



Foxborough Route 1 Economic Development Study

December 2015



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I. Project Background

The goal of the Foxborough Route 1 Corridor is to determine the type of development that can be supported by the market, to identify where there are key development opportunities and to develop strategies for the Town to attract desired development throughout the corridor. The market assessment includes an analysis of office, retail, and housing. Housing was included as part of the market assessment because more residents increase the local customer base to support retail businesses. There are also certainly opportunities along Route 1, particular in and around the commuter rail station, where residential uses are a possibility. In fact, residential becomes an even more realistic opportunity with the potential increase in commuter rail service.

Introduction

The Route 1 area has been identified through a number of previous studies, legislative acts and planning decisions as a priority areas for growth by the Town of Foxborough. The Stadium Act of 1999 established an economic development area along Washington Street/Route 1 in order to attract additional development and jobs. The Town also approved the Economic Development Overlay District in December of 1999, which includes 500 acres surrounding Gillette Stadium. A significant portion of the EDAOD is currently owned by Foxboro Realty Associates LLC (Kraft Group). The overlay district was created to encourage economic development of the property around the stadium and to address the unique pressures and demands of development and use of such property due to the high volume of pedestrian and vehicular traffic generated by uses in this area.¹ In November of 2009, the Commonwealth and Town further designated the area within the EDA as one of [16 Growth Districts](#) within the state. The Growth Districts Initiative is carried forward by EOHED and is intended to expedite commercial and residential development within the Commonwealth through strategies such as coordinating permitting efforts and identifying money for improvements, such as utility or roadway upgrades.

Route 1 was also identified through several subsequent planning studies as a priority area for growth, including the 2008 South Coast Rail Priority Development and Preservation Mapping project undertaken by SRPEDD, MAPC, and OCPC where the three regional planning agencies worked with residents, business owners, officials and organizations in order to designate priority areas for growth and conservation. The area was re-confirmed as a priority development area during the South Coast Rail Community Priority Areas Five Year Update in 2013 as well.²

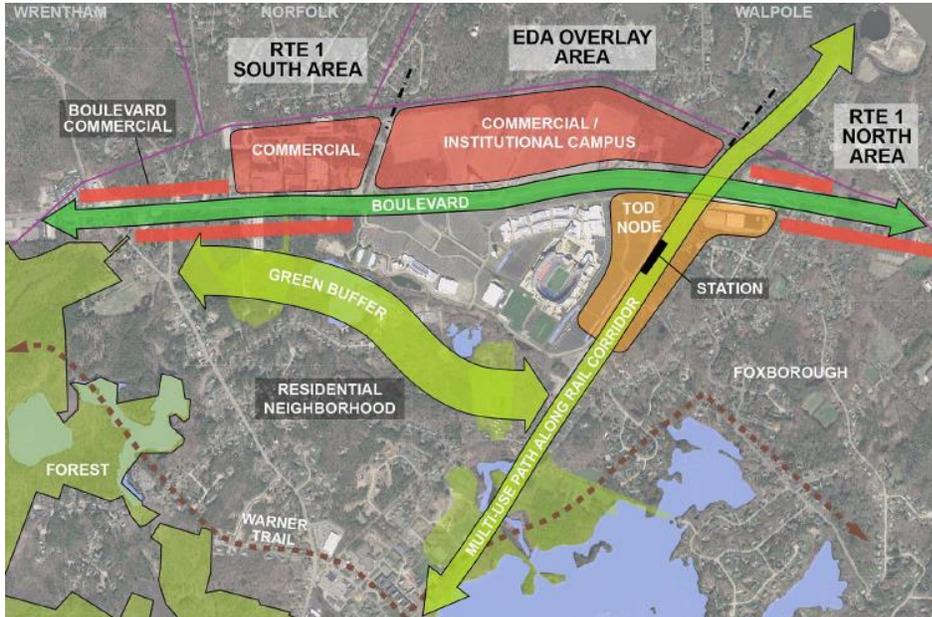
The Town of Foxborough also recently undertook a Master Planning process through which the Town identified priority nodes for growth. These include Downtown, the Route 1 Corridor, Chestnut Green, and Route 140/Foxborough Boulevard. The vision is to concentrate development across Town in locations that mirror the historic pattern of growth along the commuter rail and to find new ways to make

¹ South Coast Rail, Corridor Plan Updates, December 2013, <http://www.srpedd.org/manager/external/ckfinder/userfiles/resources/South%20Coast%20Rail/final-SCR-2013-document-121813.pdf>

² South Coast Rail, Corridor Plan Updates, December 2013, <http://www.srpedd.org/manager/external/ckfinder/userfiles/resources/South%20Coast%20Rail/final-SCR-2013-document-121813.pdf>

connections between these developed areas, including a potential trolley or bike/ped trail link.³ A graphic image created by McCabe Enterprises and delineating the Town's vision for the corridor through the Master Plan is included below.

Figure 1: Master Plan Vision for Route 1



Source: McCabe Enterprises, Foxborough Route 1 Workshop, January 29, 2015

MAPC utilized the information collected through the Master Plan study to inform a more detailed look at the corridor, to understand what the market opportunities and physical development opportunities along the corridor are and how these align with the Town's vision for the corridor.

Study Area

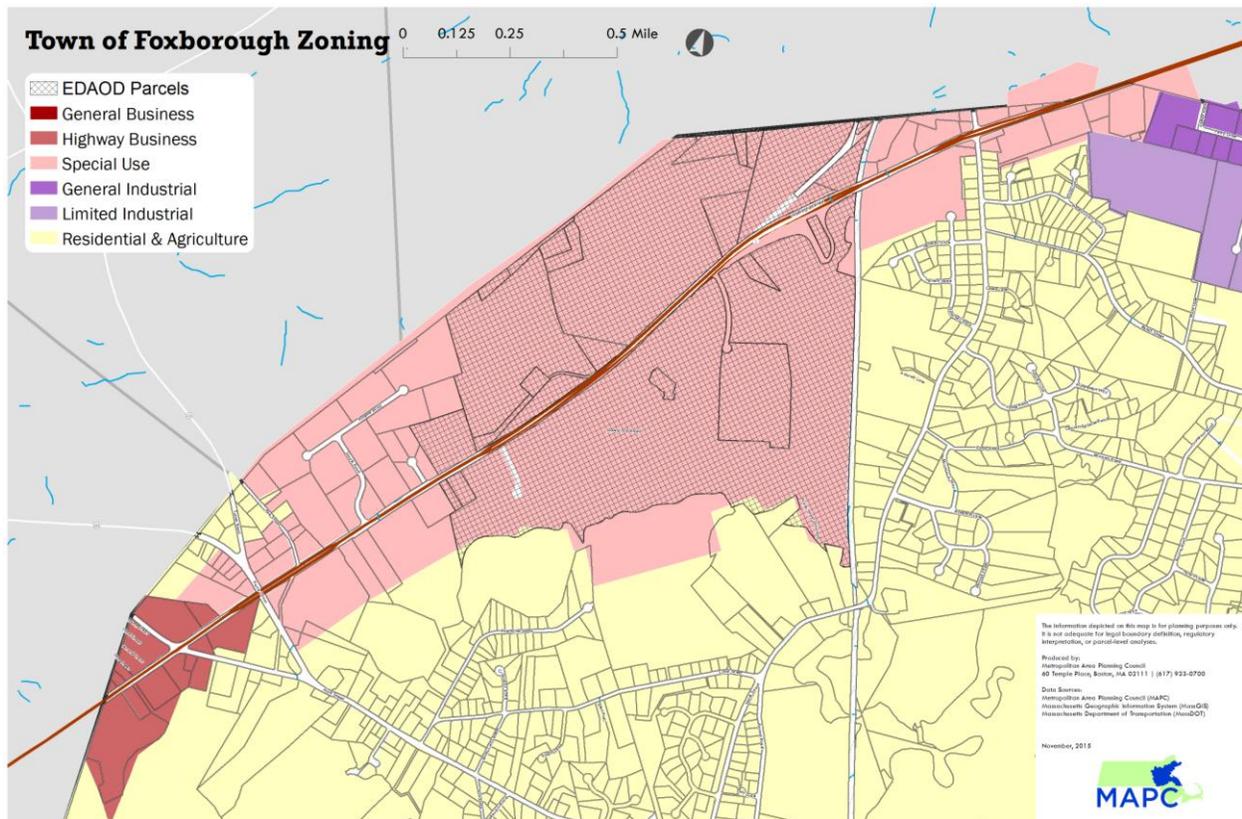
Route 1 is located in the northwest area of Foxborough. The primary study area considered consisted of the parcels zoned Highway Business and Special Use⁴. See Figure 2 below for a map of the current zoning along the Route 1 Corridor. Currently there are a number of industrial, office, and retail uses along the Route 1 corridor that all cater to a regional market. There are a number of distribution related businesses and services in addition to some natural areas and open space, including the Nature Trail and Cranberry Bog at Patriot Place. Gillette Stadium, home of the New England Patriots, is also located along Route 1. The adjoining Patriot Place includes over 700,000 square feet of retail and restaurant space and 120,000 square feet of office space, currently occupied by the Brigham & Women's / Mass General Health Care Center⁵.

³ McCabe, Foxborough Economic Development Master Plan, 2013

⁴ Certain parcels within these zoning districts were not included for the build out analysis (Gillette Stadium parcel, residentially zoned parcels or certain parcels that were deemed undevelopable because they were completely covered by the wetlands). This is discussed in more detail in the Build Out section of the report.

⁵ Blackline Retail Group, <http://blacklinere.com/RetailProperties/MA/Foxborough/Patriot-Place>

Figure 2: Town of Foxborough Zoning Map



The area includes the above referenced Economic Development Area Overlay District which represents a state designated Growth District under the Massachusetts Growth Districts Initiative. The EDAOD includes 500 acres and, according to the state, has an anticipated build out of 1.5 M square feet of office and 15,000 square feet of retail.⁶

Previous Studies

Foxborough Master Plan: Economic Development Element (March 2014)

The economic development element of the Foxborough Master Plan was completed in 2014. Through the Master planning process, participants selected a growth scenario for the Town entitled “Growth Nodes.” This scenario proposes concentrated development in distinct locations that mirror the historic development of the rail line. The plan proposes increasing connectivity amongst these separate growth nodes through a trolley service and new network of pedestrian and bicycle paths. The primary nodes identified for growth included Downtown and the Route 1 corridor. Secondary growth nodes identified were Chestnut Green and the Foxborough/Foxfield Plaza area. The Economic Development element of the Master Plan proposes the creation of a new Route 1 sewer district with the existing treatment plant at Gillette Stadium at its center in order to provide capacity for new development.

⁶ Massachusetts Executive Office of Housing and Economic Development, Growth District Communities, <http://www.mass.gov/hed/economic/eohed/pro/gdi/gdi-guidelines.html>

The vision for Route 1, as delineated through the master planning process is that Route One should be a “high quality front door to Foxborough that is well-designed, serves the region and Foxborough while maintaining the balance with nature and development, with minimal intrusion into the day to day residential life of Foxborough, capitalizing on rail and highway access.”⁷

Specific goals from the Foxborough Master Plan Economic Development Element that are applicable to Route 1 include-

- To solidify and strengthen the commercial tax base component for the Town for the long term benefit and support to the Town.
- To support appropriate concentrated growth and development in the designated EDA area and growth node.
- To encourage mixed use development on the land between the CSX rail line, transit stop and the EDA area, thereby strengthening the connection and utilizing transit oriented development principles.
- To reserve the large parcels on the west side of Route One for a planned large single corporate development using a campus style development. The west side of Route 1 should focus on non-residential development, since access to schools and recreation by children and families is difficult with Route 1.
- To foster development that is respectful of the precious water resources in Foxborough and utilizes innovative and best practices in water, wastewater, and energy conservation.
- To explore the formation of a Route One Wastewater Management District where land use and utility services plans are aligned.
- To concentrate development along Route One to avoid sprawl and costly service and utility extensions and investigate a program of Transfer of Development Rights.
- To provide for a pedestrian and bicycle connection between the residential area of Foxborough and Patriot Place, while developing and maintain a buffer between Route One development and the residential, agriculture, and natural areas of Foxborough.
- To create a green buffer to the south of growth areas along Route 1, particularly between Main Street and Keith Road. This buffer should be inclusive of the Cranberry Bog and Nature Trail.

Foxborough Housing Production Plan (July 2012)

The Foxborough Housing Production Plan underscores the need for affordable and accessible housing for elderly residents and multi-family housing for small and large related 2-4 and 5 plus person households throughout the Town. The plan also notes that new affordable housing unit development should be prioritized along Route 1 and in and around the Town Center. The plan specifically called out 119-123 Washington Street as an ideal parcel along Route 1 for housing development, but since the time of this study the Town has determined that it would not like to see additional residential development on the west

⁷ Foxborough Master Plan Economic Development Element, McCabe and Associates, March 2014, http://www.foxboroughma.gov/Pages/FoxboroughMA_Planning/masterplan/Economic%20Development%20-%20FINAL%2003-31-14.pdf

side of Route One due to concerns over access and services. That particular parcel has also already been developed as a satellite parking lot for employees at Gillette Stadium & Patriot Place.

Foxborough Commuter Rail Feasibility Study (September 2010)

The Massachusetts Bay Transportation Authority worked with EOHED to explore the feasibility of offering full time commuter rail service to the existing special-event rail station at Gillette Stadium in Foxborough. The station currently lies on a MassDOT-owned freight only line (the Framingham Secondary) running between Framingham and Mansfield. The line was acquired by MassDOT from CSX in 2015. Special event MBTA trains from Boston travel down the MBTA's Franklin Branch to access the Secondary via a connection at the MBTA's Walpole Station. Without the new commuter rail service, local peak automobile traffic on Foxborough arterials is expected to increase by 72% over the next twenty years. The study analyzed several options for commuter rail feasibility. The report also cites the importance of new housing development in the study area and how critical this would be for the viability of expanded service.

Neponset Water Management Act Planning Project

The purpose of this project was to apply a watershed-based approach to help public water suppliers in the Neponset River Watershed understand and begin preparing for their potential future obligations under the new Sustainable Water Management Initiative. The study examined demand management and reviewed water needs forecasts. It also evaluated wastewater returns and potential inflow and infiltration reduction in addition to optimization, alternative sources of supply, surface water releases, and storm water recharge opportunities.

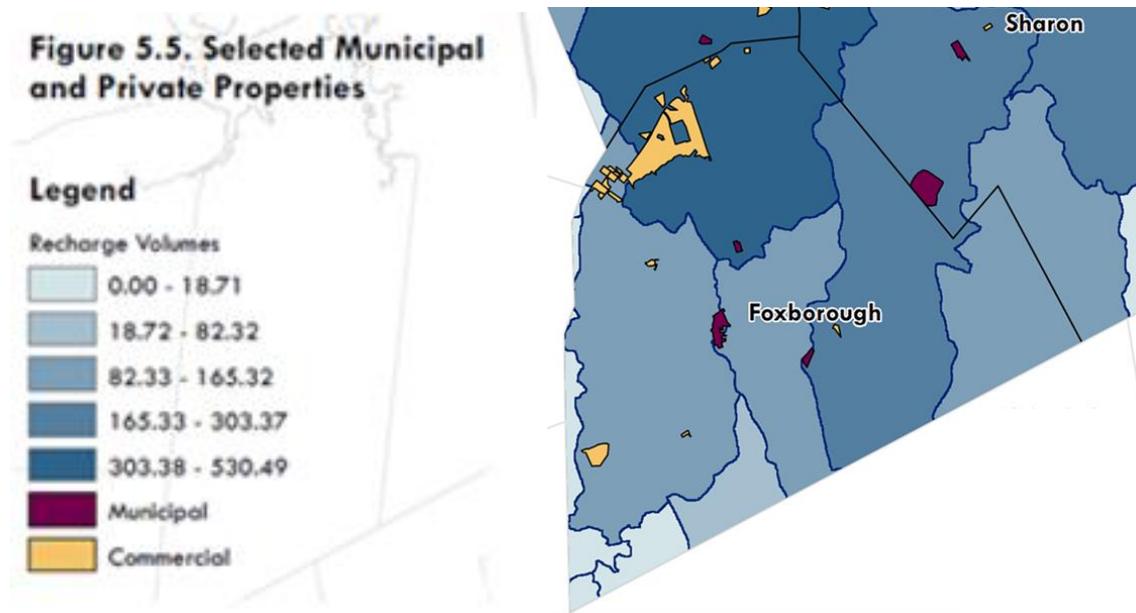
Re-charge opportunities were determined through analyzing the most currently available planning data. The analysis looked at the following characteristics of parcels.

- Soil Classifications
- Large impervious surfaces
- Location within net-depleted hydrologic units
- Land Use Code of Public/Tax exempt or commercial because of a greater likelihood of retrofitting or implementing new stormwater practices
- Containing a building built prior to Stormwater Standards indicating that there is likely no stormwater management facilities built onsite
- Having low property value to size ratio indicating that property owners may be more willing to redevelop or enhance properties.

If these parcels are re-developed they should incorporate stormwater management facilities so that stormwater recharge can be done on site rather than through a system of pipes which can lead to further pollution. Relevant to Route 1, as you can see in the below map, a number of commercial properties, including the site of Gillette Stadium were identified as priority retrofit opportunities and represent tremendous opportunity to replenish water supplies and stream flow via recharging stormwater runoff to groundwater, both from retrofitting of existing impervious surfaces and from increasing recharge requirements for future development projects. This will be a critically important consideration when

developing or re-developing sites along Route 1 since the preservation and protection of the water supply in Foxborough will be critical for any future development.

Figure 3: Foxborough Parcels Identified for On Site Recharge



Source: Neponset Water Management Act Planning Project, June 2013

South Coast Rail Corridor Plan (June 2009)

Through this planning process, three Regional Planning Authorities mapped and designated more than 30 priority development areas and more than 70 priority protection areas in 31 communities. The corridor plan outlines where new development should be supported; what land, open space and environmental assets represent the highest priorities for protection; what kind of development can be attracted to areas around new commuter rail stations; and what kind of tools can communities use and the state provide to better plan for South Coast communities. The Route 1 Corridor was designated as a priority development area through this process.

