

NEIGHBORHOOD ECONOMIC RESILIENCE ASSESSMENT
**AMESBURY DOWNTOWN &
LOWER MILLYARD DISTRICT**



AMESBURY
MASSACHUSETTS



RESILIENT CITIES CATALYST

APRIL, 2022

About I AMesbury 2030

I AMesbury 2030 was created by Mayor Gove to develop a vision for the city's future. From 2021 to 2022, the City and the I AMesbury 2030 task force are gathering community feedback, looking at Amesbury's strengths and weaknesses to collectively determine where the city wants to be in the next 10 years.

About Resilient Cities Catalyst

RCC helps cities and their communities build the capacities and partnerships needed to understand, prioritize, and concretely address their risks and chronic stresses as they pursue their strategic goals or recover from crisis.

RCC partners with city governments, businesses, neighborhoods, organizations and community stakeholders around the globe to:

1. Develop an enabling environment to build strong partnerships between cities and their communities allowing them to drive policy, planning, design, finance, and institutional resources for resilience-building efforts.
2. Ensure that ideas are turned into meaningful action by addressing gaps between project plans, project implementation and desired impacts.
3. Share and replicate learnings through a growing community of practice

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RCC appreciates the data support provided by [Replica](#) and [Emsi](#) on detailed local trip data and regional occupational demand data respectively.

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1 Executive Summary

Resilient Cities Catalyst (RCC) was commissioned by the City of Amesbury to undertake an assessment of the resilience of Amesbury's economy, with a focus on the city's downtown commercial, retail, and institutional district and Lower Millyard light industry area. Such an assessment has been timely, in two ways. First, it has provided an opportunity to learn about the local economy's strengths and vulnerabilities in the face of a major local, national, and international economic shock; specifically, that caused by the COVID-19 pandemic crisis. Second, it builds upon an earlier exploration of Lower Millyard economic development opportunities organized by the City in partnership with the Urban Land Institute, and contributes findings that will be considered as the City prepares its I AMesbury 2030 Master Plan.

In addition to the City's contribution to the assessment, support has been provided by the U.S. Economic Development Administration and the Merrimack Valley Planning Commission. Special access to detailed local trip data and to regional occupational demand data were also provided by Replica and by EMSI, respectively.

Assessment Focus: What is a Resilient Economy?

Resilience is the capacity of households, communities, businesses and institutions to survive, adapt, and thrive in the face of acute shocks (e.g., pandemics, financial crises, super storms) and underlying chronic stresses (e.g., chronic poverty and household debt, increasing inequality, underfunded institutions, poorly maintained infrastructures). The word 'thrive' is an essential part of the resilience equation.

A resilient country, city, or community has the institutional capacity to 'bounce forward' in the face of shock events, and not just bounce back to a still-vulnerable pre-crisis state. It has the wherewithal to adapt and recover from shock events in ways that advance its fulfillment of development and societal ambitions.

An economy has resilience, and it builds resilience in society, when it is developed and managed in ways that contribute substantially to the reduction of chronic stresses in the economy as a whole and in its households, communities, and businesses. The key words here are preparedness and contribution: prepared to continue economic function during a crisis and contributing to that 'bouncing forward' as communities adapt and recover.

There is a third factor: economic resilience is not ephemeral; it is built in places. Unlike financial markets, which exist largely virtually, a nation's economic life takes place in neighborhoods and in specialized business districts, in ports, farm regions, and industrial campuses. To build resilience, the work of preparedness and economic stress reduction needs to focus on the evident and distinct vulnerabilities, opportunities, and ambitions within these foundational units of the nation's economic life. RCC's Neighborhood Economic Resilience Assessments are designed to support local stakeholders as they advance that essential place-based work.

Reflecting the deep connections and interdependencies in places between their systems and their social, political, and economic conditions, RCC's Neighborhood Economic Resilience Assessments focus on identifying vulnerabilities and opportunities broadly, across a range of local conditions.

The following assessment considers conditions in six key local economic realms:

- Household economy, including income, housing, and health insurance
- Employment and occupational pathways
- Local business resilience in the face of COVID-19
- Destination competition with other regional employment and retail centers
- Regional supply of and demand for consumer goods, and related local retail resilience
- Business location conditions for small producers, makers, and artisans

The assessment's broad focus on the household, commercial, industrial, and institutional dimensions of local economy, and across the value chain of manufacturing, wholesale, and retail, enables identification of vulnerabilities in one realm that can undermine the others and, conversely, of opportunities in one realm that can also advance the others. Such an approach is consistent with a broad, emerging consensus across the fields of place-based disaster mitigation and emergency preparedness, urban planning and design, local economic development, urban sustainability, and social development. These fields have steadily emphasized the importance of integrated planning, of multi-purpose and mixed-used asset development and use, of economic diversification and cross value chain development, and of redundancy in urban services and economic supports.



Resilience is the capacity of households, communities, businesses and institutions to survive, adapt, and thrive in the face of acute shocks

Summary of Key Findings and Proposed Strategic Workstreams

Within this framework, the following figure provides a summary of findings in each of the aforementioned six areas of assessment, with a view towards leveraging strengths and pursuing opportunities in a way that also addresses identified weaknesses and vulnerabilities.

A primary conclusion of the assessment is that Amesbury's economic growth and resilience can best be pursued by focusing economic, housing, and community development efforts on the downtown and Lower Millyard area as a single, connected, and coordinated District in which producer, retail, and service businesses together with the City and key non-profit stakeholders:

- Increase sales and capture margins in identified goods areas across a coordinated District value chain of production, wholesale/direct sales, and retailing. Among other recommended measures, this can be achieved by i) increasing resident producer businesses in the targeted goods opportunity areas (including through District property and asset development improvements) and ii) through implementation of a 'buy-local' (and buy-regional) purchasing, product marketing, and customer loyalty strategy.
- Increase both residential and visitor (i.e., consumer) numbers and demand through further development of i) residential units in the District that reflect and address the city's demographic changes and ii) District programming, events marketing, and overall place-based identity promotion.

Pursue the development of strengths and opportunities...

STRENGTHS

- Stable residential community - both owners and renters.
- Competitive residential rents in regional context.
- Property tax bill on single family residences below regional average (2017).
- Strong match between regional educational resources and employment opportunity.
- Demonstration of employment market resilience ("bounce back") in COVID period.
- Adaptability of downtown food services businesses in face of COVID restrictions.
- Substantial schedule of business-generating District programs and events.
- Development and programming/activation potential of City and non-profit assets in the District (e.g., Upper Millyard and amphitheater, parking garage & lots, Carriage Museum, sidewalks, river walk, etc.).

OPPORTUNITIES

- Latent, underserved demand at local, regional, and county levels for a range of products that could be locally produced. These include: art, furniture & home furnishings, floor coverings, men's & women's clothing, clothing accessories, jewelry, luggage & leather goods, shoes, cosmetics & beauty products.
- Support further development of outdoor eating facilities and arrangements by food service businesses.
- Synergies between the above product demands (e.g., furnishings, art, floor coverings) for promotion of destination shopping/eating visits.
- Expressed interest of Lower Millyard producer/makers in doing direct sales (incl. retail).
- Multiple factors of attractiveness of Lower Millyard buildings as a business location, including strategic alignment with building owners.
- Organic sense of business community in Lower Millyard, including high level of input sourcing from local businesses.
- Further development of collective online sales platform for local businesses.
- Further developing and marketing of annual and seasonal calendar of markets, topical tourism, shopping and other business-generating programs and events.
- Potential sites in District for increased residential units and street-level retail units.

In ways that address weaknesses and vulnerabilities...

WEAKNESSES

- Relatively high housing cost burden.
- 25% of residents not earning living wage, disproportionately stressing seniors & renters.
- Need for more restaurants & food services providers, including food trucks, that operate Downtown during evening hours and in the Lower Millyard during lunch hours.
- Pattern of inconsistent Downtown retail business hours.
- Standing competition with Seabrook retailers due to sales tax differential.
- Increased & sustained competition from online and large format brick & mortar retailers in specific product areas.
- Undersupply of street level retail units.
- Deteriorated or underutilized/under programmed District assets in strategically valuable locations.

VULNERABILITIES

- Aging population.
- Shifts in housing typology demand relative to existing stock, e.g., declining household size relative to average size of stock.
- (Potential loss of affordable housing units.)
- 25% of residents not earning living wage, disproportionately stressing seniors & renters.
- (Potential high level of accumulated rent arrears in lower income households.)
- (Potential of labor supply shortage in lower pay occupations.)
- (Potential continuation of delayed return to pre-COVID downtown shopping trip levels, including by local residents.)
- Uncertain economic support mechanisms for future economic shocks, i.e., dependency upon federal and state economic adjustment supports.
- Likely increase in flood risk associated with increasing weather extremes.

Via the following recommended strategic workstreams...

The make-live-shop-play district

- Assets & facilities development and resilience building.
- Housing development for target demographic groups.

The enterprising district

- Local markets and direct sales channels development.
- Business financial resilience mechanism.
- Social enterprise partnerships development.

The destination district

- Place branding, programming & marketing.

Households

Labor Market

Local Business

Assets: public & non-profit

Related to the above findings and conclusions, the report recommends the development of three distinct but connected economic and community development workstreams for the District. These are the following:

Strategic Workstream 1: Developing the Make-Live-Shop-Play District

The chief objective for this workstream is to increase the capacity and function of the District as a combined enterprise and residential location that attracts a growing resident population of entrepreneurial producer-makers and artisans, as well as resident key workers and downsizing senior households. The primary work of this workstream is to accelerate physical improvements, developments and/or the rehabilitation of land, buildings, and other physical assets in the District for combined residential, maker/producer, retail, and visitor experience purposes. The City of Amesbury would likely take the lead in this workstream area, in partnership with building and landowners, through the I AMesbury 2030 planning process.

Strategic Workstream 2: Developing the Enterprising District

The chief objective for this workstream is to further develop enterprise clusters of artisan/maker/producers in the District that are associated with identified areas of goods demand that are not being fulfilled by local, regional, and county businesses. The primary work of this workstream is twofold. One aspect focuses on attracting enterprises related to the identified opportunity areas for goods production and wholesale/retailing clusters. The other focuses on further developing direct sales channels, platforms, markets/market events, and consumer loyalty schemes for local producer enterprises and retailers. The lead for this workstream area would likely be an alliance of district business associations, commercial building owners, and resident businesses, working in unison with the City of Amesbury.

Strategic Workstream 3: Developing the Destination District

The chief objective for this workstream is to further develop brand definition and regional and New England-wide brand awareness of the District, supporting the design and delivery of differentiated, brand-aligned District experiences for local residents, regional shoppers, and topically targeted visitor groups. The primary work of this workstream is to establish the programming and promotional efforts, and related partnerships, required to deliver a set of unique District brand experiences for this range of groups. The lead for this workstream area would likely be an alliance of district business associations, local marketing professionals, district businesses, and non-profit organizations that share a common interest in community identity and in increasing visitor/shopper numbers.

