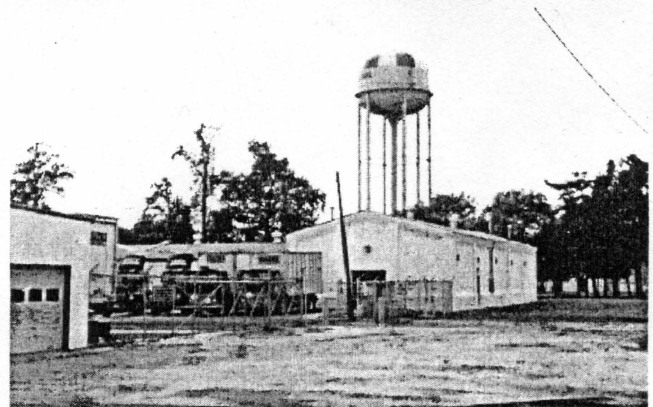

Pinelands Rural Economic Development Pilot Program



BOROUGH OF WOODBINE ECONOMIC DEVELOPMENT STRATEGY

Final Report

Whiteman & Taintor
February 2000

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OVERVIEW

Woodbine Borough's economic development strengths lie in its historic role as a regional commercial center, its existing role as a major employment center for Cape May County, and its location in proximity to the shore and the region's vacation and environmental attractions.

Elements of the Strategy

This report recommends an economic development strategy based on four complementary elements:

- ◆ *The development of the airport area* for tax-generating uses that are consistent with the airport's function in bringing visitors to the area—such uses include the proposed golf course (with ancillary meeting and dining facilities), visitor services (e.g., motel or restaurant), aircraft maintenance and support services, and general light manufacturing and storage uses;
- ◆ *The development of a specialty downtown* focusing on a broad mix of businesses relating to home improvement and home furnishings, as an anchor for additional retail and service growth to service the residents of Woodbine and surrounding communities;
- ◆ *The development of a building trades park* providing flexible, low-cost space for contractors and related businesses serving the tourist industries and seasonal homes along the shore; and
- ◆ *The promotion of Woodbine* as a convenient shopping and service area for both year-round residents and seasonal visitors.

Local and Regional Market Analyses

In order to assess Woodbine Borough's economic development strengths and opportunities, this section explores several aspects of the regional market and local economy:

- ◆ An evaluation of the *retail market potential* represented by the residents of Woodbine Borough and the surrounding communities, in order to identify what kinds of goods and services represent the strongest potential business opportunities to target for Woodbine's town center.
- ◆ An evaluation of Woodbine's *existing business mix*, in order to identify existing strengths and weaknesses in Woodbine's economy: i.e., what types of businesses are strongly represented in Woodbine Borough in comparison to surrounding areas?; and what consumer products and services do Woodbine residents need to travel outside the community to purchase, that might be provided within the community?
- ◆ A competitive review of *existing retail centers*, in order to evaluate the potential for Woodbine to accommodate the business expansion needs of contractors and other businesses serving seasonal homes and tourism businesses along the coast.

- ◆ A market analysis of *small business and industrial parks*, in order to identify the potential for developing the airport-anchored business park in Woodbine.

The Need for a Wastewater Treatment Solution

However, it is important to emphasize that these analyses point in market directions that cannot be realized without investment in infrastructure. Wastewater generation is a necessary condition which must be addressed in order to implement an economic development strategy of any great significance:

- ◆ Advanced wastewater treatment options are necessary for the redevelopment of the town center to be consistent with the established and historic character of the community. Without wastewater treatment, the existing lots cannot be redeveloped and existing businesses cannot expand.
- ◆ In addition, new larger enterprises are unlikely to be interested in the airport area without the provision of wastewater treatment options other than on-site septic systems. Business parks and industrial parks with established infrastructure are the preferred locations of new businesses.

Without wastewater treatment facilities, the number of economic development strategies are limited and have little chance of generating a measurable impact on Woodbine's economy. Consequently, the analysis and recommendations below are based on the assumption that methods of wastewater disposal appropriate for developed areas (other than on-site septic) will become available. This will be further explored in the Implementation Phase of the project.

ECONOMIC DEVELOPMENT OBJECTIVES

The generation of additional economic activity in the Borough of Woodbine will address three broad objectives: expansion of the property tax base (with accompanying reduction of the tax burden on Woodbine property owners), creation of additional jobs for Woodbine residents, and expanded availability of goods and services in the local economy. The following sections present general estimates of the levels of benefits in each of these areas that Woodbine can expect given a relatively modest increase in business activity. For the purposes of this outline, it is assumed that a reasonable target is the addition of ten small retail and service businesses to the Town Center area, and five larger commercial enterprises to the Woodbine Municipal Airport business park area.

TAX BASE EXPANSION

A key objective for Woodbine Borough is to broaden the community's tax base. Over the past two decades, the average residential tax bill in the Borough has been lower than average tax bills in the County: for example, Woodbine's 1995 average tax bill at \$1,212 was only 53% of the County's \$2,273 average bill. However, average residential valuations in the Borough are much lower than the County averages, reflecting the lower income levels of Woodbine residents. The total equalized value per resident of the Borough is also very low: in 1990 Woodbine's equalized value per capita (excluding residents of the State Developmental Center) was only \$23,073 compared to \$131,933 in the County and \$66,657 statewide.

Thus, expansion of the tax base, particularly in the commercial and industrial sectors, would ease the tax burden on Woodbine homeowners and enable the Borough to expand the level of services that it provides to its residents. In 1998 Woodbine's total equalized value was about \$67 million and its general tax rate was \$2.14 per \$100 of valuation, generating \$1,435,000 in property tax revenue.

- ◆ Assuming that each new small retail or service business in the Town Center would add \$100,000 in valuation, the establishment of ten such businesses would increase total valuation by \$1 million, or about 1.5 percent.
- ◆ The typical business attracted to the Airport business park is likely to be of a larger scale and higher value than the typical Town Center establishment. Assuming that five new businesses are established at the Airport with an average investment of \$400,000, the total increase in the tax base would be \$2 million, or about 3 percent.

Thus, attracting 15 new businesses to the Borough could increase property tax revenues by about 4.5%, or about \$64,575 per year. Such an increase would have only a marginal impact on total equalized value per capita, but would provide the Borough with some additional flexibility for funding municipal services.

EMPLOYMENT GROWTH

Woodbine Borough has a high unemployment rate relative to the State of New Jersey, although its unemployment level is comparable to that for the County. An ambitious, but

desirable target would be desirable to reduce the community's unemployment rate to the statewide level.

Since 1990, the Borough's unemployment rate has been slightly above the rate for Cape May County. In 1997, 105 Woodbine residents were unemployed out of a total labor force of 908, resulting in an unemployment rate of 11.6 percent. In the same year, the unemployment rate was 10.8% in Cape May County and 5.1% in the State of New Jersey.

To reduce the local unemployment rate to the statewide level would require the addition of 46 jobs held by Woodbine residents. Assuming that 10 new businesses are developed in the Town Center with an average of 2 new jobs per business, and that 5 larger establishments at the Airport average 5 new jobs per business, the potential increase in total employment in the community would be 45 jobs.

GOODS AND SERVICES

A final objective for Woodbine Borough is to expand the number and variety of goods and services available to residents. Specific types of businesses for which residents have expressed a need are a bank (or similar financial institution) and a supermarket. There is a strong latent demand for financial and convenience services based on the large employment base in the community as well as the resident populations of the Borough and surrounding communities:

- ◆ Roughly 1,900 people work in Woodbine, including 1,200 personnel at the Woodbine Developmental Center. Taking into account evening and night shifts, the Borough's total daytime workforce is estimated to be between 1,300 and 1,500 employees.
- ◆ Excluding the residents of state institutions, there are approximately 2,200 residents within a 2-mile radius of the center of Woodbine, and 8,900 within a 6-mile radius.

In the past—before consolidation of financial institutions and the prevalence of superstores—these population and employment levels would have been sufficient to attract and support banks, grocery stores, and other local businesses. The Borough should make a concerted effort to attract a financial institution to the Town Center. However, ultimately Woodbine must compete with the drawing power of regional shopping centers, which will be difficult. One way to compete more successfully is to establish a specialized niche in the market. A recognized specialty downtown can draw customers from a wider area and thereby build the critical mass of consumers that will encourage other businesses to locate in the area. Based on an analysis of the regional consumer market, this report suggests creating a niche around the theme of the home, which could include businesses such as home improvement, household appliances, and antique stores.

ECONOMIC DEVELOPMENT STRENGTHS AND OPPORTUNITIES

RETAIL AND SERVICE MARKET ASSESSMENT

Woodbine Borough has several distinct markets for retail and service businesses:

- ◆ *Local and regional residents.* The residential market is particularly important for everyday shopping and convenience goods, and can be further subdivided into primary, secondary and tertiary residential markets:
 - The primary residential market consists of the residents of Woodbine Borough, for whom it is clearly more convenient to patronize a business in Woodbine than to travel out of town (particularly given the lack of nearby alternatives and the absence of public transportation). In the analyses below the primary market is also defined as the population within a 2-mile radius of the intersection of DeHirsch Avenue and Washington Avenue.
 - The secondary residential market includes residents of adjacent communities who might patronize businesses in Woodbine Borough rather than drive to more distant shopping centers such as those in Millville, Vineland, Hammon-ton or Cape May Courthouse. In order to evaluate this extended residential market, the analyses below look at residents and businesses within a six-mile radius of the DeHirsch–Washington intersection. This market area includes most of Dennis Township (except for the Ocean View and Clermont areas along Route 9), portions of Upper Township (including Tuckahoe and Peters-burg) and Corbin City, and the easterly edge of Maurice River Township.
 - The tertiary residential market includes communities that are not immediately adjacent to Woodbine Borough, but which are within a reasonable driving time for some purchases. For the purpose of this study, it was assumed that the tertiary market extends to ten miles from the center of Woodbine. This area includes the southerly portions of Maurice River Township (i.e., south and east of Port Elizabeth and Manumuskin) and Estell Manor, Sea Isle City, and communities along Route 9 from Marmora south to Swainton and the outskirts of Cape May Courthouse.
- ◆ *The nonresident workforce.* Woodbine Borough is a net importer of labor, thanks largely to the presence of the Woodbine Developmental Center, Cape May County's largest employer. Roughly half of the Center's 1,200 employees commute to Woodbine from other communities, and represent a large potential market for a variety of products and services, ranging from meals and groceries to financial and personal services.
- ◆ *Local businesses.* Businesses and institutions located in and near the community must purchase goods and services. The Woodbine Developmental Center represents the largest segment of this market, but a variety of other businesses also are in need of establishments from which to purchase supplies and obtain supporting services.
- ◆ *Visitors and seasonal residents.* The South Jersey shore and Cape May draw thousands of visitors from the spring through the fall. Although these visitors do not tend to stay in Woodbine (except in limited numbers in the campgrounds), they do travel

through or near the Borough on their way to and from their vacation destinations, and many of them stay at campgrounds in nearby communities. Because of its location with respect to the region's roadway network, recreational facilities, and attractions, Woodbine is well-situated to provide services to these transient families. On a smaller scale, the Woodbine Municipal Airport is a point of entry to Cape May County for a specific kind of traveler, and increases in volume of flights at the airport will mean a growing potential market for Woodbine businesses.

The Residential Market

The shopping and spending characteristics of the residential population vary based on demographic characteristics such as income, age, and education. The residents of the various market areas defined for this study exhibit significant differences in several socioeconomic variables, as indicated in the following table.

Table 1: Market Area Demographics¹

| | <u>Primary:</u> 0-2 Mile Radius | <u>Secondary:</u> 0-6 Mile Radius | <u>Tertiary</u> 0-10 Mile Radius |
|-----------------------------|---------------------------------------|-----------------------------------------|----------------------------------------|
| Population | 2,767 | 11,909 | 32,348 |
| Avg. Household Income | \$38,606 | \$58,022 | \$60,569 |
| Per capita income | \$11,179 | \$19,088 | \$20,124 |
| Population by Race | | | |
| White | 51.1% | 86.0% | 85.3% |
| Black | 31.0% | 8.3% | 10.4% |
| American Indian | 0.3% | 0.3% | 0.3% |
| Asian/Pacific Islander | 0.9% | 1.0% | 1.0% |
| Other | 16.6% | 4.5% | 2.9% |
| % Hispanic Origin | 21.1% | 6.5% | 5.7% |
| Educational Attainment: | | | |
| % less than High School | 66.5% * | 32.9% * | 28.3% |
| % High School graduate | 33.5% | 67.1% | 71.7% |
| % Bachelor's Degree & above | 2.9% ** | 17.1% ** | 20.9% ** |
| % in Labor Force | 41.8% | 62.0% | 54.9% |

* Includes residents of Woodbine Developmental Center and, for the secondary and tertiary rings, inmates at the State prisons in Maurice River Township.

** Persons with "Bachelor's Degree & above" are also counted in "% High School graduate."

¹ Note that in this table and the following discussion, data for each market area are cumulative unless otherwise specified: that is, demographic and business data for the 0-6 mile ring include the persons, households and businesses in the primary area (0-2 mile radius); and the data listed for the 0-10 mile ring include the relevant items for both inner rings. Thus, for example, the total population of 32,348 persons within the 0-10 mile "tertiary" ring includes 2,767 residents of the primary area, 9,142 persons (11,909 - 2,767) residing from 2 to 6 miles from the center, and 20,439 persons (32,348 - 11,909) residing from 6 to 10 miles out.

Market data analysts often define categories of household types on the basis of similar clusters of social and economic characteristics. The data used in this study were provided by CACI Marketing Systems, which uses a categorization called ACORN (an acronym for "A Classification Of Residential Neighborhoods"). Based on consumer surveys at the national level, the ACORN system defines dominant household types at the Census Block Group level. The following table lists the dominant consumer types in each of the three market areas defined for this study (profiles of these consumer types are listed in Appendix 1).

Table 2: Market Area Dominant Consumer Types

| Market Areas and Dominant ACORN Consumer Types | Percent of Households |
|------------------------------------------------|-----------------------|
| <u>Primary Market Area</u> | |
| • 8E: Urban Working Families | 32.9% |
| • 6F: Low Income—Young and Old | 23.2% |
| • 8D: Hardtimes | 18.8% |
| • 7G: Heartland Communities | 12.4% |
| • 2B: Baby Boomers with Children | 7.1% |
| <u>Secondary Market Area</u> | |
| • 2B: Baby Boomers with Children | 48.2% |
| • 7A: Middle America | 18.8% |
| • 1F: Semirural Lifestyle | 9.2% |
| • 8E: Urban Working Families | 6.4% |
| • 6C: Newly Formed Households | 5.2% |
| <u>Tertiary Market Area</u> | |
| • 2B: Baby Boomers with Children | 20.2% |
| • 7A: Middle America | 18.1% |
| • 1F: Semirural Lifestyle | 17.2% |
| • 4E: Rural Resort Dwellers | 13.4% |
| • 2A: Urban Professional Couples | 13.1% |

Source: CACI Marketing, Inc.