Community Outreach

The Route 1 study kicked off during the last year of the Foxborough Master Planning process. In order to lead into the MAPC Route 1 study, the Foxborough Planning Board asked that the Master Plan consultants, McCabe Enterprises, facilitate a high level Route 1 workshop in January of 2015 as an introduction. The workshop introduced the study, gave some high level data on development constraints and opportunities along the corridor and allowed stakeholders an opportunity to give some specific feedback on development opportunities and constraints along the corridor.

Route 1 Master Plan Workshop

At the Route 1 Master Plan workshop, a group of around forty stakeholders attended to share their vision and thoughts regarding the corridor. Many of those in attendance were property owners and business owners currently along the corridor. Major points of feedback that came out of this meeting included

- S-1 zoning along the corridor needed to be updated to include more as of right uses that would make the area more attractive for development. One suggestion was that the EDAOD overlay zoning could be extended over the rest of the S-1 zoning district in order to broaden the as of right uses. Property owners in particular felt that the 25% maximum retail requirement in S-1 was restrictive and should be eliminated.
- The water restrictions in the WRPOD also make it infeasible for the location of restaurants and the restrictions in Zone III in particular should be loosened to allow for more development.
- Parking requirements are too high and should be linked to net usable space not gross usable space because there is a loss factor for common areas.
- More lighting in the area would be helpful.

The Route 1 Business Group submitted a memo to the planning board with suggested zoning changes as part of this meeting and it is attached to this report as Appendix A.

There was also a strong sentiment in previous Master plan workshops that the corridor should be greened up and made more attractive so as to be a more welcoming travel route for those entering Foxborough. This would include lighting, signage, and enhanced landscape with trees along the corridor.

Stakeholder Interviews

MAPC staff followed up with many of the attendees of this meeting and had one on one interviews with business owners along Route 1 to get their perspective on development and re-development opportunities along the corridor as well. MAPC staff also spoke with residential developers and property owners in Town to get their perspective on the residential market opportunities in Foxborough and along Route 1.

Opportunities

In general we heard that in terms of being attractive for future development, the Town's assets included a good geographic location, equi-distant between Providence and Boston. Route 1 in particular has a number of retail and restaurant amenities already that would be appealing to a residential developer. The community also has many good companies and offers good job opportunities to potential residents.

Residential developers felt that new multi-family housing stock with amenities and upgrades would be very appealing because a significant percentage of available multi-family housing stock is older. In particular, a lot of couples with dual commutes are interested in living in multi-family units, as well as empty nesters who want to stay in Town and downsize.

Constraints

The biggest challenges for re-development cited by a number of landowners, business owners, and developers were sewer, water, and transportation, along with the environmental constraints that exist along the corridor. The soils along the corridor are challenging, particularly at the northern and southern ends of Route 1, south of Route 140 and north of Foxboro Center Women's Family Health Clinic. In the center of the corridor there are some high groundwater issues that would require fill and add to development costs. The Foxborough Terminals site is a good location to consider residential, but the site needs to be raised because currently the parking lot is at the same elevation as the swamp and there are some high groundwater issues on this site as well. There is also a significant amount of ledge located on the Northern end of the corridor. Installing sewer would really be a key to unlocking development.

Property owners also noted that in many cases they were making sufficient money from parking cars for events at Gillette Stadium and there was not really an incentive to redevelop. Owners cited the low costs of maintaining a property for parking including related taxes.

The presence of Gillette Stadium and Patriot Place along the corridor was brought up by some owners as a positive and others as a challenge. Some business owners felt that Patriot Place was good for their business because the retail and restaurants bring more people to the corridor. Others felt that during games and concerts, they were better off just closing down because of the associated traffic and that this was harmful to their business. One office owner noted that he had actually lost potential tenants because they felt they would have to let their workers go early on weeknight games and concerts due to the proximity to Gillette Stadium.

Fall Route 1 Workshop



On November 4, 2015, MAPC staff hosted a second public forum to discuss the draft results of the market analysis and build out analysis components of the study and to get some input into draft recommendations that will be included in the plan. At the forum, participants discussed strategies to market the Route 1 Corridor for economic development as well as specific ways to update zoning along the corridor to create more flexibility to implement desired development. Attendees also participated in a visual preference exercise to identify the style, type, and location they preferred for future development along the corridor. Feedback collected at this forum is incorporated into the plan recommendations and included as Appendix B.

To conclude the forum, participants prioritized economic development strategies for the corridor. The most frequently voted number one priority was to investigate the creation of a Route 1 Sewer Service Area.

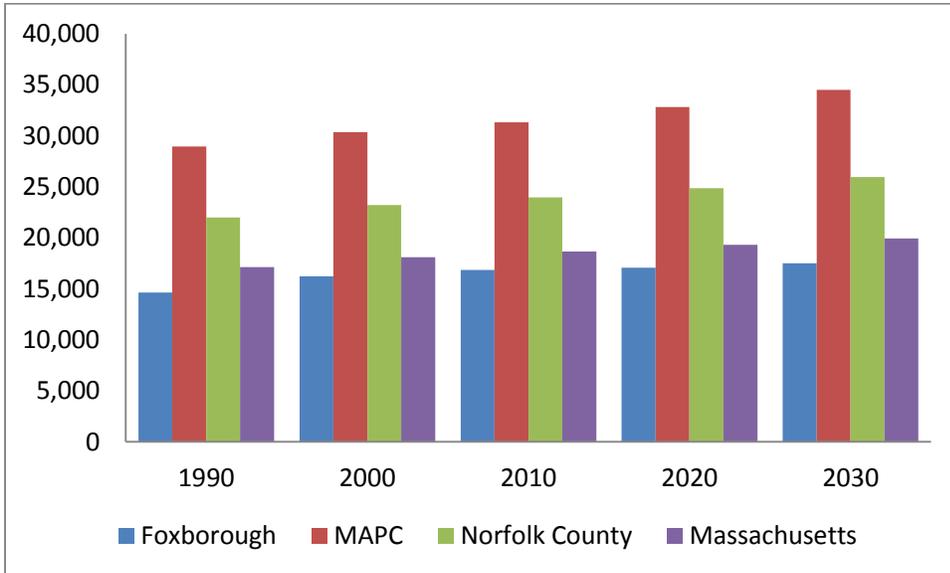
Facilitating zoning changes to incentivize more development and working with the MBTA to ensure that they increase daily commuter rail service were also highly prioritized.

II. Existing Conditions

Population & Households

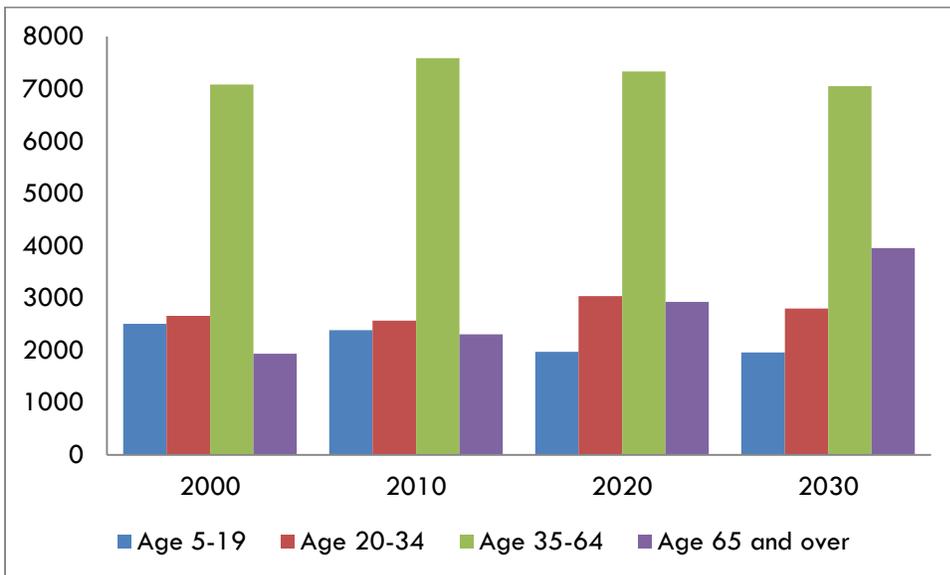
The population in Foxborough in 2010 Census was 16,865 people and 6,504 households. As seen below in Figure 4, the population is expected to continue to grow but at a limited rate. The projected population in 2030 is 17,511 which represents a 3.8% population increase from 2010.

Figure 4: Foxborough Population Projections



*Numbers for Norfolk County, MAPC, and Massachusetts indicate averages for the communities in each corresponding geographic area.

Figure 5: Foxborough Population Projections by Age



The above chart shows Foxborough’s projected population growth by age. Foxborough, along with many other communities in the region, is projected to experience a significant increase in the population age 65 older. The projected number of people age 65 plus in Foxborough in 2030 represents a 105% increase from 2010. The age 5-19 population is expected to decrease by 22%. 20-34 year olds are expected to grow by 5% by 2030 and the age 35-64 population is expected to remain relatively steady.

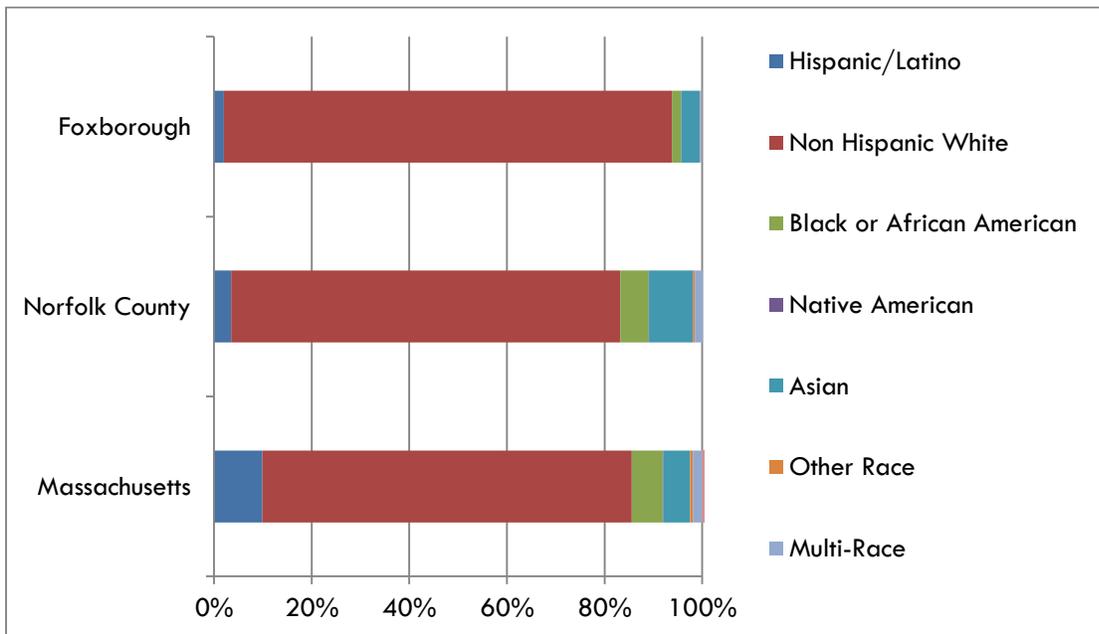
Projected population is an important factor to consider for the future housing needs of the community, but looking at projected household growth provides a more accurate picture of how many actual units will be needed and what demographics these units will need to accommodate. In Table 1 below, consistent with the population projections, households age 60 and over are projected to see the most significant growth at 60%. Households age 30-44 will also see growth of around 20% with a 25% decrease in households age 45-59.

Table 1: Foxborough Household Projections

Age	2010	2020	2030	Change (2010-2030)	% Change
15-29	510	551	489	-21	-4%
30-44	1558	1562	1876	318	20%
45-59	2386	2199	1782	-604	-25%
60 and over	2050	2695	3275	1225	60%

Even with slower population growth, it is important to keep in mind that households on average are becoming smaller. The average household size in 2010 was 2.59, but it is expected to be 2.36 by 2030. With more single person households, and fewer children per family, there is actually a need for more housing units as an average group of people will actually require more housing units than they do today.

Figure 6: Foxborough Race & Ethnicity



Source: ACS 2009-2013 5 Year Estimate

Foxborough is a predominantly white community with a 91.8% Non-Hispanic White population. Compared with the county and the state, the community has less overall diversity.

Income & Education

Table 2: Median Household Income

	2000	2013	% Change
Foxborough	\$64,323	\$91,601	42%
Norfolk County	\$63,432	\$84,916	34%
Massachusetts	\$50,502	\$66,866	32%

Source: US Census 2000 and ACS 2013

The median household income in Foxborough has risen much faster than it has for the county or the state. The median income in Foxborough is about 8% higher than the median income for the County and 37% higher than the median income for the state.

Table 3: Educational Attainment

	MA	Norfolk	Foxborough
Bachelor's Degree or Higher	22.30%	27.30%	29.30%
High School degree or higher	89.40%	93.90%	96.50%

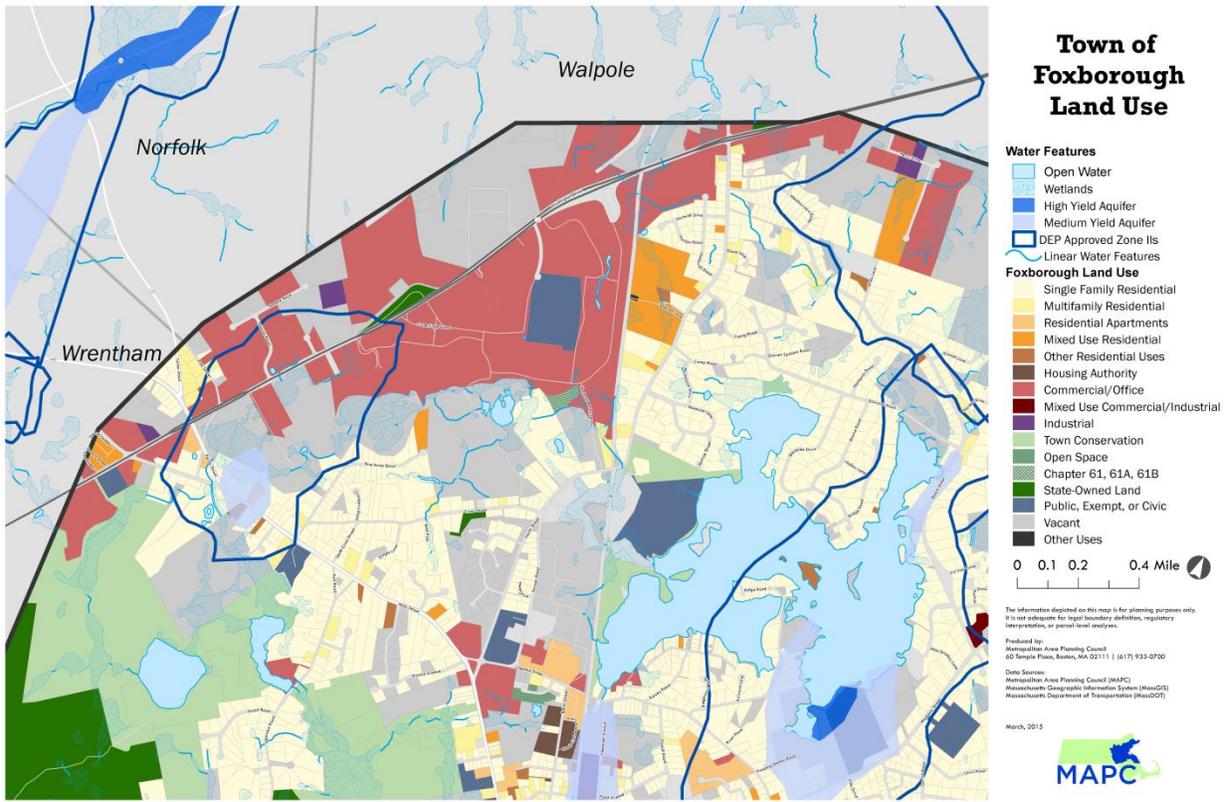
Source: ACS 2009-2013 5 Year Estimate

The Town of Foxborough has a slightly higher percentage of those with a bachelor’s degree or higher than the county or the state. The Town also has a high number of citizens with a high school degree or higher at 96.5%.

Land Use

There are currently a number of industrial, office, and retail uses along the Route 1 corridor. There are some residential units, including a mobile home park along with some single family units. There are some hotels and motels present along the corridor as well. Natural areas and open space along Route 1 include the Nature Trail and Cranberry Bog at Patriot Place. Route 1 is also home to Gillette Stadium, where the New England Patriots play, and the adjoining Patriot Place which includes over 700,000 square feet of retail and restaurant space and 120,000 square feet of office space, currently occupied by the Brigham & Women’s / Mass General Health Care Center.⁸ See the Land Use map below for a summary of land uses along the Route 1 Corridor.

Figure 7: Foxborough Land Use Map



According to the most recent assessor’s data, the breakdown of parcels along the Route 1 corridor is as follows.