2 Household Economy Resilience

From whatever vantage point one takes, the household economic conditions in a community are a foundational consideration of local economic resilience—whether that of a local government seeking to preserve its tax base to fund local services and quality of life, a company or non-profit seeking a new business location, a developer or other investor, a professional establishing a local practice, or a new graduate beginning a career. This assessment considers five aspects of local household economy:

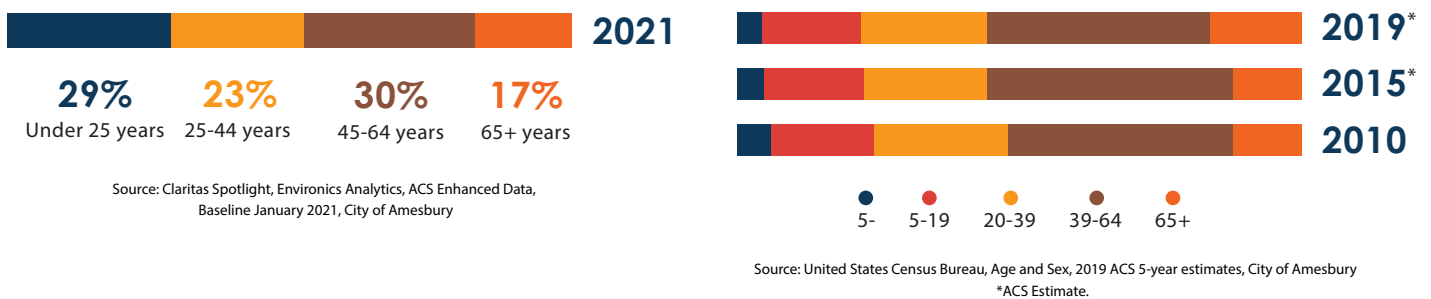
- Demographic conditions and trends
- Household incomes
- Housing conditions and trends
- Occupational profile and trends
- Healthcare and insurance

2.1 The People of Amesbury

Since 2010 Amesbury's population has been growing quite slowly, a trend currently projected to continue for the decade ahead. Between 2020 and 2030 the city's population is projected to increase by only 3%. This rate of growth is equivalent to projections for all of Essex County.

Currently, nearly 30% of Amesbury's population is under 25 years old, second only to the population group between 45 and 64 years of age. However, the average age of the city's population has been steadily increasing.

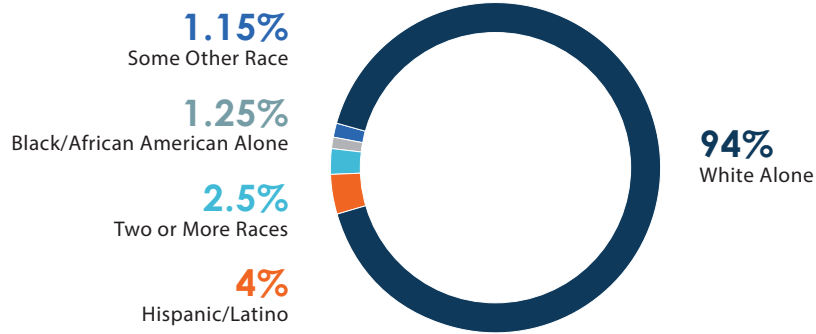
FIGURE 1. AMESBURY AGE DISTRIBUTION ESTIMATES



Since 2010, Amesbury's median resident age has increased from 39.9 years to 43.9 years of age. In 2010, the percentage of youth residents (ages 0-19) was double that of residents over 65 years old. As indicated in Table 1, projections show a reversal of this ratio by 2030, when the number of seniors is expected to be nearly double that of youth. A smaller, slower decline in working age residents is also projected over the 2020-2030 period.

This aging trend has been accompanied by a steady decrease in household size, as indicated in Table 2.

FIGURE 2. AMESBURY POPULATION BY RACE AND ETHNICITY*



Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, City of Amesbury
 *Races and ethnicities shown above represent over 1% of the population

TABLE 1. AMESBURY PROJECTED POPULATION CHANGE

Age Group	Percentage Total Population, 2010	Population Projection 2020	Percentage Total Population, 2020	Population Projection 2030	Percentage Total Population, 2030	Amesbury Change 2020-2030	Essex County Change 2020-2030
0-19	13.0%	3,321	11%	2,810	9.3%	-3.5%	-1.5%
20-34	8.7%	2,729	8.9%	2,393	7.9%	-2.4%	-2.2%
35-64	25.0%	7,726	25.2%	7,508	24.9%	-2.7%	-1.6%
65+	6.6%	3,075	10.0%	4,679	15.5%	8.7%	5.3%
Amesbury Projected Population Change		16,851		17,390		103%	

Source: United States Census Bureau, Age and Sex, 2019 ACS 5-year estimates, City of Amesbury

TABLE 2. CHANGE IN AMESBURY HOUSEHOLD CHARACTERISTICS, 2000-2019

	2000	2010	2019 (ACS Estimate)
Population	16,540	16,283	17,434
Households	6,380	6,642	7,215
Households with individuals under 18 years	2,342	2,093	2,169
Single Person	1,713	1,991	2,126
Average Household Size	2.52	2.41	2.37
Average Family Size	3.09	3.02	2.98

Source: United States Census Bureau, Households and Families, 2019 ACS 5-year estimates, City of Amesbury

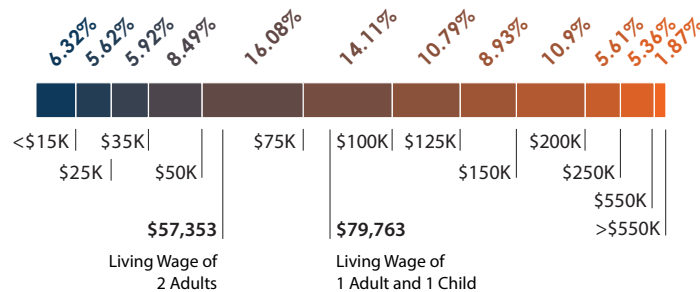
The combination of an aging population, an increase in single resident households, and a significant number of cost-burdened households (see Table 3 below) bears significant implications for shifts in local housing demand and, potentially, also for the status of the local resident workforce. Growth in the number of senior households that are downsizing to reduce retirement costs and inconveniences and in the number of single person households or households without children could drive a growing demand for smaller dwelling units. Such demand would be further driven by increasing need for housing affordability solutions, as also indicated in Table 3, below.

If planning and zoning, development rights and incentives, and access to land supply are aligned to facilitate appropriate housing development, the growth in such demand is of course an economic and livability opportunity. For instance, mixed use live-work-play development strategies involving smaller housing typologies have been widely advanced across North America, whether catering to the latent demand of resident clusters of artists, film, and start-up communities and/or to key worker occupations such as nurses and teachers. Such an approach could be incorporated into a Downtown and Lower Millyard District strategy to attract and retain a younger resident workforce related to the District's targeted manufacturing, artisan/maker, and retailer occupations.

2.2 Householder Income

Just over six percent of households in Amesbury live below the poverty line. However, many households in Amesbury do not make more than the regional living wage as estimated by the Massachusetts Institute of Technology (MIT). MIT calculates the living wage as the income needed to meet minimum standards of living given local costs; in this instance the estimated living wage for Essex County was used. Over a quarter of Amesbury residents in two-person (two adult) households do not make a living wage. Over 43% of residents in two-person households of one adult and one child do not make a living wage. Such a concentration of financially strained households in the group that represents the city's approaching average household size suggests a need for further consideration of a housing supply strategy for the associated demographic groups.

FIGURE 3. PERCENT OF HOUSEHOLDS WITHIN INDICATED INCOME BRACKETS



Sources: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, City of Amesbury; Glasimeier, 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



Roughly 20% of Amesbury households with children are led by single mothers - slightly below the national average of 23%

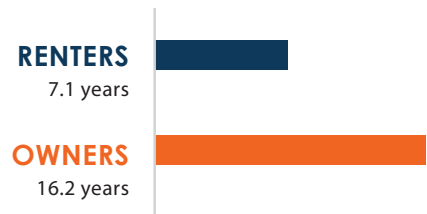
Struggles to make the living wage fall disproportionately on Amesbury's seniors and on the renting population. Senior householders (age 65+) have roughly half the median income of households with 25 to 44-year-old householders. Their estimated 2019 median income of the former was \$52,917, which is below the Essex County living wage of \$57,353 for a two-adult household. Renter households in Amesbury had an estimated median household income of \$43,601 in 2019— also below the Essex County living wage for a two-adult household or for a one-adult and one-child household. In contrast, owner-occupied households have a median household income of \$108,690.

2.3 Housing

AVERAGE RESIDENCE

Despite local housing cost issues, Amesbury has maintained impressively stable residencies for both homeowner and renter households. Roughly 69% of residents are homeowners and 31% are renters. The average residence of homeowners is 16.2 years, just over double the average length of residence for renters. Any strategy to build local household economic resilience should seek to maintain such stability, which encourages both household financial and civic investment in the community.

FIGURE 4. OWNER/RENTER TENURE



Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, City of Amesbury

COST-BURDENED HOUSEHOLDS

Nearly 35% of Amesbury's households are considered to be 'cost-burdened' as defined by the U.S. Department of Housing and Urban Development; that is, households that spend 30% or more of their gross income on housing costs. For owner-occupied households, this measure includes mortgage payments, utility bills, real estate taxes, and property insurance. For renter households, it includes rent, utilities, and renter's insurance.

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. As indicated by the 2018-2022 City of Amesbury Housing Production Plan,¹ about 70% of the city's 1,275 low-income renter households are cost-burdened and about 27% have extremely low income and are severely cost-burdened – in other words, spending more than 50% of their gross income on rent. This highlights the importance of maintaining, and adding to, the city's affordable housing stock. As indicated in the above referenced Plan, only 75% of the city's subsidized affordable housing inventory have permanent

¹ Merrimack Valley Planning Commission. City of Amesbury Housing Production Plan 2018-2022, https://www.amesburyma.gov/sites/g/files/vyhlf6891/f/uploads/amesbury_hpp_2018_-_final.pdf

TABLE 3. PERCENT OF INCOME SPENT ON HOUSING COSTS IN AMESBURY

% of Income Spent on Housing Costs	Percentage of Housing Units	Percent of Owner Occupied Housing Units	Percentage 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%

Source: United States Census Bureau, Selected Housing Characteristics, 2019 ACS 5-year estimates, City of Amesbury

affordability guarantees. Affordability guarantees of 9% of the city's affordable rental housing units have been slated to expire between 2020-2025.

Affordable housing supply issues aside, Amesbury has been an overall attractive renter household location relative to the Merrimack Valley regional rental housing market. On average, Amesbury renter household incomes are higher than those of renters in the region and in Essex County. Meanwhile, Amesbury's monthly gross rents have been on average lower than those in the region and County. These conditions—if they can be maintained—could further build the business case for additional renter housing stock in the city, in particular, if targeted to key demographic and occupational groups.

Commuting times and related costs are not typically included in calculations of housing affordability, but they are of course a factor in the choice of a residential location. The average commute time for Amesbury residents is 32.6 minutes, typically made in private owner-occupied vehicles, only adding to the necessary costs of residency in Amesbury. This is only slightly below the average commute time across Essex County, 34 minutes. However, available data indicates Essex County residents on average use private owner-occupied vehicles less frequently than Amesbury residents, which would suggest that Amesbury residents on average are bearing higher transportation costs. To further attract a younger workforce, the City therefore might further consider both how to increase District live-work housing options and how to increase transportation options using other than private vehicles.

OWNER OCCUPIED HOUSING TRENDS

Data from the 2018-2020 Amesbury Housing Production Plan indicate that (as of FY 2017), the city maintained single-family housing prices that are competitive within the Merrimack Valley region. The high relative residential property tax rate—which has been more than 30% above the regional average—could be noted as an element of competitive challenge. However, single-family housing prices have been 21% below the regional average. Therefore, the average single-family unit tax bill has been 7% below that of the regional average.

More homeowners moved into Amesbury after 2010 (18% of total) than in the region (15%) and the county (13.5%).

Although single-family home prices have risen markedly since 2010, by 2017 the median sales price had not yet reached the median peak price prior to the 2007-2010 recession. However, reflecting nationwide COVID-19 period trends, housing price increases in Amesbury have likely seen steeper price increases in recent years. Zillow data for the Boston-Cambridge-Newton, MA-NH MSA indicate that housing prices have increased by an estimated 26% between January 2019 and December 2021.

2.4 Resident Occupational Profile

EDUCATION

Amesbury residents vary in educational attainment. A quarter of the city's population holds a GED and another quarter holds 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.

TABLE 4. EDUCATIONAL ATTAINMENT AND JOB POSTINGS ANALYSIS IN AMESBURY

Educational 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%

Sources: EMSI Burning Glass, Job Postings Analysis, 2016-2021; Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, City of Amesbury

The city's educational attainment profile matches evident demand in the regional labor market. According to data provided by EMSI,² 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.