Within the primary market area (i.e., the Borough of Woodbine itself), the dominant groups are *Urban Working Families* and *Low Income: Young and Old*, which together comprise more than half of the households. Both groups have low average incomes and high unemployment and poverty rates. The third most prevalent group, *Hardtimes*, is also characterized by low household incomes and high rates of poverty and unemployment.

However, this picture changes dramatically when the demographics within the secondary and tertiary market areas are examined; that is, when the surrounding communities out to radii of 6 and 10 miles are included. Here the predominant groups are *Babyboomers with Children*, *Middle America* and *Semirural Lifestyle*. These are affluent, upscale and middle-class households with low unemployment and poverty rates and above-average household incomes. The purchasing power of these dominant market groups as a result is significantly higher than is typical within the primary market area.

Consumer Purchase Potential and Spending

These demographic differences indicated in Table 1 and Table 2 drive significantly different consumer spending patterns within the respective trade areas. The following three tables highlight key areas for attention in determining areas for potential business growth. These tables present two indices computed by CACI Marketing Systems based on national surveys of household buying patterns.

- The Purchase Potential Index (PPI) is a measure of the demand for a particular product or service, based on the number of households in the market area that purchase the product or service, relative to national averages.
- The Spending Potential Index (SPI) measures the average amount spent by households in the market area for that product or service, relative to national averages.

In each case, a value greater than 100 means that the index for the subject area is stronger than the national average, while a value less than 100 indicates a weaker index than the national average.

The PPI and the SPI are separate and distinct measures of market strength for a given service or product. High values for both indices would indicate a strong market and, therefore, a business category that the area could support; whereas low values for both indices would suggest that the market may not be strong enough to support an average number of businesses selling the product or service. However, a low value for one of these indices may be offset by a high value for the other: for example, the market area could support a business with comparatively few patrons (a low PPI) if those patrons typically spend a lot on the product or service (a high SPI). Conversely, there may be sufficient demand for a product or service on which local households individually spend little (a low SPI), if the proportion of households willing to purchase it is comparatively high (a high PPI). Therefore, the last column in each table presents a combined index based on the interaction of the PPI and SPI indices. The higher this combined index, the greater the estimated overall demand for the particular product or service.

In interpreting these indices, it is also important to keep in mind that different types of goods and services have different typical market areas. For example, a business which sells high-value items that are purchased infrequently by the individual household (such as a car dealership or furniture store) would typically draw from a larger market area than a business which sells low-cost items that are purchased frequently by all households (such as a grocery store). Also, some products and services are by their nature not purchased by households in the geographic area in which they reside: examples include transient lodging (hotels and motels) and car rentals.

In general, the population that lives within a 2-mile radius of DeHirsch & Washington (which is roughly equivalent to the area of Woodbine Borough) is below national norms in terms of both demand for products and services, and household spending on products and services that they purchase. However, Woodbine residents are near or above national demand and spending averages in several categories. Table 3 shows the business categories with the highest ten combined market potential indices, along with their constituent PPI and SPI measures, based on the demographics in the primary market area.

This list is dominated by businesses that serve residents' basic living needs, including food, clothing, and personal care. The product categories with the strongest household demand include appliances, clothing and groceries; and households spend more than the

national averages for clothing, hair care, and audio and video equipment. However, only in three categories—children’s apparel, infants’ apparel, and barbers and hair care—is the overall market strength as indicated by the combined index equal to or greater than the national average.

Table 3: Top Purchase Potential Categories in Woodbine (2-Mile Radius)

| Category | Purchase Potential Index | Spending Potential Index | Combined Index |
|-----------------------|--------------------------|--------------------------|----------------|
| Infants’ Apparel | 97 | 109 | 106 |
| Barbers & Hair Salons | 91 | 111 | 101 |
| Children’s Apparel | 94 | 107 | 101 |
| Video Equipment | 98 | 101 | 99 |
| Appliances | 105 | 93 | 98 |
| Cable Television | 93 | 101 | 94 |
| Electronics | 98 | 89 | 87 |
| Audio Equipment | 85 | 102 | 87 |
| Women’s Apparel | 95 | 91 | 86 |
| Apparel – General | 97 | 89 | 86 |

As one would expect given their demographics, the markets for all types of products and services are much stronger for the populations in the communities surrounding Woodbine. Table 4 shows the top fifteen categories for the trade area within a 6-mile radius, which includes most of Dennis Township (except for the areas along Route 9), portions of Upper Township (including Tuckahoe and Petersburg) and Corbin City, and the easterly edge of Maurice River Township.

This broader trade area has a much stronger overall demand for goods and services, and for a wider variety of products. The greater affluence of the population in this market area is reflected by stronger markets related to homeownership (home loans, paint, furniture), automobile ownership (automobile loans, automotive aftermarket), computer equipment, and leisure activities (sporting goods, toys and hobbies, video rental, audio equipment). It is interesting to note that the strongest market is for pets and pet supplies: this may reflect larger house lots and the more rural character of the surrounding area, as well as greater affluence and discretionary spending potential.

Table 5 shows the top fifteen categories for the population within a 10-mile radius of Woodbine. This area includes the southerly portions of Maurice River Township (i.e., south and east of Port Elizabeth and Manumuskin) and Estell Manor, Sea Isle City, and communities along Route 9 from Marmora south to Swainton and the outskirts of Cape May Courthouse.

Even more strongly than in the 6-mile radius, this area presents markets for products and services relating to home ownership (remodeling, home loans, homeowners insurance, paint, home improvement) and leisure activities (sporting goods, toys and hobbies, audio equipment, restaurants). The affluence of the area is indicated by the strength of the market for investments and travel (e.g., hotels/motels), while the higher educational levels are suggested by a stronger market for books and periodicals.

**Table 4: Top Purchase Potential Categories for Secondary Market Area
(6-Mile Radius)**

| Category | Purchase Potential Index | Spending Potential Index | Combined Index |
|------------------------|--------------------------|--------------------------|----------------|
| Pets & Supplies | 116 | 101 | 117 |
| Automobile Loans | 112 | 101 | 113 |
| Sporting Goods | 111 | 100 | 111 |
| Child Care | 114 | 95 | 108 |
| Home Loans | 117 | 92 | 108 |
| Paint | 114 | 94 | 107 |
| PC Hardware/Software | 107 | 100 | 107 |
| Children's Apparel | 104 | 102 | 106 |
| Toys & Hobbies | 104 | 102 | 106 |
| Video Rental | 104 | 101 | 105 |
| Audio Equipment | 102 | 102 | 104 |
| Furniture | 106 | 97 | 103 |
| Apparel – General | 101 | 101 | 102 |
| Automotive Aftermarket | 103 | 99 | 102 |
| Barbers & Hair Salons | 103 | 99 | 102 |

**Table 5: Top Purchase Potential Categories for Tertiary Market Area
(10-Mile Radius)**

| Category | Spending Potential Index | Spending Potential Index s | Combined Index |
|----------------------|--------------------------|----------------------------|----------------|
| Pets & Supplies | 114 | 104 | 119 |
| Remodeling | 117 | 101 | 118 |
| Sporting Goods | 114 | 103 | 117 |
| Automobile Loans | 109 | 103 | 112 |
| Investments | 119 | 94 | 112 |
| PC Hardware/Software | 111 | 100 | 111 |
| Toys and Hobbies | 105 | 105 | 110 |
| Home Loans | 117 | 94 | 110 |
| Homeowners Insurance | 112 | 98 | 110 |
| Paint | 116 | 94 | 109 |
| Home Improvement | 109 | 100 | 109 |
| Audio Equipment | 104 | 104 | 108 |
| Restaurants | 108 | 100 | 108 |
| Books & Periodicals | 103 | 104 | 107 |
| Hotels/Motels | 107 | 100 | 107 |

Thus, different business potentials emerge based on the size of the trade area. The immediate Woodbine area, for example, appears to have a greater relative need for “basics” such as groceries and apparel than does the broader trade area. Given the limited population, low incomes and low spending levels in the 2-mile radius primary area, however, it is doubtful whether this population alone could support additional businesses in these categories.

Some similarities, however, cut across the trade areas. Based on this analysis, it would appear that the residential market in the area surrounding the Borough provides a base of support for the following types of businesses:

- Financial services institutions (including banks) or firms offering insurance, investments, and loans;
- Businesses related to remodeling and home maintenance such as hardware stores, lumberyards, paint stores, and lawn and garden maintenance;
- Businesses selling or servicing home appliances, home entertainment equipment, and home computers;
- Sporting goods stores;
- Pet care stores.

Another approach to determining retail growth potential is based solely on the population of the town and its surrounding rural market area. One study² looked at retail trade options based on a review of retail business data files for the states of Missouri, Arkansas and Oklahoma. The study determined the “probable market range” and the threshold population needed to support the establishment of one firm for selected retail trades. Table 6 presents some of the study’s findings for 12 types of retail trade related to the categories discussed above as having potential market demand in Woodbine Borough.

² Jay Simon, Curtis Braschler, John A. Kuehn and John Croll, *Potential for Retail Trades in Rural Communities*. University of Missouri–Columbia: University Extension publication DM3035 ([http:// muextension.missouri.edu/xplor/commdm/dm3035.htm](http://muextension.missouri.edu/xplor/commdm/dm3035.htm)).

Table 6: Probable Market Ranges and Threshold Market Area Populations for Selected Retail Trades, 1975

| Industry Title | Probable Market Range (Miles) | Threshold Market Area Population to Support One Firm |
|---------------------------------------------|-------------------------------|------------------------------------------------------|
| Grocery stores | 16 | 1,250 |
| General merchandise stores | 16 | 1,536 |
| Lumber and building materials dealers | 16 | 2,595 |
| Hardware stores | 16 | 3,709 |
| Furniture stores | 16 | 4,013 |
| Radio and TV stores | 32 | 5,952 |
| Sporting goods or bicycle stores | 32 | 6,932 |
| Household appliance stores | 32 | 7,802 |
| Floor covering stores | 32 | 8,806 |
| Paint, glass and wallpaper stores | 32 | 11,528 |
| Lawn and garden supply stores and nurseries | >64 | 5,845 |
| Drapery and upholstery stores | >64 | 20,178 |

Source: *Potential for Retail Trades in Rural Communities*

There are several limitations in applying this methodology to Woodbine and other communities in the Pinelands. First, Pinelands communities do not fit the profile of "rural" areas in comparison to other areas of the country: the overall population densities are much higher than in most rural counties, and town centers are spaced much more closely together. All four counties in the Pilot Program are in the top 12 percent of counties nationwide in terms of population density. Second, towns in the Pinelands, as in the Northeast generally, are much closer to each other than they are in other areas. This means that there are few towns with a rural market radius of 32 miles, and many with market radii of less than 8 miles. Finally, it must also be noted that retail market characteristics have changed significantly in the last two decades: in particular, the emergence of superstores, "big-box" discounters and other types of stores has transformed the retail environment by extending trade areas and drawing business out of town centers. Therefore, the findings of the study cited above should be taken as general indications of the relative densities of retail establishments that can be supported, with the smaller radii and populations indicating a greater likelihood that such stores could be supported in a small community such as Woodbine.

Nonresident Employees

Woodbine Borough is a net importer of labor from surrounding areas: with a resident labor force of only about 900, Woodbine has an estimated 1,900 employees. Thus, the Borough receives a net inflow of about 1,000 workers every day (i.e., total nonresident employees less residents who commute out of the Borough). With 1,200 employees, the Woodbine Developmental Center is the largest single employer in the Borough (and in the County), and accounts for nearly two-thirds of the total number of jobs in Woodbine. Although a large portion of the Center's employees are likely to be working in evening or night shifts (and thus do not represent a significant market potential for businesses with normal daytime operating hours), the Borough's total daytime employee workforce is probably in the range of 1,300-1,500 employees.

These nonresident employees of businesses and institutions in Woodbine represent a secondary market for products and services in the Borough. To be sure, many of these workers are already included in the above analysis of the regional residential market areas; however, the fact that they are already coming to Woodbine means that it should be easier for businesses in the Borough to capture a share of purchases by regional residents who might otherwise travel to other communities for goods and services—especially convenience items such as food and beverages, dry cleaning, and personal care items.

The presence of a large daytime workforce provides a constant market potential for Woodbine businesses. However, in order to attract the daytime workforce to shop in Woodbine, services must be convenient and accessible. To meet these needs, businesses may need to make changes in the merchandise they carry, the services they provide, advertising methods, and hours of operation. This strategy is in contrast to the approach needed to capture visitors and tourists who must be encouraged to spend time in Woodbine due to its unique qualities and availability of services. In the case of the daytime workforce, the customer base already exists but needs to be encouraged to spend money in the community by catering services to them which make Woodbine an obvious, convenient choice for routine shopping and services.

Woodbine Developmental Center Residents

Residents of the Woodbine Developmental Center spend a combined total of over \$100,000 per month on various purchases in nearby malls that could remain in Woodbine if the services were made available. It is difficult in a small community to replicate the range of shopping goods and consumer services provided by regional shopping centers, but this total volume of sales is indicative of the latent buying power in the community that could help to support new businesses. For example, CACI Marketing Systems estimates that retail sales in Woodbine Borough totaled approximately \$12.2 million in 1998. Thus, the estimated spending by residents of the Developmental Center is nearly 10 percent of the existing total sales.

Visitors and Seasonal Residents

In addition to the permanent residents of Woodbine Borough and its neighboring communities, many individuals and families from outside South Jersey live in Cape May County on a seasonal basis or visit the area as vacationers. Cape May County has the second largest tourism economy of all New Jersey counties (after Atlantic County), with estimated total 1997 travel and tourism expenditures of \$2.32 billion. This includes \$478 million in estimated annual retail sales, \$763 million in expenditures for lodging, and \$646 million in restaurant dining.³ Because the existing tourism industry is concentrated along the Shore, Woodbine is not ideally located to participate fully in these economic benefits; however, the market is so large in comparison to the total economy of the Borough that Woodbine would receive a significant benefit by capturing even a small percentage of the overall spending.

A small but potentially important segment of the short-term visitor market is generated by Woodbine Municipal Airport. A 1996 study prepared for the New Jersey Division of

³ Center for Survey and Marketing Research, Longwoods International, May 1998 (for the New Jersey Office of Travel and Tourism).

Aeronautics⁴ estimated that the Woodbine Airport was directly or indirectly responsible for 27 jobs in the region, \$665,700 in payrolls, and \$1.58 million in expenditures. These estimates were based in part on surveys of airport users throughout the state, which were used to create profiles of visitor stay and expenditure patterns.