⁸ Blackline Retail Group, <http://blacklinere.com/RetailProperties/MA/Foxborough/Patriot-Place>

Table 4: Breakdown of Route 1 Parcels by Land Use Code

Land Use by Use Code	Total Parcels	% Parcels**
Residential	23	22%
Residential, mixed use	2	2%
Vacant Land (Residential)	3	3%
Commercial	34	32%
Vacant Land (Commercial)	24	23%
Industrial	12	11%
Exempt	8	8%
Total	106	

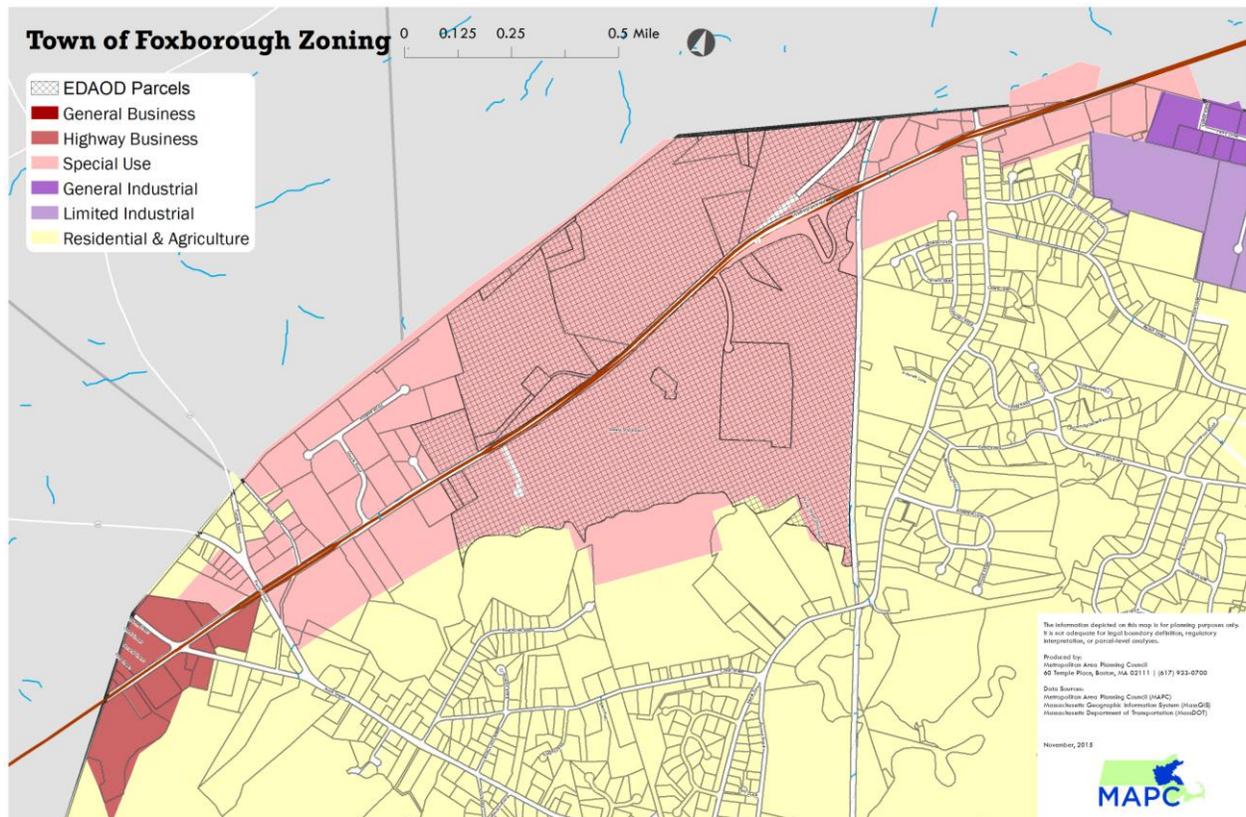
Source: Foxborough Assessor Data

*Storage warehouses were counted under Industrial even if they have a commercial land use code.

**Percent Parcels is by number of parcels, not percentage acreage of land uses.

Zoning

Figure 8: Foxborough Zoning Map



There are three underlying zoning districts and one overlay district along Route 1. At the southern end of the corridor, there is the Highway Business District, shown on the map above in red. There are also some

parcels on the southern end of the corridor that are zoned Residential & Agriculture (R40) which are shown in the above zoning map in yellow. The rest of the Route 1 corridor falls within the Special Use Zoning District (S-1), shown in the above map in light pink. There are 20 parcels within the S-1 zoning, including the Stadium parcel, that fall within the Economic Development Area Overlay District (EDAOD).

The R-40 district is the only district where residential is allowed by right, including single family structures and assisted living facilities. There is no multi-family development allowed by right anywhere along the Route 1 Corridor.

The Highway Business and Special Use Zoning include similar regulations except that there is a restriction on the amount of retail that can be included within a structure within the Special Use Zoning. S1 zoning restricts retail to 25% of the gross area of the buildings or structures on the lot. Special use zoning also requires large setbacks that do not allow development oriented closer to the road.

The EDAOD allows for additional uses and greater height flexibility than the underlying Special Use Zoning, allowing up to 50% of the gross square footage of the buildings or structures on a lot to be within mercantile or retail uses. It allows hotels by right, outdoor recreational uses, and shared parking. In terms of height, buildings can go up to 100 feet if a structure is located greater than 300 feet from the Route 1 Right of Way.

Site plan review is required for any new building or any change of use of a predominantly non-residential building in any zoning district.

In addition to the underlying zoning & the EDAOD district, the Water Resources Protection District (both Zone II and Zone III) also covers a significant portion of the southern end of the corridor, effectively restricting parcels within the WRPOD to a maximum impervious surface of 15% by right. In the map below, the Zone II area is represented in light green and the Zone III is represented in light pink (includes both Zone A and Zone C).

further subdivided into Principal Arterials and Minor Arterials.⁹ MassDOT has jurisdiction over Route 1 and has responsibility for its repair and maintenance.¹⁰

Transit Access

There is currently no regular MBTA commuter rail service to the Route 1 Corridor in Foxborough. However, the Route 1 Corridor is currently served by a commuter rail train that runs only for special events including New England Patriots games. The current station lies on a MassDOT-owned freight only line (the Framingham Secondary) running between Framingham and Mansfield. Special event MBTA trains from Boston travel down the MBTA's Franklin Branch to access the Secondary via a connection at the MBTA's Walpole Station.¹¹

In 2014, the MBTA announced a plan to start running commuter rail express service to Foxborough, using the freight line. The service would run trains from South Station on the existing Fairmount Line to Readville on the Franklin Line and then nonstop to Foxborough. It would initially run five times a day on weekdays, including two peak trips in the morning and two in the afternoon. There have been discussions with the Kraft Group regarding providing parking for the station as well. The expanded commuter rail service is slated to start in December of 2016.

GATRA is the regional transit authority for Foxboro, but they do not offer fixed route bus service in Town. They only offer paratransit service. Paratransit is door to door transportation serving people 60 plus and/or those who meet the requirements of the Americans with Disabilities Act (ADA) who are not 60 years old. The Foxborough Council on Aging & Human Services also has a 14 passenger senior shuttle¹².

The Neponset Valley Transit Management Association (TMA) also serves Foxborough and offers programs such as on-line ride-matching to form carpools and vanpools and a Guaranteed Ride Home Program.

Pedestrian and Bicycle Environment

Route 1 is an auto oriented corridor and is designed to maximize auto travel. It currently does not have strong pedestrian or bicyclist amenities. Although there are sidewalks located along much of Route 1, they are not well-maintained and contain significant gaps to accommodate large driveways into various establishments along the corridor. The sidewalks lack streetscaping and buildings are set back significant distances from the road with parking lots in front, which does not encourage walking or biking. With the exception of Patriot Place, stores and restaurants along the corridor are also located far enough apart that it is not easy to walk from one establishment to the next.

⁹ Massachusetts Department of Transportation, Functional Classification, December 2015, <https://www.massdot.state.ma.us/planning/Main/MapsDataandReports/Maps/FunctionalClassification.aspx>

¹⁰ Massachusetts Department of Transportation, Jurisdiction of Roads, December 2015, <https://www.massdot.state.ma.us/planning/Main/MapsDataandReports/Maps/JurisdictionofRoads.aspx>

¹¹ Foxborough Commuter Rail Feasibility Study, September 1, 2010. Prepared for: MBTA with support from: MA Executive Office of Housing & Economic Development. Jacobs Engineering Staff with CTPS, [http://www.mbt.com/uploadedfiles/About_the_T/T_Projects/T_Projects_List/Final%20Foxborough%20Commuter%20Rail%20Report%20\(01-Sept-10\)%20-%20REPORT%20ONLY.pdf](http://www.mbt.com/uploadedfiles/About_the_T/T_Projects/T_Projects_List/Final%20Foxborough%20Commuter%20Rail%20Report%20(01-Sept-10)%20-%20REPORT%20ONLY.pdf)

¹² Town of Foxborough, Transportation, December 2015, http://www.foxboroughma.gov/Pages/FoxboroughMA_COA/transportation

Parking

There is a significant amount of parking located along Route 1, including lots owned by Kraft that are used for game day parking as well as private lots for establishments, many of which are re-purposed as game day or concert parking when there are events going on in Gillette Stadium. At Gillette Stadium alone, there are more than twice as many parking spaces as there are parking meters in all of Boston.¹³

Traffic

Although it was not a primary goal of this study to analyze traffic, according to a presentation by Tim Thompson, transportation engineer at PARE Corporation, at the Route 1 Master Plan Workshop in January 2015, there are approximately 28,000 vehicles per day on Route 1 and about approximately 2,800 vehicles per hour during peak traffic periods.¹⁴ Traffic management will certainly need to be considered if new development is pursued. However, the roadway was constructed to accommodate peak game day and event traffic so there is some additional capacity during non-games/events for development types that may have complementary needs. Office space for example generates the majority of trips on weekdays between 9 AM and 5 PM. Also, if regular Commuter Rail service does become an option, new commercial and residential development could take advantage of a close location to this station and reduce potential car trips. As mentioned previously, by the end of 2016, there are expected to be five daily commuter trains connecting Foxborough to Boston.

Recent Development Proposals

In 2009, the Kraft Group proposed to redevelop the property at 67 Washington Street & 53 Washington Street (primarily parking lots across Route 1 from the stadium/Patriot Place site) for approximately 1.45 million gross square feet of office/high tech office space and about 150,000 gross square feet of retail space, intended to complement the other uses of the Overall Stadium Project. The project would also include a pedestrian bridge across Washington Street to connect the new development with the Stadium and Patriot Place.

¹³ Gillette Stadium Venue Information, December 2015, <http://gillettstadium.com/venue-information>

¹⁴ PARE Corporation, January 29 2015 Route 1 Workshop Presentation

III. Market Study

A key component of this study was to analyze market opportunities along the Route 1 Corridor. MAPC staff conducted a market assessment of residential, retail, and office uses to better understand what kind of development might be supported by the current market.

Residential Market Analysis

Integrating residential uses along with commercial uses along the Route 1 Corridor will help to create a thriving mixed use corridor that is attractive to residents, visitors, and future developers alike. Residents help to bring activity to an area on the weekends and evenings when office workers are home and they also help to support retail establishments and restaurants. The most appropriate sites for residential are likely on the East side of the corridor within walking distance of the commuter rail station (½ mile). Public forum participants in particular were very interested in seeing residential uses integrated alongside retail and office within close proximity of the commuter rail station.

It is also important to consider that changes in demographics and lifestyle preferences over the past twenty years have led to emerging trends in the types of residential developments in demand in the greater Boston region. Large, single-use suburban developments, such as office parks or condominium complexes, have become an outdated model of development that no longer appeal to younger, knowledge-based workers seeking dynamic work and living environments.¹⁵ Similarly, elder married couples looking to downsize from their large, single-family homes have preferred smaller condominium units in locations that are in amenity-rich environments that provide transit, retail, and service options. In fact, studies have shown that elderly households would prefer to live within walking distance of transit, and are unlikely to stay in their suburban homes due to limited transportation choices.¹⁶

With these lifestyle preferences in mind, MAPC staff analyzed the residential market in the Town of Foxborough overall and then looked specifically at Route 1 to understand what kind of residential opportunities may exist.

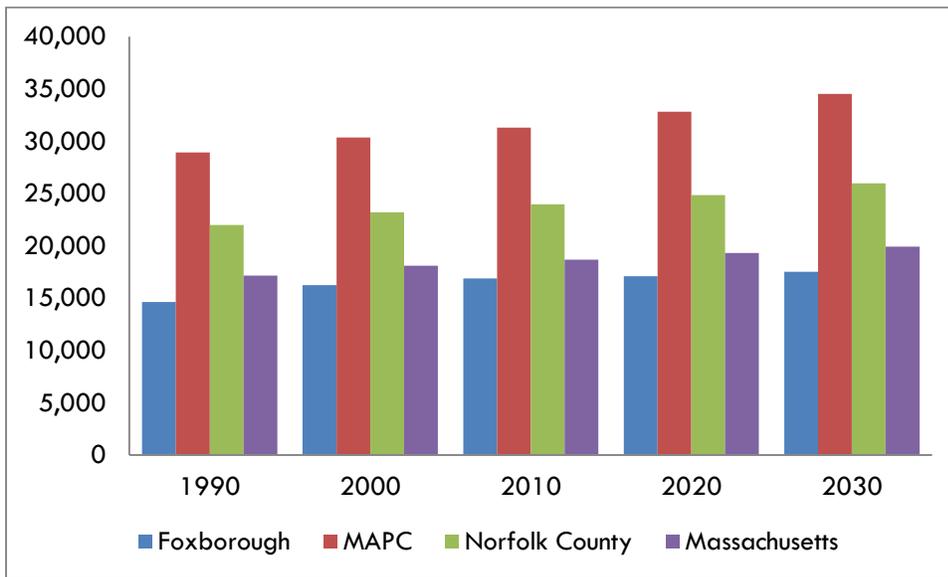
Population & Household Projections

The population in Foxborough at the time of the 2010 Census was 16,865 people and 6,504 households. As seen below in Figure 10, the population is expected to continue to grow but at a limited rate. The projected population in 2030 is 17,511 which represents a 3.8% population increase from 2010.

¹⁵ Metropolitan Area Planning Council, Wells Avenue Market Study, March 2015, <http://www.mapc.org/sites/default/files/Wells%20Avenue%20Market%20Study%2020March2015%20Final.pdf>

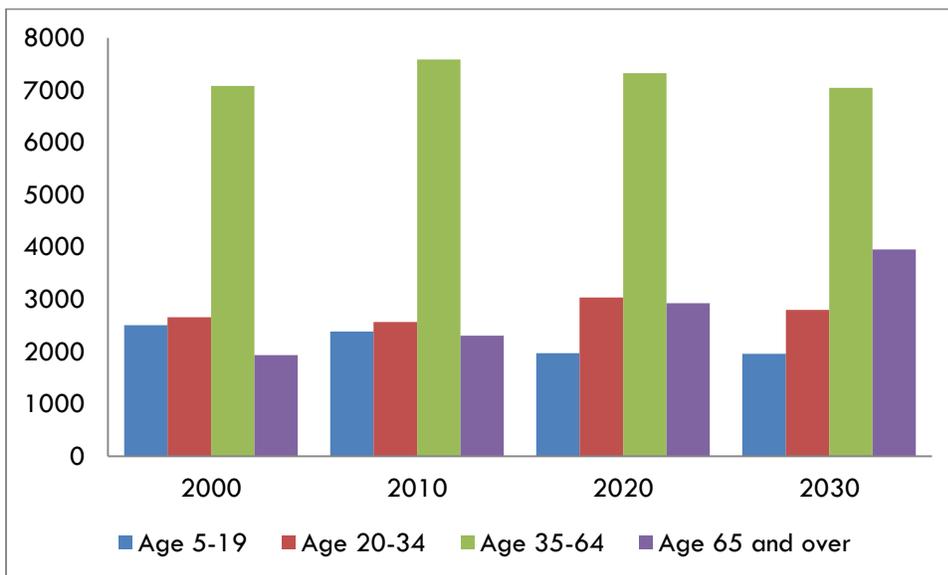
¹⁶ Bailey, Linda. 2004. *Aging Americans: Stranded without Options*: Surface Transportation Policy Project.

Figure 10: Foxborough Population Projections



*Numbers for Norfolk County, MAPC, and Massachusetts indicate averages for the communities in each corresponding geographic area.

Figure 11: Foxborough Population Projections by Age



The above chart shows Foxborough's project population growth by age. Foxborough, along with many other communities in the region, is projected to experience a significant increase in the population age 65 older. The projected number of people age 65 plus in Foxborough in 2030 represents a 105% increase from 2010. The age 5-19 population is expected to decrease by 22%. 20-34 year olds are expected to grow by 5% by 2030 and the age 35-64 population is expected to remain relatively steady.

Projected population is an important factor to consider for the future housing needs of the community, but looking at projected household growth provides a more accurate picture of how many actual units will be

needed and what demographics these units will need to accommodate. In Table 5 below, consistent with the population projections, households age 60 and over are projected to see the most significant growth at 60%. Households age 30-44 will also see growth of around 20% with a 25% decrease in households age 45-59.

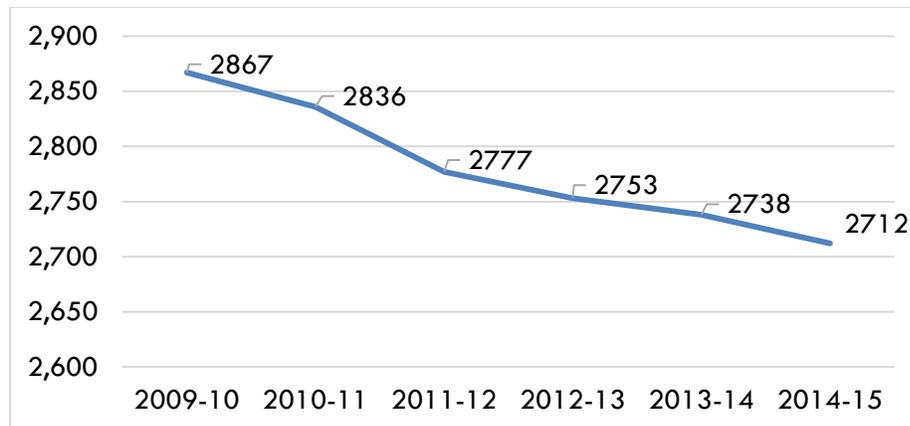
Table 5: Foxborough Household Projections

	2010	2020	2030	Change (2010-2030)	% Change
15-29	510	551	489	-21	-4%
30-44	1558	1562	1876	318	20%
45-59	2386	2199	1782	-604	-25%
60 and over	2050	2695	3275	1225	60%

Even with slow population growth, it is important to keep in mind that households on average are becoming smaller. The average household size in 2010 was 2.59, but it is expected to be 2.36 by 2030. With more single person households, and fewer children per family, there is actually a need for more housing units as an average group of people will actually require more housing units than they do today.

School Enrollment

Figure 12: School Enrollment



Source: MA Department of Elementary and Secondary Education

Consistent with the above population projections, school enrollment in Foxborough has been declining over the last five years. There are 5% (155 students) less students enrolled in 2014-2015 than in 2009-2010. Although the data is not yet available through the Massachusetts Department of Elementary and Secondary Education for 2015-2016 numbers, according to a recent article in the Foxboro Report, enrollment in Foxborough’s public schools this year has seen its biggest drop in five years.¹⁷

¹⁷ Foxborough Reporter, Enrollment drop for schools biggest since '11, <http://www.foxbororeporter.com/articles/2015/10/19/news/17835171.txt>

Household Type

According to 2009-2013 ACS data, there were 6,451 households in the Town of Foxborough. The majority of households in Foxborough are family households. As is shown in Table 6 below, about 30% of households in Foxborough have children and 55% of family households are married. Nonfamily households make up about 33% of all households in Foxborough. 24% of households are households that are living alone and 11% of households are living alone and age 65 or older.