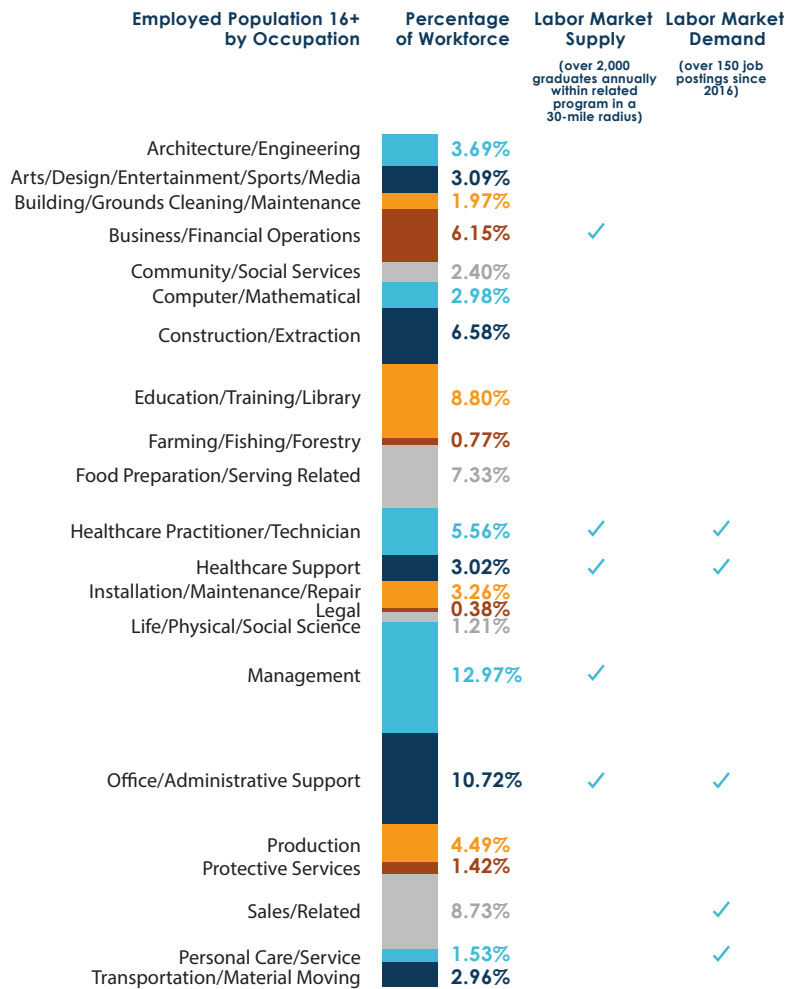
JOB POSTINGS ANALYSIS

Beyond Amesbury's existing labor supply, the top college-level programs within a 30-mile radius of the city are in business, management, marketing, and related support services; health professions and related programs; education; engineering; and psychology. These programs correspond to several of the most common job postings in the region over the past five 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 persons who consist of nearly 10% of Amesbury's population and are a key employment group in the Downtown and Lower Milliard District. Reflecting the aging of Amesbury's population which is further projected

² <https://www.economicmodeling.com/>

into the future, the City and local business stakeholders should consider ways to attract young people with occupations that are aligned with the above occupational groups.

FIGURE 5. JOB POSTINGS ANALYSIS



Sources: EMSI Burning Glass, Job Postings Analysis, 2016-2021, City of Amesbury; Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, City of Amesbury

2.5 Household Health

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.

FIGURE 6. HEALTH INSURANCE COVERAGE AND MEDIAN HOUSEHOLD INCOME BY RACE



COVID-19 VACCINATION RATES

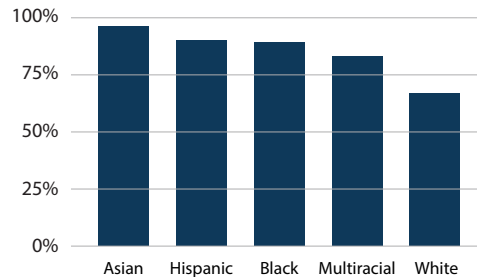
COVID-19 has tested America's trust in public health institutions, particularly through the rollout of life-saving vaccines. Amesbury's COVID-19 vaccination rates vary by race. Although 80-90% of Amesbury's Black, Hispanic, multi-racial, and Asian populations are fully vaccinated (defined as receiving one dose of Johnson and Johnson's COVID-19 vaccine or two doses of Moderna or Pfizer's COVID-19 vaccines), only 66% of Amesbury's white residents are fully-vaccinated. Amesbury's COVID-19 vaccination rates as of December 21st, 2021 are lower than those of both Essex County and the State of Massachusetts. Sixty-nine percent of Amesbury residents are fully vaccinated compared to 73% and 77% in Essex County and Massachusetts, respectively. These numbers further diverge when comparing percentages of the population that have received COVID-19 boosters. Twenty-two percent of Amesbury residents have received the booster, compared to 36% and 37% of Essex County and Massachusetts residents respectively. These lower than average vaccination rates among Amesbury as a whole and its white resident population, in particular, may reflect reticence on the part of the city's population to trust and follow the advice of medical professionals with implications for broader household and community health outcomes.

TABLE 5. AMESBURY VACCINATION RATES (as of 12/21/21)

	Amesbury	Essex County	State of Massachusetts
% fully vaccinated	69%	73%	77%
% with booster	22%	36%	37%

Source: Massachusetts Department of Public Health, City of Amesbury COVID-19 vaccination data and updates

FIGURE 7. AMESBURY VACCINATION RATES BY RACE AND ETHNICITY



Source: Massachusetts Department of Public Health, City of Amesbury COVID-19 vaccination data and updates

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

As has been the case across the United States, the COVID-19 pandemic has placed severe economic strains upon Amesbury households, businesses, non-profit organizations, local governments, and health care services—strains for which nearly all were unprepared. In this economic crisis, however, the federal and Commonwealth governments provided timely and sustained economic supports and adjustment programs, which helped local economies, businesses, and households mitigate losses. Federal government assistance through the CARES Act, American Rescue Plan Act, rent eviction moratoria, and Federal Reserve Bank measures buffered against the worst impacts. Such buffering support provided conditions in which businesses and institutions could innovate and adapt their business models and operational procedures to weather the economic shock.

However, despite these measures, certain occupations, industries, districts, neighborhoods, and households exhibited unique economic vulnerabilities. For instance, the food services, hospitality, cultural and entertainment industries, and local retailers, in general, have had to manage the acute impacts of the COVID lockdowns while facing continued competition from 'disruptive' business models and formats using new technology, such as online retail and entertainment. Unemployment among frontline service occupations, which often have lower pay, has left many renter households with cumulative rent arrears and, in turn, landlords with meager revenues to offset unabated costs. While many local businesses have responded with innovation and adaptation, many may continue to face reduced sales, reduced margins, and employment following recovery from the health crisis.

This section of the report explores how these COVID period shocks and stresses have affected Amesbury, highlighting aspects of local economic resilience as well as vulnerabilities to be addressed in building the District's and the city's future local economic resilience and vitality.

3.1 Employment Vulnerability

Throughout the COVID pandemic period, Amesbury's employment market exhibited resilience. Unemployment rates in Amesbury were lower than those across Essex County, except during the first COVID-19 lockdown period in April 2020. That month, Amesbury's unemployment peaked at 16.6% as mandatory business closing orders were established throughout New England.

FIGURE 8. AMESBURY AND ESSEX COUNTY UNEMPLOYMENT RATES January 2020 - August 2021

	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%

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

Following the end of first-wave business closing orders in June-July 2020, Amesbury's unemployment rate began a steady recovery towards pre-COVID levels. Except for a one percent increase in unemployment in the January 2021 peak month of Amesbury COVID cases, the unemployment rate continued its steady decline into the near full employment range of 4% in May 2021. This steady recovery in employment is a further indication of resilience in Amesbury's labor market and business activity in the face of an acute shock to the local, regional, and national economy—that is, 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 is provided.

Amesbury institutions quickly benefited from Paycheck Protection Program loans. As indicated in Table 6 below, particularly hard-hit industries such as accommodation and food services, on the one hand, and retail trade, on the other hand, saw average loans of \$83,000 and \$210,000 respectively. Amesbury retailers did notably well in securing forgivable payroll loan support, scoring the highest average loan amount across all the city's industries. However, the level of PPP support secured begs the question of how local retailers would weather a future economic shock if they did not have recourse to transitional liquidity support.

The city's manufacturing, wholesale, finance and insurance, education, health care, construction, and professional/technical services industries, albeit more buffered from the impact of lockdowns, also secured substantial forgivable payroll loan support. Of interest is the low level of payroll support secured by loan recipients in the real estate and arts and entertainment industries (24 loans in total), which are important business areas for the further development of the Downtown and Lower Millyard District as a visitation and shopping—if not also future residential—destination. Either proprietors in these areas are very small and therefore have very small, reported payrolls (thereby reducing their loan allowances), or they did not effectively pursue PPP support. Alternatively, they were resilient in the face of the pandemic and did not require much support.

TABLE 6. AMESBURY BASED RECIPIENT OF PAYCHECK PROTECTION PROGRAM LOANS

NAICS Code	Industry	Average Loan Amount	Number of Business Recipients
44-45	Retail Trade	209,965	25
31-33	Manufacturing	181,361	23
42	Wholesale Trade	154,395	12
61	Educational Services	133,405	5
52	Finance and Insurance	109,315	9
62	Health Care and Social Assistance	106,502	31
23	Construction	85,101	35
72	Accommodation and Food Services	82,607	36
54	Professional, Scientific, and Technical Services	78,344	54
51	Information	47,729	2
81	Other Services	37,027	38
11	Agriculture, Forestry, Fishing and Hunting	32,511	3
56	Management of Companies and Enterprises	31,641	16
53	Real Estate and Rental and Leasing	30,810	12
48	Transportation and Warehousing	23,690	6
71	Arts, Entertainment, and Recreation	13,825	12
22	Utilities	12,020	1

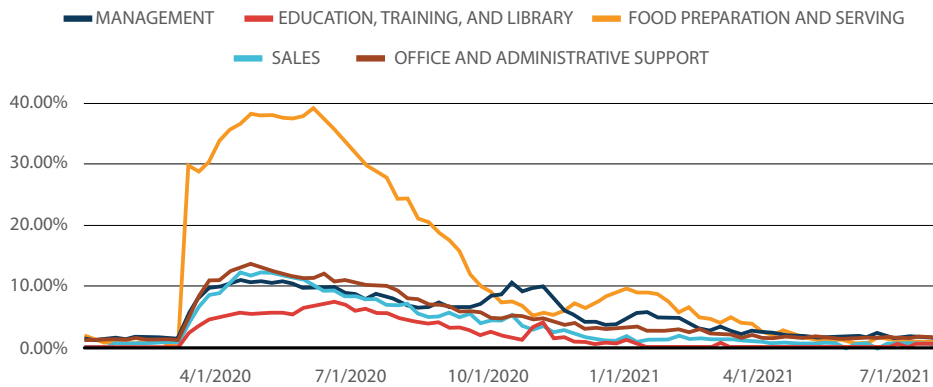
Source: U.S. Small Business Administration, Paycheck Protection Program

OCCUPATIONAL EMPLOYMENT VULNERABILITY

In the context of such payroll supports, Amesbury's top five occupations also mostly faced peak unemployment in the spring of 2020. In fact, this was the case across all major occupational categories. There were secondary peaks in unemployment in management occupations in November-December 2020 and in food preparation and serving occupations in December 2020-February 2021. The peak in food services industry unemployment occurred coincident with Amesbury's peak in COVID-19 cases in January 2021. However, the January 2021 peak was far below the nearly 40% unemployment level in food services during the spring of 2020 lockdown. Along with Paycheck Protection Program support, this second, lower peak suggests that measures taken by food services businesses to adapt to the COVID shock were helping.

However, the 2021 wave of 10% unemployment in food services occupations suggests potential continued 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. Food services businesses make a substantial contribution to local resident quality of life (i.e., residential attractiveness), to business location attractiveness (i.e., as an amenity for local business employees), and as an attractor of destination visits and shopping trips. Therefore, understanding the current status of Amesbury's food services businesses and exploring mechanisms to build their resilience should be an important consideration in any strategy for the Downtown/Lower Millyard District.

