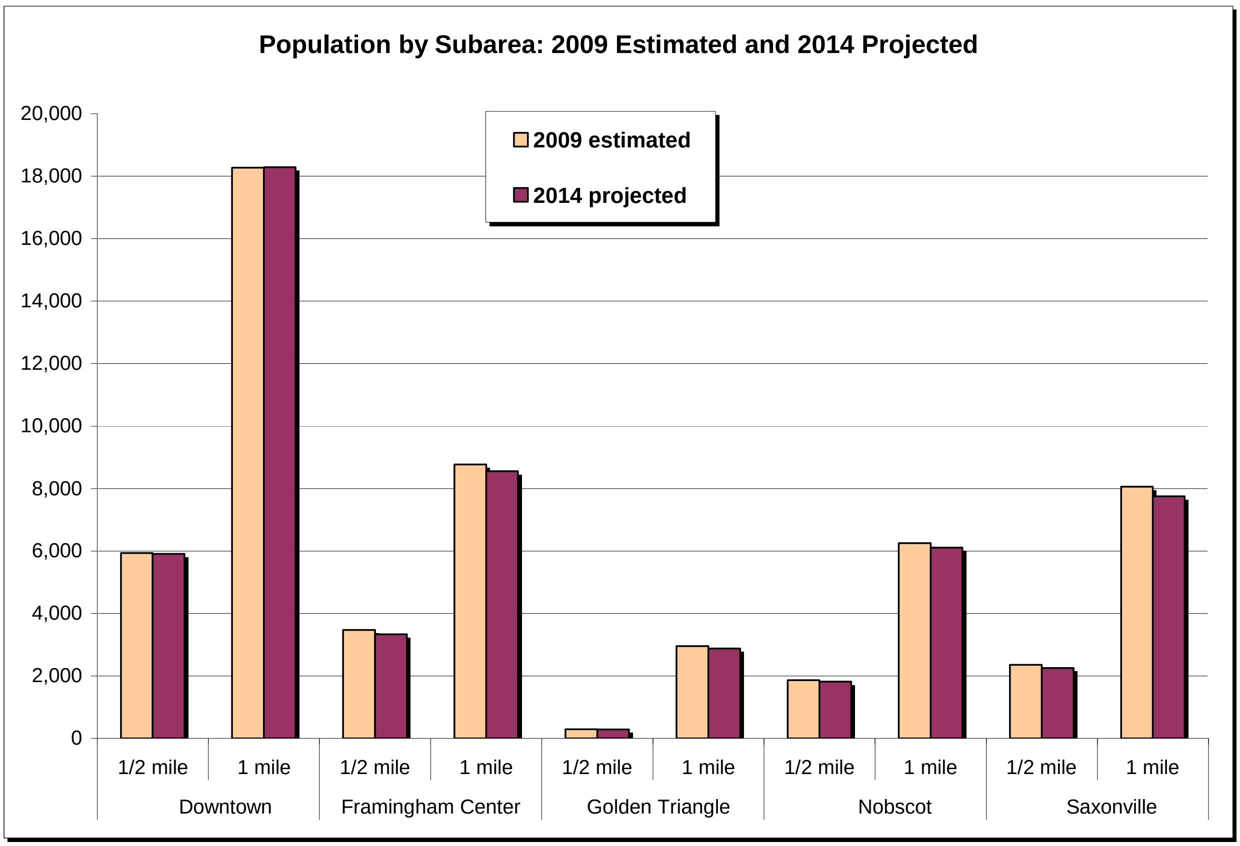
| POPULATION AND HOUSING CHARACTERISTICS | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Subarea | Downtown | | Framingham Center | | Golden Triangle | | Nobscot | | Saxonville | | Framingham Overall |
| *Radii* | *1/2 mile* | *1 mile* | *1/2 mile* | *1 mile* | *1/2 mile* | *1 mile* | *1/2 mile* | *1 mile* | *1/2 mile* | *1 mile* | |
| **Population** | | | | | | | | | | | |
| 2009 estimated | 5,938 | 18,273 | 3,477 | 8,774 | 723 | 7,261 | 1,868 | 6,253 | 2,353 | 8,062 | 64,476 |
| 2014 projected | 5,909 | 18,285 | 3,337 | 8,556 | 699 | 7,026 | 1,819 | 6,111 | 2,252 | 7,753 | 63,336 |
| Projected Change 2009-2014 | -29 | 12 | -140 | -218 | -24 | -235 | -49 | -142 | -101 | -309 | -1140 |
| *2009 Per capita Income* | *$ 16,846* | *$ 19,053* | *$ 28,405* | *$ 32,303* | *$ 37,257* | *$ 34,200* | *$ 43,790* | *$ 43,113* | *$ 336,884* | *$ 34,649* | *$ 32,506* |
| Median Age | 36.6 | 36.0 | 28.6 | 38.8 | 42.3 | 40.1 | 41.0 | 41.6 | 41.0 | 41.6 | 39.2 |
| **Households** | | | | | | | | | | | |
| 2009 estimated | 2,067 | 6,685 | 1,070 | 3,344 | 291 | 2,959 | 762 | 2,405 | 876 | 3,281 | 25,163 |
| 2014 projected | 2,033 | 6,613 | 1,001 | 3,239 | 284 | 2,881 | 748 | 2,366 | 940 | 3,178 | 24,654 |
| Projected Change 2009-2014 | -34 | -72 | -69 | -105 | -7 | -78 | -14 | -39 | 64 | -103 | -509 |
| *2009 Median Household Income* | *$ 34,732* | *$ 38,776* | *$ 68,694* | *$ 65,261* | *$ 89,484* | *$ 75,375* | *$ 78,846* | *$ 90,326* | *$ 67,511* | *$ 72,182* | *$ 63,600* |
| Average Household Size | 2.87 | 2.73 | 3.25 | 2.62 | 2.48 | 2.45 | 2.45 | 2.60 | 2.69 | 2.46 | 2.56 |
| Speak Only English at Home | 47% | 52% | 78% | 78% | 87% | 76% | 85% | 87% | 82% | 86% | 70% |
| Speak Other language at Home | 53% | 48% | 22% | 22% | 13% | 24% | 15% | 13% | 18% | 17% | 30% |
| NO vehicles | 17% | 15% | 8% | 10% | 3% | 5% | 4% | 4% | 3% | 2% | 8% |
| **Employment Type** | | | | | | | | | | | |
| % Blue Collar | 23% | 23% | 6% | 10% | 14% | 13% | 8% | 10% | 16% | 15% | 15% |
| % White Collar | 45% | 50% | 76% | 75% | 76% | 74% | 84% | 80% | 71% | 74% | 69% |
| % Service and Farm | 32% | 27% | 18% | 15% | 10% | 13% | 8% | 10% | 13% | 11% | 16% |
| **Housing** | | | | | | | | | | | |
| Total Units | 2,067 | 6,939 | 1,107 | 3,455 | 3,034 | 3,034 | 777 | 2,446 | 1,000 | 3,345 | 25,963 |
| 1 Unit Detached | 4% | 21% | 43% | 48% | 86% | 65% | 72% | 86% | 66% | 75% | 50% |
| 3-19 Unit Structures | 46% | 42% | 28% | 26% | 11% | 8% | 6% | 2% | 21% | 14% | 20% |
| 50-plus unit Structures | 5% | 6% | 9% | 11% | 0% | 16% | 12% | 6% | 2% | 2% | 14% |
| Owner Occupied | 24% | 30% | 54% | 54% | 81% | 64% | 80% | 88% | 71% | 78% | 55% |
| Renter Occupied | 76% | 70% | 46% | 46% | 19% | 36% | 20% | 12% | 29% | 22% | 45% |
| *2009 Median Value of Owner Occupied* | *$ 251,103* | *$ 262,142* | *$ 295,098* | *$ 327,950* | *$ 306,111* | *$ 321,821* | *$ 338,859* | *$ 355,769* | *$ 314,982* | *$ 315,697* | *$ 328,128* |

The following bullet points summarize selected comparisons between the planning areas.