Table 6: Family and Non-Family Households

	% of Total Households
Family households	67%
With own children under 18 years	30.7%
Married-couple	55.1%
Male Householder, no spouse present	1.9%
Female Householder, no spouse present	10.1%
Nonfamily households	33%
Householder Living Alone	24.9%
Aged 65 and older	11.6%

Source: ACS 2009-2013

Housing Units by Type

The breakdown of Foxborough's housing units by type is included in Table 7 below. 67% of Foxborough's housing units are single family units. Since 2009, 134 single family units have been permitted in Foxborough and only 4 multi-family units have been permitted. However, there is currently a 40B proposal for a multi-family development with around 250 units called Domain Foxborough that would increase the Town's overall multi-family unit percentage.

Table 7: Housing Units by Type

	Units	Percentage
Single Family	4463	67%
Two-Family	287	4%
3-4 Units	355	5%
5-9 Units	877	13%
10-19 Units	306	5%
20+ Units	377	6%
Other Units	69	1%
Total	6,665	

Source: ACS 2009-2013 5 Year Estimates

Housing Affordability and Cost Burden

According to 2009-2013 ACS data, the median household income in Foxborough is \$91,601. For family households, the median household income is \$105,818 and for non-family households, the median household income is \$48,268. Median household income varies by tenure with \$109,948 for owner households and \$45,579 for renter households and also by age as displayed in Table 8 below.

Table 8: Median Household Income By Age

Age	Median Household Income
Total	\$91,601
Householder under 25 years	\$38,534
Householder 25 to 44 years	\$99,186
Householder 45 to 64 years	\$118,011
Householder 65 years and over	\$51,288

Source: ACS 2009-2013 5 Year Estimates

As seen in the above table, the median income for younger households under 25 years old and older households 65 years and older are much lower. This will be important to keep in mind when thinking through the future affordable housing needs of the Town.

According to the HUD Comprehensive Housing Affordability Strategy (CHAS) data for 2007-2011, about 30% of households in Foxborough are cost burdened and 12% of households in Foxborough are severely cost burdened. Households that spend more than 30% of their gross income on housing are considered to be housing cost burdened, and those that spend more than 50% are considered to be severely cost burdened. Table 9 below shows cost burden by household type and shows that Elderly Non Family households experience the highest rates of both cost burden and severe cost burden, which is again an important factor to consider in the determination of Foxborough’s future affordable housing needs.

Table 9: Cost Burden by Household Type, All Households

	Households	Cost Burden		Severe Cost Burden	
		Count	Percent	Count	Percent
Elderly (1-2 Members)	795	155	19%	45	6%
Elderly Non Family Households	880	425	48%	245	28%
Small Family Households	3045	750	25%	280	9%
Large Family Households	605	215	36%	40	7%
Other Households	1145	365	32%	140	12%
Total	6470	1910	30%	750	12%

Source: HUD Comprehensive Housing Affordability Strategy (CHAS), 2007-2011

Age of Housing Stock

As shown in Table 10 below, 19% of housing units in Foxborough were constructed in 1939 or earlier. The most significant amount of units were built between 1960 and 1999 (at 51%) and just about 10% were added since 2000.

Table 10: Age of Housing Stock

Year Built	Total Units	% Total Units
2000 or later	662	10%
1960-1999	3,449	51%
1940-1959	1,327	20%
1939 or earlier	1,296	19%

Source: ACS 2009-2013 5 Year Estimate

Occupancy Characteristic: Tenure and Length of Time

Almost three quarters of Foxborough’s housing stock is owner-occupied at 69%. When compared with the surrounding subregion, the Three Rivers Interlocal Council, Foxborough does have a higher percentage of rental units however, at 31% versus the 24% average for the rest of the subregion. Table 11 below reveals that about half of owners have been living in Foxborough since before 1999, but the other half have moved to Foxborough more recently, after 2000. The majority of renters (94%) have moved into Foxborough after 2000. In general, renters tend to be more mobile than owners, but 59% of renters have been in the Town for at least 6 years (moved in 2000 to 2009). More detail on rentals is included later in this report.

Table 11: Tenure and Length of Stay

	Number	Percentage
Owner occupied:	12,851	
Moved in 2010 or later	903	7%
Moved in 2000 to 2009	5,610	44%
Moved in 1990 to 1999	3,179	25%
Moved in 1980 to 1989	1,181	9%
Moved in 1970 to 1979	1,002	8%
Moved in 1969 or earlier	976	8%
Renter occupied:	4,087	
Moved in 2010 or later	1,415	35%
Moved in 2000 to 2009	2,402	59%
Moved in 1990 to 1999	120	3%
Moved in 1980 to 1989	40	1%
Moved in 1970 to 1979	55	1%
Moved in 1969 or earlier	55	1%

Source: ACS 2009-2013

Table 12 below shows that the percentage distribution of owner versus rental units has remained fairly consistent since 2000. However, about 279 rental units were added between 2000 and 2013, which represents a 16% increase over the number of rental units in 2000.

Table 12: Tenure Over Time

	2000		2013		Change	
	#	%	#	%	#	%
Owner Occupied	4,417	71.9%	4,448	69%	31	0.7%
Rental Occupied	1,724	28.1%	2,003	31%	279	16.2%
Total	6,141		6,451		310	5%

Source: ACS 2009-2013 and US Census 2000 Data

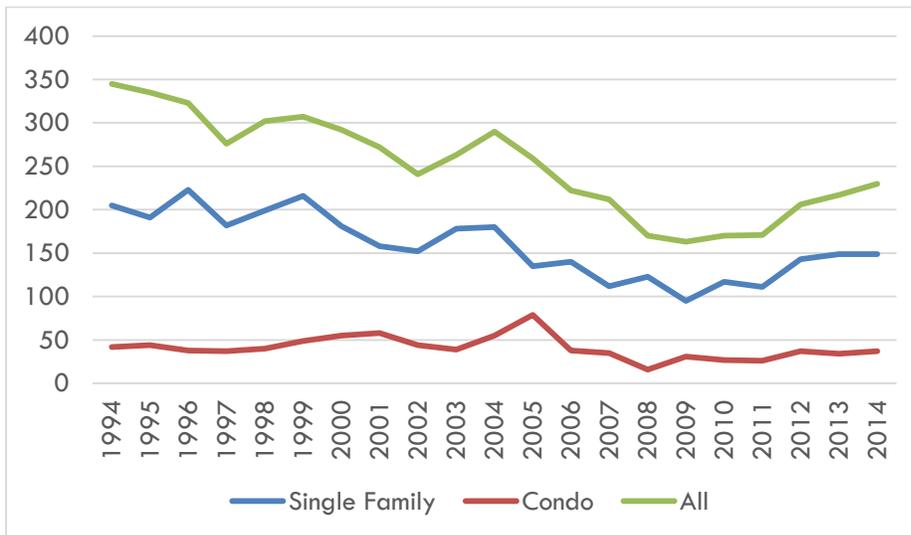
Vacancy

According to the 2009-2013 American Community Survey, Foxborough's housing vacancy rate is at 4.2%. This is slightly below the standard 5% rate, which suggests that the housing market may be tight. The overall vacancy rate is also lower than the Massachusetts rate of 9% and the MAPC region's rate of 6%.

Housing Sales and Pricing

The chart below shows the number of housing sales in Foxborough between 1994 and 2014. The number of single family sales in Foxborough actually peaked in 1996 at 223 units and then declined pretty steadily through 2009. Since 2009, single family sales have been increasing although they are still not approaching the 1996 peak number, with the number of single family sales through October in 2015 currently around 161. Condo sales in Foxborough have fluctuated over the past 20 years, with a peak of 79 units in 2005. Condo sales have shown some growth over the last five years, but in 2015 through October condo sales were at 35 which is less than half the peak sales in 2005.

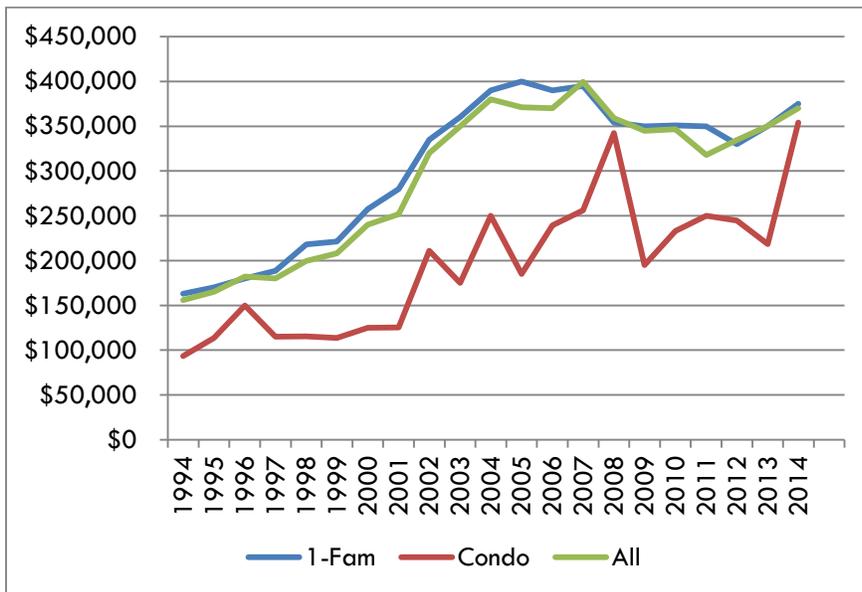
Figure 13: Number of Housing Sales, 1994-2014



Source: The Warren Group, 2014

In Figure 14 below, the median sales price for single family homes and for condos is displayed. According to the data from the Warren Group, the median sale price of housing in Foxborough is \$370,000 in 2014. This is down from the height of the market in 2007 when it was at around \$399,500. However, the median sales price has been growing since 2008. Single family prices were up 5.9% in 2014 versus 2008 and condo prices were up 3.4% in 2014 over 2008.

Figure 14: Median Sales Price, 1994-2014



Source: The Warren Group, 2014

Local residential brokers and property owners felt that there is definitely demand for additional units in Foxborough and particularly that the market is still strong for multi-family in Town. Brokers did acknowledge however that there may be some challenges related to locating units on Route 1 and that residential development would have to be thoughtful and well designed in order to be accommodated alongside Patriots football games and other stadium events. However, Foxborough is an appealing location for residential because it is equidistant between Providence and Boston, has many retail options and good job opportunities. One property owner mentioned that modern rentals with amenities would likely be particularly appealing because much of the current rental stock in Town is outdated and average. Units in the Lodge, a large modern multi-family complex with 250 units located in a different area of Foxborough, were in high demand and quickly leased out.

Recent Sales by Unit Type

In order to better understand the present market for housing in Foxborough, MAPC staff compiled prices for condos and Town homes recently sold in Town.

Table 13: Recent Sales by Unit Type

Address	Use	Beds	Baths	Sq Ft	Sale Date	Sale Price
19 Fuller Rd	Con	1	1	769	6/1/2015	\$139,989
32 Pierce St	1-F	4	2	1,764	6/2/2015	\$400,000
96 Beach St	1-F	3	2	1,474	6/5/2015	\$397,000
11 Leonard St	1-F	4	2	2,450	6/8/2015	\$500,000
1 Abbie Ln	1-F	4	3	4,973	6/9/2015	\$665,000
13 Cannon Forge Dr	Con	2	2	1,674	6/11/2015	\$395,000
88 Cocasset St	Con	2	1	1,350	6/12/2015	\$219,000
87 N High St	1-F	3	2	1,392	6/12/2015	\$125,000
47 Mechanic St	1-F	4	1	2,220	6/15/2015	\$310,000
2 Alex Ln	1-F	4	2	2,650	6/18/2015	\$500,000
84 Cocasset St	Con	1	1	774	6/18/2015	\$128,000
185 Mechanic St	1-F	3	2	2,368	6/18/2015	\$450,000
12 Rhodes Ln	1-F	2	1	1,878	6/19/2015	\$402,500
76 Ridge Rd	1-F	2	1	720	6/19/2015	\$335,000
272 Central St	1-F	4	1	1,596	6/19/2015	\$150,000
73 Ridge Rd	1-F	3	2	1,536	6/22/2015	\$550,000
13 Morse St	1-F	4	1	1,462	6/24/2015	\$335,000
88 Cocasset St	Con	3	1	1,286	6/25/2015	\$244,000
12 Everett Ln	1-F	3	2	1,270	6/26/2015	\$369,900
2 Mary Way	1-F	4	3	2,690	6/26/2015	\$679,900
447 South St	1-F	4	3	3,670	6/29/2015	\$490,000
4 Betsy Davis Rd	1-F	4	2	2,352	6/30/2015	\$492,100
181 Chestnut St	Con	2	2	2,024	6/30/2015	\$385,000
32 N High St	1-F	3	1	967	6/30/2015	\$233,625
98 Mechanic St	Con	2	1	1,184	6/30/2015	\$222,900
149 Central St	1-F	2	2	1,848	6/30/2015	\$349,000
188 Chestnut St	1-F	3	2	1,021	7/1/2015	\$369,900
23 Meadowview Rd	1-F	3	1	1,428	7/3/2015	\$355,000
11 Shoreline Dr	1-F	4	2	2,160	7/7/2015	\$500,000
184 Chestnut St	1-F	4	2	2,735	7/10/2015	\$434,000
32 Meadowview Rd	1-F	2	2	1,484	7/10/2015	\$345,000
11 Vernal Ave	1-F	2	1	930	7/10/2015	\$157,500
59 Neponset Ave	1-F	6	3	1,987	7/14/2015	\$290,000
62 Neponset Heights Ave	1-F	3	1	896	7/16/2015	\$350,000
170 Main St	1-F	2	1	784	7/16/2015	\$100,000
107 North St	1-F	4	2	3,548	7/16/2015	\$615,000
129 S High St	1-F	3	1	1,400	7/17/2015	\$325,000

Source: Zillow.com, June & July 2015 sales

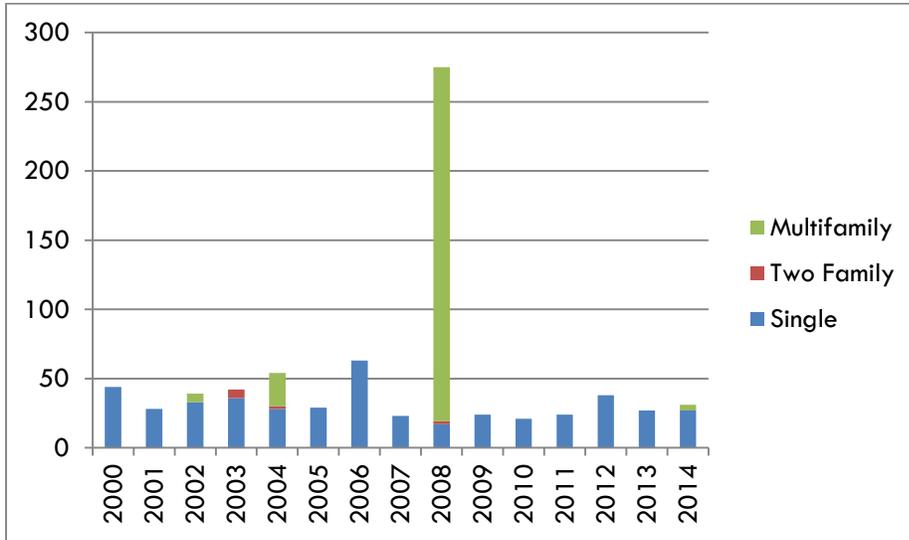
Some of the newer condo listings that are larger and similar to Townhomes have sold at particularly high prices. These include 181 Chestnut Street which was constructed in 2009 and sold for \$385,000 and 13 Cannon Forge Drive which sold for about \$395,000.

Overall, there is not a lot of multi-family inventory available for lease. A search in September 2015 only yielded 9 condo listings. There is likely a need for more condominium development to meet demand from the younger demographic as well as seniors.

Building Permits

As demonstrated in Figure 15 and Table 14 below, the majority of recent building permits in Foxborough have been for single family units, with only 4 multi-family building permits being issued since 2009. Between 2000 and 2014, Foxborough issued permits for a total of 762 housing units. Of those, 462 (60%) were for single family units, while 300 (40%) were for units in two-family or multi-family buildings. Foxborough did see a significant amount of multi-family units permitted in 2008 at 256 units and, as mentioned previously, currently has another 40B proposal for around 250 units.

Figure 15: Building Permits by Number of Units, 2000-2014



Source: U.S. Census Building Permit Survey

Table 14: Building Permits by Number of Units, 2000-2014

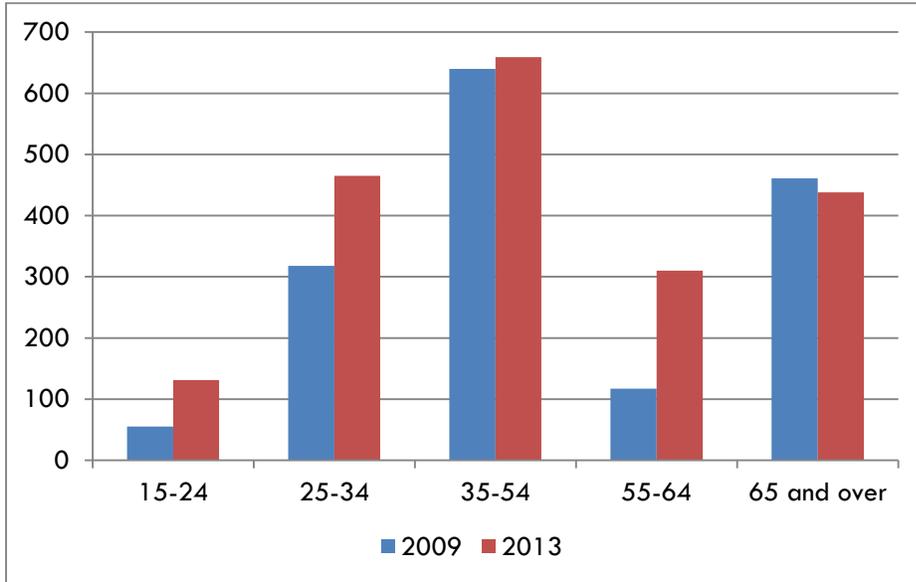
Year	Single	Two Family	Multi Family	Total
2000	44	0	0	44
2001	28	0	0	28
2002	33	0	6	39
2003	36	6	0	42
2004	28	2	24	54
2005	29	0	0	29
2006	63	0	0	63
2007	23	0	0	23
2008	17	2	256	275
2009	24	0	0	24
2010	21	0	0	21
2011	24	0	0	24
2012	38	0	0	38
2013	27	0	0	27
2014	27	0	4	31

Source: U.S. Census Building Permit Survey

Rentals

As mentioned previously, renter households overall have gone up about 26% in the last five years. There are also many more renters under the age of 35 (223 more renters) than there were in 2009. Renters age 55-64 have also increased by about 165% between 2009 and 2013, as you can see in Figure 16 and Table 15 below.