FIGURE 9. OCCUPATIONAL UNEMPLOYMENT AMONG THE TOP 5 OCCUPATIONS IN AMESBURY



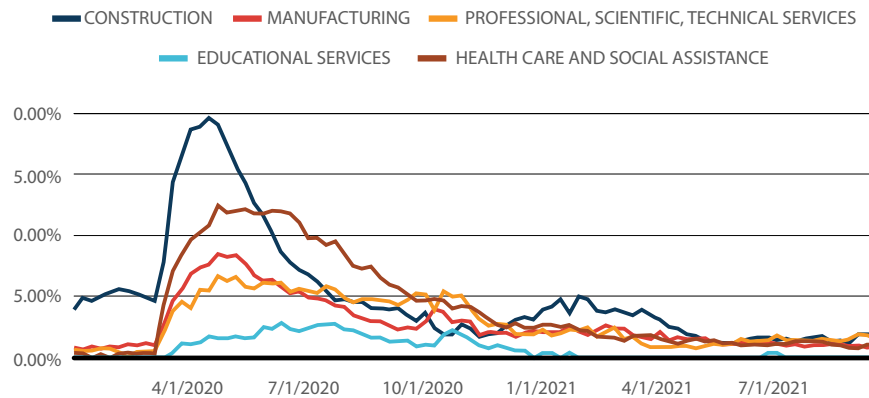
Sources: State of Massachusetts Department of Unemployment Assistance, Economic Research Department, Labor Market Information, accessed October 2021, not seasonally adjusted, City of Amesbury; Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, City of Amesbury

3.2 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 in the spring of 2020. However, when COVID-19 cases peaked in Amesbury in January 2021 local employment levels had substantially recovered and stabilized at a near full employment level. Only the construction industry saw a secondary increase in unemployment in the winter of 2021, albeit only to the level of 5%, not seasonally adjusted. This level of construction unemployment in Q1-2021 is equivalent to that indicated for Q1-2020 prior to the COVID-19 shock. The indicated Q1-2021 spike in construction industry unemployment may therefore just reflect a typical winter season reduction in business activity. The figure may even indicate an increase in seasonal employment relative to earlier years, reflecting increased COVID period expenditures on home improvements.

Therefore, the city's pandemic period employment outcomes, across industries, suggest substantial resilience in local industry and labor markets in the face of shocks when these shocks 1) are accompanied by the provision of government income and payroll supports and 2) when the nature of the shock (and other demographic factors) increases the attractiveness of residential locations outside of major urban centers (or, conversely, when the economic stress does not drive relocation to metropolitan centers).

FIGURE 10. INDUSTRY UNEMPLOYMENT AMONG THE TOP 5 INDUSTRIES IN AMESBURY



Sources: State of Massachusetts Department of Unemployment Assistance, Economic Research Department, Labor Market Information, accessed October 2021, not seasonally adjusted, City of Amesbury; Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, City of Amesbury

3.2 Amesbury as a Destination

One measure of local competitiveness is the preference shown by regional shoppers and diners to travel to Amesbury versus neighboring municipalities. In this sense, local trip data from the COVID-19 crisis period also provides another lens through which the resilience of Amesbury's economy can be understood.

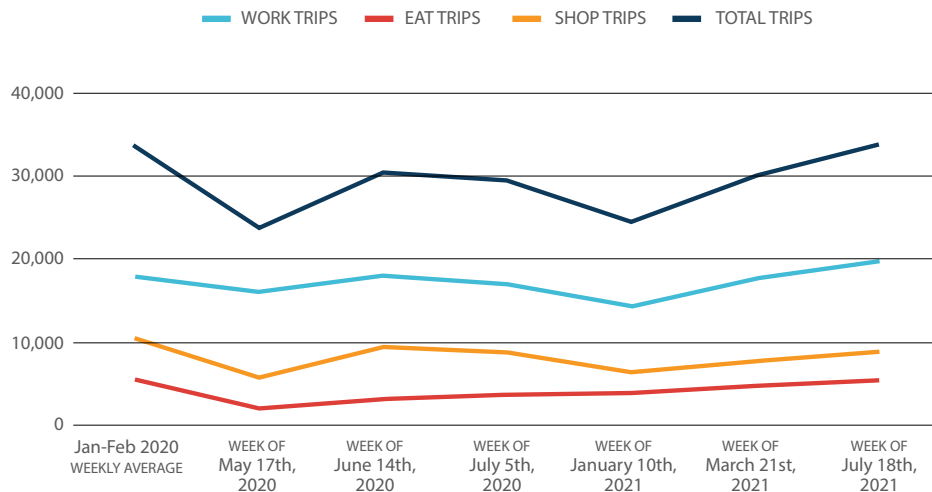
The data in this section, obtained from Replica, outlines trips within Amesbury as well as trips from municipalities whose residents, since 2020, made the most trips to Amesbury.³ In this section Replica data on average trips during the months of January-February 2020

3 <https://replicahq.com/>

was used as a pre-COVID baseline to help us understand how COVID restrictions changed local trip behavior, in particular for shopping and dining activities. Similarly, average trips taken during the first COVID period re-opening months of June-July 2020 are used here as a baseline to evaluate trip trends under re-opening or return-to-new normal conditions. 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 the underlying data indicates that location changes begin in January 2020.

COVID-19 pandemic economic stresses have impacted trip patterns most everywhere that lockdowns occurred. In Amesbury, business closures during lockdown periods, together with reports of inconsistent opening hours during reopening periods, would affect both destination trips and opportunistic stops in the downtown for shopping and eating. Similarly, as elsewhere, the shift from office to remote, online work routines decreased workday trips to Amesbury, including accompanying weekday trips and commuter stops for shopping and dining. Reduced weekday trips and downtown foot traffic would be expected to reinforce decisions by local retail businesses to reduce open hours, providing a disincentive to travelers during those hours of closure to make Amesbury a destination.

FIGURE 11. WEEKLY TRIPS TO AMESBURY



Source: Replica Trends Data, Origin-Destination Trips Ending in Amesbury

AMESBURY AS A WEEKEND AND WEEKDAY DESTINATION

Figures 12 - 13 below present data on weekend and weekday trips to Amesbury as they align with key events and downtown promotional activities that may have impacted trip counts. The figures consider trips that originated in Amesbury, Salisbury, Newburyport, and Seabrook, since these trip origins-destinations reflect the most frequent trips made in the Amesbury area, both before the onset of the pandemic and during the pandemic period.

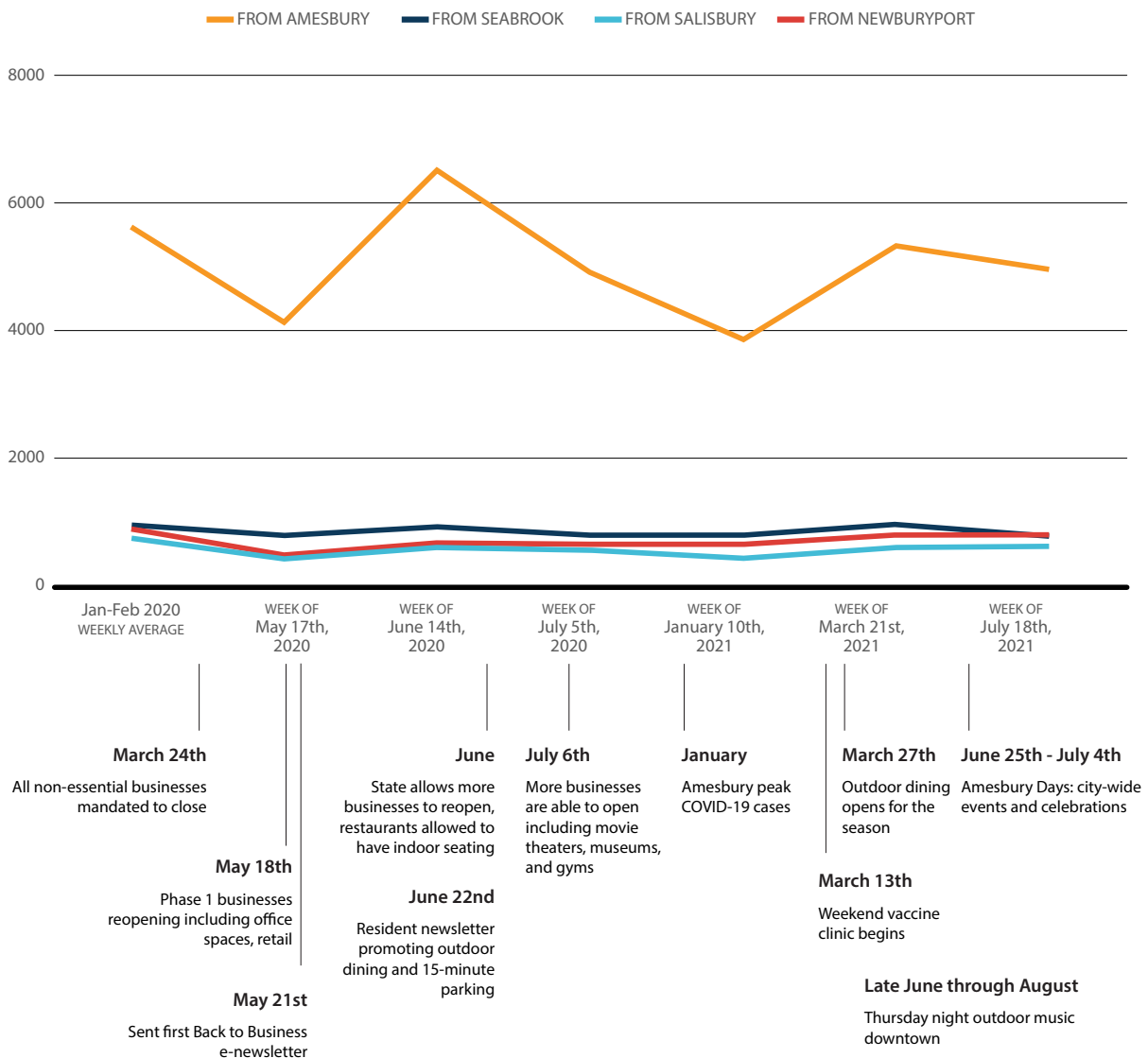
Weekend trips to Amesbury during the COVID period reached their highest levels in June-July of 2020, during the first reopening from the initial March-May 2020 COVID-19 lockdowns. Trips to Amesbury then again rose significantly in March of 2021, following the city's peak in COVID-19 cases in January 2021. Although these two periods of travel

recovery were mostly driven by local Amesbury residents making local trips, trips from Seabrook, Salisbury, and Newburyport — three of the most popular sources of trips to Amesbury — also contributed to the rise in trips to Amesbury.

These two moments of trip increases correspond with a series of efforts by City and Commonwealth officials to re-establish normal economic life. In the June-July 2020 period, following the first lockdown, the Commonwealth allowed more businesses to reopen for indoor dining, gyms, and movie theaters. Simultaneously, Amesbury launched a series of promotional efforts, including the Back to Business e-newsletter and a resident newsletter.

Similarly, after the peak COVID-19 infection period in the winter of 2021, outdoor dining reopened, and vaccine clinics began in Amesbury in March of 2021. These initiatives were followed by the Amesbury Days events and promotions in late June and early July 2021.