- The largest concentrations of population within ½ and 1 mile of each area's central location are in the Downtown area followed by Framingham Center. The Golden Triangle has the fewest number of persons within the ½ mile radius followed by Nobscot which also has the fewest number of persons within a 1 mile radius.

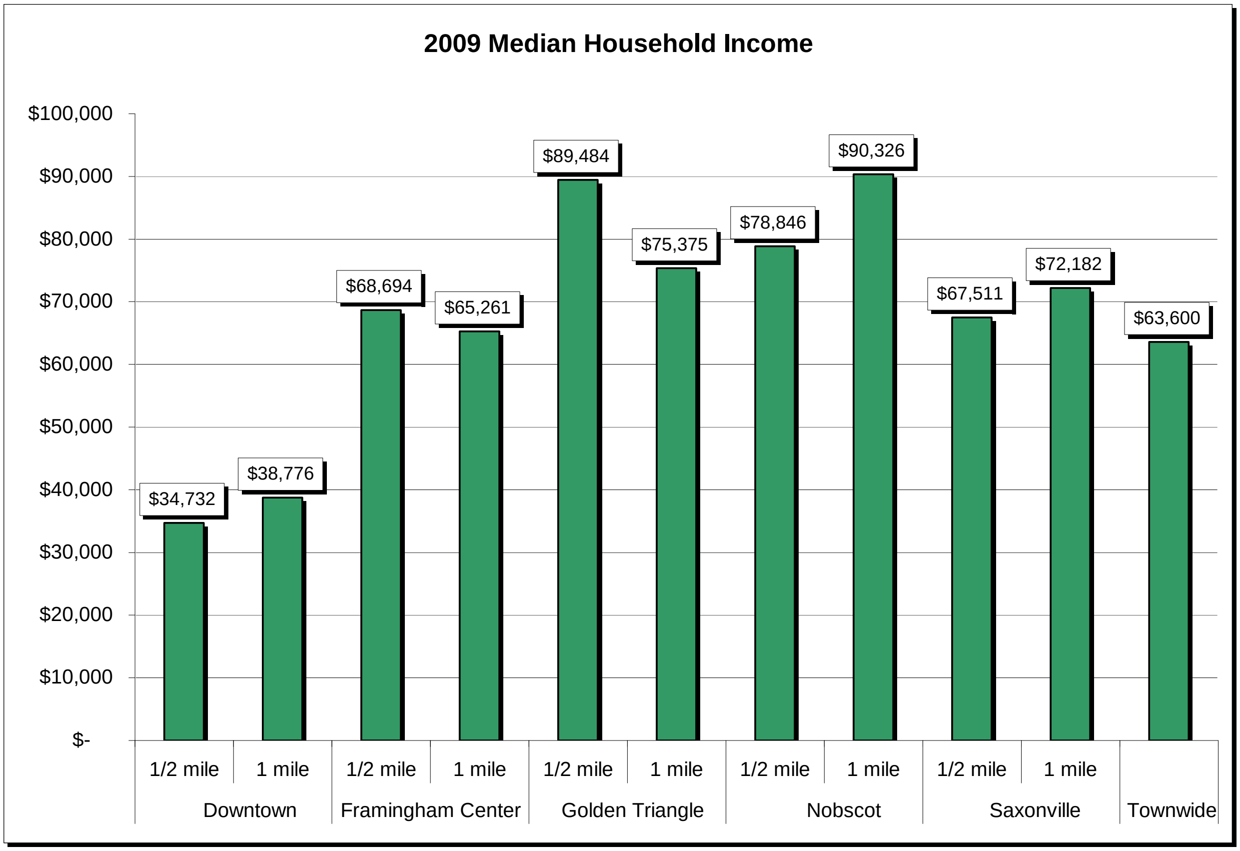
- With the exception of the area within 1 mile of the Downtown, all other areas are projected to experience a slight loss of population by 2014. A comparison between estimated population in 2009 and projected population in 2014 (Source: *Claritas Site Reports*) is graphed in Figure A. All areas are projected to experience a slight decline in number of households by 2014 with the exception of the ½ mile area of Saxonville center.

**Figure A**




- There are sharp differences in per capita and median household incomes within certain planning areas. The median household income within the ½ mile Downtown area is estimated at about $35,000, less than half the median household income of $79,000 estimated for the ½ mile Nobscot planning area. Median household income Town wide is estimated at $64,000 in 2009. Median household income within each of the planning areas is graphed in Figure B.

**Figure B**




- Nearly 30% of Framingham residents speak a language other than English at home (primarily Spanish and Portuguese), according to the 2000 US Census data as updated by Claritas. About 50% of Downtown area residents speak a language other than English at home compared to 15% in the Nobscot planning area.

- About 8% of Framingham's households overall do not own at least one vehicle compared to 17% of Downtown area households. Only 3% of Saxonville planning area households have no vehicles available.

- Fifty percent (50%) of Framingham's overall dwelling units are in single family detached structures, with 20% in 3-19 unit structures and 14% in structures with 50 or more units. By contrast, only 21% of dwellings within 1-mile of Downtown are single family homes while 86% of housing stock within the 1-mile radius Nobscot planning area is single family detached structures. Figure C graphs housing types by planning area.

- Fifty-five percent (55%) of Framingham's overall dwelling units are owner occupied and 45% renter occupied. Approximately 24% of dwelling units within the ½ mile Downtown area are owner occupied compared to 80% owner occupied housing within the ½ mile Nobscot planning area. Owner occupancy by planning area is graphed in Figure D.