Figure 16: Rental Households by Age, 2009-2013



Source: ACS 5 Year 2009 Estimates and ACS 5 Year 2013 Estimates

Table 15: Age of Renter Households, 2000-2013

Age	2009	2013	% Change
15-24	55	131	138%
25-34	318	465	46%
35-54	640	659	3%
55-64	117	310	165%
65 and over	461	438	-5%

Source: ACS 5 Year 2009 Estimates and ACS 5 Year 2013 Estimates

Table 16 below outlines rental rates at some of Foxborough's residential complexes. One-bedroom rentals are going for anywhere between \$1085 and \$1861. Two bedrooms are renting from \$1105-\$2198 and three bedrooms are available at \$1625.

Table 16: Rental Rates at Foxborough Residential Complexes

# Bedrooms	Lodge at Foxborough (400 Foxborough Blvd)	Chestnut Place (135 Chestnut st)	Walnut Park (3-20 Fuller Rd)	Putnam Village (6 Putnam Rd)	Hillcrest Village (1 Hillcrest Rd)	Pine Tree Garden (101 Chestnut St)
1b	\$1,861		\$1,085-\$1,159			
2b	\$2,198	\$1,425	\$1,269-\$1,399	\$1,380-\$1,445	\$1,450-\$1,460	\$1,105-\$1,355
3b		\$1,625				

Source: Rental listings from August 2015

Table 17 below has median rent information from Zillow.com that shows the median rent in Foxborough by bedroom and overall.

Table 17: Foxborough Median Rents, December 2015 Listings

	1 bed	2 bed	3 bed	All
Median Rent	\$1,899	\$2,560	\$2,350	\$2,027

Source: Zillow.com, rental listings as of December 2015

Recent Development & Pipeline Projects

There are currently only 2 multi-family housing projects in Foxborough’s development pipeline with a total of 256 proposed housing units. Domain Foxborough is a 248 unit project located on the North side of Fisher Street in Foxborough that will be permitted through the 40B Comprehensive Permit process. These will be rental units and include 25% affordable units. The second project is called Highland Ridge and will also be permitted through the 40B Comprehensive Permit process. This development includes 8 cottage-style single family homes and is located at 144 Main Street.

Housing Market Demand, 2015-2020

Given existing inventory and demographic changes it is likely that there is potential to support additional housing units, particularly multi-family units and smaller single family units, in the Town of Foxborough. MAPC’s housing projections represent how changing trends in births, deaths, migration, and housing occupancy might result in higher population growth and greater housing demand. In order to assess the market potential for housing within a community, MAPC staff compare these projections with the number of units that have actually been permitted over the past five years to understand how supply is aligning with demand. Because markets cross municipal boundaries, it is important to look at residential supply and demand across multiple communities. A community may actually experience more or less market demand if surrounding communities are either not producing enough or producing significantly more housing than the demand projections indicate. For example, if a community adjacent to Foxborough is exceeding their

housing demand projection, they are capturing some of the regional market demand and thereby lowering the individual demand within Foxborough.

MAPC staff first identified a broader focus area of housing markets that might reasonably compete with Foxborough in attracting residents. The focus area identified included Mansfield, Norfolk, North Attleborough, Plainville, Sharon, Walpole, and Wrentham. MAPC staff then considered projected housing unit demand through 2020 by combining total projected demand from the entire focus area by both housing type and tenure. Based on MAPC demand projections, an estimated 5,118 units were projected by 2020 within the focus area.

In addition to the projected demand, it is also important to consider the supply of the number of units that have been permitted since 2011 and have begun to fulfill projected demand. Based on available building permit data, Foxborough has captured 4% of the multi-family building permits within the focus area since 2011. If Foxborough can capture a similar amount of the additional expected demand for the focus area through 2020, it could likely support between 40 multi-family (2% capture) and 121 multi-family (6% capture) Town wide. These projections are likely to be exceeded however due to the 250 unit multi-family development that is being proposed by the Hanover Companies. This large development will likely substantially increase the percentage of multi-family development that Foxborough captures within the focus area and will likely decrease multi-family demand in some of the other communities. Within the total focus area there is currently unmet demand for 937 multi-family ownership units and 1,192 multifamily rental units so there is an opportunity for Foxborough to capture significantly more multi-family units if the Town prioritizes building residential. Route 1 could meet some of this demand by supporting multi-family transit oriented units on the East side of the corridor. These units would be made more appealing if the Town can focus on bringing more amenities, including retail, restaurants, and parks and recreation opportunities to the corridor.

In terms of single family housing, the Town of Foxborough has captured about 12% of the single family building permits within the focus area since 2011 based on permit data. If Foxborough can capture a similar amount of the additional expected demand for the focus area through 2020, it could likely support between 200 (10% capture) and 240 (12% capture) single family units Town wide. Some existing single family housing is likely to be freed up by older generations who are looking to downsize however so there may not be a need to actually construct this much new single family housing if existing units are being freed up to meet the market demand. There is unlikely to be a significant amount of single family housing developed along Route 1. Single family alternatives or Townhomes near the commuter rail station could potentially be feasible however.

Table 18: Regional Housing Unit Demand

Regional Housing Unit Demand		Capture		Units	
Housing Unit Type	Regional Housing Unit Demand (# of units by next 10 years)	Low	High	Low	High
Multifamily	2,129	2%	6%	40	121
Single Family	2,989	10%	12%	200	240
Total	5,118			240	361

Retail Market Analysis

Currently there are a number of retail uses along the Route 1 corridor alongside industrial and office uses that cater to a regional market. Gillette Stadium’s adjoining Patriot Place includes over 700,000 square feet of retail and restaurant space and 120,000 square feet of office space, currently occupied by the Brigham & Women’s / Mass General Health Care Center.¹⁸ Outside of Patriot Place however, there are not a lot of retail establishments or restaurants. Restaurants outside of Patriot Place include Lafayette House, Dunkin Donuts, Chickie Flynn’s, Subway, McDonalds, Papa Gino’s, and Eastern Pearl. In particular, there is a real lack of shoppers goods outside of Patriot Place. Shopping establishments on Route 1 in Foxborough outside of Patriot Place include Speedway, Demetri’s Functions, Stadium Gulf, Lee Nails, Rodman Ford, Stadium Auto sales, Benco Truck Sales, Ben Cline (Tractor dealer), Enterprise Rent a Car, We Got Soccer, Seasonal Specialty Stores, Chace Building Supply, Foxboro Auto Wholesale, NAPA Auto Parts Unlimited, Dalzell Brothers (used car dealer), and Motorcycles of Manchester. The establishments are overwhelmingly auto oriented with a number of gas stations, auto & motorcycle dealers, and auto shops. There are very limited specialty stores including We Got Soccer which sells soccer shoes, equipment, and apparel as well as Seasonal Specialty Stores which sells patio furniture, spas, game room furniture and décor for the Christmas season.

Within Patriot Place, there are more than 40 retail and restaurant establishments. The shopping and dining destinations are listed in Table 19 below.

¹⁸ Blackline Retail Group, <http://blacklinere.com/RetailProperties/MA/Foxborough/Patriot-Place>

Table 19: Retail and Restaurants at Patriot Place

Shopping	Dining
AC Moore	Bar Louie
Alex and Ani	Blue Fin Lounge
Bass Pro Shops	Capriotti's Sandwich Shop
Bath & Body Works	CBS Scene Restaurant & Bar
Bed, Bath & Beyond	Cupcake Charlies
Charming Charlie's	Davio's
Christmas Tree Shops	Dunkin Donuts
Claire's	Five Guys Burgers
CVS	Godiva
Eastern Mountain Sports	Menchie's Frozen Yogurt
Express	Moe's Southwest Grill
Fanautical	Olive Garden
Go! Calendars and Games	Red Robin
Green Tangerine Spa & Salon	Saga Hibachi Steakhouse
Life is Good	Skipjack's Seafood Restaurant
Off Broadway Shoes	Studio 3
Olympia Sports	Tavolino Pizza Gourmet
Patriots ProShop	Toby Keith's I Love This Bar and Grill
Patriots ProShop Collection	Twenty8 Food & Spirits
Reebok	
Santander Bank	
Sleepy's	
Solstice Sunglass Boutique	
The Artist's Studio and Gallery	
Trader Joe's	
Ulta Beauty	
Verizon Store	
Victoria's Secret	

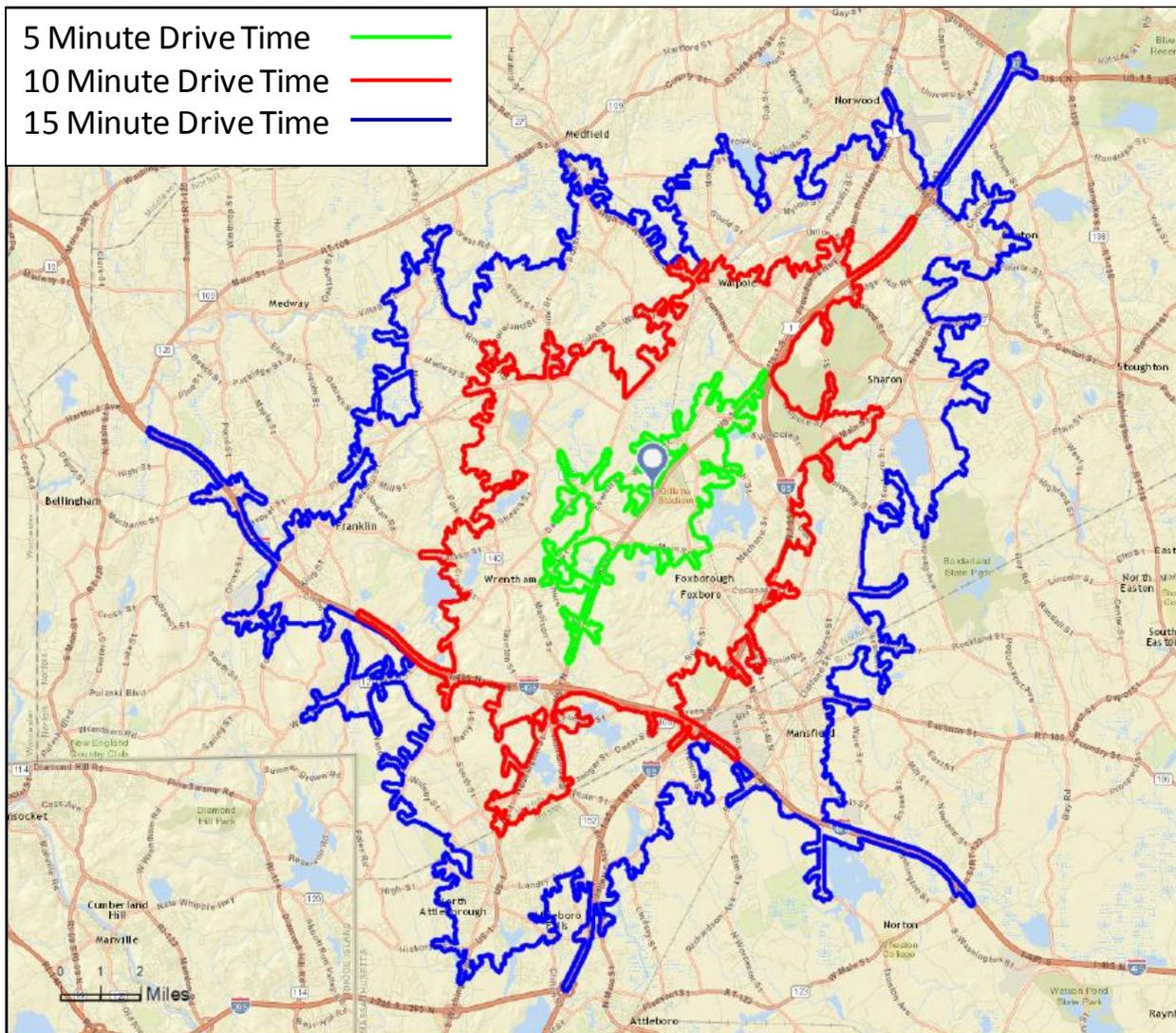
Source: Patriot Place, <http://www.patriot-place.com/>

Trade Area

In order to estimate the amount of additional retail that Route 1 in Foxborough could support, it is important to first identify a trade area. The trade area is the geographic are from which a retail establishment generates sales. There are many factors to consider when determining a primary trade area including the distance and time that people may be willing to travel in order to reach a destination, any physical or geographic barriers as well as regional competition. Because Route 1 is a heavily travelled corridor and the businesses serve a regional market it is reasonable to assume a primary trade area (from which most repeat business comes) of a ten minute drive time and a secondary trade area (from which stores will still capture business, but the capture rate would be smaller than in the primary area) of a fifteen minute drive time. It is reasonable to assume that people would be willing to travel these distances in order to attain goods and services along the Route 1 Corridor.

The drive times are displayed in Figure 17 below.

Figure 17: Retail Trade Area



Source: ESRI Business Analyst

Retail Opportunity Gap Analysis

MAPC staff analyzed ESRI Business Analyst data within the defined trade areas in order to conduct a retail gap analysis. A retail opportunity or gap analysis looks at the overall demand for retail goods and services within a designated trade area based on the spending potential of the households (demand), and the actual sales for those goods and services within the market area (supply). The difference between the demand and supply is called the retail “gap.” If the demand exceeds the supply, there is “leakage,” meaning that residents must travel outside the area to purchase those goods. In such cases, there is an opportunity to capture some of this spending within the market area to support new retail investment. When there is greater supply than demand, there is a “surplus,” meaning consumers from outside the market area are coming in to purchase these good and services. In such cases, there is limited or no opportunity for additional retail development. Thus, the retail gap analysis provides a snapshot of potential opportunities for retailers to locate within an area.

Below in Table 20 is a summary of the retail opportunity gap analysis by industry group and trade area. Figures in parenthesis and red are negative numbers that indicate there is a surplus of sales within the trade area. In other words, there are a significant number of establishments in the trade area within that industry group. Figures in green are positive numbers that indicate a retail gap or leakage and represent potential opportunities for more retail in the area.

Table 20: Retail Opportunity Gap Analysis

	NAICS	PRIMARY TRADE AREA	SECONDARY TRADE AREA
		10 minute drive time	15 minute drive time
Total Retail Trade and Food & Drink		(\$84,927,839)	(\$658,538,585)
Total Retail		(\$62,517,425)	(\$689,888,350)
Total Food & Drink		(\$22,410,414)	\$31,349,765
Mixed Use Oriented Industry Groups			
Furniture & Home Furnishings Stores	442	(\$1,978,587)	(\$809,656)
Electronics & Appliance Stores	443	(\$4,217,625)	(\$17,420,327)
Building Materials, Garden Equip. & Supply	444	(\$13,639,624)	(\$11,082,681)
Food & Beverage Stores	445	(\$43,021,144)	(\$124,317,037)
Health and Personal Care	446,4461	\$22,888,007	\$67,298,163
Clothing & Clothing Accessories	448	\$20,102,626	(\$39,832,327)
Sporting Goods, Hobby, Book and Music Stores	451	(\$1,460,624)	\$8,673,107
Miscellaneous Store Retailers	453	(\$2,022,039)	\$2,778,245
Food Services & Drinking Places	722	(\$22,410,414)	\$31,349,765

Source: ESRI Business Analyst

The table above indicates that there is a relatively limited opportunity for additional retail establishments along Route 1. There is some opportunity to introduce new clothing stores. Within the primary trade area, there is a gap that could potentially support up to five clothing stores and one furniture store. There is also an opportunity to support about two more full service restaurants and a health and personal care store within the secondary trade area. There is a significant amount of regional competition nearby including Wrentham Village Outlets, Walpole Mall, Cabot Park, Mansfield Crossing, and The Village Shops of Canton. The presence of so much other retail nearby limits the potential for the market to support significant new retail along Route 1 at this time.

Potential Supportable Retail Square Footage

MAPC staff uses a conservative capture rate to analyze the retail gap and understand the potential for additional establishments. This capture rate acknowledges that any single retail district will never be able to re-capture the full amount of retail leakage. Competition from regional shopping areas such as those mentioned above, as well as online shopping will always draw business away from the study area. When analyzing the market potential within the primary trade area, MAPC uses a 10% capture rate. When looking at market potential within the secondary trade area, MAPC uses a lower 5% capture rate. Using

this methodology, the market within a ten minute drive time and fifteen minute drive time of the study area could likely support the types of stores detailed below in Table 21.

It is important to note that the data below is not a prediction for what will occur in Foxborough; rather it is an opportunity or estimate of retail space that could be supported based on the gap analysis figure, average sales per square foot of different store types, average store sizes, and an estimated spending capture within each trade area.

Table 21: Market Potential Estimate

Trade Area	Supportable Square Footage	Total Establishments	Types
Primary Trade Area (10 minute drive time)	14,000 sq ft	6	5 Clothing Stores, 1 Furniture Store
Secondary Trade Area (15 minute drive time)	20,000 sq ft	3	1 Health & Personal Care Store, 2 Full Service Restaurants

Source: ESRI BAO and MAPC

The market within the primary trade area can support up to 6 additional establishments with the best opportunities being clothing stores.

The market within the secondary trade area is actually more limited, likely due to the presence of regional competition within the expanded area. The market within the secondary trade area can support 3 establishments including 1 Health & Personal Care store and 2 Full Service Restaurants.