FIGURE 12. WEEKEND TRIPS TO AMESBURY

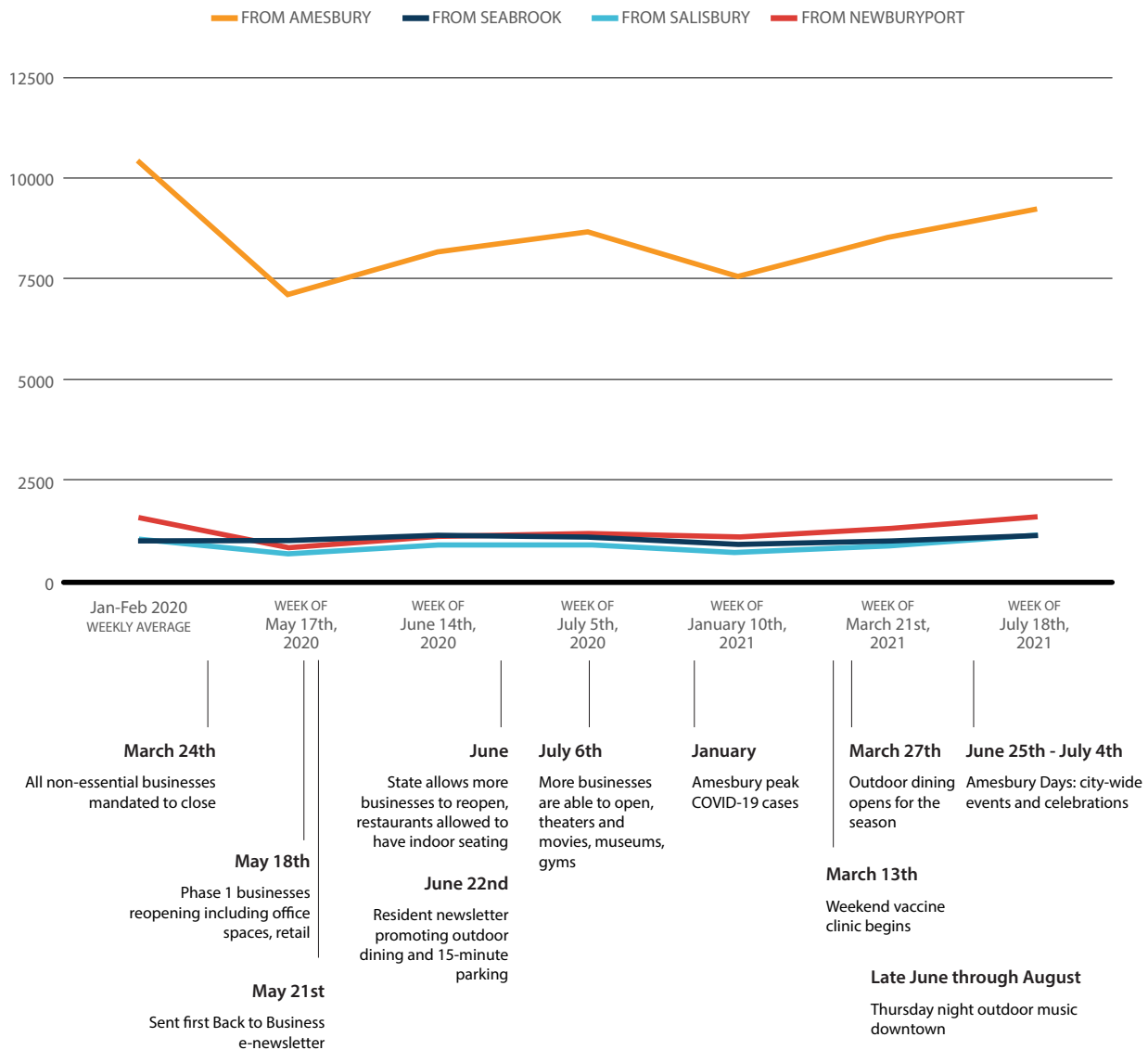


Source: Replica Trends Data, Origin-Destination Weekend Trips Ending in Amesbury

Weekday trips to Amesbury spiked in July of 2020. As of the summer of 2021, weekday trips 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. The reopening of outdoor dining and the vaccination efforts that started in March 2021 continued throughout the year. Simultaneously, the City continued promotional efforts started in the summer of 2020, then built upon in June-July 2021 including Amesbury days and Thursday night downtown outdoor music events.

As Amesbury looks to become a greater destination in Essex County, continuation of these earlier City efforts, and building upon these, would serve to re-establish pre-COVID trip and destination shopping/dining patterns in the lives of area residents, while attracting new visitors and destination trip purposes. Even as Amesbury began living with COVID-19 in 2021, there were a wide variety of events and activities to attract people to the city.

FIGURE 13. WEEKDAY TRIPS TO AMESBURY



Source: Replica Data, City of Amesbury Origin Destination Weekday Trips Ending in Amesbury

The figure below summarizes events in August of 2021. Amesbury strategically organized multiple events on Thursday nights throughout the summer. The City together with the Downtown and Lower Millyard District business community should consider building on efforts like these.

FIGURE 14. EVENTS IN AMESBURY IN AUGUST 2021

August 2021						
Sun	M	Tu	W	Th	F	Sa
		Amesbury National Night Out 25th Anniversary		Flair in the Square - Outdoor Painting Class Music in the Millyard - Featuring Adam Matthew Trio	Food Truck Nights at Cider Hill Farm	
				Flair in the Square - Outdoor Painting Class Music in the Millyard - Featuring Tiny Circus	Food Truck Nights at Cider Hill Farm	Annual Peach Festival at Cider Hill Farm
				Sacred Cod Food Truck at Silvaticus Music in the Millyard - Featuring Jump Street	Porch Fest - Byrony & Birch Studios Food Truck Nights at Cider Hill Farm	
Annual Peach Festival at Cider Hill Farm				Flair in the Square - Outdoor Painting Class	Thiwaites Market English Savory Pies	Annual Peach Festival at Cider Hill Farm
Annual Peach Festival at Cider Hill Farm				Music in the Millyard - Featuring 2 of Us		
Bark Brunch, Adoption Event at Brewery Silvaticus with Rescue Inc. and the Angry Donut			Trivia Night at Silvaticus	Flair in the Square - Outdoor Painting Class Free Outdoor Workout Series	Food Truck Nights at Cider Hill Farm	Outdoor Yoga and Beer

Source: Amesbury Chamber of Commerce

COMPETING DESTINATIONS

Although the data at our disposal does not include pre-COVID summer trip counts to understand how the summer of 2020 compared to a pre-COVID summer (e.g. 2019), the 2020 trip counts are used below as a baseline to understand recovery between 2020 and 2021. Table 7 below outlines the percentage change in eating and shopping trips on weekdays and weekends from Newburyport, Seabrook, and all other destinations. Newburyport and Seabrook are selected given their competition with Amesbury as different kinds of shopping and eating destinations and the high traffic between Amesbury and each of these two municipalities before and during the COVID period.

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. Despite previously noted declines in COVID period staffing levels, Amesbury restaurants showed resilience with significant increases in eating trips as the pandemic progressed, not only by local residents, but across the greater Amesbury region.

Shopping trips made less of a rebound from the summer of 2020. Both weekday and weekend shopping trips originating from locations in Amesbury as well as from Seabrook declined in July 2021 relative to the June-July 2020 period. However, the total of weekday shopping trips from all destinations, including 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, it does appear that Amesbury has been able to capitalize on greater weekday foot traffic.

TABLE 7. CHANGE IN EATING AND SHOPPING TRIPS TO AMESBURY FROM SUMMER 2020 TO SUMMER 2021

	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%

Source: Replica Trends Data, Origin-Destination Trips Ending in Amesbury

TRIPS TO SEABROOK

Throughout the pandemic, particularly on weekdays, the trip data suggests that Seabrook captured an increased portion of Amesbury's consumer base for eating and shopping than was the case prior to the pandemic. Better understanding the role that differences in Massachusetts and New Hampshire COVID restrictions played, as well as the contribution of Seabrook's zero sales tax retail environment would clarify whether this shift in local shopping/eating destinations is temporary or could become lasting. Further understanding of the different types of purchases and dining experiences being sought in Seabrook versus Amesbury would also further help focus and design local efforts to differentiate the Downtown/Lower Millyard as a shopping/dining destination.

There is some evidence that the shift in weekend shopping/eating trips to Seabrook is temporary. For instance, in the summer of 2020, following the first lockdown period, there was a significant increase in local shopping trips made by Amesbury residents, coinciding with citywide shop local promotional efforts. Then, in the summer of 2021, weekend trips for all purposes from Amesbury to Seabrook declined. However, unlike the summer of 2020, there was not a correlated increase in shopping and dining trips within Amesbury that originated within the city's boundaries, indicating the need for efforts to reactivate and build upon pre-COVID local trip patterns by Amesbury's own residents.

TABLES 8 AND 9. TRIPS TO SEABROOK, NH FROM AMESBURY

		Weekend					
Month	Work	Eat	Shop	Change In working trips	Change In eating trips	Change In shopping trips	
	Jan-Feb avg.	185	159	1,351	--	--	--
2020	May	245	190	1,316	32.43%	19.75%	-2.59%
	June	230	224	1,422	24.32%	41.17%	5.26%
	July	191	212	1,123	3.24%	33.61%	-16.88%
2021	January	167	144	1,114	-9.73%	-9.25%	-17.54%
	March	206	176	1,372	11.35%	10.92%	1.55%
	July	162	143	1,087	-12.43%	-9.88%	-19.54%

Source: Replica Trends Data, Origin-Destination Trips Ending in Amesbury

		Weekday					
Month	Work	Eat	Shop	Change In working trips	Change In eating trips	Change In shopping trips	
	Jan-Feb avg.	301	93	787	--	--	--
2020	May	398	119	849	32.08%	27.96%	7.88%
	June	337	173	1,060	11.84%	86.02%	34.69%
	July	289	171	901	-4.09%	83.87%	14.49%
2021	January	287	106	853	-4.76%	13.98%	8.39%
	March	300	108	871	-0.44%	16.13%	10.67%
	July	372	122	998	23.45%	31.18%	26.81%

Source: Replica Trends Data, Origin-Destination Trips Ending in Amesbury

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

Considering the above conditions, the COVID period has put downtown Amesbury small businesses through their own stress test and adaptability challenges. Adding to the continuing structural 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 and flooding events, or public safety conditions that reduce access to and safety in the downtown area.

Figure 15 (below) summarizes COVID's downtown retail and food services impacts over the period of Q2-2020 until Q3-2021, across a full range of areas. Across Massachusetts and the U.S., COVID restrictions bore the most severe retail sector impacts on the travel and hospitality, and restaurants/food services industries. However, restaurants and food service providers throughout the U.S. responded by adopting take-out and home delivery solutions. Sales data indicates that this was also the case in Amesbury. During the COVID period downtown Amesbury restaurants increased sales (E). The data suggest that local

demand from restaurants decreased, but we believe that this reflects, as elsewhere, increased purchases from food services providers through online platforms (which are accounted for in a different industry category than food services).

FIGURE 15. DOWNTOWN RETAIL AND FOOD SERVICES DEMAND AND SUPPLY THROUGHOUT THE COVID PERIOD



Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, Downtown Amesbury

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 in response to increased resident and non-resident demand.

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 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 resident and non-resident demand. These include furniture & home furnishings, electronics & appliance stores, jewelry stores, hobby & musical instrument stores, used merchandise stores, and pet stores. With the exception of 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, such as the [Made in Amesbury online retail platform]. Therefore, reduced sales by these downtown retailers may reflect the slow adoption of online sales channels, potentially meriting a collective response as these kinds of retailers pursue full recovery and business growth. 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 further develop Downtown/Lower Millyard District promotion and programming activities (e.g., festivals, markets, special sales offerings, and other events).

- On a dollar basis, the largest estimated COVID period shifts in 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 increased 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 increased downtown resident demand that was 110% of pre-COVID levels, but businesses in this category 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 had a \$136,000 sales surplus to non-downtown residents prior to COVID-19.

3.4 COVID 'Stress Test' Conclusions

Overall, the COVID period highlighted resilience in the city's labor market, but this resilience was likely so great because of the range of federal and state economic support measures provided. In the face of future economic shocks, during which similar supports are not available, such local resilience may only be possible if the community has organized its own local mechanisms for buffering impacts and for supporting recovery efforts.