Table 7: Estimated Economic Impacts of Woodbine Airport

| | Jobs* | Payroll | Expenditures |
|---------------------|-----------|------------------|--------------------|
| Direct Impact | 16 | \$389,000 | \$825,100 |
| Secondary Impact | 11 | \$276,700 | \$755,900 |
| Total Impact | 27 | \$665,700 | \$1,581,400 |

* Rounded

The Woodbine Municipal Airport thus plays a significant role in the local and regional economy, but its potential has yet to be fully tapped. As indicated in Table 8, the Woodbine Airport has a considerably smaller economic impact than the three closest other airports in terms of annual visitors, on-airport employment, and airport-generated regional employment and expenditures. In addition to the total impacts, two aspects of this comparison are noteworthy for their relevance to the airport's role in Woodbine's economic development. First, visitors to the Woodbine Airport tend to spend 18 to 35 percent less per visit in the local economy than do visitors to the surrounding airports. This may be due to the relative lack of consumer businesses in proximity to the airport. Second, the Cape May County Airport and especially the Millville Municipal Airport generate much higher levels of employment and expenditure impact from tenants than from airport visitors, probably due in large part to the availability of infrastructure at these competing locations. The higher economic and employment impacts of Millville and Cape May Airports are also due to a much higher volume of planes, which creates demand for more service at the airport and in the vicinity.

⁴ New Jersey Division of Aeronautics, *Economic Impact of General Aviation in New Jersey*, May 1996 (prepared by The Airport Technology and Planning Group, Inc., under contract to the Delaware Valley Regional Planning Commission).

Table 8: Estimated Economic Impacts of Woodbine Municipal Airport Compared to Other Nearby General Aviation Airports

| | Woodbine Municipal Airport | Millville Municipal Airport | Cape May County Airport | Ocean City Municipal Airport |
|-------------------------------------------------------|----------------------------------|-----------------------------------|-------------------------------|------------------------------------|
| Annual General Aviation Visitors | 3,200 | 18,000 | 13,500 | 15,700 |
| Annual GA Visitor Expenditures | \$475,500 | \$4,104,000 | \$2,450,300 | \$2,852,300 |
| Direct Expenditures per Visitor | \$149 | \$228 | \$182 | \$182 |
| Airport-Generated Employment* (Direct + Indirect) | | | | |
| • Airport Tenants | 7 | 1,303 | 137 | 22 |
| • General Aviation Visitors | 20 | 173 | 104 | 120 |
| • Total | 27 | 1,476 | 241 | 142 |
| Airport-Generated Expenditures (Direct + Indirect) | | | | |
| • Airport Tenants | \$598,500 | \$177,046,600 | \$9,962,000 | \$1,509,000 |
| • General Aviation Visitors | \$982,500 | \$8,480,300 | \$5,063,200 | \$5,893,800 |
| • Total | \$1,581,000 | \$185,526,900 | \$15,025,200 | \$7,402,800 |

*Rounded Source: New Jersey Division of Aeronautics, *Economic Impact of General Aviation in New Jersey*, May 1996.

EXISTING BUSINESS MIX

Existing Strengths

Business data for Woodbine were obtained through CACI Marketing Systems for the same geographic areas as for the analysis of consumer purchase and spending potential, i.e., radii of 2 miles, 6 miles and 10 miles from the intersection of DeHirsch Avenue and Washington Avenue. The business database is extracted from information licensed from InfoUSA which contains data on approximately 11 million businesses that have been verified through telephone contacts. Information regarding the total number of businesses, number of employees and sales volume were provided at a two-digit Standard Industrial Classification (SIC) code level.

The primary market area data set represents businesses located within the Borough of Woodbine. The secondary and tertiary data sets provide a regional market context by including the Dennis Township area (6 miles) and surrounding communities such as Estell Manor, Corbin City, Sea Isle City and Cape May within the larger region. The database identifies 99 establishments employing 1,919 people in Woodbine Borough (as approximated by the 2-mile radius around the intersection of DeHirsch and Washington Avenues). The summary of businesses by 2-digit SIC code is presented in Appendix 2.

Using these databases, an analysis was performed to compare the number of businesses in each ring in relation to the population served. First, the number of establishments in each business category in each geographic area was divided by the population of the same geographic area, to generate a ratio of businesses to population. Then the ratio for the primary market area (i.e., Woodbine Borough) was divided by the ratio for the 10-mile ring area, and the result was multiplied by 100. The resulting "business index" compares how many businesses of each type are available within Woodbine Borough, relative to population, in comparison to surrounding areas. A business index that is

greater than 100 indicates that Woodbine is providing more businesses or employees relative to its population than those in the larger region, and thus may represent an existing strength. On the other hand, an index of less than 100 indicates that Woodbine is providing fewer businesses or employment opportunities relative to its population, which may indicate a weakness in the local market or an opportunity for new business development.

Table 9 presents the business categories that are strongest in Woodbine relative to the surrounding region, based on the ratio of the number of establishments to the area's population. Woodbine's strongest areas include Justice, Public Order and Safety; Heavy Construction; Motor Freight Transportation; and Business Services.

Table 9: Primary Woodbine Businesses

| SIC Code | Description | Number of businesses in 2-mile radius | Business Index |
|----------|-------------------------------------------------------------------|---------------------------------------|----------------|
| 92 | Justice, Public Order and Safety | 7 | 334 |
| 16 | Heavy Construction, Except Building Construction - Contractors | 2 | 225 |
| 42 | Motor Freight Transportation | 2 | 225 |
| 73 | Business Services | 4 | 198 |
| 75 | Automotive Repair, Services and Parking | 4 | 184 |
| 52 | Building Materials, Hardware, Garden Supply & Mobile Home Dealers | 4 | 177 |
| 83 | Social Services | 2 | 165 |
| 82 | Educational Services | 3 | 149 |
| 86 | Membership Organizations | 6 | 133 |
| 50 | Wholesale Trade - Durable Goods | 3 | 116 |
| 80 | Health Services | 2 | 113 |
| 91 | Executive, Legislative & General Government, Except Finance | 6 | 111 |

While the strength of various business sectors varies, the number of total businesses in Woodbine relative to the Borough's population is comparable to the ratio for the wider region (i.e., the overall business index is 100). And a similar employment index is high for Woodbine at 185, reflecting the regional importance of the Woodbine Developmental Center. However, many of the business categories in which Woodbine ranks highest are not high ratables for the community. For example, the Justice, Public Order and Safety category includes establishments such as the Emergency Management Office and the State Police station that provide employment opportunities within the community, but are tax exempt and do not contribute to the Borough's tax base. This is also true for the Social Services, Educational Service, and General Government categories. Membership Organizations primarily include churches, which are also tax exempt.

The Building Materials category includes businesses such as Flora for Fauna and Woodbine Hardware. The Business Services category includes Talon Videos, Beach Home Services, Atlantic Able, and Classic Auction Service.

Under-Served Business Categories

Although Woodbine has a variety of business types, several areas may be under-served given the potential market demand. The SIC codes with the lowest business indices are listed in Table 10.

Table 10: Under-Represented Business Categories

| SIC Code | Description | Number of businesses in Woodbine | Business Index |
|----------|------------------------------------------------------------------|----------------------------------|----------------|
| 51 | Wholesale Trade - Nondurable Goods | 1 | 69 |
| 56 | Apparel and Accessory Stores | 1 | 69 |
| 72 | Personal Services | 2 | 69 |
| 58 | Eating and Drinking Places | 5 | 56 |
| 79 | Amusement and Recreation Services | 2 | 51 |
| 76 | Miscellaneous Repair Services | 1 | 48 |
| 57 | Home Furniture, Furnishings and Equipment Stores | 1 | 46 |
| 07 | Agricultural Services | 1 | 33 |
| 55 | Automotive Dealers and Gasoline Service Stations ⁵ | 1 | 33 |
| 70 | Hotels, Rooming Houses, Camps, and Other Lodging Places | 1 | 31 |
| 15 | Building Construction - General Contractors & Operative Builders | 1 | 21 |

Woodbine has a total of 23 establishments in the retail trade category (Table 11). General merchandise stores; apparel and accessory stores; and home furnishings stores are lacking relative to the population in Woodbine. With the exception of automotive dealers and service stations, there are few options within the surrounding 6-mile region. Retail establishments such as general merchandise, apparel stores, and home furnishings could be a potential market focus as many downtowns rely on the retail trade category as a base for economic activity. The retail sector currently does not have a strong presence in Woodbine's town center.

⁵ This number is not accurate when compared to field observations: Woodbine is currently home to two car dealers and two gasoline service stations.

Table 11: Retail Trade Establishments

| SIC Code | Description | 2 mi. | 6 mi. | 10 mi. |
|--------------|-------------------------------------------------------------------|-----------|-----------|------------|
| 52 | Building Materials, Hardware, Garden Supply & Mobile Home Dealers | 4 | 12 | 28 |
| 53 | General Merchandise Stores | 0 | 0 | 5 |
| 54 | Food Stores | 4 | 8 | 46 |
| 55 | Automotive Dealers and Gasoline Service Stations | 1 | 11 | 37 |
| 56 | Apparel and Accessory Stores | 1 | 3 | 18 |
| 57 | Home Furniture, Furnishings and Equipment Stores | 1 | 4 | 27 |
| 58 | Eating and Drinking Places | 5 | 21 | 111 |
| 59 | Miscellaneous Retail | 7 | 26 | 90 |
| Total | | 23 | 85 | 362 |

Among other retail categories, there are very few options for grocery shopping less than 10 miles away from Woodbine (see Table 15). Residents of Woodbine and surrounding communities can make use of J&J Superette and MG's Market in Woodbine but otherwise must travel to Cape May Courthouse, Sea Isle City, Stone Harbor, Millville, Mays Landing, Ocean View, Egg Harbor Twp., Ocean City, and Wildwood. It should be noted that the area within 10 miles or more from Woodbine has a greater development density as it includes portions of Route 9 and the Shore communities and therefore contains a greater number of businesses.

The decline of retail activity in small town centers is commonly blamed on competition from newer shopping centers. Regional malls, big-box retailers and "power centers" up to 20 miles away provide competition for major purchases that are made less frequently, and the number of stores within these centers provides opportunities for consumers to make a variety of smaller purchases in one shopping trip. However, local shopping centers and downtowns serve local residents' need for convenient access to more frequently purchased items. The CACI data identified only three shopping centers within 10 miles of Woodbine:

Table 12: Shopping Center Locations

| Shopping Center | Distance from Woodbine | Year Open | Gross leasable area (Square Feet) |
|-------------------------------------|------------------------|-----------|-----------------------------------|
| Cape May Court House | | | |
| • 12 stores | 10.7 mi. | 1965 | 100,000 |
| • Anchors: A&P, Ames Dept. Store | | | |
| Trader's Lane | 10.8 mi. | 1976 | 12,000 |
| Shoppers Haven | 10.7 mi. | 1961 | N/A |

Source: CACI Marketing, Inc.

Thus, although Woodbine is unlikely to support a major shopping center due to demographic profiles and the impact this type of development would have on the character of the community, opportunities do exist for expanding the types of retail uses in Woodbine.

As shown in the analysis above, Woodbine has a strong market potential according to the Business Index for the heavy construction and building materials, hardware, and garden supply categories. The number of special trade contractors is average for the region (within a 10-mile radius of Woodbine) with a Business Index of 103. However, as shown in Table 13, a substantial number of these contractors are based in the Woodbine area. These businesses generally have 1-4 employees and total annual sales under \$500,000. The specific types of contractors in the area provide services for construction and home building; insulation; siding; painting; home improvements; roofing; air condition, heating and ventilation; road building; septic tanks; concrete; and general contracting.⁶

Table 13: Construction Businesses

| SIC Code | Description | 2 mi. | 6 mi. | 10 mi. |
|----------|------------------------------------------------------------------|-----------|-----------|------------|
| 15 | Building Construction – General Contractors & Operative Builders | 1 | 19 | 60 |
| 16 | Heavy Construction, Except Building Construction – Contractors | 2 | 3 | 11 |
| 17 | Construction – Special Trade Contractors | 8 | 34 | 96 |
| | Total | 11 | 56 | 167 |

However, the number of home furniture, furnishings and equipment stores and building construction sector are very low (Business indices of 46 and 21, respectively). Due to the amount of available, relatively inexpensive land in Woodbine, there may be potential for creating a “home improvement” marketing strategy for Woodbine. This would build on existing strengths, attract new business and create a theme for the town center. This issue is explored in greater detail below, in the Recommended Economic Development Strategy section (page 37).

In addition to the types of businesses above, several kinds of service businesses that are currently absent from Woodbine’s economy could potentially service the regional market area. In particular, the presence of financial institutions is important in a town center, as a place for employees to cash paychecks, for local businesses to deposit receipts, and for a wide range of related financial services and transactions.

It should be noted that although there is a potential market demand for several types of businesses, the actual local market demand may not be strong enough to support it. For example, the Borough has tried to attract banks to the area but has not been successful. This may indicate the need to offer additional incentives to businesses that could potentially serve the Woodbine market.

⁶ The inventory is based on contractor businesses which have a Woodbine address. The business may be physically located in Woodbine or within one of the surrounding townships.

Table 14: Businesses Absent in Woodbine

| SIC Code | Description | # of Businesses within X miles of the intersection of DeHirsch & Washington Avenues | | |
|---------------------------------------------|------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------|--------|
| | | 2 mi. | 6 mi. | 10 mi. |
| Finance, Insurance & Real Estate | | | | |
| 60 | Depository Institutions | 0 | 3 | 15 |
| 61 | Nondepository Credit Institutions | 0 | 0 | 3 |
| 62 | Security & Commodity Brokers, Dealers, Exchanges & Services | 0 | 0 | 3 |
| 64 | Insurance Agents, Brokers and Service | 0 | 0 | 2 |
| Services | | | | |
| 81 | Legal Services | 0 | 0 | 3 |
| 87 | Engineering, Accounting, Research, Management & Related Services | 0 | 5 | 18 |

The Home Improvement and Construction Market

As stated previously, Woodbine may have the potential to capture a larger share of uses that relate to home improvements. The evaluation of business indices based on SIC codes indicated a potential demand for a variety of retail and service uses related to this niche. In order to examine in more detail the potential competition for specific home improvement businesses, an analysis was carried out using telephone directory search tools available through the internet. Searches were carried out for specific business types within specified distances from the intersection of Washington Avenue and DeHirsch Avenue. The results of the search are shown in Table 15.⁷

⁷ It should be noted that the data may not be entirely accurate due to the inclusion of businesses that no longer exist or multiple locations for a particular establishment.