**Figure C**

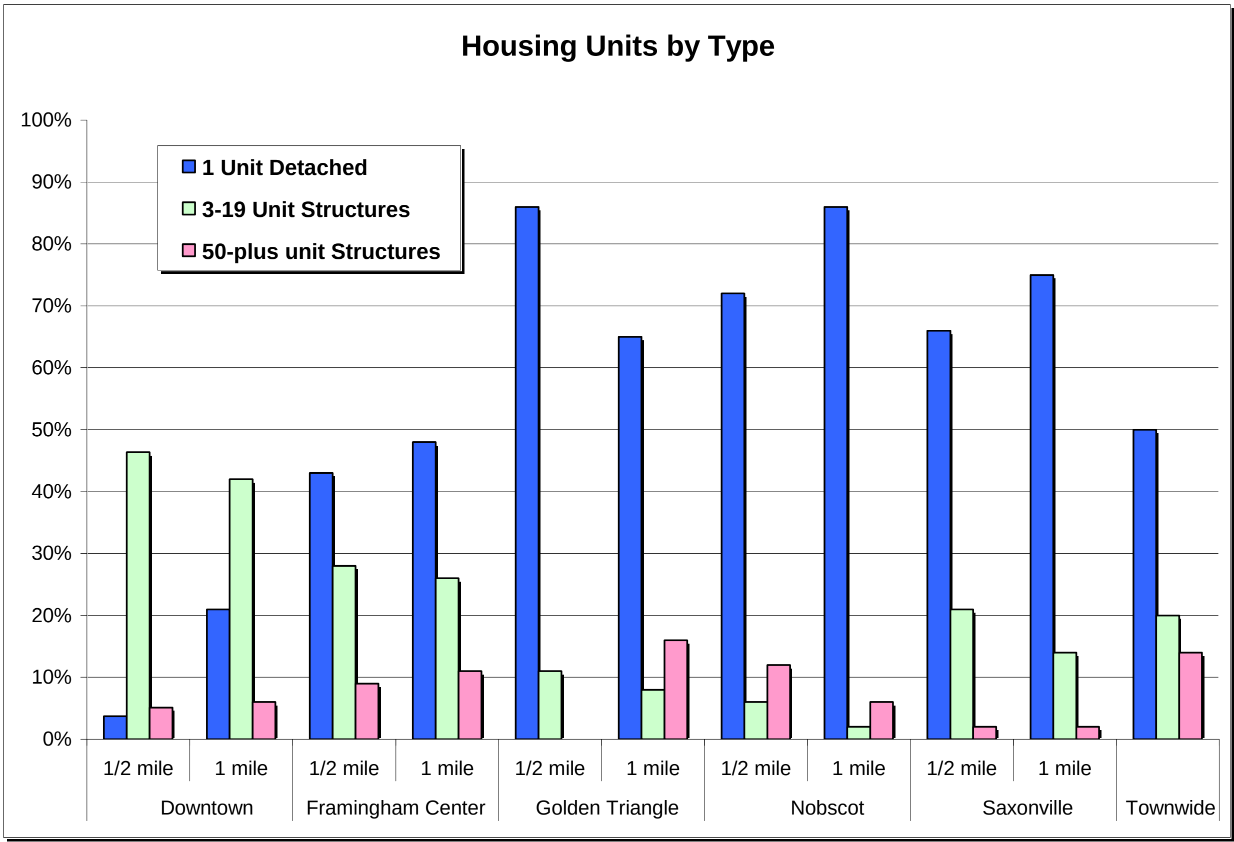
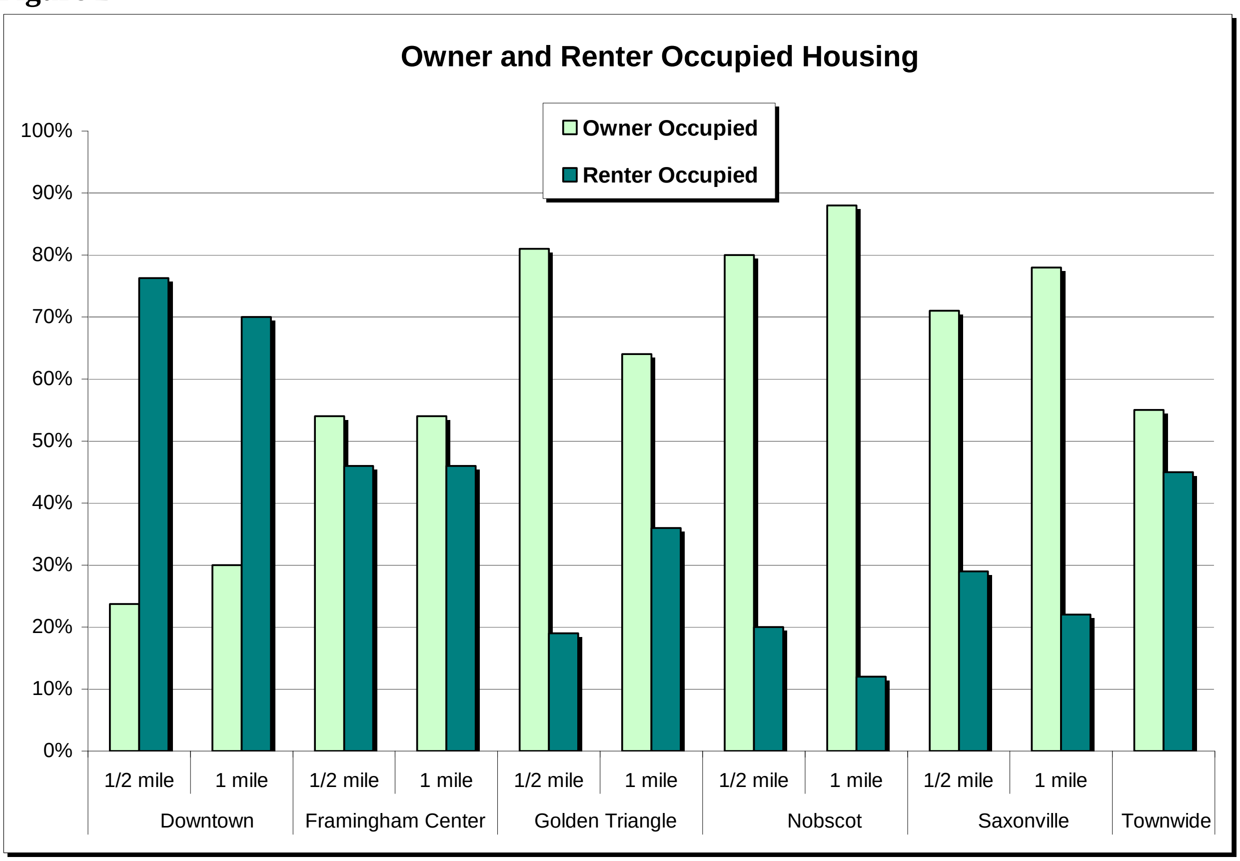



**Figure D**



## Economic Characteristics

Table 2 shows selected business and employment characteristics within each of the targeted planning areas as well as for the Town of Framingham overall.