It is important to note that there are many factors that influence whether or not a retail store or restaurant may want to locate in a particular area. Some of the additional factors that impact the decision to locate a new retail establishment include:

- Availability and quality of the retail space
- Size of the spaces available
- Location of the space- is this a place where many people are passing by?
- Foot traffic
- Rents and terms
- Parking- is it available nearby or within a short walk?
- Product or service price points
- Marketing
- Business plan and acumen
- Zoning and other regulatory obstacles
- Permitting and inspection processes

Although the potential exists for more retail, based on the numbers, the amount captured may be less, dependent on the above factors. For example, Route 1 is a heavily traveled route with the opportunity to bring in many customers. However, the large setbacks currently required are a challenge to retail and business visibility. The fact that there are often events and football games that occur along the corridor may be viewed as a positive by some retail establishments hoping to draw customers from the fan base, but it may be a negative for others who may lose out if their typical customer base chooses to avoid the area because of event associated traffic.

Worker Retail Potential

In addition to residents, workers within the primary trade area can also support additional establishments along Route 1 in Foxborough with their spending power. According to the International Council of Shopping Center (ICSC)¹⁹, workers spend approximately \$100 on food and convenience goods during the work week. Within the primary trade area (10 minute drive time), there are approximately 26,637 employees. If Route 1 could capture the spending of some of these workers, they may be able to support additional establishments as seen below in Table 22 below.²⁰

Table 22: Worker Retail Potential

	Local Worker Spending		Potential Supportable Retail	
	# of workers (rounded)	Annual Spending (estimated)	Square footage retail	Number of supportable stores
Workers within ten minute drive time (10% capture rate)	2664	\$1,332,000	4,593	2.3

¹⁹ Goover, Joel, “New Retail Frontier: Lunchtime Shoppers,” International Council of Shopping Centers, June 2012

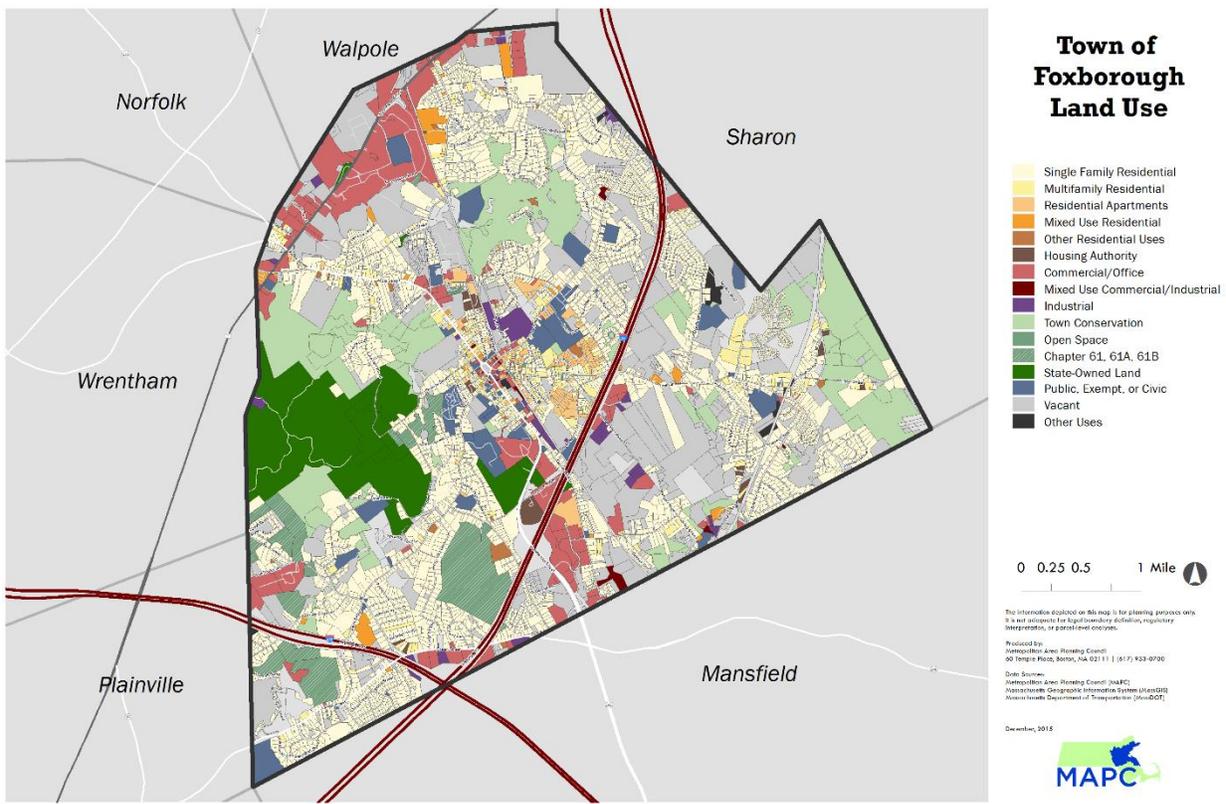
²⁰ Assumes 50 work weeks per year and that workers within primary trade area will frequent retail once per week and spend \$10.

Office Analysis

In order to determine the potential office demand along Route 1 in Foxborough, MAPC staff first looked Town wide to analyze existing office inventory, economic trends in Foxborough, and regional trends in the office market.

As you can see in the below land use map (Figure 18), Foxborough has four commercial/retail areas including the Downtown, Foxborough Plaza (Commercial Street), Foxfield Plaza (on the Mansfield Town line), and Route 1. Route 1 has a significant amount of commercial establishments as noted above. However a significant amount of this is service and retail with a relatively limited amount of professional office space.

Figure 18: Foxborough Land Use Map



Economic Trends

Jobs

Foxborough had a total of 14,003 jobs in 2014 with about 5,743 people employed in jobs that are office-based (see Table 23 below). Jobs in Foxborough between 2008-2013 (post-recession) have actually been growing at a much faster percentage than both the county and the state (24% versus 4% and 4% respectively). In this time period, Foxborough added 2,687 jobs and has significantly surpassed 2001 pre-recession level of jobs (9,434 jobs). The highest percentage of job growth occurred within office-based industries (categorized at the top of Table 23 below). The Town saw 126% growth in Professional and Technical Services, 81% growth in Real Estate and Rental and Leasing, 53% growth in Health Care and

Social Assistance, and 27% growth in Administrative and Waste Services. This is a positive trend indicating the desire for office space in Foxborough within recent past. Although the Town lost jobs in some industries, overall Foxborough added 1,667 jobs in office and institutional sectors with 41% growth between 2008 and 2014. This is significantly higher than the 6% and 9% growth seen in office and institutional sectors at the county and state level respectively.

Table 23: Comparative Employment Analysis

	Foxborough					Norfolk					Massachusetts				
	2001	2008	2001-2008 % Change	2014	2008-2014 % Change	2001	2008	2001-2008 % Change	2014	2008-2014 % Change	2001	2008	2001-2008 % Change	2014	2008-2014 % Change
51 - Information	228	563	147%	689	22%	12,636	12,130	-4%	10,814	-11%	117,751	95,197	-19%	92,060	-3%
52 - Finance and Insurance	1,004	234	-77%	226	-3%	29,257	26,115	-11%	23,047	-12%	183,989	179,999	-2%	166,469	-8%
53 - Real Estate and Rental and Leasing	112	98	-13%	177	81%	5,750	5,855	2%	5,769	-1%	44,899	42,454	-5%	43,060	1%
54 - Professional and Technical Services	466	904	94%	2,041	126%	18,791	21,880	16%	22,223	2%	247,890	262,502	6%	287,943	10%
55 - Management of Companies and Enterprises	No data	351	No data	151	-57%	10,841	10,892	0%	10,265	-6%	71,925	61,461	-15%	63,519	3%
56 - Administrative and Waste Services	1,184	772	-35%	978	27%	15,904	16,592	4%	18,223	10%	170,152	168,860	-1%	173,830	3%
61 - Educational Services	No data	727	No data	827	14%	24,007	26,306	10%	29,911	14%	294,213	318,545	8%	346,140	9%
62 - Health Care and Social Assistance	337	427	27%	654	53%	38,212	41,162	8%	51,050	24%	429,761	500,348	16%	600,253	20%
Office/Institutional Sectors-Building Type	3331	4076	22%	5743	41%	155398	160932	4%	171302	6%	1560580	1629366	4%	1773274	9%
44-45 - Retail Trade	674	1,085	61%	1,375	27%	42,026	40,012	-5%	42,424	6%	359,024	348,176	-3%	350,186	1%
71 - Arts, Entertainment, and Recreation	556	1,942	249%	2,457	27%	4,502	6,614	47%	7,780	18%	46,961	54,391	16%	59,942	10%
72 - Accommodation and Food Services	842	1,126	34%	1,834	63%	21,798	23,557	8%	27,646	17%	237,739	257,074	8%	288,985	12%
81 - Other Services, Ex. Public Admin	127	136	7%	203	49%	11,345	14,039	24%	11,688	-17%	113,608	129,707	14%	114,971	-11%
Retail/Commercial & Other Building Type	2199	4289	95%	5869	37%	79671	84222	6%	89538	6%	757332	789348	4%	814084	3%
23 - Construction	323	330	2%	402	22%	19,525	19,162	-2%	22,690	18%	151,270	144,233	-5%	140,314	-3%
31-33 - Manufacturing	No data	1,208	No data	659	-45%	32,747	24,038	-27%	16,465	-32%	389,232	286,458	-26%	250,534	-13%
42 - Wholesale Trade	810	1,111	37%	980	-12%	19,054	18,418	-3%	7,592	-59%	141,086	136,527	-3%	124,109	-9%
48-49 - Transportation and Warehousing	199	172	-14%	174	1%	10,092	7,758	-23%		-100%	113,128	101,241	-11%	101,302	0%
Industrial/Warehousing-Building Type	1332	2,821	112%	2215	-21%	81418	69376	-15%	46747	-33%	794716	668459	-16%	616259	-8%
92 - Public Administration	136	No data	No data	158	16%	9,590	9,242	-4%	10,176	10%	140,511	137,140	-2%	136,808	0%
Total, All Industries	9,434	11,316	20%	14,003	24%	327,067	324,559	-1%	337,209	4%	3,276,103	3,245,755	-1%	3,363,035	4%

Source: MA Department of Labor and Workforce Development

Table 24: Average Weekly Wage Comparison

	Foxborough					Norfolk					Massachusetts				
	2001	2008	2001-2008 % Change	2014	2008-2014 % Change	2001	2008	2001-2008 % Change	2014	2008-2014 % Change	2001	2008	2001-2008 % Change	2014	2008-2014 % Change
51 - Information	\$764	\$1,369	79%	\$2,059	50%	\$1,046	\$1,447	38%	\$1,587	10%	\$1,244	\$1,590	22%	\$1,898	19%
52 - Finance and Insurance	\$1,432	\$1,711	19%	\$2,043	19%	\$1,249	\$1,561	25%	\$1,809	16%	\$1,682	\$2,286	26%	\$2,651	16%
53 - Real Estate and Rental and Leasing	\$849	\$1,364	61%	\$2,273	67%	\$787	\$966	23%	\$1,253	30%	\$831	\$1,086	23%	\$1,400	29%
54 - Professional and Technical Services	\$1,145	\$1,513	32%	\$1,597	6%	\$1,262	\$1,834	45%	\$2,033	11%	\$1,428	\$1,855	23%	\$2,185	18%
55 - Management of Companies and Enterprises	No data	\$2,165	No data	\$4,632	114%	\$1,346	\$1,513	12%	\$1,789	18%	\$1,280	\$1,934	34%	\$2,433	26%
56 - Administrative and Waste Services	\$566	\$729	29%	\$916	26%	\$615	\$786	28%	\$805	2%	\$585	\$744	21%	\$813	9%
61 - Educational Services	No data	\$802	No data	\$961	20%	\$677	\$968	43%	\$1,016	5%	\$741	\$977	24%	\$1,094	12%
62 - Health Care and Social Assistance	\$626	\$757	21%	\$707	-7%	\$658	\$899	37%	\$1,053	17%	\$698	\$958	27%	\$1,023	7%
44-45 - Retail Trade	\$704	\$526	-25%	\$583	11%	\$534	\$564	6%	\$607	8%	\$477	\$532	10%	\$578	9%
71 - Arts, Entertainment, and Recreation	\$3,047	\$1,955	-36%	\$1,564	-20%	\$701	\$895	28%	\$810	-9%	\$530	\$655	19%	\$679	4%
72 - Accommodation and Food Services	\$292	\$371	27%	\$398	7%	\$296	\$347	17%	\$378	9%	\$311	\$371	16%	\$408	10%
81 - Other Services, Ex. Public Admin	\$453	\$570	26%	\$510	-11%	\$510	\$525	3%	\$643	22%	\$477	\$542	12%	\$660	22%
23 - Construction	\$786	\$1,080	37%	\$1,046	-3%	\$1,050	\$1,254	19%	\$1,422	13%	\$963	\$1,178	18%	\$1,311	11%
31-33 - Manufacturing	No data	\$1,281	No data	\$1,499	17%	\$1,106	\$1,349	22%	\$1,416	5%	\$1,047	\$1,327	21%	\$1,603	21%
42 - Wholesale Trade	\$969	\$1,171	21%	\$1,106	-6%	\$1,188	\$1,384	16%	\$1,559	13%	\$1,190	\$1,479	20%	\$1,696	15%
48-49 - Transportation and Warehousing	\$722	\$769	7%	\$819	7%	\$707	\$894	26%	\$981	10%	\$750	\$899	17%	\$972	8%
92 - Public Administration	\$1,241	No data	No data	\$1,725	39%	\$903	\$1,089	21%	\$1,305	20%	\$861	\$1,108	22%	\$1,342	21%
Total, All Industries	\$1,006	\$1,171	16%	\$1,199	2%	\$849	\$1,048	23%	\$1,141	9%	\$865	\$1,092	21%	\$1,233	13%

Source: MA Department of Labor and Workforce Development

Wages

As you can see in Table 24 above, although Foxborough has added jobs at a faster rate than both the state and the county, the average weekly wage growth in the Town between 2008 and 2014 lags behind both the County and the state. The Town of Foxborough has seen 2% growth in their average weekly wage for all industries while the County has seen 9% growth and the state has seen 13% growth in average weekly wages between the period of 2008 and 2014. However, many of the office based sectors have seen very positive average weekly wage growth when compared with the county and the state, indicating that many of the newer office based jobs in Town are providing comparatively strong wages. These sectors include Information which has seen 50% wage growth between 2008 and 2014 versus 10% and 19% growth at the County and State level respectively. Real estate and Rental and Leasing in Foxborough has seen 67% growth in weekly wages compared with 30% and 29% at the County and State level respectively and Management of Companies and Enterprises in Foxborough has seen 114% growth versus 18% and 26% growth in the County and State respectively. Administrative and Waste Services and Educational Services in Foxborough have also seen positive wage growth exceeding the growth rate of the County and the State. Health Care and Social Assistance notably has seen a decrease in average weekly wages with a 7% decrease between 2008 and 2014 compared with 17% and 7% growth at the County and State level respectively.

Largest Employers

MAPC staff also analyzed data on the largest employers to determine which industries are the most represented amongst this group. Below in Table 25 are the 24 employers in Foxborough that employ more than 100 people. Some of the larger employees have opened or expanded fairly recently, including Brigham and Women's in 2009 and Schneider Electric which is currently working to expand their new facility. The industries below represent a cross section of office, industrial, and retail establishments.

Table 25: Foxborough Largest Employers

	Address	Town	State	Number of Employees	NAICS Code
Schneider Electric	Neponset Ave	Foxboro	MA	1,000-4,999	3353
Team Ops LLC	Patriot Pl	Foxboro	MA	1,000-4,999	5416
Brigham & Women's Mass General	Patriot Pl	Foxboro	MA	250-499	6221
Advantage Sales & Marketing	Foxboro Blvd	Foxboro	MA	100-249	5416
Bass Pro Shops	Bass Pro Dr	Foxboro	MA	100-249	4511
Bearing Point Inc	Hampshire St # 200	Foxboro	MA	100-249	5416
Distribution Services-America	North St	Foxboro	MA	100-249	4931
Foxboro Express	North St	Foxboro	MA	100-249	4842
Foxborough High School	South St	Foxboro	MA	100-249	6111
Foxborough Regional Charter	Central St	Foxboro	MA	100-249	6111
GE Lighting	Foxboro Blvd	Foxboro	MA	100-249	3351
Gillette Stadium	Patriot Pl	Foxboro	MA	100-249	7113
Hockomock Area YMCA Foxboro	Mechanic St	Foxboro	MA	100-249	6241
New England Patriots Fan Force	Patriot Pl	Foxboro	MA	100-249	7112
New England Revolution LP	Patriot Pl	Foxboro	MA	100-249	7112
Norcap Lodge	Walnut St	Foxboro	MA	100-249	8133
Paychex Inc	Foxboro Blvd # 400	Foxboro	MA	100-249	5412
Right At Home	Leonard St # 6	Foxboro	MA	100-249	6216
Robert Allen Group Inc	Hampshire St # 3A	Foxboro	MA	100-249	3133
Rodman Ford	Washington St	Foxboro	MA	100-249	4411
Rodman Ford Sales	Washington St	Foxboro	MA	100-249	4411
Showcase Cinemas De Lux	Patriot Pl	Foxboro	MA	100-249	5121
Stavios	Patriot Pl	Foxboro	MA	100-249	7225
Super Stop & Shop	Main St	Foxboro	MA	100-249	4451

Source: MA Department of Labor and Workforce Development

Employment Projections

Analyzing job projections at a more regional level demonstrated what industries are growing in and around the Town of Foxborough and where there is the greatest potential for Foxborough to continue to grow its office market.

The Massachusetts Department of Labor and Workforce Development projects job growth between 2012 and 2022 (13.38% or 38,705 jobs for traditional office oriented industries) for the Metro/South West Workforce Investment Area. This area includes Ashland, Bedford, Bellingham, Boxborough, Brookline, Canton, Carlisle, Concord, Dedham, Dover, Foxborough, Framingham, Franklin, Holliston, Hopkinton, Hudson, Lexington, Lincoln, Littleton, Marlborough, Maynard, Medfield, Medway, Millis, Natick, Needham, Newton, Norfolk, Norwood, Plainville, Sharon, Sherborn, Southborough, Stow, Sudbury, Walpole, Waltham, Wayland, Wellesley, Weston, Westwood, and Wrentham.