One such mechanism being established by increasing numbers of communities across the United States is local relief funds.⁴ These funds are typically capitalized through contributions of municipalities, community foundations, community development finance institutions (CDFIs) and/or the local business community via special assessment mechanisms. Funds may focus on small business relief; or on provision of relief for non-

⁴ An excellent overview of local relief fund models was published by the Drexel University Nowak Metro Finance Lab in 2020, available here: [Emergency Fund Typologies | Nowak Metro Finance Lab | Drexel University](#).

profit, social services, and cultural organizations; and/or for particularly vulnerable households or frontline occupations. Local funds might be further linked with pooled insurance mechanisms so that extreme losses are transferred to the capital markets. However, risk transfer solutions generally only make financial sense for areas facing high and sustained catastrophic risks (e.g., hurricanes, earthquakes etc).

The economic shocks of the COVID period highlighted pre-existing vulnerabilities associated with structural changes in the retail and food services sectors. Downtown Amesbury retailers lost business during the pandemic to both online retailers and to larger format brick-and-mortar retailers in Seabrook. Inconsistent retail store opening hours have been reported as an additional contributor to declines in sales.

The increase in shopping and eating trips by Amesbury residents to Seabrook during the COVID period seems to have declined, but continued efforts are needed to re-establish local resident trip patterns for shopping and dining downtown. Local restaurants and other food services providers appear to have adapted well to increased pick-up ordering and the use of delivery apps; however, these also appear to have reduced employment in the industry.

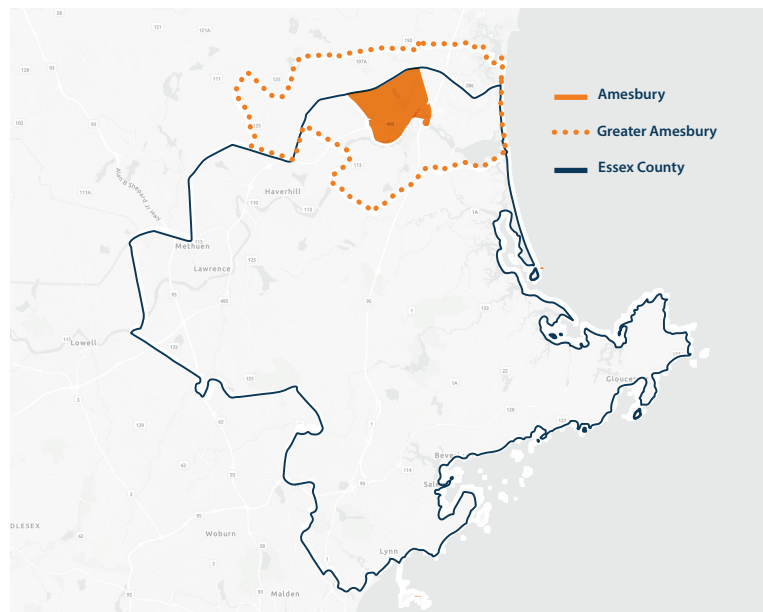
While mechanisms such as local relief funds can prepare Amesbury for major, future economic shocks, the following opportunities provide a means to both continue Amesbury's current recovery and to increase economic vitality and resilience into the future.

- Recognizing Amesbury's competition with other local shopping and dining districts, downtown stakeholders should continue to collaborate on developing unique and predictable downtown visitor-consumer 'experiences' that stand out from those available elsewhere in the region—and that cater to a range of demographics and interests. Programs, markets, and topical festivals can serve as fulcrums for downtown visits that leverage moments of peak retail and food services sales on a predictable annual cycle.
- The economic vulnerability of a downtown such as that in Amesbury is increased by the lack of major downtown employers. That being said, as is widely known, major downtown districts that relied on daytime office employers continue to suffer in the new 'hybrid office' work environment. The proximate location of Amesbury's Lower Millyard offers the downtown a unique opportunity, in that manufacturer and maker business activities are generally not viable in residential locations. In effect, downtown Amesbury's largest employer is the sum of business and employee occupants in Lower Millyard buildings. Lower Millyard businesses can be key partners in the aforementioned downtown experiences and events. Lower Millyard employees offer existing and latent downtown consumer demand for businesses that work to serve them. For these reasons, the report later explores the opportunities associated with a combined Downtown/Lower Millyard District development strategy.
- Further developing the online sales capabilities of Downtown/Lower Millyard District businesses represents a third area of recommended focus to strengthen the resilience of District businesses and employment in the face of long-term changes in competition and consumer behavior and in the face of future shock events that restrict physical access and on-site shopping in the District.

4 Sizing the Downtown/Lower Millyard District Opportunity as a Manufacturer-Maker-Retail Hub

As Amesbury works to 'bounce forward' economically from the COVID period, taking lessons from it, the re-evaluation of known opportunities and identification of new opportunities comes back into focus. This section uses data on local and regional goods demand and sales, and findings from a survey of Lower Millyard business tenants, to identify areas of business strength and business development opportunities to increase the District's economic activity, competitiveness, and resilience.

FIGURE 16. MAP OF STUDIED AREAS



4.1 The Downtown/Lower Millyard District Retail Sector: An Overview

Data from Environics Analytics provides a first, baseline understanding of Amesbury's and the District's weaknesses, strengths, and opportunities as a place for goods and services wholesaling and retailing. The data shows what types of goods have been attracting customers to Amesbury, or have been convenient for people commuting through Amesbury and its downtown. The data also shows what goods and food services sold in the District have the best chance of securing purchases from people who do not reside in the District, including from residents in the rest of Amesbury, and the greater Amesbury region.

The data presents three different snapshots. **Local Retail Snapshot 1.1** compares the level of sales by District businesses to the level of demand by Amesbury residents. In all goods and food services areas, Amesbury residents are demanding more than is being sold by establishments located in the District. However, District businesses come closest to meeting the demand of all city residents in the following areas:

TABLE 10. 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

Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, Amesbury Downtown and Lower Millyard

- Musical instruments and supply stores
- Hobby, sewing, toy, and game stores
- Pet and pet supply stores
- Women's clothing stores
- Home furnishings, including window treatments
- Electronics stores

District retail businesses in the above areas sell minimally 10% and up to 46% of Amesbury's total demand for those goods.

Nonetheless, District establishments even in these goods areas are generally only meeting a fraction of the demand of the city's residents. A full comparison of sales by businesses in the District relative to Amesbury-wide demand can be found in **Local Retail Snapshot 1.2**, located at the end of this section of the report.

Local Retail Snapshot 1.3 builds on the picture by showing how well demand for each area of goods and food services is being met by businesses in Amesbury, in Greater Amesbury, and in Essex County. For purposes of this study, Greater Amesbury is the area that includes Amesbury, MA; Merrimac, MA; West Newbury, MA; Newburyport, MA; Salisbury, MA; Seabrook, NH; South Hampton, NH; and Newton, NH.⁵

⁵ Haverhill is excluded from this report's delineation of the Greater Amesbury area, based on input from the project task force and trip pattern data.]

To further identify the attractiveness of increasing local manufacture, wholesale, and retail in the above goods areas, **Local Area Snapshot 1.3** also indicates which industry/product areas offer manufacturing and retail jobs salaries that are above the Essex County living wage for a single adult household.

The key findings from this economic 'snapshot' are the following:

- The following are product areas where total annual sales by Greater Amesbury businesses are not sufficient to meet the total *demand of Amesbury residents*. In other words, Amesbury residents are likely purchasing these goods from retailers outside of the region or from online platforms. These are also product areas where average manufacturing and/or retailing salaries are above the living wage for a single adult household. This suggests that there could be latent demand in Amesbury for local purchases of products manufactured and sold in Amesbury.
 - Cosmetics and beauty supplies (only manufacturing jobs are above living wage)
 - Clothing accessories (only manufacturing jobs are above living wage)
 - Men's clothing (manufacturing jobs are nearly at living wage; retail jobs are below living wage)

- The following are product areas where stores located in the Greater Amesbury region are not able to supply the consumer demand of Greater Amesbury residents. Manufacturing and retailing jobs in these industry areas offer average salaries that are above the living wage for a single adult household. Therefore, consideration should be given to ways to further develop local (e.g., District-based) manufacture and wholesale and retail sales of products in these areas:
 - Furniture and home furnishings
 - Floor coverings
 - Jewelry, luggage, and leather goods
 - Cosmetics and beauty supplies (only manufacturing jobs above living wage, not retail jobs)
 - Men's and women's clothing (manufacturing jobs nearly at living wage; retail jobs are below living wage)
 - Shoes (only manufacturing jobs above living wage)
 - Clothing accessories (only manufacturing jobs above living wage)
 - Art (although provision of living wage salary is not certain)

The following are product areas where stores located in the Greater Amesbury region are *supplying more* than the consumer demand of Greater Amesbury residents. In other words, shoppers from outside of the region come into the region to make purchases of these goods; or, alternatively, stores in the region are fulfilling remote purchases of these goods. As above, the following industry areas have been highlighted because their average manufacturing and retailing salaries are above the living wage for an Amesbury single adult household.

- Other home furnishings, such as window treatments
- Sporting goods, hobby, and musical instruments
- Beer, wine, and liquor

TABLE 11. 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 ● Sales Surplus/ ● Demand Leakage	GREATER AMESBURY DEMAND: Greater Amesbury Supply ● Sales Surplus/ ● Demand Leakage	ESSEX COUNTY DEMAND: Essex County Supply ● 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	\$45,997,806	\$27,785,288	\$58,492,613
Electronics stores	443142	\$44,651	(NAICS 3352)	\$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	\$90,078,344	\$9,353,244	-\$285,703,614
Pharmacies and drug stores	44611	\$47,721	(NAICS 3254)	\$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
Family clothing stores	44814	\$20,573		\$30,106,085	\$8,288,888	-\$44,127,439

Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, Amesbury Downtown and Lower Millyard

TABLE 11. 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		AVERAGE MANUFACTURING SALARY (Essex County) Related to Retail Product Area	LOCAL MARKET		REGIONAL MARKET
		AVERAGE RETAIL SALARY (Essex County)			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	\$20,076,100	\$7,242,294	\$16,654,747
Sporting goods stores	45111	\$30,598		(NAICS 33993)	\$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	\$1,589,759	\$596,184	\$3,861,912
Book stores and news dealers	4512	\$24,736		\$67,341	\$6,124,989	\$4,088,797	\$2,331,026
(NAICS 323)							
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

Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, Amesbury Downtown and Lower Millyard

4.2 Prospects for a Destination Manufacturer-Maker-Retailer District

The above local (Amesbury) and regional (Greater Amesbury) retail snapshots indicate areas where local manufacturers, makers, and artisans could fill gaps in local goods availability and also take advantage of existing areas of local attractiveness for certain kinds of shopping. This section of the report begins to explore how these opportunities could be developed in the District.

Without question, a key factor of competitiveness for specialized, local manufacturing and maker economies is the ability to develop cost-effective access to local and regional retail customers and wholesale buyers, and to build their loyalties. The development of reliable 'buy-local' (or buy-regional) purchasing and customer loyalty arrangements allows local producers to efficiently capture margins that would otherwise accrue to larger wholesale and retail businesses (including online platforms).

Buy-local/regional economic development strategies involve the establishment of producer-wholesaler-retailer business communities that are supported by their associations, the municipality, and civic organizations via 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. Buy-local strategies typically involve local shopper loyalty programs and other mechanisms, such as local money schemes. Loyalty schemes together with specialized destination markets and maker/artisan 'open studio' events increase awareness of and incentivize purchases from downtown fixed location retail and food services businesses. In turn, downtown retailers can also serve as sales outlets for locally produced items.

When considering the viability of creating specific promotions, markets, and events that feature both producers and retailers 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 and other visitation activities (e.g., combining visits to craftsperson or artisan studios with promotional offerings of meals, drinks, and other forms of tourism, such as music performances).
- The proximity of buyers/consumers. For instance, consumers would typically make longer trips to search for bespoke items (e.g., art, jewelry, furniture) versus consumables or more standardized items that could be purchased elsewhere or online.

The below figure indicates areas of potential for such coordinated local producer, maker, and retailer events and promotions development within the context of a strategy to develop the Downtown and Lower Millyard as an integrated economic district.