Table 15: Competitive Review of Potential Businesses

| Business category | Number of businesses within specified radius from intersection of Washington Ave. & DeHirsch Ave. | | | | | |
|---------------------------------------------|---------------------------------------------------------------------------------------------------|-----------|-----------|------------|-------------|-----------------------|
| | 0-2 miles | 2-4 miles | 4-6 miles | 6-10 miles | 10-20 miles | Total within 20 miles |
| Home improvements | - | 1 | 4 | 8 | 66 | 79 |
| Related retail categories: | | | | | | |
| • Antique dealers | - | 1 | 1 | 9 | 22 | 33 |
| • Craft supplies | 1 | - | - | 2 | 5 | 8 |
| • Furniture–indoor | - | - | 1 | 3 | 31 | 35 |
| • Furniture–outdoor | - | - | - | 3 | 8 | 11 |
| • Lighting fixtures–retail | - | - | - | - | 5 | 5 |
| • Retail lawn & garden equipment & supplies | - | - | - | - | 8 | 8 |
| • Retail nurseries – lawn & garden supply | - | - | - | - | 3 | 3 |
| Building trades | | | | | | |
| • Contractors | * | * | * | * | * | 1,155 |
| • Sign manufacturers | 1 | 1 | 4 | 3 | 26 | 35 |
| Other services | | | | | | |
| • Grocers–retail ⁸ | 2 | - | - | 1 | 47 | 50 |
| • Hotels & motels | - | - | - | 2 | 381 | 383 |
| Area (square miles) | 12.6 | 37.7 | 62.8 | 201.1 | 942.5 | 1,256.6 |
| Businesses per sq. mi.** | 0.3 | 0.1 | 0.2 | 0.2 | 0.6 | 0.5 |

*See detailed analysis of contracting firms below.

**Excluding contractors.

The analysis produced the following findings:

- ◆ Few home improvement establishments or other related retail establishments are located within 6 miles of Woodbine. Home improvement establishments included in the telephone directory within a 6-mile radius list addresses for Woodbine, Tuckahoe and South Seaville. Home improvement establishments within the 6-10 mile area are located in Cape May Courthouse, Ocean View, and Sea Isle City. Once the comparison area is expanded to the 10-20 mile radius, a substantial number of home improvement businesses are located along the shore (Ocean City, North Wildwood and Rio Grande) and in the larger communities of Vineland, Millville and Egg Harbor Township.
- ◆ Two antique stores are located in nearby Tuckahoe, but the majority are located nearer the shore communities of Cape May Courthouse, Marmora, Mauricetown and

⁸ This is a subset of the "Food Stores" category shown in Table 11.

Heislerville. Craft supply stores, furniture stores (both indoor and outdoor), and gardening centers are also lacking within the 10-mile region.

- ◆ Over 1,100 contracting firms are within 20 miles of Woodbine. These firms support the strong housing construction and home improvement market along the shore. As vacant land in the shore communities is consumed by development or becomes more costly, the continuing need for these types of service businesses creates an opportunity for Woodbine, which has plentiful land at relatively low cost to attract these types of businesses to the community when relocation or expansion is necessary.

An analysis of contracting firm locations (by distance from Woodbine) was conducted in order to assess Woodbine's locational advantages for this type of business within the regional economy. This analysis indicates that Woodbine already has a high concentration of such firms, and is, in effect, a center for such businesses within a radius of up to 10 miles. Looking at rings of 2 miles, 5, miles, 10 miles and 20 miles from the center of Woodbine, the number of contractors per square mile is highest in Woodbine itself (i.e., the 2-mile ring) at 1.27. The 2-5 mile and 5-10 mile rings (Dennis, Maurice River, Ocean View, etc.) have much lower densities of contracting firms, at about 0.5 and 0.6 firms per square mile. The 10-20 mile ring, includes the more densely developed communities along the shore (Ocean City, Somers Point, Cape May Courthouse, Wildwood), as well as larger communities such as Millville, Mays Landing and Egg Harbor Township. Within this ring are 1,155 contracting firms, or 1.02 per square mile. This review indicates that the Woodbine area may be a desirable place for these types of businesses to locate. The number and types of contractors in the region are shown in Table 16.

Table 16: Contractors in Region

| Type of Contractor | Number of contractors within specified distance from intersection of Washington Ave. & DeHirsch Ave. | | | | |
|------------------------------------|------------------------------------------------------------------------------------------------------------|--------------|---------------|----------------|--------------------------|
| | 0-2 miles | 2-5 miles | 5-10 miles | 10-20 miles | Total within 20 miles |
| Air conditioning | 3 | 3 | 8 | 48 | 62 |
| Building | 1 | 6 | 21 | 114 | 142 |
| Carpet layers | | | | 5 | 5 |
| Caulking | | | | 1 | 1 |
| Concrete | 2 | 1 | 6 | 27 | 36 |
| Decorating | | | | 1 | 1 |
| Demolition | | | 5 | 3 | 8 |
| Drilling & boring | | | | 2 | 2 |
| Driveway construction | | | | 2 | 2 |
| Dry wall | | 1 | | 3 | 4 |
| Dry wall (wholesale) | | | | 2 | 2 |
| Electric | 1 | 1 | 9 | 67 | 78 |
| Electric – commercial & industrial | | | | 1 | 1 |
| Environmental & ecological | 1 | | 4 | 14 | 19 |
| Equip. & supplies rental | | | | 3 | 3 |
| Equip/supplies – dealers/service | | | | 3 | 3 |
| Equipment manufacturing | | | | 1 | 1 |
| Excavating | | | 9 | 37 | 46 |
| Fence | | | | 1 | 1 |
| Fire & water damage restoration | | | 1 | 7 | 8 |
| Fire damage restoration | | | | 1 | 1 |

Table 16 (continued)

| Type of Contractor | Number of contractors within specified distance from intersection of Washington Ave. & DeHirsch Ave. | | | | |
|--------------------------------------|------------------------------------------------------------------------------------------------------------|--------------|---------------|----------------|--------------------------|
| | 0-2 miles | 2-5 miles | 5-10 miles | 10-20 miles | Total within 20 miles |
| Garbage collection | | 1 | 1 | | 2 |
| General | 1 | 3 | 10 | 96 | 110 |
| General – single-family homes | | | | 4 | 4 |
| Grading | | | | 2 | 2 |
| Heating | 2 | 3 | 13 | 98 | 116 |
| Heating equipment (wholesale) | | | 1 | 6 | 7 |
| Insulation | | 2 | | 5 | 7 |
| Land clearing & leveling | | | 1 | 3 | 4 |
| Landscape | 1 | 1 | 14 | 67 | 83 |
| Marine | | 1 | 1 | 10 | 12 |
| Mason contractors (wholesale) | | | | 2 | 2 |
| Masonry | 1 | 3 | 5 | 24 | 33 |
| Mechanical | | | 1 | 3 | 4 |
| Painting & paper hanging | | 1 | 10 | 41 | 52 |
| Painting – commercial & industrial | | | | 3 | 3 |
| Paving | | | 1 | 9 | 10 |
| Pile driving | | 2 | 1 | 4 | 7 |
| Pipeline | | | | 1 | 1 |
| Plastering | | | 1 | 3 | 4 |
| Plumbing | | 4 | 9 | 73 | 86 |
| Remodeling & repair | | | | 1 | 1 |
| Road building | 1 | | 1 | | 2 |
| Roofing | 1 | | 1 | 47 | 49 |
| Rubbish & garbage removal | | | | 7 | 7 |
| Septic tanks – installation | | | 1 | | 1 |
| Septic tanks – designers | | | | 5 | 5 |
| Sewer | | | | 3 | 3 |
| Sheet metal work | | | | 7 | 7 |
| Shoring | | | | 1 | 1 |
| Siding | | | 4 | 47 | 51 |
| Stone setting | | | | 1 | 1 |
| Stucco & exterior coating | | 1 | | 3 | 4 |
| Swimming pool dealers | | | | 7 | 7 |
| Telephone & television cable | | | | 2 | 2 |
| Terrazzo, tile, marble & mosaic work | | | 1 | 3 | 4 |
| Tile – ceramic | | | 2 | 18 | 20 |
| Utility contractor | | | 1 | 2 | 3 |
| Warm air heating and A/C (whlsle) | | | 1 | 2 | 3 |
| Waterproofing | 1 | | | 7 | 8 |
| Total | 16 | 34 | 144 | 961 | 1155 |
| Area (square miles) | 12.6 | 66.0 | 235.6 | 942.5 | 1,256.6 |
| Number of firms per square mile | 1.4 | 0.5 | 0.6 | 1.0 | 0.9 |

LOCATIONAL ADVANTAGES

Land Availability

Woodbine has a compact, well-developed town center, extensive institutional facilities at the Developmental Center, and a significant amount of land devoted to airport use. However, the Borough also has a substantial amount of vacant land surrounding and interspersed within these developed areas. Opportunities exist for new development, infill and redevelopment of existing property. Vacant and wooded land not under public ownership comprises approximately 27% of the Borough's land area. The Borough owns approximately 1,194 acres of property, including the 700 acre airport area. This is roughly 23% of the Borough's total land area. The majority of the parcels owned by the Borough are lots of less than one-third acre near the town center, but many are vacant, contiguous parcels which could be combined for new development.

Local Realtors and business owners agree that one of the strongest competitive advantages that Woodbine has over surrounding communities is the amount of vacant, inexpensive land. However, these people are also quick to point out that the lack of sewer is a deterrent as a potential business location and usually counteracts the positive aspect of land availability. Businesses would rather pay a higher price in another location with readily available infrastructure rather than save money on land and building prices only to go through what they perceive to be an expensive, time consuming and often frustrating process of establishing a wastewater treatment option that complies with existing regulations. Therefore, Woodbine's land availability asset can only be useful as a potential draw to business if infrastructure is in place.

The average assessed valuation of vacant lots in Woodbine is approximately \$12,500 per acre. In comparison, a recent article of the Press of Atlantic City states that Egg Harbor Township is attempting to sell commercial land acquired through tax foreclosure for roughly \$100,000 per buildable acre. These values are affected by the size of available parcels, infrastructure, highway access, and surrounding business and population densities. While the actual difference in market values may be much lower, the magnitude of the spread indicates an opportunity for Woodbine in recruiting new businesses.

Town Center

The town center has been the historic hub of the community and was once the regional shopping location. Woodbine is one of the few Pinelands communities included in the Pilot Program with an existing downtown. While the area is in need of improvements, the structure of a downtown presently exists and there are substantial opportunities for redevelopment with the right mix of infrastructure improvements and market demand.

Case Studies

There are several small communities around the country that have successfully revitalized their downtowns, often beginning with small-scale improvements that have led to larger projects. The two case studies below can serve as models for the revitalization of Woodbine's town center.

- *Helen, Georgia.* The town of Helen, Georgia (population 265) was a dying lumber town in the Georgia mountains. There were 9 small businesses in town to service

local residents and while many drove through Helen on their way to Atlanta, few stopped in Helen. At the initiative of three local businessmen, the town undertook the process of facade and streetscape improvements, including the improvements of vacant lots. The improvements were based on the creation of a Bavarian motif inspired by the sketches of a local scene designer. The improvements were made possible through the efforts of the City of Helen and the local chamber of commerce. The building owners remodeled their businesses at their own expense and state funds were used to create an addition to the City Hall.

Once the visual improvements were complete, people who had once only passed through the community began to stop and spend time in Helen. This resulted in the need for additional public facilities, and new business opportunities were created as people wanted places to shop, eat and stay the night. The Farmers Home Administration and the Appalachian Regional Commission provided funding for a new water and sewer plant to accommodate the increase in the tourism industry. All other expenditures were underwritten by the municipality. Between 1970 and 1988, an estimated 1,415 jobs were created (many of which are seasonal); tax revenues have increased by \$482,000 and other public revenues have increased by \$162,000; and 140 new small businesses, 14 new restaurants, and 14 new motels have been created. Helen is now the third most visited place in Georgia.

While the success of Helen, Georgia is an inspirational revitalization story, the scale of the improvements are not recommended for Woodbine. The important finding of this case study is that the organization created by a few individuals to improve the appearance of the community led to the rehabilitation of existing structures, increased tourism and created the need for additional supporting businesses.

- *Brunswick, Maryland.* The economy of this community of 4,572 was tied to the railroad, which began to decline. The downtown area deteriorated as a result with several stores in danger of closing. In addition, a new shopping center was constructed which began to draw business away from the downtown. A group of interested citizens began to organize a Main Street revitalization program, and the election of a new mayor supportive of these efforts brought city government into more direct involvement and provided a commitment from city officials.

From the initial volunteer efforts, the Brunswick Revitalization Committee was officially appointed. The official recognition made it possible to receive state and federal funds for revitalization. A Community Development Block Grant provided funds for renovation, rehabilitation of older buildings, capital improvements and the establishment of a revolving loan fund. The town government provided a minimal amount of assistance for workshops, postage, photography and a matching grant. These efforts have resulted in two new start-up businesses; one business retained under new ownership; one business expansion; several new full-time jobs; renewed interest by businesses owners in renovating their properties; increased traffic in the downtown; and a new promotion process. The lesson for Woodbine is that town center merchants and businesspersons can effectively compete with other shopping locations through organization and making small improvements.

Tourists & Visitors

Due to Woodbine's location with respect to the regional road network and the proximity to the coast, there is a strong potential for attracting tourists and visitors to the commu-

nity. This will generate a need for additional services and facilities and will increase the amount of money spent within the community, further supporting business vitality.

Woodbine could potentially serve as a hub within the context of the ecotourism strategy for Dennis/Maurice River. Woodbine is in close proximity to many ecotourism destinations within the region:⁹

Table 17: Proximity of Ecotourism Sites to the Woodbine Area

| Site / Facility / Attraction | Distance from Woodbine |
|---------------------------------------------------|------------------------|
| Belleplain State Forest | 0 mi. |
| Great Cedar Swamp Bike Trail | 0.25 mi. |
| Dennis Creek Fish & Wildlife Management Area | 1.0 mi. |
| East Creek Pond Lodge | 2.5 mi. |
| Timber and Beaver Fish & Wildlife Management Area | 2.75 mi. |
| Tuckahoe River | 3.5 mi. |
| Lester MacNamara Fish & Wildlife Management Area | 3.7 mi. |
| East Creek Boat Ramp | 4.0 mi. |
| Delaware Bay | 4.0 mi. |
| Cape May Bird Observatory | 4.2 mi. |
| Atlantic Ocean | 6.0 mi. |
| Corson's Inlet State Park | 6.5 mi. |
| Cape May County Park | 7.0 mi. |
| Wetlands Institute | 10 mi. |
| Stone Harbor Bird Sanctuary | 11.25 mi. |
| County Park Fishing Creek Area | 12.0 mi. |
| Higbee Beach Wildlife Management Area | 20 mi. |
| Lighthouse and Cape May Point State Park | 21.5 mi. |

One of the primary objectives for the economic development strategies in the nearby towns of Dennis and Maurice River is to attract more tourism through the promotion of existing amenities. However, public and private facilities are needed to service visitors in order for tourism to increase in this area. For example:

- ◆ With the exception of campgrounds, few options exist for overnight accommodations in the Woodbine area. The only two motels within 10 miles are the El Dorado and the Boulevard Motel. However, 381 hotels and other accommodations are listed in the telephone directory within the 10 to 20 mile region (see Table 15). These areas primarily cater to the tourism industry related to shore travel.
- ◆ With a total of five eating and drinking establishments, Woodbine Borough has only about half as many restaurants, and less than one-fifth as many restaurant employees, as one might expect based on the average ratio of such establishments to population in the surrounding area (as indicated in Table 10, the business index for this category is only 56 and the employee index is 17). In part this reflects the fact that Woodbine does not capture its proportionate share of the seasonal tourist and visi-

⁹ Woodbine application for Pilot Program.

tor trade. Existing establishments within this category include Dionysus Restaurant, Smokey's delicatessen, Woodbine Custard Ranch, and the Mouse Trap Bar & Grill. Expanding the types of restaurants available could serve a greater number of potential customers by providing a variety of dining options.