### Table 2

| BUSINESS AND ECONOMIC CHARACTERISTICS | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Subarea | Downtown | | Framingham Center | | Golden Triangle | | Nobscot | | Saxonville | | Framingham Overall |
| Radii | 1/2 mile | 1 mile | 1/2 mile | 1 mile | 1/2 mile | 1 mile | 1/2 mile | 1 mile | 1/2 mile | 1 mile | |
| **Businesses** | | | | | | | | | | | |
| Total Establishments | 716 | 1,152 | 305 | 647 | 295 | 1,086 | 84 | 189 | 148 | 220 | 3,235 |
| Total Employees | 10,490 | 15,371 | 3,652 | 7,260 | 6,688 | 25,621 | 566 | 4,008 | 1,206 | 2,303 | 54,879 |
| Average Employees per Establishment | 15 | 13 | 12 | 11 | 23 | 24 | 7 | 21 | 8 | 10 | 17 |
| Total Business Sales (millions) | $ 890 | $ 1,368 | $ 380 | $ 831 | $ 810 | $ 3,592 | $ 58 | $ 523 | $ 134 | $ 291 | $ 6,931 |
| Average Sales per Establishment (millions) | $ 1.24 | $ 1.19 | $ 1.25 | $ 1.28 | $ 2.75 | $ 3.31 | $ 0.69 | $ 2.77 | $ 0.91 | $ 1.32 | $ 2.14 |
| Ratio of Establishments to Dwelling Units | 0.3 | 0.2 | 0.3 | 0.2 | 0.1 | 0.4 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| | | | | | | | | | | | |
| **Employment by Major Sector** | | | | | | | | | | | |
| Manufacturing | 151 | 864 | 54 | 105 | 17 | 852 | 6 | 21 | 71 | 253 | 2,157 |
| TransCommUtilities | 270 | 530 | 18 | 99 | 137 | 379 | 5 | 32 | 25 | 157 | 1,395 |
| Wholesale Trade | 795 | 1,524 | 39 | 154 | 286 | 580 | 15 | 22 | 28 | 282 | 2,236 |
| Retail Trade | 1,378 | 1,880 | 464 | 1,524 | 3,636 | 13,617 | 137 | 2,821 | 255 | 276 | 18,602 |
| Finance/Insurance/Real Estate | 325 | 469 | 284 | 461 | 307 | 4,860 | 55 | 70 | 60 | 78 | 6,175 |
| Services | 6,262 | 7,713 | 2,572 | 4,124 | 1,412 | 4,522 | 302 | 796 | 726 | 1,131 | 19,695 |
| Public Administration | 818 | 1,468 | 155 | 639 | 0 | 6 | 0 | 2 | 0 | 0 | 2,203 |
| Ratio of Jobs to Population | 1.8 | 0.8 | 1.1 | 0.8 | 9.3 | 3.5 | 0.3 | 0.6 | 0.5 | 0.3 | 0.9 |
| | | | | | | | | | | | |
| **Retail Gap (in $000s)** | | | | | | | | | | | |
| Convenience Food Stores | $ (1,445) | $ (2,684) | $ (252) | $ (54) | $ (346) | $ (1,830) | $ (101) | $ 297 | $ (318) | $ (1,622) | $ (6,266) |
| Specialty Food Stores | $ 283 | $ 837 | $ 202 | $ 464 | $ 48 | $ (2,388) | $ 126 | $ 414 | $ 152 | $ 527 | $ 3,177 |
| Book Stores & News Dealers | $ 238 | $ 728 | $ 557 | $ 956 | $ 86 | $ (3,862) | $ 246 | $ 800 | $ 251 | $ 889 | $ 950 |
| Full Service Restaurants | $ (204) | $ 436 | $ (527) | $ (1,864) | $ (2,316) | $ (87,163) | $ 974 | $ 2,740 | $ 1,233 | $ 3,560 | $ (44,536) |
| Limited-service Eating Places | $ 2,220 | $ 4,173 | $ (1,903) | $ (8,256) | $ (565) | $ (17,633) | $ 1,240 | $ 4,415 | $ 1,457 | $ 5,824 | $ 5,980 |
| Special Foodservices | $ (1,105) | $ (714) | $ 412 | $ (67) | $ 127 | $ (10,833) | $ (38) | $ 103 | $ 388 | $ 1,234 | $ 803 |

The following bullet points summarize selected economic comparisons between the planning areas, as shown by the data in Table 2 above.

- More than 75% of all jobs within Framingham are located within the ½ mile radius for Downtown and the 1 mile radius for the Golden Triangle. Jobs within the ½ and 1 mile radii of each planning area's central location are graphed in Figure E.

- The employment concentrations in the Downtown and Golden Triangle areas hold across all major industry sectors, including manufacturing, retail and wholesale trade, finance and services, as shown by the data in Table 2.

- Most of the 3,200 business establishments in Framingham are relatively small. Notwithstanding several major employers, establishments Town wide average 17 employees and $2.1 million in annual sales. Average employees per establishment (24) and sales per establishment ($3.3 million) are highest in the 1 mile Golden Triangle area, and lowest within the ½ mile Nobscot planning area (7 employees per establishment and $690,000 in average annual business sales).

- One measure of the relative concentration of business activity in each planning area is the ratio between employees and population. That ratio is highest in the Golden Triangle area and lowest in the Nobscot planning area, as graphed in Figure F.