Below in Table 26 is projected growth within the Metro/South West Workforce Investment Area for industries that are more likely to locate in traditional office buildings. It is projected that slightly more than 38,000 office-oriented jobs will be added within the WIA. Businesses will require office space to house their workers and it is likely that more space will be needed than is currently available. Other municipalities within the WIA will be competing for these jobs however, so Foxborough will need to be strategic in order to draw additional jobs to Town and to the Route 1 area. Industries with the highest percentage job growth in the Metro South/West Workforce Investment Area include Professional, Scientific, and Technical Services, and Health Care and Social Assistance. Education is also an industry that is growing rapidly.

Table 26: Projected Job Growth in Metro/South West Workforce Investment Area

Industry	Employment 2012	Employment 2022	Change Level	Change Percent
Information	25,886	27,099	1,213	4.70%
Publishing Industries (except Internet)	15,413	15,241	-172	-1.10%
Telecommunications	3,270	3,029	-241	-7.40%
Data Processing, Hosting and Related Services	1,772	1,798	26	1.50%
Finance and Insurance	20,358	21,535	1,177	5.80%
Credit Intermediation and Related Activities	5,902	6,340	438	7.40%
Insurance Carriers and Related Activities	8,863	9,337	474	5.30%
Real Estate and Rental and Leasing	7,207	7,653	446	6.20%
Real Estate	5,682	5,988	306	5.40%
Professional, Scientific, and Technical Services	64,541	79,289	14,748	22.90%
Management of Companies and Enterprises	23,152	24,745	1,593	6.90%
Administrative/Support/Waste Management/Remediation	31,308	32,242	934	3.00%
Administrative and Support Services	30,140	31,199	1,059	3.50%
Waste Management and Remediation Service	1,168	1,043	-125	-10.70%
Educational Services	55,089	60,140	5,051	9.20%
Health Care and Social Assistance	61,647	75,190	13,543	22.00%
Total	289,188	327,893	38,705	13.38%

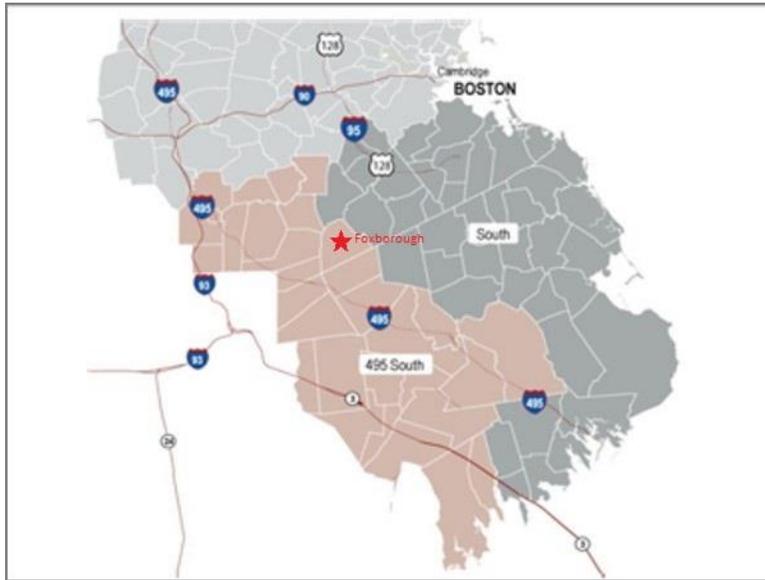
Source: MA Department of Labor and Workforce Development

Office Market Conditions

MAPC staff also looked broadly at the Boston regional office market to identify the role of Foxborough within the larger market. Overall the office market in the Greater Boston region continues to do very well with total vacancy dipping to 14.1% nearing 2007 lows and direct average rents increasing more than 5% year over year in nine out of the twelve Boston submarkets. Boston leads the country in wage growth and is among only three US metropolitan areas that exceed the US growth rate.²¹ Foxborough is part of the 495 South submarket as defined by Jones Lang Lasalle, but is also on the border of the South submarket and likely competes with many of these communities as well. See Figure 19 below for a map of the 495 South and South submarkets as defined by Jones Lang Lasalle.

²¹ Jones Lang Lasalle, Q2, 2015.

Figure 19: JLL Office Submarkets



Source: Jones Lang Lasalle

Because of Foxborough’s proximity to the South submarket, characteristics of both the 495 South Market and South Market are compared with the 128/Mass Pike market (a suburban market that is doing particularly well within the Greater Boston region) and the overall suburb office market in Table 27 below.

Table 27: Comparative Analysis of Regional Office Markets

	495/South	South	128/ Mass Pike	Suburbs
Supply (million s.f.)	2.3 SF	12.6 SF	20.1 SF	88.7 SF
% Class A	49%	56%	58.20%	58.73%
Average Asking Rent	\$19.68	\$21.86	\$32.80	\$22.51
YoY Rent Growth	5.9%	7.5%	13.6%	4.9%
Total Vacancy	13.1%	15.9%	7.9%	15.1%
YoY Change (ppts)	-5.4	-4.4	-1.6	-1.9
Total Net Absorption YTD	-59,554	260,063	-174,369	543,300
as % stock	-2.6%	2.1%	-.86%	0.61%
Total Availability	27.8%	18.5%	13.90%	20.60%
y/y Change (ppts)	-2.7	-3.0	-1.6	-1.6

Source: Jones Lang Lasalle, Q2, 2015

Table 27 above demonstrates that the 495 South market is lagging behind the suburbs overall and does not currently compare very well with a thriving suburban market such as 128/Mass Pike. Rents in 495 South are much lower at \$19.68 versus \$32.80 for 128 Mass Pike. Vacancy rates and total availability are also much higher. The total vacancy in 495 South has been steadily decreasing however which is a positive sign for future office potential.

The South submarket is also seeing steady decreases in its office vacancy rate as well as positive net absorption numbers. Rents in the South submarket are also slightly more competitive than in 495 South at \$21.86, although they still lag behind the suburbs overall. Leasing activity has been notably strong in the

South submarket however and rents have been increasing year to date. Access to public transportation and amenity rich buildings has helped to attract office tenants to this submarket.²²

Route 1 has a number of potential advantages in terms of attracting potential office tenants, including access to public transportation and large parcels that can be more easily developed. Challenges that will have to be addressed in marketing the corridor for office development include traffic, potential conflicts between office tenants and weekday events at Gillette Stadium, as well as physical and environmental constraints throughout the corridor.

²² Jones Lang Lasalle, Q2 2015.

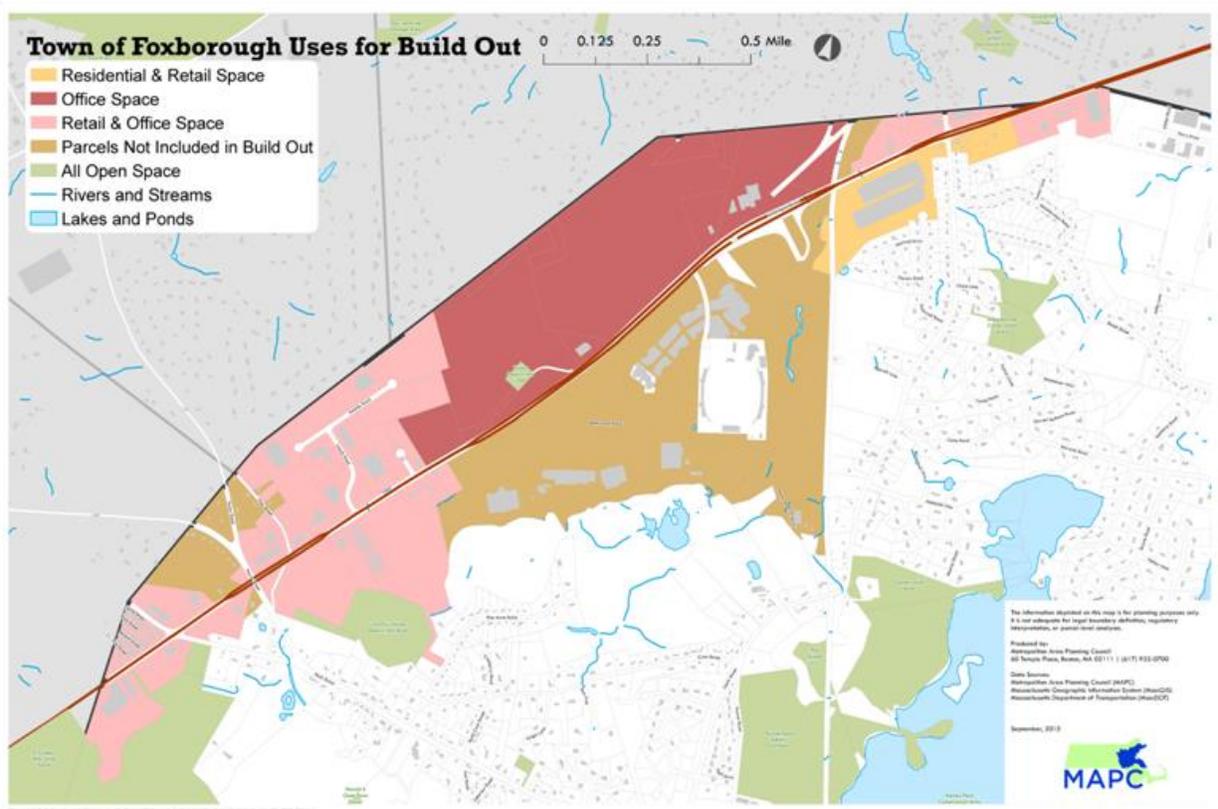
IV. Build Out Analysis

The second major component of the MAPC Route 1 study is a build out analysis. A build out analysis is a theoretical exercise to understand how much of a certain use can be built within a study area. The nature of the exercise is to abide by the current zoning and physical development constraints and to maximize the build out potential to give the Town a sense of what could happen and what is limiting within their current zoning ordinance.

Definition of Study Area

The build out analysis did not include all of the parcels located in the R-40, Highway Business, and Special Use Zones. Parcels that were not included in the build out are the site of Gillette Stadium and Patriot Place, all parcels within the R-40 zoning and any parcels that were undevelopable because they were completely encompassed by wetlands, rivers, streams, or their respective buffers. Figure 20 below details which parcels were not included in the build out analysis. In order to complete a build out analysis, it is also important to identify what kind of uses should be modeled, whether that be residential, commercial, or industrial. Figure 20 also displays parcel by parcel what uses were modeled for the purposes of the Route 1 build out. Office & retail were the predominant uses modeled. However, the build out did include residential for parcels on the East side of Route 1 that are within walking distance (1/2 mile) to the commuter rail station.

Figure 20: Foxborough Uses Modeled for Build Out Map

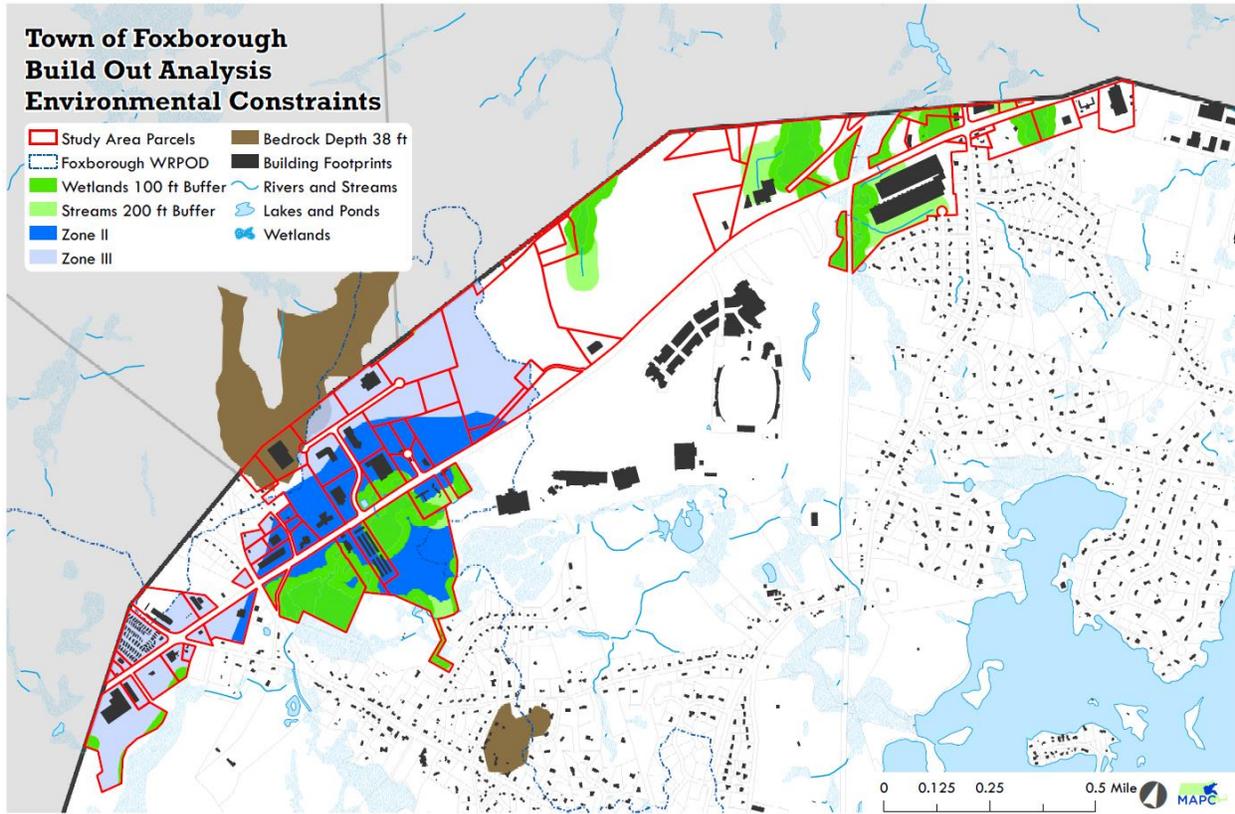


For the purposes of the build out, MAPC staff modeled three scenarios, two of which were constrained by zoning impervious maximums and one of which was constrained by septic limitations as delineated in the zoning and in relationship to the soils. The septic limitation of 110 gallons per 10,000 square feet for those parcels located within the Water Resources Protection District and soil conditions were considered for parcels outside of the WRPOD to determine if these parcels were suitable to support septic systems. Each of these scenarios were also restricted by wetlands, river, and stream buffers present within the corridor. So, for example, if a parcel was within the WRPOD and 80% covered by wetlands buffers, maximum build out would be 15% under the first scenario below, but maximum build out would only be 20% under the 2nd scenario because the environmental constraints are more restrictive than the zoning. For the EDAOD, in the septic limited scenario, it was assumed that development would be required to have a package treatment plant since the limit on size of standard septic systems is 10,000 gallons per day. Therefore, the EDAOD parcels were not effectively further constrained in the septic limited scenario. The three build out scenarios are included in the list below.

- 1) Parcels within the Water Resources Protection Overlay District were restricted to 15% impervious.
- 2) Parcels within the Water Resources Protection Overlay District were restricted to 50% impervious.
- 3) Septic Limitation

Figure 21 below details the environmental restrictions present along the Route 1 corridor that were factored into the build out analysis.

Figure 21: Environmental Constraints on Route 1



Other assumptions that were made for the purpose of the build out are included as Appendix C.

Results of Build Out

Table 28: Results of Route 1 Build Out

	15% WRPOD Restriction	50% WRPOD Restriction	Septic Limited Scenario
Total Build Out	5,016,557.28	6,197,136.55	5,503,406.14
Net Change from Existing Built Out Space	3,827,276.28	5,007,855.55	4,314,125.14
Estimated Septic Flow from Existing Space*	146,153.05	146,153.05	146,153.05
Estimated Future Commercial Space	4,519,326.92	5,699,906.19	5,006,175.78
Estimated Number of Potential 2 Bedroom Units	497.23	497.23	497.23
Estimated Septic Flow from potential buildout uses and built space*	382,257.92	462,556.66	415,364.99
Estimated Traffic generated from existing uses	29,141.63	29,141.63	29,141.63
Estimated Traffic Generated from Potential Build Out Uses**	67,827.46	91,534.55	77,718.12
Existing Tax Revenue (\$)***	1,667,183.44	1,667,183.44	1,667,183.44
Projected Tax Revenue (\$)***	5,115,855.94	5,958,372.16	5,463,853.29

*Based on Title V regulations and existing uses.

**Based on ITE Manual codes for land uses.

***Existing & Projected Tax Revenue Based on 15.19 tax rate for residential and 17.52 tax rate for commercial

As you can see in Table 28 above, the 15% WRPOD max impervious restriction is actually more restrictive than the Septic Limited Scenario in terms of the estimated amount of future commercial space that could be built along the corridor.

V. Development Opportunities & Constraints

Development Constraints

The market analysis and build out exercise revealed that there are many development constraints along the corridor. A bulleted list below summarizes these constraints.

- Many parcels are located within the Water Resources Protection Overlay District (Zone II and Zone III) which allows for a maximum impervious surface of only 15 percent by right.
- Presence of wetlands, streams, and vernal pools mean that there are many buffers in which development cannot occur. There are also floodplain areas and conservation areas including the Cranberry Bog.
- Currently the majority of properties along the corridor are on septic. The exception is that Gillette Stadium has its own wastewater treatment plant. Specific properties such as Demetri's Function Facility are also on sewer, taking advantage of their proximity to Walpole and accessing the Walpole system.
- Currently, there is not sufficient electric and power for existing and future development demand and the Town has a high susceptibility to power outages, although National Grid does has a plan to address this issue.
- Some of the soils are challenging and not well suited for septic systems, particularly on the northern and southern ends of the Route 1 corridor. Bedrock, high groundwater, and poor drainage are particular challenges.
- Revenue from game day and event parking creates a disincentive to redevelop.
- There is an improving but comparatively weaker market for retail and office uses at this time.

Development Opportunities

Despite these challenges, there are some key assets along Route 1 that can be built on to make the corridor even more attractive for future development. These assets are summarized below.