Woodbine could use tourism as one market to rebuild the retail base of the community and to increase awareness of the region and its resources. Woodbine could also serve as a lower cost service area that supports tourism oriented toward birding, kayaking and outdoor enthusiasts who are looking for a less developed and lower cost location than Cape May.

Airport

The 1996 economic impact study conducted for the New Jersey Division of Aeronautics noted that, in comparison to all states in the nation, New Jersey ranks second in terms of general aviation aircraft per square mile, but last in terms of the number of airports available to serve each 100,000 persons in the state. As a result, the limited number of general aviation airports are extremely valuable to the state. Furthermore, unlike the situation in other states, more than two-thirds of New Jersey's general aviation airports that are open to the public are privately owned, and a number of privately-owned airports have recently been sold or converted to non-aviation uses. These factors make the remaining publicly-owned airports, such as Woodbine's, very important to the state's transportation system and economy.

The primary function of the Woodbine Municipal Airport is servicing the travel and recreational needs of aviation "hobbyists" that travel to the area for tourism-related activities. As the Business Park continues to grow, there may also be an increase in the number of corporate planes and business executives that travel to the area. The planned golf course may also serve as a draw for those seeking conference facilities and meeting areas that could develop as a result of the airport and surrounding business park development.

In all likelihood, the Woodbine Airport will continue to serve twin and turbo aircraft (i.e., 8-12 seats) and is unlikely to expand to accommodate intermediate size aircraft due to land limitations that restrict the size of the runways.¹⁰ However, Woodbine is in an excellent position to act as a reliever to the Atlantic City airport as the pilots of many smaller planes do not want to fly into that area due to the amount of air traffic and the airport would prefer to avoid the slower moving small aircraft.¹¹ Other nearby airports are not considered to be competitive within the market Woodbine is competing for due to their locations. Ideally, Woodbine will attract those visiting the shore and Atlantic City casinos. The Cape May airport is much further from the Atlantic City

¹⁰ The Airport has two runways which are 3,073 feet and 3,304 feet in length. The Port Authority's Proposed Airport Layout Plan calls for extending these to 3,600 feet and 5,000 feet, respectively. A runway of 3,580 feet is required to accommodate 100 percent of small airplanes with less than 10 passenger seats, and a minimum runway of 4,000 feet can accommodate the majority of small aircraft with 10 or more passenger seats; but a greater length is needed to accommodate small jet and larger turboprop aircraft.

¹¹ Note: Bader Field in Atlantic City is another primary general aviation airport, with approximately twice the annual volume of transient arrivals. Bader Field handles primarily single-engine private planes, but is scheduled to close by December 31, 2005.

casino growth and has a stronger connection to the Delaware/Maryland region. The Millville airport is too far west to be attractive for access to the casinos or the shore and the Ocean City airport has land constraints so it cannot expand its facility to attract a larger market.

Woodbine Airport has not experienced the same growth as other nearby airports due in large part to limitations in airport facilities, services and amenities during the 1980s and the early part of the 1990s. The lack of facility expansion hindered the Airport's ability to attract aircraft and aviation related businesses until recently when 14 T-hangers were constructed, attracting six additional airplanes based at the airport. Although there has been a delay in the development of Woodbine's Airport, the present Woodbine Port Authority has taken steps in rejuvenating the capital improvement program. The based aircraft forecasts for Woodbine Airport are shown below.¹²

Table 18: Woodbine Municipal Airport – Based Aircraft Forecast

| Year | Registered in Cape May County | Based at Woodbine Airport | Woodbine as Percent of County |
|---------------|-------------------------------|---------------------------|-------------------------------|
| 1983 Actual | 101 | 23 | 23% |
| 1985 Actual | 105 | 24 | 23% |
| 1990 Actual | 127 | 34 | 27% |
| 1995 Actual | 155 | 42 | 27% |
| 2000 Forecast | 185 | 50 | 27% |
| 2003 Forecast | 212 | 57 | 27% |

Source: Woodbine Airport Layout Plan Update (April 1998), Table 4-4.

As of April 1998, approximately 40 single-engine aircraft were based at the Woodbine Airport. The absence of multi-engine and turbine-powered aircraft based at the Airport is due to the existing runway lengths, which are too short for a large percentage of these types of planes. Plans to extend the runway will allow the airport to accommodate a greater number of multi-engine aircraft by the year 2000. The Airport Master Plan also assumes that the airport will begin to accommodate an increase in small jet traffic as some businesses have expressed an interest in the airport. This growth is expected to stimulate economic growth as more people will frequent the airport and require more fuel and other services.

The Airport Business Park provides an opportunity for an increase in business development in Woodbine. The area is mostly undeveloped at this time but an 18-hole golf course is proposed on 200 acres of land abutting the airport. If wastewater disposal can be provided to the area, the relatively inexpensive land prices will attract businesses. Local Realtors believe that manufacturers, seafood processing and other light industrial uses would be very interested in locating in Woodbine if sewer service were provided.

Market Analysis

A market analysis of Airport Industrial/Business Parks in the eastern United States was performed in order to assess the types of businesses that may be attracted to Woodbine's Airport Business Park (see Appendix 3). The types of parks that were

¹² Woodbine Airport Layout Plan Update, prepared by DY Consultants, Inc., April, 1998.

targeted for the analysis were those that are located in small to mid-size communities and had airports comparable in size to Woodbine. Airports that service commercial carriers were excluded from the research due to the larger market area that they would serve.

Table 19: Airport Industrial/Business Parks

| Name of Airport Industrial/Business Park | Location |
|------------------------------------------|-------------------|
| Accomomack Airport Industrial Park | Melfa, VA |
| Adirondack Airport Business Park | Lake Clear, NY |
| Belfast Airport Industrial Park | Belfast, Maine |
| Concord Airport Industrial Park | Concord, NH |
| Dansville Industrial Park | Dansville, NY |
| Elizabethtown Airport Industrial Park | Bladen County, NC |
| Hopedale Industrial Park | Hopedale, MA |
| Lebanon Airport Business Park | West Lebanon, NH |
| Montague Airport Industrial Park | Montague, MA |
| North Central Industrial Air Park | Lincoln, RI |
| Plymouth Airport Industrial Park | Plymouth, MA |
| Westover Airpark North | Chicopee, MA |
| Westover Metropolitan Airport | Chicopee, MA |

In general, the majority of the airparks do not have tenants which are dependent upon the airport directly. Airport proximity is an advantage if a company needs airport access, but many simply need reasonably priced land. In most cases, the business/industrial park was established adjacent to an airport because the land was available, airports are usually accessible to major road networks, and airports and industrial uses are compatible neighbors. While some business parks provide aircraft maintenance and repair facilities, most of these parks are relatively unsophisticated to undertake specific industrial targeting. The general marketing strategy is to make the availability of space known to as wide an audience as possible, but no specific industries are targeted and most marketing efforts are focused on the immediate region. Most airport business park agencies work with local commercial real estate brokers as their primary marketing effort. In addition, various agencies involved in airport industrial/business park management stated that the majority of corporate relocations are handled through site selection professionals, who are the primary recipients of marketing efforts.

Case Study

A marketing plan was developed for the Montague, Massachusetts Airport Industrial Park in 1994.¹³ The Industrial Park is 64 acres in size and sites are serviced by electric, gas, sewer, water and fiber optic cable. The Turner Falls municipal airport abuts the industrial park and provides a 3,000 foot runway. As part of the market research, nine current tenants were interviewed to determine the strengths and weaknesses of the industrial park based on the location decisions of these businesses.

The interviews indicated that Montague's Airport Industrial Park is attractive to business owners who are already based in the area and are looking to start a new company or expand an existing company. Two of the companies were start-ups or small firms

¹³ *Montague Industrial Park Expansion Project: Marketing Plan*. Prepared by RKG Associates, Inc. and LandUse, Inc., September 30, 1994.

that were attracted by inexpensive rental space. Almost all of the interviewees stated that their decision to locate in the area was largely determined by the availability of competitively priced land that was ready for development (i.e., correct zoning, roadway to site constructed, utilities available, and few site constraints for construction). Other attractions cited included the amount of space for parking and deliveries, the proximity to five colleges, and the appearance of the area.

Businesses in the industrial park, for the most part, do not use the Turner Falls Airport due to its lack of freight handling capacity and therefore, proximity to the airport was not considered heavily in making the decision to locate in Montague. Although many tenants stated that the airport facility was in need of upgrades in order to improve the appearance and the services provided, two of the nine businesses stated that they would use an air freight service if it were made available. One business owner originally planned to make use of the airport to fly customers' items in for work and out for delivery (throughout the U.S., Australia and Europe), but has used United Parcel Service (UPS) instead. Several companies indicated that they make use of trucking services, or they own a truck fleet, because products often have to be boxed and covered during transit. A few tenants stated that the owners of the companies, investors, and some clients make use of the airport in order to visit the site.

Tenants of the Montague Airport Industrial Park noted that they only knew about the existence of the Park and availability of land through word of mouth or local newspapers. The tenants all regard the park as an important resource for the Town that should be capitalized upon in a more professional and productive fashion. Suggestions for marketing included providing better signage for the location of the park; advertising available land, and creating an exhibit for industrial shows held in the region. The tenants recommended the creation of an Industrial Park Commission to coordinate the management and marketing of the Park. Almost all tenants agreed that there is a need for one single, experienced, professional point of contact for permitting, rather than relying on a volunteer board which often lacks expertise and may not follow standard procedures. One business stated that "unknowns cost money; get rid of the unknowns." Tenants also suggested creating a handbook for applicants that details the process, necessary information, and the time line for approval.

Tenants of the Montague Airport Industrial Park also provided suggestions regarding the types of businesses that the Town should avoid. One cautioned that the Town should avoid "state of the art" operations that will go out of business when grant money runs out. Another advised against the Town building "on spec" as it would limit the number of potential tenants to fit the space. Rather, it would be better to marshal all potential funding sources to discuss the range of options with various potential tenants.

Implications

Although the Woodbine Airport Business Park has substantially more land available for development and the airport facility is more developed than in Montague, several comparisons and observations can be made from the results of the market study in Montague and the other case studies in the eastern United States:

- Woodbine should not rule out the potential for attracting businesses that are related to aviation, but it should not depend on this factor in business recruitment.
- The location decisions in Montague and other airport parks were largely based on the cost of land and available infrastructure. Woodbine has a similar asset with the

amount of low cost, vacant land but the lack of infrastructure does not make it a desirable site location. The Woodbine Port Authority may be working under the assumption that the benefits of locating near the airport will outweigh the lack of sewage treatment – however, the research has shown that complete utility service is a far more important location factor than proximity to an airport.

- Unlike the Montague case study, Woodbine already has a Port Authority to oversee the management and development of the airport and the business park. However, streamlining the permitting process through an agreement with the Pinelands Commission may prove to be a valuable resource in recruiting businesses.

Railroad

The revitalization of the Cape May Railroad may also serve as a boost to economic development in Woodbine and the surrounding area. Cape May Seashore Lines, the operator of the passenger rail service, plans to extend service from Cold Spring Village to Tuckahoe. Once the track rehabilitation project is complete, there is the potential for a passenger stop near the Woodbine airport which would enhance the area as a multi-modal facility. This would provide Woodbine with an additional linkage to tourism within the Cape May area. The implementation of the recommendations included in this report for the town center and the airport would create a reason for people to stop in Woodbine.

Although no formal discussion has taken place, the rehabilitation of the rail line may also create an opportunity for establishing freight service in the future. The addition of rail service near the Airport Business Park could increase its desirability as a business location and promote development of the area.

Rail Trail

Dennis Township, the Borough of Woodbine and Middle Township are in the process of completing a tri-municipal application for funding through TEA-21 to create an 11-mile rail-trail. The trail would begin at the Belleplain State Forest, pass through Dennis and Woodbine to South Seaville, and follow the Atlantic Railroad right-of-way through Middle Township to the Cape May County Park Zoo in Cape May Courthouse. The trail is intended to be used for bicycle riding, walking/running, and horseback riding. Portions of the trail will also be accessible to the disabled. This would provide an additional recreational resource to these communities as well as create an important tie between Cape May Courthouse and the Belleplain State Forest. The rail trail would also link into smaller trail projects in both Woodbine and in Middle Township.¹⁴

The Borough of Woodbine has received funding through the Intermodal Surface Transportation Efficiency Act (ISTEA) for the completion of a 1.46 mile path in the town center for walking, jogging and bicycle use. The trail will be located along the 100-foot wide median strip of DeHirsch Avenue, from Fiddler Hill Road to Lincoln Avenue. This path will provide linkages from Woodbine residential areas to the Developmental Center, Lincoln Park, and the commercial establishments along Washington Avenue. The southern terminus of the pathway is located just north of the rail line near the airport, providing an important linkage between the airport area and the town center. The

¹⁴ Albert Knoll, Dennis Township Administrator. Telephone conversation, 2/16/99.

addition of bike trails within Lincoln Park is currently in progress and will link into the DeHirsch pathway. In addition to the pathway, landscaping, striping, signage, a bus shelter and bicycle racks and lockers will also be provided through the use of the ISTEA funds.

ECONOMIC DEVELOPMENT CHALLENGES

LABOR FORCE

Like other communities in Cape May County, Woodbine Borough's unemployment rate is high relative to the State of New Jersey. While the high rate indicates the existence of a pool of available labor, the education and skill levels in the Borough are also relatively low. Fourteen percent of adult residents (excluding residents of the Developmental Center) have less than 9 years of education, compared to nine percent of County and State residents; and only 3 percent of Borough residents have at least a college degree, compared to the County average of 22 percent and the Statewide average of 30 percent. These figures suggest that there is a need for skills enhancement to improve the competitiveness of the local labor force.

However, the Borough and region also have a pool of skilled workers who are employed on a seasonal basis in activities related to the County's tourism industry, particularly in construction and related services. This skilled labor pool represents a potential resource for the development of related year-round businesses.

Household structures may represent a constraint to the availability of employees: thirty-six percent of Woodbine's households consist of single females with children. As a result, adequate day care services would likely be required to free these parents to work, assuming that suitable employment were found.