**Figure E**

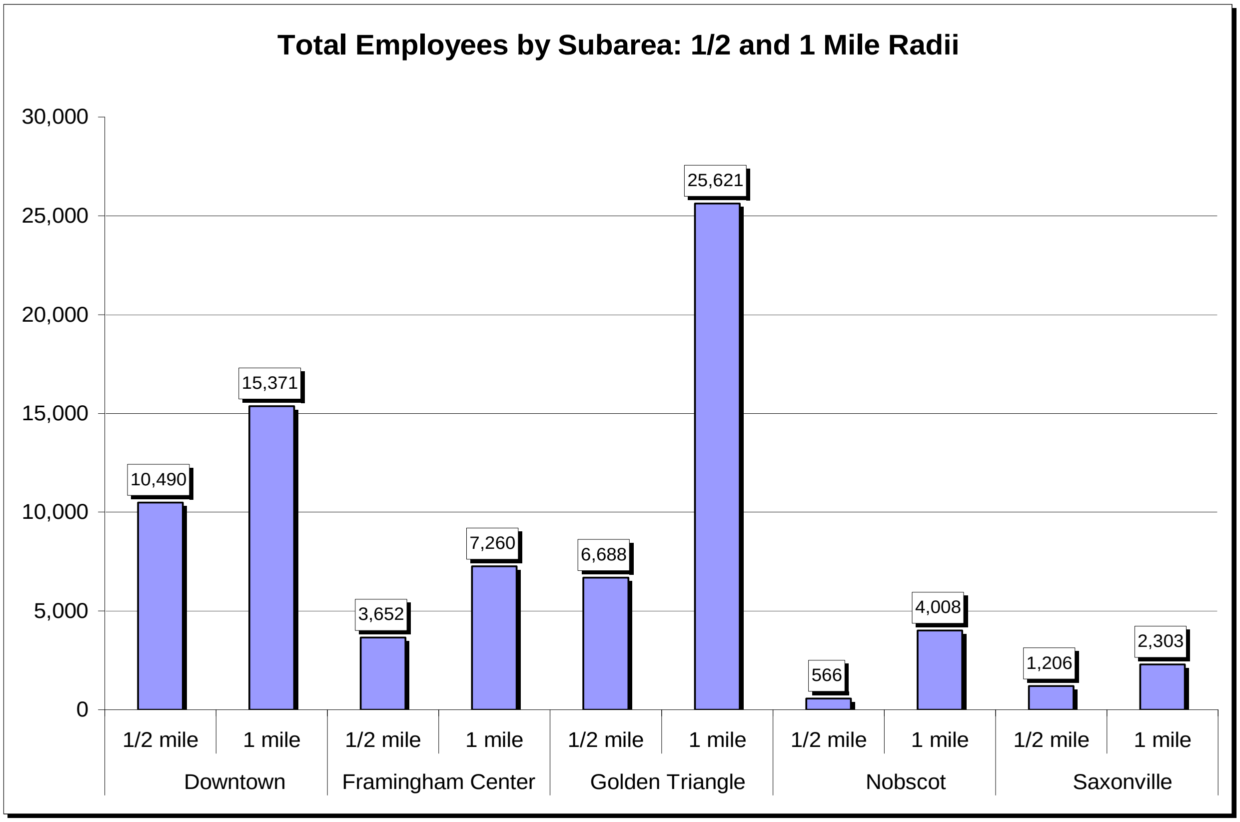
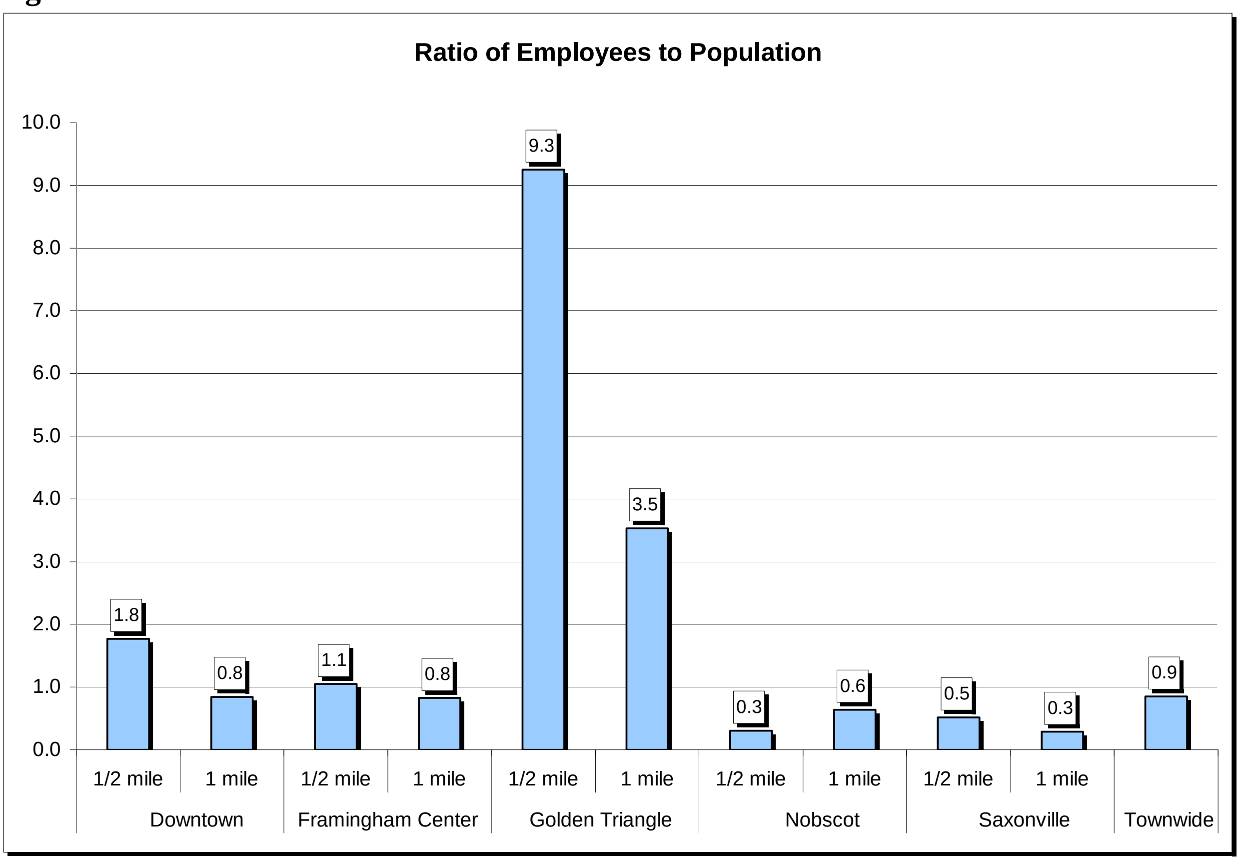



**Figure F**



**Market Driven Retail Development Opportunities**

Broader opportunities for economic development are best examined in the context of specific sites, individual business prospects, and regional employment trends. One measure of business development potential at the local neighborhood level is the difference between resident expenditures for retail goods and services and actual store sales within a defined geographic area. This is often referred to as the "retail gap," and it implies that consumers will tend to purchase retail goods or go to restaurants close to home if the desired goods and services are locally available. Data in Table 2 show, for the respective ½ and 1 mile radii, apparent opportunities for new or expanded restaurant and selected retail store sales within each geographic area. The Consumer Expenditure Survey is the primary data source for resident expenditures while the Economic Census is the primary sources of sales data used by *Claritas Site Reports* in estimating the current retail gap. Numbers in parentheses (#) indicate that store sales in the area are now exceeding the purchasing power of residents within that same area.

As data in Table 2 indicate, there are limited retail market opportunities in each of the planning areas except for the Golden Triangle, where the numbers in parentheses (#) show significant influx of customers and sales above the purchasing power of households living within the ½ and 1 mile radii. The following bullet points note selected restaurant/retail store types that might be expanded or newly developed based on the current gap between resident expenditures and actual stores sales within the local areas:

- **Downtown –** specialty food stores, book stores and news dealers, limited-service eating places
- **Framingham Center –** specialty food stores, book stores and news dealers
- **Nobscot –** specialty food stores, book stores and news dealers, full service restaurants, limited-service eating places
- **Saxonville –** specialty food stores, book stores and news dealers, full service restaurants, limited-service eating places