- Large sites and many surface parking lots with opportunity for infill development
- Existing special event commuter rail service and proposal for daily weekday service.
- Presence of retail and restaurants that could serve future office workers or residents.
- Natural attractions including the Cranberry Bog and Nature Trail
- There is water & wastewater capacity to accommodate additional development linked to Gillette Stadium within the EDAOD²³. The Kraft wastewater treatment plant has excess capacity because it is built to accommodate game days and concerts.
- Walpole also has a sewer connection that could potentially service business in the father north end of the corridor.
- Route 1 was built to accommodate game day traffic and should be able to accommodate additional trips created by complimentary uses such as office space.

²³ Notice of Project Change, EEA #12037, New Patriots Stadium and Related Infrastructure Project, Phase III-A, March 2009, Submitted by Foxboro Realty Associated LLC to Executive Office of Energy and Environmental Affairs.



Development Near a NFL Football Stadium

Throughout the planning process, there were several questions raised around what is the most appropriate type of development or use to locate near a football stadium that can also play a role in creating a more vibrant active corridor.

In order to understand more about the kind of development that has been successful near football stadiums, MAPC staff did a brief literature review of best practices implemented by other communities with stadiums

throughout the country.

National Case Studies

The City of Minneapolis hired HR&A to explore development opportunities near the new US Bank NFL stadium that is currently under construction and through this work examined case studies of major US cities' sports stadium districts. The case studies showed that stadia can promote development, but it is necessary to have a master plan for the district that considers the opportunities, the proximity to other venues, public investment that is needed in the public realm, as well as connections to transit. The key lessons learned from their studies are below

- “A stadium alone is unlikely to drive capital investment in the surrounding area.
- Locating a stadium near other sports arenas or a convention center can help to bring more people to the district year-round, as opposed to only during the limited number of game days each year.
- The most successful examples of development in a stadium district have been in master-planned areas and have required the negotiation of public-private partnerships with developers.
- Without a master plan or vision for the district, stadiums fail to catalyze the development of neighborhood amenities and in some cases development of any kind.
- Additional public investment in the infrastructure and amenitization of the area, e.g. through investment in transit and/or the public realm, consistent with a master plan, is highly correlated with success”²⁴

The City has also been undertaking a number of additional planning efforts related to better neighborhood integration of the new stadium and has learned of the importance of mitigating the large feel of these structures by working to integrate public space and streetscapes surrounding the stadium that contribute to a more human scale. They are also facing a challenge with surface parking adjacent to and close by the stadium serving as a barrier to new development because of low property tax rates, high revenue, and

²⁴ HR&A Advisors, Minneapolis East Downtown Parking Lot Study, March 2013, <http://www.ci.minneapolis.mn.us/www/groups/public/@cped/documents/webcontent/wcms1p-114547.pdf>

inflated expectations of land value (all issues that are similar along the Foxborough Route 1 Corridor). Other best practices for growing economic development around sports stadiums (mostly baseball) included locating residential in close proximity to the stadium and a thoughtful channeling of stadium fans through commercial corridors to maximize secondary activity.

A few examples of what specific stadiums have done to integrate their development with the surrounding community are listed below.

- In Denver at Sports Authority Field, there is a linear greenway that leads to the stadium from the south called the Sports Legends Mall. It is used for pre-game events as well as year-round festivals and other entertainment activities.
- In Seattle, Stadium Place, a mixed-used development project began construction in December 2011 in much of the stadium's north parking lot. The project contains 520 residential units (mix of rental and owners) as well as retail and office space.
- In Indianapolis, the Lucas Oil Stadium was linked with the Indianapolis Cultural Trail, a bicycle and pedestrian system that connects to Downtown cultural destinations and serves as the hub for the central Indiana greenway system²⁵.

While it can be a challenge to integrate a football stadium into a mixed use and walkable environment, as referred to previously Route 1 does have a number of strong existing or potential amenities that may make this integration easier. First of all, the transit oriented nature of the corridor (if Foxborough commuter rail is indeed increased to daily service) will allow people to travel to and from the area by commuter rail. Secondly, the fact that Patriot Place has a number of retail and restaurant establishments already could be an attractive amenity for both residential and commercial development.

²⁵ Request for City Council Committee Action from the Department of Community Planning and Economic Development-Planning Division. Best Practices for Development in Stadium Area, June 28, 2012.
<http://www.minneapolismn.gov/www/groups/public/@cped/documents/webcontent/wcms1p-107913.pdf>

VI. Recommendations

Overall, the most supported new development type along the Route 1 Corridor was office space. If the Town is interested in attracting additional office space to the corridor, it is important to consider the changing nature of suburban office development as well as the changing demographics and lifestyle preferences that are contributing to these new development patterns. Developers and proprietors of office parks are noticing changing demographics, lifestyle preferences of the growing younger workforce as well as aging households, and a spike in the general public awareness around environmental issues. New suburban office development is at a two decade low-just 12 million square feet were built between 2001 and 2012 compared to 160 million in 1988 and 1989 (WSJ-CBRE 2012). In Massachusetts, a number of tech companies that once blanketed the Route 128 technology corridor have migrated, or have plans to migrate, to the Boston-Cambridge area. According to Jones Lang LasSalle's 2014 Q4 report, office vacancy rates in Boston's suburbs (18.6%) are almost twice as high as Boston's CBS (10.3%).

However, there are examples of recent suburban office developments that have been successful. These developers have understood knowledge-based workers lifestyle preferences, and new construction in the most powerful commercial submarkets area overwhelmingly mixed-use and near transit, attributes that are marketed heavily to potential tenants (CBRE 2012 & 2013; FMI 2014). Introducing a mixture of uses is the most vital strategy for a new office park development or office retrofit.

In terms of attracting additional development to the Route 1 corridor it is also critically important to keep in mind that this is a particularly environmentally sensitive area. Development priorities also need to be balanced with environmental constraints. In order to maximize development and be sensitive to environmental constraints, the following recommendations should be considered.

Attract new development to the corridor

Encourage public private partnerships to facilitate new development

In order to incentivize development in an area where the market is improving but still not as comparably strong as other suburban markets, it is important for public and private organizations to work collaboratively to facilitate flagship development projects that may help to improve the market and attract additional investment.

- Consider public/private partnerships with developers to help address gaps in financing redevelopment projects. Gaps may exist for predevelopment work such as infrastructure related to the development and for parking. Consider sharing a portion of development and infrastructure costs by being a partner on infrastructure improvements. Tying into Mansfield sewer is one example of how the Town is already doing this as the Town will bear some costs and the developers connecting to sewer will pay some costs as well.

Utilize incentives to attract development to the Route 1 Corridor

- Consider using Tax Increment Financing (TIF) to incentivize new development along the Route 1 corridor. The Town previously used this tool in negotiations with Invensys (now Schneider

Electric) and can use this experience as a reference point for any new TIF negotiations that may occur.²⁶

- Consider opting into the 43D local expedited permitting program, a state program that offers communities a tool to promote targeted economic and housing development. 43D provides a transparent and efficient process for municipal permitting. It guarantees local permitting decisions on priority development sites within 180 days and it increases the visibility of the community and target development site. The community also gets priority consideration for MassWorks Infrastructure Program grants, brownfield remediation assistance and other financing through quasi-public organizations, online marketing of the site and promotion of a pro-business regulator climate, improved municipal planning and permitting efficiencies, and collection of special fees for priority development site permit applications²⁷.
- Consider creating incentives similar to those used by other communities with football stadiums to attract economic development nearby. Tax abatements and low interest loans are commonly utilized. In Pittsburgh, the City implemented a split tax rate where the buildings were taxed at about 1/6 the rate of the land in order to incentivize parking lot owners to redevelop. The state of New Jersey, implemented a transit oriented tax credit within one half mile of a transit station linked to the number of jobs that a specific project created. The tax credit was more significant for those projects that were generating a higher number of jobs.

Market the Corridor

- Convene a working group of stakeholder in and around Route 1 that can develop a brand identify for the corridor. This group should include business owners, property owners, developers, Town staff, and interested citizens.
- Establish an online presence to market and promote the Route 1 Corridor. This could be on the Town website, profiling the development potential and character of the corridor as well as the Town's vision.
- Work with regional chambers of commerce as well as other regional business and economic development entities in order to market the corridor, produce promotional videos, info fact sheets etc. Groups such as the Neponset Valley Chamber of Commerce or the Tri-Town Chamber of Commerce (Foxborough, Canton, and Norwood) can help to assist with these efforts. Ensure that these effort include both public and private partners.
- Increase cooperative marketing efforts to attract Game Day fans to various other establishments along the corridor. People who come in for games were not considered as part of the market analysis because they do not necessarily live or work in the area. This is a significant group of potential customers that can help to support retail establishments along the corridor. Social media and smartphone technology are invaluable tools that can offer these kinds of cross promotions.

²⁶ General Laws, The 189th General Court of The Commonwealth of Massachusetts, Part I, Title VII, Chapter 40, Section 59: Tax Increment Financing Plan, <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter40/Section59>

²⁷ Massachusetts Executive Office of Housing and Economic Development, Chapter 43D Local Expedited Permitting, <http://www.mass.gov/hed/economic/eohed/pro/zoning-and-permitting/43d/chapter-43d-local-expedited-permitting.html>

Develop incentives for current property owners to redevelop along the Route 1 Corridor

- Work with property owners and developers to understand their financial concerns and create incentives that may motivate them to redevelop.
- Work on an in depth study to learn more about what other cities have done to incentivize surface parking lot development in areas where owners are making a significant amount of money from parking. This is the situation in many cases near football stadiums. The study should also include a Pro Forma comparing parking revenues versus money that could be made off of redevelopment and an understanding of tools available to help close the gap in financing if it's not financially feasible to develop.
 - Pittsburgh used tax abatements for new buildings constructed in order to incentivize development. The City also provided low interest loans for commercial and residential rehab and construction. Pittsburgh also implemented a split tax rate, increasing tax on land and leaving taxes on buildings level so that by the 1990s the buildings were taxed at 1/6 the rate of the land. The difference in taxation became meaningful to parking lot owners, because the split-tax rate, coupled with County and School district taxes, resulted in a 200% difference between the total tax on improvements and on land. The City also successfully utilized a number of public private partnerships to incentivize new commercial development in particular.
 - The state of New Jersey utilized a transit oriented tax credit within one half mile of a transit station. The tax credit was more significant for those projects that were generating a higher number of jobs.²⁸ This may be an option for those parcels located closer to the commuter rail station.



Create a long term plan to introduce sewer to the Route 1 Corridor



Right now, with the exception of Gillette Stadium and Patriot Place, which are served by the Kraft wastewater treatment plant, the Route 1 corridor is not currently serviced by sewer and development relies on septic systems. This severely restricts the development potential on much of the southern and northern end of the corridor. There has been some progress on sewer Town wide as the Town has recently entered into an Inter-Municipal Agreement with Mansfield and Norton that would make more treatment capacity available at the Mansfield wastewater treatment plants. The Town also created a sewer

²⁸ HR&A Advisors, Minneapolis East Downtown Parking Lot Study, March 2013, <http://www.ci.minneapolis.mn.us/www/groups/public/@cped/documents/webcontent/wcms1p-114547.pdf>

service area Downtown that prioritizes that area for sewer expansion. Overall, these efforts have been largely focused in Downtown.

The Town should also be exploring sewer solutions on Route 1. The master plan brings up several potential options for accessing sewer. These include

- Connecting with the Town's current sewer systems,
- Connecting to the MWRA by extending sewer from Walpole to the Route 1 area, or
- Forming an independent sewer district with the purchase of development wastewater treatment services²⁹.

The Master Plan also notes the importance of creating a financing approach for the new WWTP that is price sensitive and encourages more users to hook up to the sewer system in order to spread operating and capital costs amongst more users and to create a reasonable sewer connection price³⁰.

Introduce Amenities to the Route 1 Corridor

It is important to ensure that any new commercial development incorporates urban mixed use amenities in order to fundamentally change the character of the Route 1 corridor to a more attractive and appealing destination. Related recommendations are detailed below. Office developers in particular realize that there is a real value for their employees if they have access to amenities such as restaurants, retail, open space, trails, public art, walkable areas. These should all be considered as part of new development that may come to the corridor and should be required especially if a large scale campus office development is introduced here. Ensuring that amenities are included in new developments was also a strong preference voiced by November public forum participants.

- Enhance aesthetics of Route 1, including appropriate lighting, signage and enhanced landscape with trees along corridor.³¹
- Ensure crosswalks and well-maintained sidewalks throughout the corridor.
- Consider building a pedestrian bridge to connect areas on the East side of the corridor to the West side.
- Develop a green buffer between Route 1 and Foxborough's residential neighborhoods. The green buffer should include the mix of recreation, open space, wetlands, conservation and agricultural lands.³² This will help to create open space amenities and also offer a smoother development process for future proposals along Route 1.

²⁹ McCabe Associates, Sewer, Growing Smart & Land Use Issues Paper, March 10, 2015.

³⁰ Foxborough Master Plan, McCabe Associates, 2015

³¹ Foxborough Master Plan, McCabe Associates, 2015

³² Foxborough Master Plan, McCabe Associates, 2015

Ensure daily Commuter Rail Service and options for alternative modes of transportation along the Corridor

A regular daily commuter rail service will be a highly attractive asset for potential developers considering the Route 1 Corridor. Since there is already an active proposal by the MBTA to expand the current special event service to a daily service, it is critical to pursue this option and ensure that it is implemented.



- Continue negotiations and discussions with the MBTA to ensure that daily commuter rail service is introduced by the end of 2016.
- Work with new commercial tenants to run a shuttle that frequently brings people from the Foxborough Commuter Rail station to new commercial areas on the NorthWest side of Route 1.
- The Town and Neponset Valley TMA should encourage all businesses along Route 1 to join the Transportation Management Association. TMA's offer innovative solutions to reduce the number of cars on the road to alleviate traffic congestion and improve air quality. Programs include Guaranteed Ride Home Programs and on-line ride-matching to form carpools and vanpools. TMA coordinators also often do outreach where they may offer incentives or raffle prizes to individual employees that agree to carpool.
- Businesses could also consider providing alternative modes of transportation such as carshare, bikeshares, and/or bike facilities to help get people from the commuter rail or their homes to other places along Route 1. Companies like Zagster partner with real estate/multi-family companies, businesses, hotel chains, and universities that are looking to provide value added services and benefits to residents, guests, and employees by providing bike sharing programs. They have currently partnered with Nordblom Company to offer bike sharing at Network Drive at Northwest Park, a 7-building, 155 acre office park located in Burlington, MA³³.

Update Zoning to be More Development Friendly

Zoning restrictions that are currently in place are currently incentivizing uses such as warehouses and auto shops because they are low water uses. While it is again important to be respectful of the environmental constraints along the corridor, there may be some flexibility in the zoning that can still achieve environmental goals while allowing for more development.

Zone II and III

Under the current Water Resources Protection District, Zone II and Zone III are both regulated with a 15% maximum impervious surface requirement. Zone II is the primary resource area or the area of an aquifer which contributes water to a well under the most severe recharge and pumping conditions that can be anticipated. Zone III is the land area beyond the area of Zone II from which surface water and groundwater drain into Zone II. Water is a precious resource, particularly in Foxborough, and new development needs to be respectful of that resource and to incorporate innovative strategies for re-using and recycling water

³³ Zagster: A Better Way to Bike, December 2015, <http://zagster.com/>

when possible. After the delineations of these two zones are confirmed, Zone II zoning should stay as is, but Zone III zoning could be modified to a kind of performance zoning based on re-charge that could potentially allow developers to increase the amount of impervious if they agree to clean and recharge all water onsite. This could open up some development opportunities, particularly on the southern end of the corridor that is heavily covered by the WRPOD.

- Commission a hydro-geologic modeling study to determine the appropriate boundaries for both Zone II and Zone III
- Once the boundaries have been determined, allow owners of Zone III parcels to utilize a larger percentage of their lots for development if they agree to clean and recharge water onsite.

S-1 (Special Use)

- Reduce the setbacks in S-1 zoning

In order to create a more visually appealing corridor, reducing the setbacks in S-1 zoning would allow for buildings to be located closer to the road and for people passing by to be able to better see the different establishments that are present on the corridor. This is particularly important for retail and restaurants which depend on high visibility for their success. In particular, changing the relationship between frontage requirements and setback requirements in this district can help to address this issue.

- Increase the amount of retail that is allowed by right within the S-1 district as part of mixed use developments.

Because the retail market is not particularly strong, this should be done at a modest amount, but could allow more ground floor retail if build 2 to 3 story buildings with offices above.

- Consider expanding some of the allowed uses in the Economic Development Area Overlay District into the S-1 Zoning to allow S-1 developers and property owners more flexibility.

EDAOD

- Consider allowing more dense development at lower heights closer to the road.

While it is important not to reduce the amount of density allowed in the EDAOD in order to keep this area attractive for office development, making some changes to the zoning to make development more visually appealing and less imposing on Walpole residential areas could help to facilitate a smoother development process in the corridor. Currently the EDAOD district allows the ability to go up to 100 feet if a structure is located greater than 300 feet from the Route 1 Right of Way which incentivizes tall development far from the Route 1 corridor and close to the Walpole residential areas. Allowing denser development at lower heights closer to the road could help to alleviate this issue.

- If parking structures are developed at any future developments, individual companies can implement strategies where they charge for parking and then actually pay employees who do not drive or who carpool in order to incentivize fewer cars on the road. If employees are carpooling, they can switch who drives every month or split the check amongst all carpool participants.
- The Town has been flexible with their parking requirements for certain developments previously and could consider codifying this flexibility into the zoning parking regulations. For example, developers could be allowed to make the case that they need less parking and then utilize parking strategies such as land banking where the developer agrees to leave a certain portion of the lot covered by grass rather than building parking. If the developer can prove later on that they don't need additional parking they will not have to build it. It saves the developer money because it's easier to plant grass than build parking and reduces the amount of space dedicated to parking, improving the aesthetic of the area.

Create New Zoning to Incentivize Transit Oriented Development Including Residential

- Create a Transit Oriented Development Overlay near the Commuter Rail Station that would allow for multi-family development.
 - New construction of multifamily development is not allowed within the S-1 or EDAOD districts. While it was determined through the Master Planning process that residential is not a desired use for the West side of Route 1, allowing residential around the commuter rail station (especially if the service is increased to run regularly throughout the week) is a viable option. Not only would additional residents in the area support the need for daily rail service, they would also contribute to the customer base for existing retail along Route 1 and help to keep the corridor active on weekends and during non-work hours.