INFRASTRUCTURE

Wastewater

Presently, with the exception of the Woodbine Developmental Center, all domestic and industrial wastewater is treated by onsite septic systems. As discussed above, this is one of the primary constraints to development. With the absence of wastewater treatment systems (other than septic systems), the types of businesses that Woodbine is attempting to attract will be significantly limited in size. Table 20 demonstrates the typical square footages allowed for different types of uses if a septic system is the only wastewater treatment available.

Existing uses within the town center are located on lots of approximately 0.25 acres. Based on the data in Table 20, a retail establishment could only be a *maximum* of 200 square feet to occupy an existing lot and a restaurant could be no more than 100 square feet. Therefore, in order to create an establishment of typical size (roughly 1,000 to 2,000 square feet), it would be necessary to combine 4 to 8 lots within Woodbine's town center. While opportunities for infill development exist, few options would allow for the assembly of this number of consecutive properties. In addition, the lower density would be inconsistent with the existing pattern of development and would detract from the cohesive nature of a strong downtown.

Table 20: Building Size Limitations Based on Lack of Wastewater Disposal¹⁵

| Type of Use | Current Pinelands CMP Requirement | Additional Assumptions To Base Estimates | Estimated Gallons Per Day Per Sq. Ft. | Typical Sq. Ft./Acre Based on Estimates |
|-------------|-----------------------------------|------------------------------------------|---------------------------------------|-----------------------------------------|
| Warehouse | 15 gpd/employee | 1 worker per 5,000 sq. ft. | 0.003 | 33,000 |
| Industrial | 15 gpd/employee | 1 worker per 435 sq. ft. | 0.035 | 2,850 |
| Retail | 0.125 gal/sq. ft. | | 0.125 | 800 |
| Office | 0.125 gal/sq. ft. | | 0.125 | 800 |
| Restaurant | 5 gal/seat/sitting | 2 sittings/day 42 sq. ft./seat | 0.24 | 400 |
| Hotel | 130 gal/bed | 530 sq. ft. per bedroom | 0.25 | 400 |

Due to Woodbine’s current level of economic distress, the Borough believes that it cannot afford to be in a position that does not allow it to respond to developer interest due to a lack of infrastructure. The Borough’s dependence on the Woodbine Developmental Center as a major employer adds to the urgency for creating additional employment opportunities as cutbacks have been discussed for this facility. These factors combined with development opportunities available at the Airport Business Park and other areas throughout Woodbine, make it necessary for the Borough to find a feasible way to provide sanitary sewer service in order to encourage economic development.¹⁶

If sanitary sewer service were provided, the regulatory review process would be diminished and the density of potential uses increased. The Woodbine Developmental Center’s sewage facility has the potential to become a shared institutional resource. In order to make this possible, the Borough has identified the following necessary actions:

- ◆ Transfer the title to the sewage treatment facilities and operations from the State to the Borough’s Municipal Utilities Authority, or provide the Borough with the right to utilize the State’s facility; and
- ◆ Provide priority funding for the Borough to create the necessary linkages and sewer lines from the Developmental Center’s treatment facilities to the airport and the town center.

The Borough has prepared an analysis of the costs associated with the acquisition and linkage of the Developmental Center Sewage Treatment facilities. It has also analyzed the cost to construct modest improvements to the current plant to expand capacity by over 100,000 gallons per day. The estimated cost (design and construction of the plant and disposal costs) of extending sewer service to the airport was estimated to be \$1.2 million (in 1994 dollars) for Phase 1 and \$906,000 for Phase 2. The estimates assume that approximately 119 acres of land with 777,546 square feet of building area would be

¹⁵ Provided by Larry Liggett of the Pinelands Commission. October 22, 1998.

¹⁶ *Synopsis of Proposed Strategy For Use of Woodbine Developmental Center’s Wastewater Treatment Facilities.* Borough of Woodbine. Submitted to the New Jersey Department of Treasury, May 1997.

accommodated within the two phases. The capacity would meet the needs for the development opportunities at the Airport Business Park and the phasing of the project would correspond to the proposed construction of the park. Operating costs were estimated to be \$88,200 per year for a 100,000 gpd treatment plant (this estimate apparently does not correspond to the option of the Borough owning and managing the existing State facility).

Flows and cost estimates for extending sewer service to the town center area were based on residential flows due to the predominance of this use in the area at the present time. Using a design population of 2,500, the study determined that the system would have to be designed for a flow of 200,000 gallons per day (gpd). Total cost of the system was estimated to be \$6.65 million in 1994 dollars, including design and construction of the sewer system, treatment plan, and disposal area.

Based on cost versus return, providing sewer service to the Airport Business Park would provide a greater benefit to the Borough than providing service to the town center. The Port Authority has been investigating both potential tenants for the park and possible funding for infrastructure. Providing sewer service to this area would open up the development potential and employment opportunities in the community without an economic burden to residents. If sewer service were provided to the town center without providing service to the airport, the cost to residents would be approximately \$12,000 per tie in (assuming 550 serviceable lots). However, it should be noted that the cost-benefit analysis did not include alternatives such as small, less expensive treatment systems that could service a more limited number of businesses and residences in the town center. By providing sewer service to the airport, the Borough would gain additional ratables and the Borough Municipal Utilities Authority (MUA) would benefit through an increase in water usage. The MUA has the capacity and permit allocation to provide the necessary volume of water to the airport area. When development of the Airport Business Park becomes successful, then tying a portion of the town center into the system, creating a new plant or acquiring the Developmental Center's facility may be practical.¹⁷

Airport Expansion

The Woodbine Port Authority has been active in pursuing Federal Aviation Administration and State Department of Transportation, Division of Aeronautics, funding for capital improvements to and expansion of the airport runways and related airport facilities. A Master Plan for the airport complex was completed in April 1998. The Airport Capital Improvement Plan provides projected costs and funding sources for all projects to be completed over the next 20 years. Major investments have been planned for short (0-5 years), medium (5-10 years), and long term (10-20 years). Recently, the Port Authority was successful in securing a commitment of more than \$1 million in loans and matching grants from the New Jersey Casino Reinvestment Authority to help pay for a variety of improvements, including extending the runway to 5,000 feet, constructing 40 additional hangars and associated taxiway, extending an existing water main across the Airport property, and constructing a new access road and parking area.

The short term goals of the Port Authority are to develop facilities that will appeal to the general aviation community and boost local economic conditions through increased

¹⁷ *Sewerage Feasibility Study for the Borough of Woodbine*. Prepared by Van Note-Harvey Associates. November 1995.

operations at the airport. Plans include the construction of T-hanger facilities, runway rehabilitation, completion of an environmental assessment for development, improvements to the taxiway and terminal building, and construction of a general aviation apron.¹⁸ (The Port Authority also anticipates that construction for the golf course will begin during this time.) These improvements are necessary in order to increase the revenue stream to the Port Authority so that additional improvements may continue. As the Port Authority continues development of T-hanger facilities, airside-related services such as maintenance and airplane sales will likely grow, as will the Fixed-Based Operator Facility for general operations and marketing of the Airport and other related uses.

The most significant impediment to the Port Authority's ability to attract development to the Airport Business Park is the lack of adequate infrastructure, particularly sanitary sewer service. The Port Authority has expressed frustration in the amount of time required to pursue funding for airport improvements and believes that it should be eligible for economic development incentives that will provide a reasonable competitive advantage to attract new private industry to the business park.

¹⁸ Woodbine Airport Layout Plan Update, prepared by DY Consultants, Inc., April, 1998

RECOMMENDED ECONOMIC DEVELOPMENT STRATEGY

KEY COMPONENTS

- ◆ *Town center improvements.* This area should contain a broad mix of uses that support the primary, secondary and tertiary market areas as well as serve the non-residential workforce, local businesses and visitors. The area should be promoted as a specialty downtown relating to home improvements and home furnishings in order to serve as a basis for marketing to broader markets and to create an anchor for additional retail and service growth. Physical improvements to buildings and the streetscape will be necessary to create a more memorable experience to those who visit the area, create a distinct identity for the town center, encourage more activity, and promote business.
- ◆ *Airport development.* The development of the airport and associated business park are key to creating a significant economic impact in Woodbine. Continuing with capital improvements to the airport to increase usage and revenues for the Port Authority will have spin-off effects for economic development. The business park and golf course will provide valuable employment opportunities, increase the tax base and further define Woodbine as an economic center.
- ◆ *Home improvement focus.* Woodbine can target its marketing efforts to businesses and customers by building on an existing strength of providing service and businesses relating to home improvements. This will provide an opportunity to expand services in the town center, expand and increase the diversity of the business base, provide employment opportunities and create a market niche for the community.
- ◆ *Promotion.* A detailed marketing strategy must be developed that emphasizes Woodbine's identity as a home improvement center, a community that is business friendly, an alternative to costly shore locations for both businesses and visitors, and the availability of relatively low cost, vacant land.
- ◆ *Wastewater treatment options.* Wastewater treatment is essential to implement the above economic development strategies. The revitalization of Woodbine's historic Town Center *cannot* be achieved if property owners and business owners continue to rely on septic systems for wastewater disposal. At the Airport, a certain level of development can take place because of the extensive amount of land available for wastewater dilution; however, the availability of sewers would allow for a significantly greater density and a correspondingly more efficient use of land.

While a preliminary feasibility study has identified wastewater collection and treatment options for both the Airport and the Town Center, the Borough should explore other options that may be less costly than connecting to the Developmental Center's existing plant, and/or are necessary to ensure sufficient capacity, such as a separate package treatment plant to serve the core commercial area. Also, the need for off-site dilution should be further explored with the Pinelands Commission as a potential solution to the Town Center's redevelopment limitations. Further exploration of these options will be a critical next step in refining an economic development strategy for the Borough.

LAND USE STRATEGY

One of the key objectives of Woodbine's economic development strategy is to create a clear identity for the community. A community is often defined by specific areas of town that represent its character and/or by unique assets that are not available in other locations which result in that particular community having a competitive advantage over others. The town center of Woodbine provides an opportunity for the community to create a strong identity by providing a service-oriented center to accommodate residents, business needs, tourists and local employees. The Airport Business Park provides an opportunity to attract new office and industrial and recreational uses (such as the golf course) that creates an identity for Woodbine within the business and aviation communities. Woodbine's proximity to the coast and amount of relatively inexpensive land, provide a unique opportunity for contractors and other trades dependent upon the activity near the shore to locate in Woodbine. Each of these potential market areas will become assets to Woodbine and contribute to the community identity, strengthen the tax base and provide additional job opportunities.

However, it is important that the pursuit of these strategies is accompanied by a detailed land use plan. The types of businesses mentioned above must be located in specific areas of the community so that they do not compete with one another and cause a further deterioration of the community identity by resulting in a mixed land use pattern with no apparent link or tie to adjacent properties. The land use plan also assists in the marketing of the community by ensuring that adequate space is provided for desirable uses. A variety of land uses in designated locations can assist in providing stability in the tax base as various business sectors fluctuate with economic cycles. For example: Woodbine was once a major manufacturing center and a large portion of the nonresidentially zoned land was committed to this use. When manufacturing declined, Woodbine lost businesses and did not have a substantial amount of additional nonresidential development to compensate for this loss. By targeting areas for specific types of uses rather than allowing one particular use to develop, the tax base will be more stable over time. These designated areas can also be incorporated in capital improvement and design strategies to provide the necessary infrastructure appropriate for each type of business area. The land use pattern can largely be created through zoning regulations [See Figure 1: Woodbine Conceptual Land Use Map, page 41].

Zoning not only determines the type of use allowed, but the intensity of that use. The town center should continue to consist of smaller lot sizes and narrow setbacks, to the extent possible given requirements for groundwater protection and stormwater retention. This type of zoning will encourage small-scale, pedestrian oriented uses that require a minimal amount of parking. The appearance of the streetscape within the town center can be greatly enhanced by improving landscaping and screening requirements within this district. Areas to accommodate contractors and other more intensive commercial and business uses with greater space requirements than are found in the town center should be zoned with larger lot size requirements and setbacks. This will allow for ample parking and storage of materials that may be necessary to support these types of businesses without conflicting with adjacent properties. The Airport Business Area could accommodate uses with loading facilities, supply storage and other supporting facilities that require a greater lot area than many existing uses in the Borough. Adoption of zoning provisions that call for screening and other barriers will ensure that industrial uses do not conflict with the proposed golf course and potential related uses catering to tourists and business executives.

A town center typically serves as a concentration of small-scale business activity, municipal service center and a place for community gathering. Traditional downtowns generally include dining establishments, small convenience stores, office space, financial institutions and other business services. The style of development that is typically found in a town center is one that contains a distinct neighborhood that has historical context, encourages interaction between residents, provides access to services, and discourages poor uses of land and other resources. Traditional town centers are typified by a diversity of housing types, proximity to neighborhood shopping, walking paths, pedestrian-oriented design (rather than auto-dominated) and centrally located open spaces. Woodbine has the potential to create this type of downtown through infill of vacant lots and buildings, the continued pursuit of creating a park and bike trail within the median of DeHirsch Avenue, and the addition of landscaping and defined community gathering places. Many downtowns also create "themes" to further enhance their community identity. As mentioned above, it is recommended that Woodbine promote itself as a home improvement center.

Woodbine is also in need of areas zoned for general business to allow for uses that are different from the retail and service establishments within the town center and the larger employers in the Airport Business Park. During the Inventory and Analysis Phase of this project, two Woodbine businesses stated that they specifically chose the community as a base of operation to service the shore community due to the comparatively lower land prices and the ability to expand their businesses. Building contractors, plumbers, electricians and other private contractors that often depend on the shore communities for work, may also turn to Woodbine for a lower cost alternative to the shore as the base of their operations. The existing light industrial district between the town center and Lincoln Park is an example of the type of area that could be provided. Additional districts may be feasible in the now vacant areas surrounding the town center. This would allow these types of uses to benefit from the proximity to services in the area while reserving the town center for small businesses that cater more to drop-in visitors and pedestrian traffic.

The Airport Business Park is in the developmental stage. As the municipal airport improvements are completed, a greater number of aviation users will frequent the airport and increase the potential market base in Woodbine. Existing tenants such as Gentilini Ford will become more important in Woodbine's economic development strategy as a means of transporting airport users to the town center and other areas within the region. The Airport Business Park will provide space for aviation related uses, manufacturing, warehousing and other commercial and light industrial uses that are larger in scale and more intensive than those accommodated in the town center and proposed general business areas. The area will also be the site of a golf course, providing opportunities to attract tourists, business executives, and others to Woodbine. This also provides a potential market for adding golf course compatible uses such as meeting space, conference facilities, hotels, restaurants and other complementary uses.

TOWN CENTER

Marketing Opportunities

Many focus group participants felt that a "theme" should be developed within the town center (along Washington Street in particular) in order to encourage business development and help establish a distinct identity for Woodbine. Creating a theme is an important economic development objective. A solid market orientation can be

incorporated into business recruitment, advertising, signage, marketing materials, and promotional events. In addition, the unique design characteristics of downtowns provide such areas with a marketing advantage over shopping malls. Potential approaches include promoting Woodbine as an historic industrial community or emphasizing the important role that the Jewish pioneers had in creating the existing pattern of development.