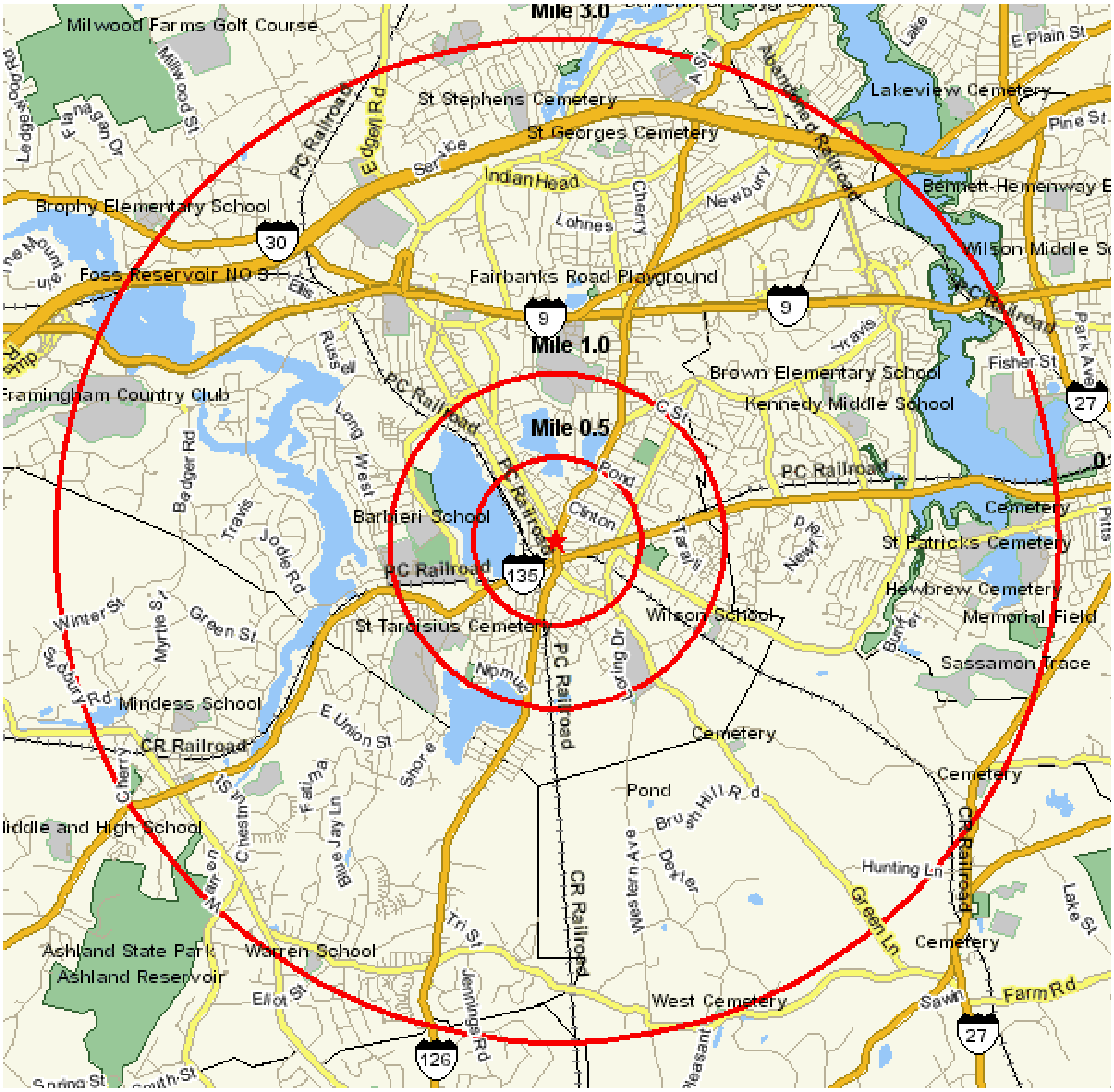
Care must be taken in interpreting the apparent development opportunities indicated by a "retail gap" analysis. Some establishments can succeed in areas with no retail gap if those areas are destinations for residents living outside the local area, as is clearly the case in the Golden Triangle and Downtown. Conversely, the retail gap may indicate an opportunity for additional sales and employment in a specific neighborhood but cannot be realized because of transportation, parking, or other physical constraints; or because significant competition exists just outside the defined geographic area. Such issues are not addressed in this memorandum.

# Appendix

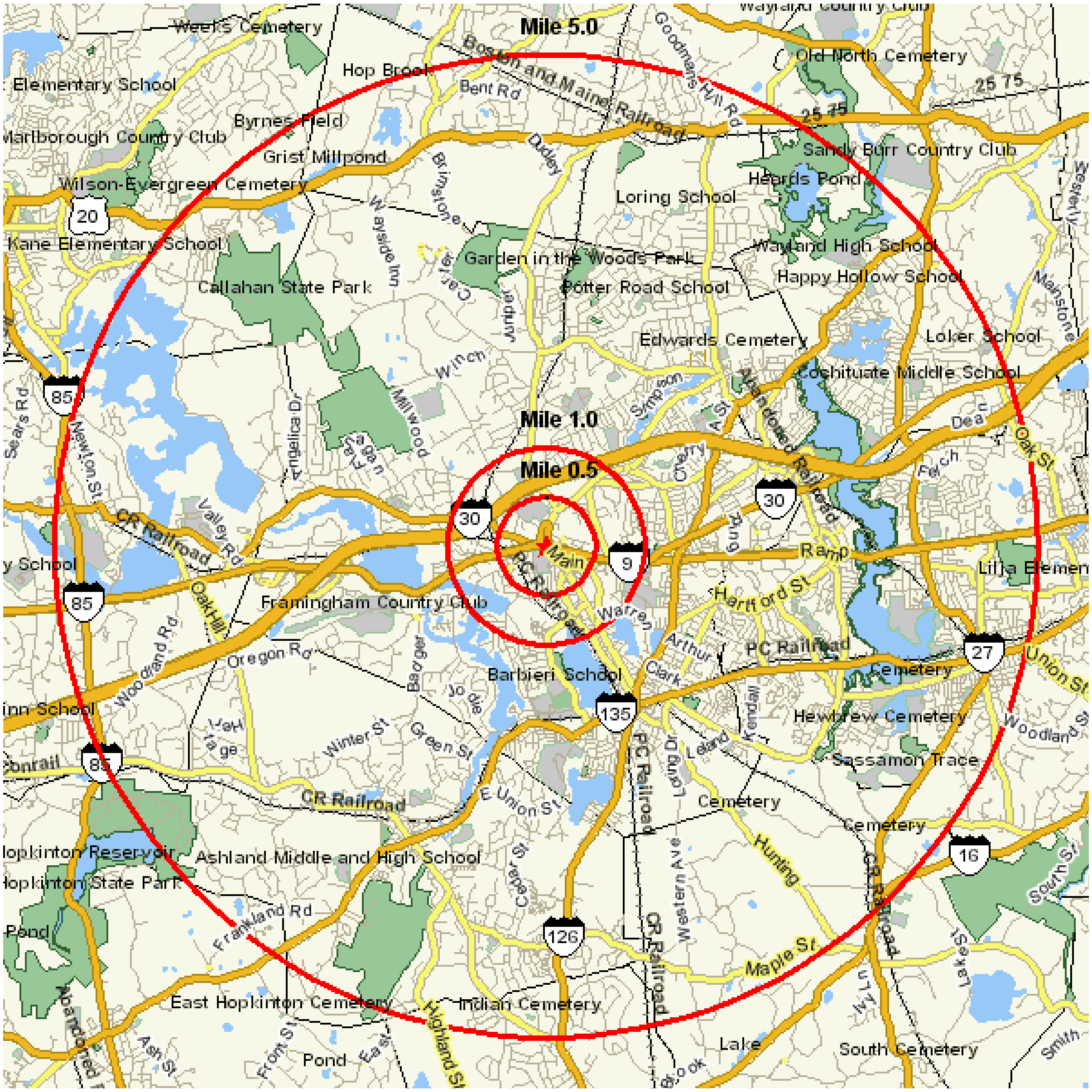
*Planning Areas Radii Maps*

(1/2 mile and 1 mile radii used for analysis)