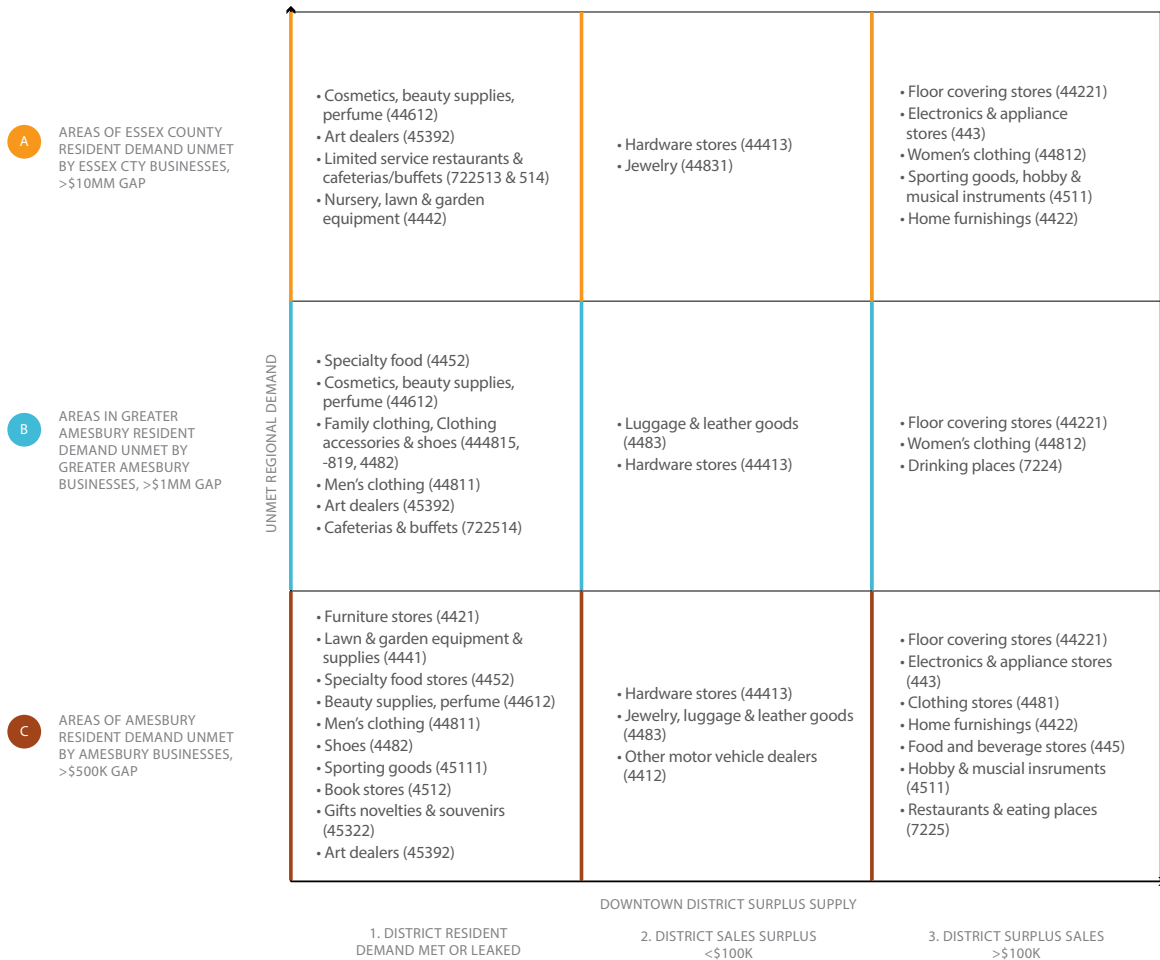
As noted above, the products that are least available to local consumers from retailers located in Essex County, Greater Amesbury, and Amesbury are:

- 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 (with the exception of electronics). 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)

FIGURE 17. UNMET REGIONAL DEMAND AND DISTRICT SURPLUS SUPPLY



Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, Amesbury Downtown and Lower Millyard

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.

Local Retail Snapshot 1.2, below, indicates the extent to which retailers in the District meet the demand of consumers in the city of Amesbury (a negative number indicates the amount of Amesbury demand that is not being met by sales in the District).

4.3 Lower Millyard Survey: What the Entrepreneurs and Business Owners Say

To further understand priorities and opportunities for development of the Downtown/Lower Millyard District as a distinct, destination manufacturer-maker-retail center within Essex County and the Merrimack Valley region, business tenants in two Lower Millyard commercial buildings were invited to complete an online survey. Proprietors of 20 small manufacturer, maker, and artisan businesses provided responses. These businesses are located in three Lower Millyard buildings: The Trades Mill, 14 Cedar Street Studios, and 11 Chestnut St. In general, the responses indicate that:

- Proprietors have a clear view as to the locational advantages for establishing producer/maker/artisan business in Amesbury, in the District, and in Lower Millyard buildings.
- Some Lower Millyard businesses are already combining production with wholesaling and retailing activities. They seek further support for doing this kind of cross value chain business.
- A number of respondents articulated the synergistic relationship between the Lower Millyard and the Downtown, and had clear ideas about how to further develop those synergies and the District as a whole.
- Respondents favored increased collective efforts to market and sell their products, and to establish mechanisms to support District businesses in times of economic shock and strain.

TABLE 12. NUMBER OF EMPLOYEES AMONG LOWER MILLIARD
TENANT RESPONDENTS

# of Employees	# of Respondents
1 - 2 Employees	15
3 -10 Employees	5
11 - 20 Employees	0
20+ Employees	1

LOWER MILLIARD LOCATIONAL ADVANTAGES

Among the respondents, 58% have had their business located in Amesbury for less than five years. A third of the respondents had established their Amesbury business locations within the last two years. Only two respondents had been located in Amesbury for more than 10 years.

Half of the respondents indicated that they had relocated to Amesbury from elsewhere; in other words, that they were not start-ups. Most of the indicated former locations of these businesses were in Essex and Middlesex Counties, Massachusetts. One business had relocated from Durham, NH and one from New York City.

Almost all of the businesses had only one business location. Fourteen percent had additional business locations in Massachusetts, New Hampshire, or Vermont. As indicated in Table 13, the primary reasons for relocation were affordability of rent, the convenience of the location to home, and proximity to downtown Amesbury.

The respondents also expressed very clear views about the advantages and desired qualities of the buildings in which they were located, including landlord relations and relations with fellow tenants. Proprietors mentioned the following (in no priority order):

- Easy access and load-in facilities and arrangements
- Parking availability
- Quality of space, including meeting and small event space
- Attractiveness of being in a mill building
- Sustainability measures in the outfitting of the mill building
- Great landlords
- Safety of the area
- Good working environment
- "The perfect artsy vibe"
- Proximity to like-minded businesses
- Location with other maker businesses that provide advice and support
- "A very creative atmosphere and peers who are growing their business... offers a wealth of information on so many levels."

An impressive 85% of respondents agreed that their current location helped them make business connections that supported their business growth. Eighty-three percent of the respondents that agreed with this statement were located in the same building, with the remaining 17% located in neighboring mill buildings. Respondents indicated that landlords and local organizations have been most responsible for making those connections. However, connections were also reported to have emerged via networking, word of mouth by other businesses, and reputation arising from previous locations in Boston and New York.

TABLE 13. REASONS FOR AMESBURY LOWER MILLYARD TENANT RESPONDENTS SELECTING AMESBURY

Reason for Selection of Amesbury Location	# of Respondents
Reasonable rent*	7
Convenient location / close to home	6
Great town / proximity to downtown	5
Quality space	3
Community and local municipal support	3
Economic development	1
Art studios	1
Existing client base in Newburyport	1

*Number of total responses exceeds the total number of survey respondents because several respondents provided multiple answers

COMBINING LOCAL PRODUCTION, LOCAL SALES AND LOCAL PURCHASING

Seventy-six percent of the responding businesses had wholesale customers in Essex County. Among these, the amount of total wholesale sales to Essex County customers ranged from 10% to 50% of total sales.

Half of the respondents said that they would consider direct sales of their products in a made-in-Amesbury retail outlet space, whether located Downtown or in the Lower Millyard. Sixty percent of respondents said that they would participate in seasonal marketing events for made-in-Amesbury products.

A smaller number of responding businesses—20%—also did retail sales from their Lower Millyard locations or from another fixed location. The retailing businesses were largely producing art or artisanal crafts. However, half of the respondents were doing online sales, some of these indicating that more than 50% of their sales was through online channels.

An impressive 74% of the respondents reported that they regularly purchase material inputs for manufacturing or their artisanal/craft production from other Amesbury businesses. Reasons given for 'buying local' were:

- Easy access and convenience
- Tremendous inventory, great staff, convenient location of input seller
- Desire to support local businesses

THE CASE FOR A DISTRICT APPROACH: LOWER MILLYARD AND DOWNTOWN BUSINESS SYNERGIES

In response to the open-ended question, "What aspects and amenities of your current location are most attractive to help your business?", two respondents indicated the proximity to and easy ability to walk downtown. When asked for inputs on what to improve their business location's attractiveness, respondents answered (among other things):

- More proximate access to cafes and restaurants. A number of respondents advocated for more mixed uses in the Lower Millyard area.

- Improved signage, including a large sign indicating the businesses in the Lower Millyard
- Access to retail spaces
- Developing a more inviting streetscape that links the Lower Millyard to the Downtown, including sidewalks, lighting, and rail-trail extension
- Improvements to both the upper waterfall and the lower waterfall areas as gathering spaces
- Further rehabilitation of abandoned buildings, and removal of decrepit buildings
- Development over the municipal parking lot, including shops, eateries, offices and housing.

OTHER DISTRICT ECONOMIC DEVELOPMENT 'NEXT STEPS'

Finally, the proprietor respondents shared a range of ideas for further development of their market opportunities in Amesbury and the District. These include:

- Business network meetings with local businesses organized and held at local breweries
- A webpage that heralds the businesses in the community and how those businesses could be supported
- Organization of concerts in the Lower Millyard
- Further development of an online collective shop
- A local business lending facility and/or microlending program
- Business development grants for identified new opportunities

The above inputs from local producer/maker/artisan businesses provide an indication of the extent to which a distinctive, coherent business community is emerging in the Lower Millyard that can join with Downtown business counterparts to pursue District-wide opportunities.

These pursuits can be shaped in ways that not only build the City's producer/maker businesses (including cultural entrepreneurs) but that also address household-level economic stresses, and that buttress and build upon heritage assets and qualities while serving contemporary lifestyle interests. In sum, the city's bounce forward pursuit (including with use of recovery resources and the new Infrastructure Act) can be designed to renew and build the differentiated offerings, experiences, and identity of Amesbury's Downtown and Lower Millyard District. The pending preparation of the City's new I AMesbury 2030 master plan provides an outstanding opportunity to flesh out those lines of collective efforts and to ensure that City policies, zoning, codes, services and incentives are aligned to support their success.

5 Strategic Directions: Recommendations & Conclusions

The findings reported in the preceding sections highlight a range of conditions, which considered together in our assessment, indicate three main opportunities for increasing business establishment, employment, visitors, and sales within the Downtown/Lower Millyard District. These opportunities are summarized as three workstreams for further elaboration in the preparation of a District development strategy and action plan. The concept for each workstream is derived from a mix of identified strengths and opportunities that have been identified in this assessment. Each workstream concept considers how to leverage and build upon those opportunities in ways that can address weaknesses and vulnerabilities that have also been identified in the assessment. The key economic strengths and opportunities, and identified economic weaknesses and vulnerabilities, are summarized in Figure 18.

FIGURE 18. KEY FINDINGS & STRATEGIC WORKSTREAMS

Pursue the development of strengths and opportunities...

STRENGTHS

- Stable residential community - both owners and renters.
- Competitive residential rents in regional context.
- Property tax bill on single family residences below regional average (2017).
- Strong match between regional educational resources and employment opportunity.
- Demonstration of employment market resilience (“bounce back”) in COVID period.
- Adaptability of downtown food services businesses in face of COVID restrictions.
- Substantial schedule of business-generating District programs and events.
- Development and programming/activation potential of City and non-profit assets in the District (e.g., Upper Millyard and amphitheater, parking garage & lots, Carriage Museum, sidewalks, river walk, etc.).