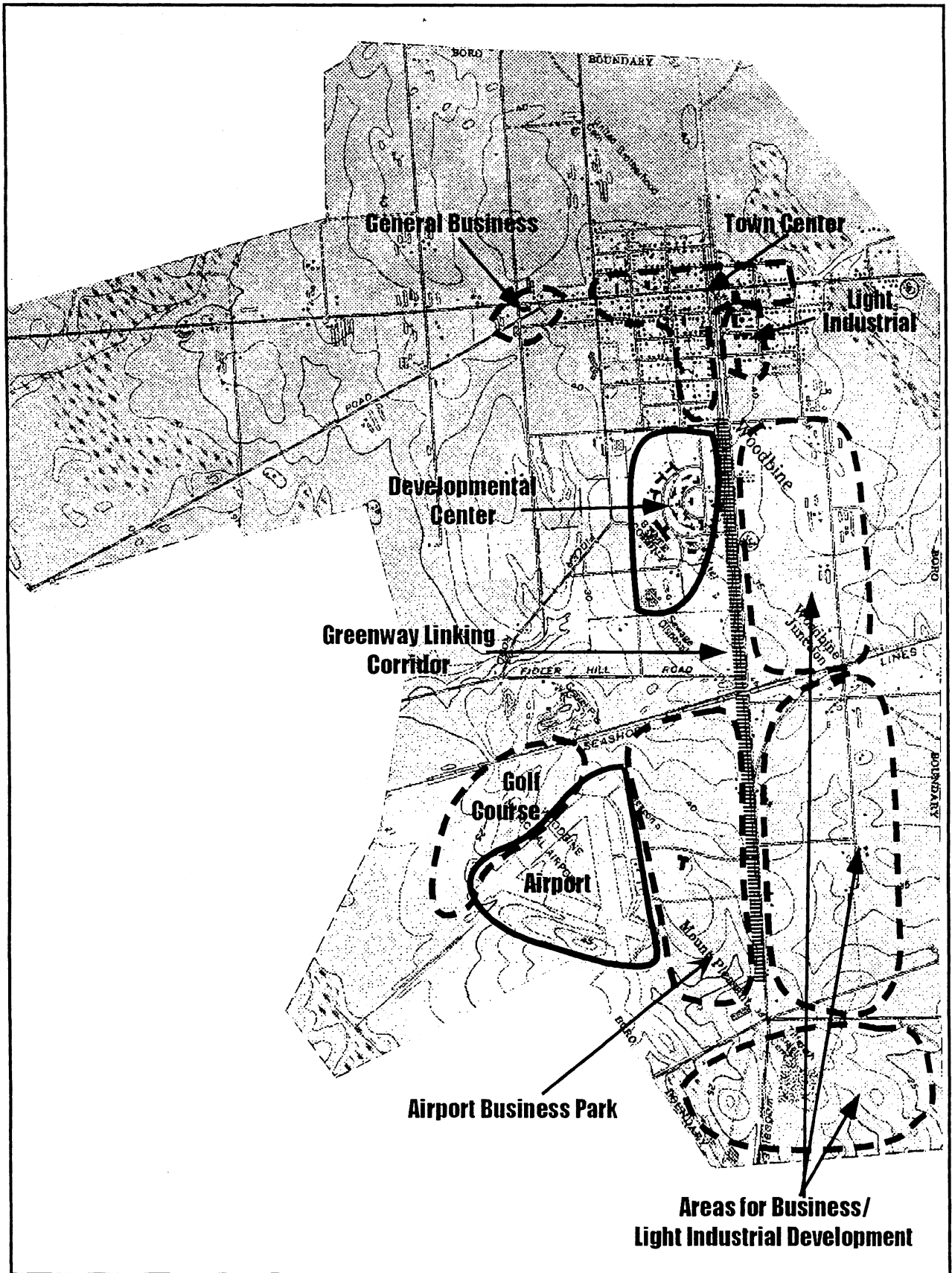


Figure 1:
Woodbine Borough - Conceptual Land Use Plan

An additional strategy that can be pursued in creating an identity for Woodbine is pursuing a specific market niche that can result in the expansion and recruitment of businesses and serve as a base for additional retail and service establishments. Based on the market analysis described in the beginning of this report, stores and services related to remodeling and home maintenance can be supported by the local and regional residential markets. This market potential combined with the number of existing establishments related to this service, could be used as the basis for establishing a "home improvement" market niche in Woodbine (this is described in greater detail under the Service Businesses section, page 45).

Retail & Service Uses

A strong retail base is one of the key components to a successful town center. The potential for retail uses (clothing stores and groceries in particular) is high within the primary market area, but is unlikely to be supported by this market alone. However, retail establishments such as hardware stores, paint stores and other home improvement related uses could be supported. Once these types of stores become well established in Woodbine and spending activity increases in the town center, it may be possible for more traditional retail stores to be established and supported. Retail establishments could serve the local and regional residential population, residents of the Woodbine Development Center, the nonresidential workforce, and visitors.

Other types of businesses that focus group participants suggested were appropriate for Woodbine include a bank, professional offices, and restaurants. These types of uses may also be feasible in the town center. The market potential for financial services is strong, but few are available within the immediate area. Businesses within the finance, insurance and real estate category as well as legal services, accounting and other business services are virtually non-existent in Woodbine. These types of business could be supported by area residents in part, but would primarily draw on local businesses and the nonresidential workforce that would be created by building upon the home improvement focus. The number of restaurants in Woodbine is relatively limited. This is a type of business that can cater to all of the potential markets—area residents, the non-residential workforce, local businesses and tourists. Eating and drinking establishments within a town center provide for a more lively and active downtown as well as act as supporting services to the tourism industry.

Image

Woodbine is fortunate in that many of the historic structures within the town center still remain. However, physical improvements are necessary within the town center to enhance the appearance of the area. From a design standpoint, it is important to make use of existing assets rather than attempting to create false historical themes. The management of existing historic resources, for example, should not be confused with the creation of historic images such as making use of pseudo-colonial doorways and plastic snap-in window frames. Consequently, while improving the appearance of the town center is recommended, following the example of creating a Bavarian theme as was used in Helen, Georgia is not (see the case study presented on page 24).

A detailed design and planning strategy is needed for the town center to address sidewalks, landscaping, parking, road and streetscape design, signage and facade improvements. This approach will provide general blueprints for action as to how each property owner might improve his property. It will also clearly identify areas where the Borough,

the Chamber of Commerce or state and federal grants can be of assistance, and areas that will be the responsibility of the land owner. Grants and other funding are available to assist property owners with facade improvements, signage changes and other improvements identified in the strategic planning process for the town center. It may also be useful to create a non-profit organization to pursue the planning for the town center as it will increase the opportunities for receiving funding and could allow for the hiring of staff to work on specific issues.

Increased landscaping, improved lighting, cohesive signage, facade improvements and the creation of public spaces can make Woodbine's town center more appealing. In most cases, the most immediately effective improvements will be related to storefront improvements such as signs, awnings, and building color. Often times, signs are manufactured for shopping mall strips intended to attract the gaze of passing motorists rather than for smaller downtowns scaled for pedestrians and slow-moving vehicles. Signs within the town center should respect the scale of the buildings and use the minimal wording and colors necessary to express the intended message. Recessed entryways to buildings encourage pedestrians to enter buildings. The entryway blurs the distinction between the public space of the sidewalk and the private space of the store, creating a more inviting streetscape. The effect of the recessed entryway can largely be accomplished through the use of awnings over building entrances. Color, materials and facade treatments of buildings should continue to encourage the diversity of styles in the town center, but should not dramatically contrast with other buildings. New buildings should not stand out because of any unusual color or uncommon exterior finish.

Woodbine needs to improve its "gateways" in order to convey to visitors that they have reached a specific place. This will improve Woodbine's sense of identity and create a distinct town center area. Signs, landscaping, land use and other factors all play a role in defining the gateway to a community.

Promotion

In order to attract people to Woodbine, focus group participants recommended holding promotional festivals and sidewalk sales. These types of events would be both a local and regional draw, largely determined through marketing materials and promotional efforts. Woodbine was once well known for these types of events. Space could be rented by vendors along the median of DeHirsch Avenue, within Lincoln Park and on vacant, Borough-owned parcels. The fees from the festivals could be reinvested in visual improvements in the town center and other infrastructure (such as sidewalk improvements, pedestrian areas, benches and lighting). To further promote the town center and pride in the community, suggestions such as designating a "Woodbine Day" or "Woodbine Week" as the focal point for promotional events was recommended. These events could also be an occasion to recognize local property owners by providing an award for property beautification and for the cleanest street. Residents and business owners could also be inspired to assist in recreating the town center through a contest to develop a new "Welcome to Woodbine" slogan.

AIRPORT

The Woodbine Port Authority envisions the airport area as a business campus associated with the development of an 18-hole golf course. The corporate center part of the golf course will provide areas for seminars and meetings as well as recreation-related uses such as a clubhouse serving breakfast, lunch and snacks. Ideally, supporting

services such as motels and full-service restaurants will be developed, but the lack of a sewer system makes this part of the vision a greater challenge. The airport area will also provide aircraft uses such as fuel and maintenance.

ERM Partnership recently signed a memorandum of intent with Woodbine to build an 18-hole golf course on 200 acres of land abutting the airport that will be leased to the company. It is anticipated that this recreational facility will spur additional development in the form of supporting commercial facilities, business development and related recreational uses. The golf course proposal has been endorsed by the Borough as it will bring people to the area during the off-season, has a minimal impact to the community in terms of service costs, generates property tax revenues, and has the potential for spin-off development. It is expected that the golf course development will result in 75-80 jobs during the peak season and approximately 50 jobs year round, and could attract approximately 30,000 tourists who would not otherwise visit Woodbine.¹⁹

Much of the land along DeHirsch Avenue near the airport entrance has been designated for a business park. Campark Liquors and the new Gentilini Ford facility are the only active businesses in this area at the present time (an older building along the main airport access road is being used for storage by a heating and plumbing company). Warehousing and light manufacturing have been discussed as potential uses if no sewer system is made available, while restaurants, motels and a banquet facility have been discussed if infrastructure improvements are made. Medical facilities and professional offices have also been considered. According to local realtors, a market for low-cost manufacturing and food processing exists in the region so long as sewer service is provided.

As shown in the market analysis, several industries in the manufacturing and transportation and communications categories are lacking in Woodbine and the surrounding six-mile radius. Manufacturing industries such as rubber and miscellaneous plastics; industrial and commercial machinery and equipment; transportation equipment; and other miscellaneous manufactures are located within the 10-mile radius, but not in Woodbine. Due to the lower land costs in Woodbine, the airport may have the potential to attract these types of industries.

Woodbine should create a targeted strategy to market the business park to existing, independently owned small to mid-sized companies in New Jersey, with a focus on light manufacturing, warehousing/distribution, business services and "back office" operations (such as phone-based customer service for credit card companies). These uses should be designated for a specific portion of the business park, reserving space for uses related to the golf course in distinct portions. An effective marketing message will focus on cost savings and other locational advantages in order to appeal to these business sectors. A brochure for direct mailing should target New Jersey businesses within specific Standard Industrial Classification (SIC) codes, such as the 2000 series (manufacturing of food and kindred products), the 2500 series (manufacturing of furniture and fixtures), 3720 through 3728 (manufacturing of aircraft parts), the 3900 series (miscellaneous manufacturing), and the 7300 series (business services).

¹⁹ Information provided by ERM Partnership at the October 1, 1998 Town Center focus group meeting.

The primary concepts to be included in the direct mail marketing material are:

- ◆ An aerial view of the property and the site plan
- ◆ A description of the attributes of the site such as access and proximity to the airport and shore communities, and low land costs.
- ◆ Data on labor availability and prevailing wages.
- ◆ Information on zoning and permitting procedures (including applicable Pinelands Commission regulations and any pre-approvals developed for the business park)
- ◆ Identification of the resources that could serve as an incentive for development.
- ◆ A statement from the mayor and/or Woodbine Port Authority regarding the community's willingness to work cooperatively with the prospective tenant during the permitting process.
- ◆ Quotes from existing businesses regarding the attributes of the location and the community.

SERVICE BUSINESSES

Home Improvements

Building on the strength of the number of contractors and building supply stores, it would be a logical marketing strategy to promote Woodbine as a "home improvement" center. Promoting a variety of businesses that have underlying similarities could strengthen the community identity of Woodbine while creating a stronger base of retail, commercial and service establishments. Smaller scale retail-oriented businesses could be located within the town center while more intensive uses requiring greater land areas could be located in general business districts and light industrial districts. This will create a specific concept for Woodbine to market as well as providing these businesses with the benefit of receiving spin-off business from related establishments. Generally, uses that are 3,000 square feet or less are appropriate for the town center while larger establishments should be located in other business areas so not as to disrupt the character and continuity of the town center streetscape. Suggested business types and potential locations include the following:

Table 21: Potential Home Improvement Businesses

| Potential Business* | Town Center | General Business | Light Industrial |
|------------------------------------------------------------|-------------|------------------|------------------|
| Antique stores | X | | |
| Arts and crafts | X | X | |
| Awnings & signs | X | X | X |
| Building supplies/ lumber | | | X |
| Cabinetry | X | X | |
| Contractors | | X | X |
| Fabric store | X | X | |
| Furniture store | X | X | |
| Gardening supply/ nursery | | X | X |
| Hardware store | X | X | |
| Home decorating | X | X | |
| Landscaping services | | X | X |
| Lighting fixtures | X | X | |
| Pool & Patio stores | | X | X |
| Pre-fabricated building (staircases, windows, doors, etc.) | | | X |
| Specialized tools | X | X | |
| Woodworking | | X | X |

* Note: Business types shown as appropriate for both the town center and General Business would depend on the size of the establishment.

In addition to promoting these types of uses throughout Woodbine, the community could also create a "building trades park." This park would be a unique asset for Woodbine to market. Generally, contractors and supporting businesses of the seasonal economy are not location dependent as much of the work is performed off-site. The proximity to the shore and the amount of available, inexpensive land makes Woodbine a good base of operation. The building trades park could expand upon these assets by providing the following additional amenities:

- business incubator services,
- link to nearby trades schools,
- low cost labor from developmental school for very basic tasks,
- special zoning designation and pre-review by the Pinelands Commission,
- connection with the casino service industry: goods and services that are not provided by the casino staff itself, e.g., set designers.

A direct mailer similar to the one developed for the Airport Business Park is an effective means to market this concept. The mailing should be targeted to existing businesses currently located in Cape May County, Cumberland County, and Atlantic County that have SIC codes of 1500 (general contractors and operative builders); 1700 (special trade contractors); 2500 (manufacturing of furniture and fixtures); 5020 (wholesale furniture and home furnishings); 5021 (wholesale furniture); 5023 (wholesale home furnishings); 5030 through 5039 (wholesale of lumber and construction materials); 5200 through 5260

(retail trade of building materials, garden supplies and hardware stores); and 5700 through 5720 (retail trade of furniture and various home furnishing stores).