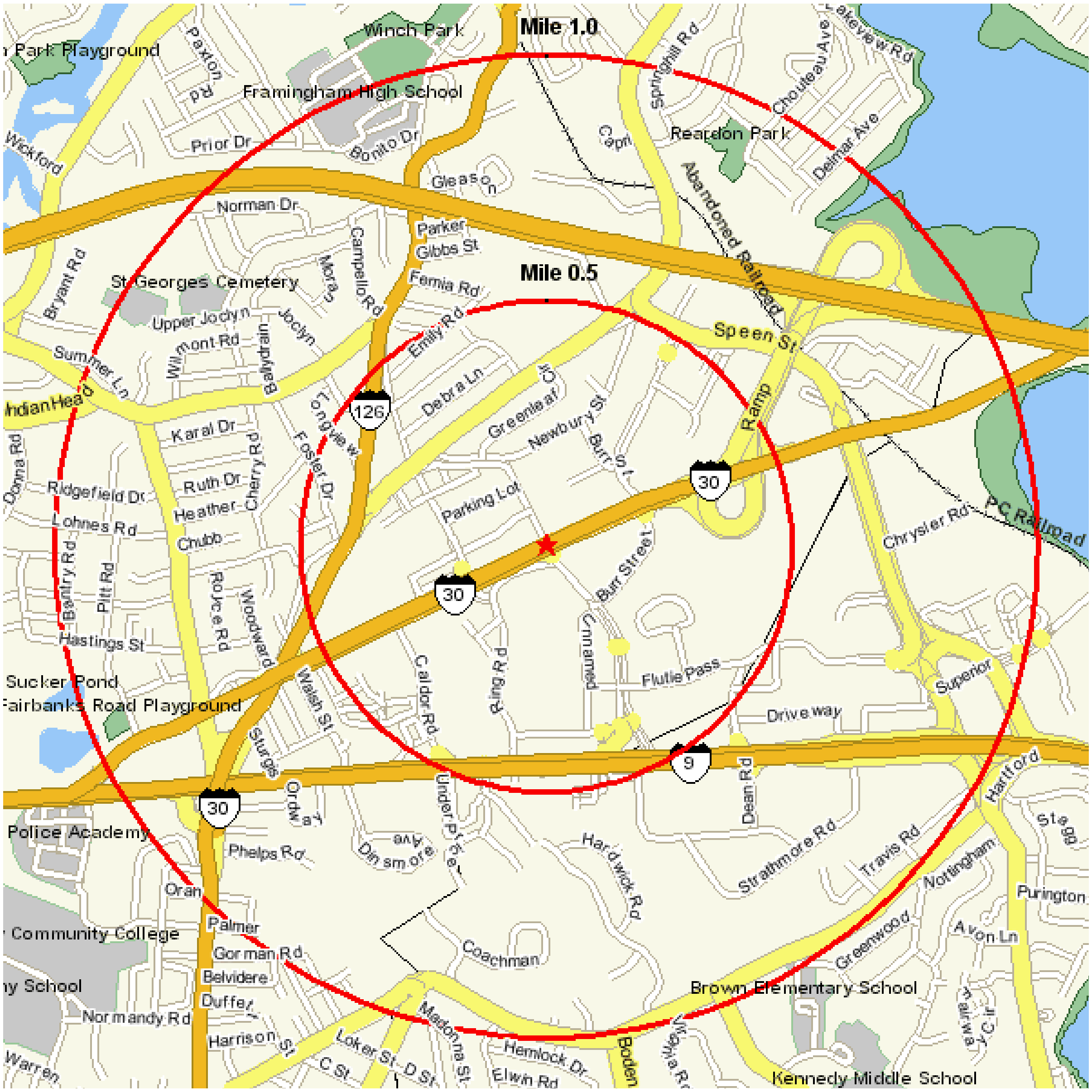
## Downtown



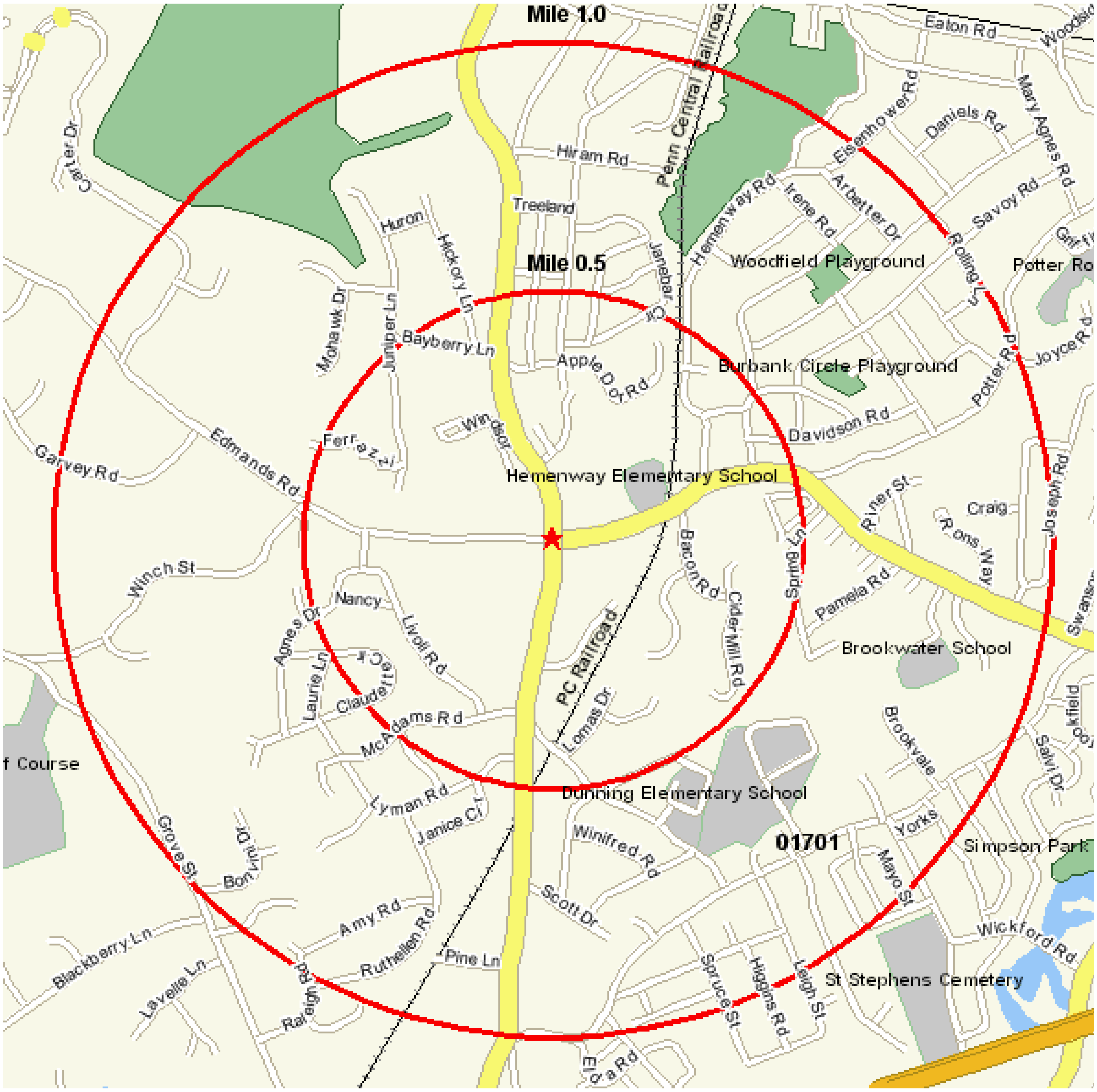
# Framingham Center



# Golden Triangle

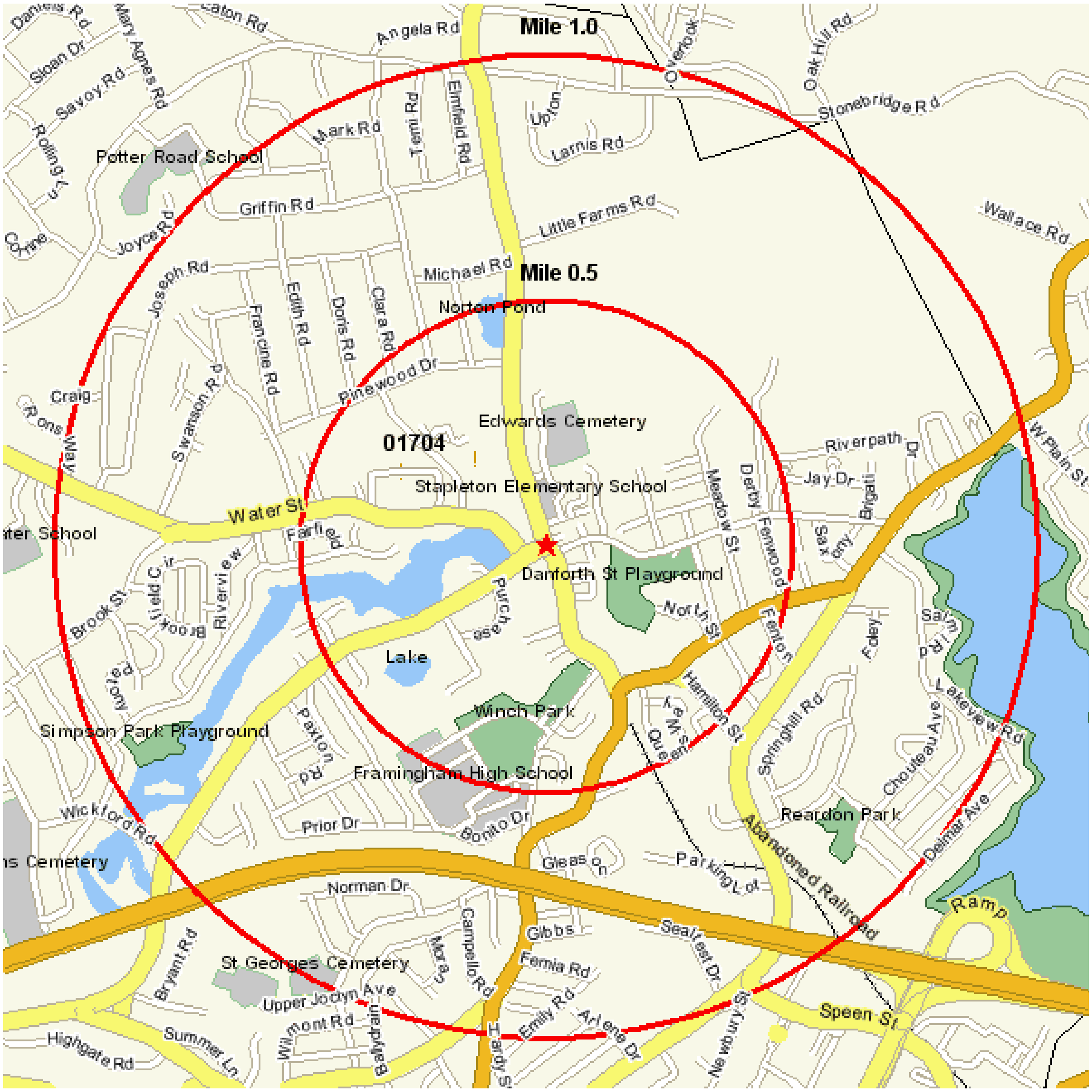


## Nobscot



Mile 1.0
Mile 0.5
Eaton Rd
Hiram Rd
Treeland
Huron
Hickory Ln
Penn Central Railroad
Eisenhower Rd
Daniels Rd
Mary Agnes Rd
Savoy Rd
Arbetter Dr
Irene Rd
Hemenway Rd
Woodfield Playground
Rolling Ln
Potter Rd
Janebar Cir
Mohawk Dr
Juniper Ln
Bayberry Ln
Apple D'or Rd
Burbank Circle Playground
Joyce Rd
Davidson Rd
Windsor
Ferrazzi
Edmands Rd
Garvey Rd
Hemenway Elementary School
Riner St
Craig
Joseph Rd
Winch St
Bacon Rd
Spring Ln
Nancy
Agnes Dr
Livoli Rd
Cider Mill Rd
Pamela Rd
PC Railroad
Brookwater School
Laurie Ln
Claudette Cir
McAdams Rd
Lomas Dr
Brookvale
Salvi Dr
Lyman Rd
Janice Cir
Dunning Elementary School
Winifred Rd
01701
Yorks
Simpson Park
Grove St
Mayo St
Scott Dr
Amy Rd
Ruthellen Rd
Wickford Rd
Blackberry Ln
Pine Ln
Spruce St
Higgins Rd
Leigh St
St Stephens Cemetery
Lavelle Ln
Raleigh Rd
Elda Rd
Carter Dr
Carter Dr
Carter Dr
Carter Dr

# Saxonville



Mile 1.0
Mile 0.5
01704
Potter Road School
Edwards Cemetery
Stapleton Elementary School
Norton Pond
Danforth St Playground
Lake
Winch Park
Framingham High School
Simpson Park Playground
St Georges Cemetery
Reardon Park
Water St
Abandoned Railroad
Speen St
Parking Lot