OPPORTUNITIES

- Latent, underserved demand at local, regional, and county levels for a range of products that could be locally produced. These include: art, furniture & home furnishings, floor coverings, men’s & women’s clothing, clothing accessories, jewelry, luggage & leather goods, shoes, cosmetics & beauty products.
- Support further development of outdoor eating facilities and arrangements by food service businesses.
- Synergies between the above product demands (e.g., furnishings, art, floor coverings) for promotion of destination shopping/eating visits.
- Expressed interest of Lower Millyard producer/makers in doing direct sales (incl. retail).
- Multiple factors of attractiveness of Lower Millyard buildings as a business location, including strategic alignment with building owners.
- Organic sense of business community in Lower Millyard, including high level of input sourcing from local businesses.
- Further development of collective online sales platform for local businesses.
- Further developing and marketing of annual and seasonal calendar of markets, topical tourism, shopping and other business-generating programs and events.
- Potential sites in District for increased residential units and street-level retail units.

In ways that address weaknesses and vulnerabilities...

WEAKNESSES

- Relatively high housing cost burden.
- 25% of residents not earning living wage, disproportionately stressing seniors & renters.
- Need for more restaurants & food services providers, including food trucks, that operate Downtown during evening hours and in the Lower Millyard during lunch hours.
- Pattern of inconsistent Downtown retail business hours.
- Standing competition with Seabrook retailers due to sales tax differential.
- Increased & sustained competition from online and large format brick & mortar retailers in specific product areas.
- Undersupply of street level retail units.
- Deteriorated or underutilized/under programmed District assets in strategically valuable locations.

VULNERABILITIES

- Aging population.
- Shifts in housing typology demand relative to existing stock, e.g., declining household size relative to average size of stock.
- (Potential loss of affordable housing units.)
- 25% of residents not earning living wage, disproportionately stressing seniors & renters.
- (Potential high level of accumulated rent arrears in lower income households.)
- (Potential of labor supply shortage in lower pay occupations.)
- (Potential continuation of delayed return to pre-COVID downtown shopping trip levels, including by local residents.)
- Uncertain economic support mechanisms for future economic shocks, i.e., dependency upon federal and state economic adjustment supports.
- Likely increase in flood risk associated with increasing weather extremes.

Via the following recommended strategic workstreams...

The make-live-shop-play district

- Assets & facilities development and resilience building.
- Housing development for target demographic groups.

The enterprising district

- Local markets and direct sales channels development.
- Business financial resilience mechanism.
- Social enterprise partnerships development.

The destination district

- Place branding, programming & marketing.

Households

Labor Market

Local Business

Assets: public & non-profit

The remainder of this report describes the three recommended strategic workstreams with reference to this figure and, of course, to the findings presented in the preceding sections, from which the figure is derived.

Strategic Workstream 1: Developing the Make-Live-Shop-Play District

WORKSTREAM OBJECTIVE

The chief objective for this workstream is to increase the capacity and function of the District as a combined enterprise and residential location that attracts a growing resident population of entrepreneurial producer-makers and artisans, as well as resident key workers and downsizing senior households. The primary work of this workstream is to accelerate physical improvements, developments and/or the rehabilitation of land, buildings, and other physical assets in the District for combined residential, maker/producer, retail, and visitor experience purposes. The City of Amesbury would likely take the lead in this workstream area, in partnership with building and land owners, including through the I AMesbury 2030 planning process.

Sub-objectives for this workstream include:

- 1.1. To address household economy resilience issues by increasing the supply of affordable Amesbury housing stock to match the declining size and budgets of three Amesbury residential demographics, whose incomes are strained in the context of existing housing supply. These are:
 - younger, new households, in particular those engaged in artisan or other producer occupations (highlighted in Workstream 2);
 - key worker and frontline worker households (e.g., healthcare technicians and support, personal care workers, administrative and retail staff), and
 - downsizing senior households

Consideration of housing opportunities in the District would factor building typologies that have proven most attractive and economically viable for each group, including small housing units, live-work units, and multi-family buildings.

- 1.2 To support growth in producer-maker and artisan retail activity in the District, in particular for the associated micro- and small enterprises, by increasing the supply of street facing storefronts, micro-retail market spaces (e.g., servicing of parking and other public lots for markets, a market pavillion), and maker studios. Sub-objectives 1.1 and 1.2 could be pursued simultaneously through attraction, incentives, and partnerships with developers and building owners who are experienced in the design and management of live-work spaces.
- 1.3 To increase the utilization and contribution of existing District building, land, street, walkway and natural assets to both livability and visitor experience through their further development. A broad approach to 'development' would range from rehabilitation and investment in land and building assets (e.g., the parking garage, walkways, bike trails), to the utilization of Upper Millyard buildings and public spaces, to the introduction of signage, and wayfinding, to the addition of amenities, such as rapid charge e-vehicle charging stations.

Key initial actions in this workstream could include:

- Prepare an updated inventory of underdeveloped or underutilized public and private assets in the District, determining optimal uses for these assets in the context of District strategy, and how the City could best leverage these assets to foster innovative and tailored residential and commercial development that is aligned with the District strategy.
- Identify measures for advancing the improvement and utilization of the identified assets (i.e., via planning changes and allowances, specific projects, development incentives and partnerships).
- Identify and pre-qualify prospective development/investment partners who have track records with the kinds of product types needed to advance 1.1 and 1.2, including development, leasing, and management of artisan/micro-retail market spaces.
- Identify sources of federal and state funds to support asset improvement projects, and secure the active support of federal and state representatives for prioritized District investments.

Strategic Workstream 2: Developing the Enterprising District

WORKSTREAM OBJECTIVE

The chief objective for this workstream is to further develop enterprise clusters of artisan/maker/producers in the District that are associated with identified areas of goods demand that are not being fulfilled by local, regional, and county businesses. The primary work of this workstream is to attract enterprises related to these goods production and wholesale/retailing clusters, and to further support existing and new business and employment growth for producer enterprises via direct sales channels, platforms, and markets/market events, and through consumer loyalty schemes. The lead for this workstream area would likely be an alliance of district business associations, commercial building owners, and resident businesses, working in unison with the City of Amesbury.

Sub-objectives for this workstream are:

- 2.1 To build upon and further invest in direct sales spaces and market events that service local artisan/maker/producers and that attract and provide a marketing/sales outlet for related non-resident regional goods producers in the key goods cluster areas. In this way, the District can further increase its attractiveness—and awareness of its attractiveness—as a business location for region-wide enterprise owners and artisans in the prioritized product areas.
- 2.2 To build upon and further invest in the utilization of one or more online sales platforms by District businesses (including retailers), doing so in a way that can highlight 'Made in Amesbury' messaging for consumers and prospective visitors, and 'Make it in Amesbury' messaging for prospective, resident enterprises.
- 2.3 To work with existing local non-profits, and to attract additional brand relevant non-profit partners, to offer and market unique programming experiences (e.g., concerts, tours, classes) that deliver the District's defined brand promise (see section 3 below).

Key initial actions in this Workstream could include:

- Designate specific locations as fixed location local market areas, identify improvements for these areas to better support their utilization as market locations, and further define the management requirements for regular and/or periodic markets in these locations.
- Further support and develop established and successful District market events, considering both the logistical needs and the programming and promotion needs for further growth of these events. Create thematic and scheduling linkages between thematic markets (e.g., furnishings and woodworking) and thematic program events (e.g., a woodworkers convention).
- Evaluate the experiences of local businesses with their use of online sales platforms, and consider the feasibility and attractiveness of new entrant 'buy local' online sales platforms, such as **shopIN.nyc**.
- Evaluate the range of local purchases loyalty program models, ranging from points cards to local money systems, including their feasibility for application in Amesbury, and local business interest in participating in such schemes.
- Evaluate the diverse range of local business support fund models, and potential sources of endowment and/or revenues to establish a designated District business support fund for use in times of heightened economic distress in the region or arising from a localized shock event (e.g., a flood).

Strategic Workstream 3: Developing the Destination District

WORKSTREAM OBJECTIVE

The chief objective for this workstream is to further develop brand definition and regional and New England-wide brand awareness of the District, supporting the design and delivery of differentiated, brand-aligned District experiences for local residents, regional shoppers, and topically targeted visitor groups. The primary work of this workstream is to establish the programming and promotional efforts, and related partnerships, required to deliver a set of unique District brand experiences for this range of groups. Targeted groups would range a gamut of defined visitor types such as regional weekend shoppers, opportunistic visitors (i.e., interstate highway travelers), regular seasonal visitors (e.g., families participating in youth sports events), and topical interest groups (e.g., arts, history).

The lead for this workstream area would likely be an alliance of district business associations, and local marketing professionals, district businesses, and non-profit organizations that share a common interest in community identity and in increasing visitor/shopper numbers.

The authors recommend that place brand development efforts for the District build upon recent community branding themes (i.e. Make history here) by expanding the range of ways that Amesbury is a place for 'making'. For instance, the District could also be understood as a place, for instance, for 'making it,' 'making a sustainable future,' and 'made in Amesbury' themes. As well, District place branding can also be integrated with recent efforts to develop and market the District as a cultural district.

Sub-objectives for this workstream are:

- 3.1 To identify ways to better market the District to select visitor types/groups (e.g., such as summertime vacation travelers on the 495/95 corridors) that could add to existing visitor trip patterns.
- 3.2 To increase visibility within the District of local artisan/maker/producer enterprises and their goods.
- 3.3 To complete a District place brand strategy exercise or process that articulates a set of clearly defined brand promises tailored for targeted visitor and customer groups, including the particular emotional experiences and practical benefits that District businesses, non-profit stakeholders, and programming should aim to deliver to each group.
- 3.4 To refine and update existing City and District related marketing collateral (e.g., logos, signage, online and print materials) to reflect and communicate the District's brand proposition(s) to different audiences.

Key initial actions in this Workstream could include:

- Establish a District place branding project and project team.
- Convene an initial meeting with topically relevant Amesbury non-profit organizations to explore how they can contribute to District brand strategy and programming, and to identify related non-profits with whom additional partnerships could be explored.
- Establish signage within the District indicating the locations of District artisan/maker/producer enterprises.
- Establish signage at interstate highway exits that highlight the existence of and nature of the District. In addition to inclusion of standard services and resources icons, such signage would ideally provide opportunity to indicate current District markets, events, and programs.
- Establish and/or improve wayfinding and topical (e.g., historical) signage in the District to better ensure that the fascinating history of the District becomes better known to residents and visitors.
- Prepare a unified programming (and related marketing) approach providing greater synergistic scheduling and one-stop awareness of the wide range of interesting District events, amplifying key themes of District brand identity.
- Explore targeted marketing promotions for targeted visitor groups (e.g., summertime coastal New England vacationers; historical professionals, students, and hobbyists).

In conclusion, Amesbury's post-COVID bounce forward pursuits (including with use of recovery resources and the Infrastructure Investment and Jobs Act) can be designed to renew and build the differentiated offerings, experiences, and identity of Amesbury's Downtown and Lower Millyard District. The above recommended pursuits can build upon Amesbury's identified strengths and opportunities. They can be shaped in ways that not only build the District's artisan/maker/producer businesses (including cultural entrepreneurs), but that also address household-level economic stresses, and that buttress and build upon heritage assets and qualities while serving the city's changing demographic mix and contemporary lifestyle interests. The pending preparation of the City's new I AMesbury 2030 master plan provides an outstanding opportunity to further flesh out the above recommended lines of collective effort, and to ensure that City's policies, zoning, codes, services and incentives are aligned to support their success.

Appendix

TABLE 14. 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

Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, Amesbury Downtown and Lower Millyard

TABLE 14. 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
				● Leakage
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

Source: Claritas Spotlight, Environics Analytics, ACS Enhanced Data, Baseline January 2021, Amesbury Downtown and Lower Millyard