APPENDIX 1: DOMINANT CONSUMER CLASSES IN THE WOODBINE BOROUGH MARKET AREAS

CACI Marketing Systems has identified ten consumer types that are most dominant in the market areas defined for the Woodbine Borough market analysis. Table 22 lists these consumer types and their associated groups; and the remainder of this section lists the profiles for each type.

Table 22: ACORN Groups and Consumer Types Dominant in Woodbine Market Areas

| Group | Consumer Type |
|-------------------------------|------------------------------------------------------------------|
| 1. Affluent Families | 1F: Semirural Lifestyle |
| 2. Upscale Households | 2A: Urban Professional Couples 2B: Baby Boomers with Children |
| 4. Retirement Styles | 4E: Rural Resort Dwellers |
| 6. City Dwellers | 6C: Newly Formed Households 6F: Low Income: Young and Old |
| 7. Factory & Farm Communities | 7A: Middle America 7G: Heartland Communities |
| 8. Downtown Residents | 8D: Hardtimes 8E: Urban Working Families |

GROUP 1. AFFLUENT FAMILIES

Consumer Type 1F: Semirural Lifestyle

Semirural Lifestyles are a prosperous population who have opted for semirural locales and lifestyles. They maintain their livelihood by self-employment, working at home and commuting.

Demographic: Older and married, this market includes couples aged 35 to 64 years with and without children living at home. About 35 percent of the households are empty nesters; 40 percent have school-age children living at home. The median age is 35.5 years.

Socioeconomic: This is the largest, although not the wealthiest, affluent market, with a median household income of \$48,800. It includes 4.6 percent of all households. Unemployment is low, but the sources of income are more varied in this affluent market, including self-employment income (both farm and nonfarm) with the usual wage and salary sources plus interest and dividend income. Although many Semirural Lifestyles work at home, most are commuters. More than 30 percent of the labor force cross county lines to get to work.

Residential: Semirural Lifestyles live in semirural areas or on the urbanized fringe of metropolitan areas. Many of the homes are newer, built since 1970, and home value is above average, \$135,000. The majority of homes are valued between \$100,000 and

\$150,000. These neighborhoods are scattered throughout the United States, with a particularly high concentration in New Hampshire.

Buying Habits: Semirural Lifestyles are homebodies—interested in home projects, reading books, needlework, and cooking. Outside the home, their activities include golf, tennis and racquetball, weight training, biking, camping, hiking, and jogging/running. Although their residence is more rural, they have retained some urbane preferences like visiting museums. They spend on children's apparel and toys, home furnishings and improvement, and the latest electronic gadgets: personal computers, stereos, televisions, videos, and camcorders. They are more likely to have 2 cars, with one being new. Semirural Lifestyles also read books specifically romance and mysteries, and magazines such as *Consumer Digest* and *Family Circle*.

GROUP 2. UPSCALE HOUSEHOLDS

Consumer Type 2A: Urban Professional Couples

Urban Professional Couples are the yuppies of the 1980s, matured to middle age. Most of the households are married couples, although the traces of the 1980s remain with higher numbers of single-person and shared households.

Demographic: This market is slightly older and includes the first cohorts of the baby boom. The Median age for the Urban Professional Couples is 36.7 years. Households are predominantly married-couple families, with few or no children, but the mix also includes the aftermath of high divorce rates through the 1980's with single-person and shared households.

Socioeconomic: Median household income is slightly over \$42,600. Labor force participation is high; unemployment low. The labor force is well-educated and well-employed, mainly in professional or managerial positions. More than 35 percent of adults (age 25+) have earned a college degree.

Residential: The urban residential profile is a high-density mix of single-family homes and townhouses with smaller (two to five units) rentals. Most homes are owner-occupied, including condominiums (twice the national average). Home value is above average, \$148,500. These neighborhoods are located inside urbanized areas scattered throughout the United States, although higher concentrations of Urban Professional neighborhoods may be found in New England states: Connecticut, Massachusetts, Rhode Island, and Vermont.

Buying Habits: Physically active, Urban Professional Couples play a variety of sports, including bicycling, hiking, camping, billiards/pool, fitness walking, and swimming. They spend their money on home improvements, toys, hardcover and paperback books, and contributions. They like to spend more leisure time outside the home—dancing, theaters and concerts, bars, and dining out instead of cooking. They take mostly domestic vacations. Media preferences include reading 2 or more newspapers and magazines such as *Consumer Digest*, *Money*, *Glamour*, and *Smithsonian*.

Consumer Type 2B: Baby Boomers with Children

Baby Boomers with Children — is a homogeneous market who spends their time and money on home and family-oriented activities and goods.

Demographic: Two-thirds of the households are married couples; most with children (over 50 percent higher than the national average). Median age is 32.0; 33 percent of the population is under the age of 20. Typical of the cohort, many are migrants, still moving to find the best jobs or location.

Socioeconomic: This market represents 4.0 percent of all households. Baby Boomers with Children have very high labor force participation rates including a high proportion of families with two workers, but they are not as affluent. Median household income is \$41,300. Postsecondary schooling is evidenced, but this group is less likely to have completed a four-year degree.

Residential: Single-family homes built during the 1970s are typical. Most homes are owner-occupied and valued about 20 percent below the U.S. average, at \$89,500. Neighborhoods are found within the urbanized fringe of metropolitan areas—in smaller towns and in rural nonfarm communities. Western states, especially Utah and Alaska, are prominent in the distribution of Baby Boomers with Children, harking back to westward migration of Baby Boomers in the 1970s.

Buying Habits: This group represents family and home-oriented consumerism. There is little time for civic activities. They tend to have personal loans, use credit unions, and have savings accounts. They like to drive 4-wheel drive vehicles and buy vehicles based on the gas mileage. Leisure time includes playing board games, going to the movies, playing golf, and bicycling. Fast food, takeout and delivery, is also popular. They own pets and spend their money on home furnishings and improvements, children's toys, camping and exercise equipment, and electronics such as televisions, stereo equipment, children's videos, and cameras. Media preference is watching television, specifically children's programs.

GROUP 4. RETIREMENT STYLES

Consumer Type 4E: Rural Resort Dwellers

Rural Resort Dwellers are the locals who reside in rustic getaways, including retirees who have opted for fresh air and the great outdoors. Remote and rural, these areas depend upon seasonal trade to sustain the local economy.

Demographic: Local residents are older. The median age of the population is 39.5 years, but the householders are concentrated in the 55-plus age groups. Almost 45 percent of householders are over the age of 55 years. Families are predominantly married couples. Many recently retired to the area.

Socioeconomic: Over 40 percent of the households earn less than \$25,000, but their poverty rate is the same as the national rate of 13 percent. Rural Resort Dwellers earn a modest living from seasonal employment and farming. More than 20 percent receive retirement income; 35 percent, Social Security. Most of the labor force is employed part-time. Median household income is \$27,800.

Residential: Residences are single-family or mobile homes and are owner-occupied. Sixty percent of the housing is vacant for seasonal use. Average value is low, \$100,000, for all owner-occupied units, but comparatively high for rural areas. More than 90 percent of the Rural Resort Dwellers are in rural villages. These areas can be found in

most states, but Rural Resort Dwellers are concentrated in the North—around the Great Lakes and in New England, especially Maine, New Hampshire, and Vermont.

Buying Habits: Rural Resort Dwellers live the great outdoors. Four-wheel drive vehicles, camping equipment, and domestic trips reflect their lifestyle. They are top-ranked for owning gardening equipment and like to garden (indoor or outdoor), mail/phone order from magazines and catalogs, order videotapes (paying with check or money orders), and needlework. They also like to spend time reading books and cooking for fun. They are ranked among the highest to own large dogs, cats, and taking vitamins. Spending is likely to include household furnishings and home improvements, small and large appliances, cameras, women's apparel, jewelry, and auto aftermarket products like tires, mufflers, and spark plugs. Media preferences include watching videos, and reading magazines such as *Country Living*, *Field and Stream*, and *Popular Mechanics*.

GROUP 6. CITY DWELLERS

Consumer Type 6C: Newly Formed Households

Newly Formed Households neighborhoods offer affordable housing that attracts young householders. This is a large, moderate income market that features an active lifestyle.

Demographic: Young, newly formed households are characteristic of this market; however, the neighborhoods are in transition, including older households, too. The mix of household types represents young families and single-parents plus married-without-children and single-person households that are typical of young and old alike. Median age is 34.0 years.

Socioeconomic: This is a large, moderate income market, more than 5 percent of all households. Median household income is \$30,800. Unemployment and poverty are low. Half of the work force is employed in the manufacturing and service industries.

Residential: Newly Formed Households neighborhoods offer affordable housing: older, single-family homes, and duplexes. Average home value is \$67,700, 40 percent below the national average, and average rent is \$430, 12 percent below average. These neighborhoods can be found in the urbanized areas of any state, but are most common in the smaller, metropolitan areas of Iowa, Kansas, Minnesota, Nebraska, New Hampshire, Oregon, Rhode Island, Vermont, Washington, and Wisconsin.

Buying Habits: Newly Formed Households are active in bowling and playing billiards/pool, performing volunteer work, and taking domestic trips. Most of these households drive older cars. This market ranks third for fast food delivery and for using coupons to purchase tobacco products. They also use coupons for other products such as groceries. Media preferences reflect the young and old households in this market: radio (golden oldies and soft contemporary rock), and reading 3 or more weekly newspapers. They also spend time watching television, watching children's videos, and reading *Seventeen*, *Woman's World*, *Soap Opera Digest*, *McCalls*, and *Rolling Stone* magazines.

Consumer Type 6F: Low Income: Young and Old

Low Income: Young and Old incorporate the extremes of the age distribution, the very young and the elderly, as reflected in their lifestyles.

Demographic: Low Income: Young and Old encompass the very young and the old, who are supported by a relatively young working age population. Almost half of the households are single-parent or single-person. The median age, 32.4 years, represents the gap between householders under 25 and over 75 years. These neighborhoods are diverse racially too, including white, Black and American Indian.

Socioeconomic: Median household income is \$21,400. About 60 percent of these households earn less than \$25,000. They have rates of unemployment and poverty that are twice the national averages. Thirty percent of the households receive Social Security, and 20 percent receive public assistance. Labor force participation is below average.

Residential: Most of the housing is older, built before 1950. Vacancy rates are high, more than 10 percent, and home value is low, \$44,000. Single-family units, duplexes and quads account for most of the housing in these neighborhoods. Half are renter-occupied. These neighborhoods are urban, located within metropolitan areas and smaller cities throughout the country, with the highest concentration in the Midwest.

Buying Habits: Low Income: Young and Old lifestyle is both young and old. They buy infant toys, toy cars and trucks, jewelry, and household items such as flatware and washing machines. They are most likely to drive 2-door sedans or upper/middle sized cars. Media preferences include watching television (shows like *Unsolved Mysteries* and the *ABC Monday Night Movie*), along with reading magazines such as *T.V. Guide* and *Vogue*.

GROUP 7. FACTORY & FARM COMMUNITIES

Consumer Type 7A: Middle America

The largest consumer market is rural, slightly older, and family oriented. The neighborhoods are newer, owner-occupied, single-family homes; the income, average.

Demographic: The demographic profile of these communities is similar to the U.S. population—just a little older, more white, and more family. The median age is 35.6 years, slightly older with more householders aged 35-44 and fewer under 25 years. Seventy percent of households are married couples, compared to 55 percent for the U.S. The distribution of children is similar; family size is average, 3.1 persons per family.

Socioeconomic: Middle America is a megamarket, representing almost 8 percent of U.S. households and a market share of almost 7 percent. Median household income is \$33,300. Almost 35 percent of these households earn less than \$25,000, but very few are below the poverty level. Labor force participation is average; unemployment, 5.2 percent, below average. Most of the work force is employed in manufacturing or farming. Thirty percent commute to a different county or state to work.

Residential: Middle America is rural nonfarm neighborhoods, located primarily in the Midwest (41 percent) or South (34 percent). Single-family and mobile homes predominate. More than 15 percent are mobile homes, twice the national proportion. Their homes are owner-occupied and valued at an average of \$79,700, 30 percent lower than the national average. Most were built after 1970.

Buying Habits: How does the Middle America market spend its time and money? Their lives are busy and centered around the home. Leisure activities include hunting, fishing,

and needlework. Their budget priorities are home-oriented: improvements, children's apparel and toys, footwear, videos, and lawn, garden, and camping equipment. Most of the families own pets. They are likely to take domestic trips by car. This market ranks high for having personal loans (not education), and is also likely to have auto loans (for new cars), secured line of credit, savings, home mortgage loans, and CDs. However, this market tends not to use credit cards. Media preferences include reading newspapers 3 times a week, and reading magazines such as *Family Circle*, *Field & Stream*, *Country Living*, *Country Home*, and *Ladies Home Journal*.

Consumer Type 7G: Heartland Communities

The Heartland Communities are small towns and communities that dot the interior of the country from Minnesota down through Arkansas. Their citizens are older, lifelong residents; their children, moved away.

Demographic: The Heartland Communities are older. The median age of the population is 37.6 years, with just about half of the householders over 55. There are few younger householders or children in this market. As the population ages, the dependency ratio of young (<15 years) and old (>65 years) to the working age (15-64 years) population is increasing. Households are still predominantly families, but married couples with no children at home and singles are increasingly common in the Heartland Communities.

Socioeconomic: Median household income is \$24,900. The Heartland Communities has a 3.7 percent share of consumers. Labor force participation is low, especially for women, less than 40 percent. It is due, in part, to retirement. More than 40 percent of the households are receiving Social Security income. Lack of opportunity contributes to lower participation, too. A third of adults have not completed high school. Half are employed part-time. However, wages and salaries are not the only source of income. About 16 percent are self-employed—in farming or other business.

Residential: Homes are older, single-family and owner-occupied for the most part. Single-family houses account for almost 75 percent of the housing. Almost 70 percent are owner-occupied; more than 10 percent of the housing is vacant. Average home value is less than \$50,000—60 percent lower than the national average. These neighborhoods are located in rural communities and towns outside metropolitan areas. Although scattered throughout the United States, the Heartland Communities are concentrated in Midwestern and Southern states: Arkansas, Idaho, Iowa, Kansas, Minnesota, Missouri, Montana, Nevada, North Dakota, Oklahoma, South Dakota, and West Virginia.

Buying Habits: The Heartland Communities are civic-minded consumers, active in their communities through fund raising, working for political candidates, and participating in 6+ public activities. Their leisure time includes taking domestic trips, mostly in the West, and casino gambling. This is a good mail/phone order market for clothing and shoes as these consumers tend to purchase from catalogs. They are top-ranked for outdoor vegetable gardening and rank among the highest for flower gardening. They are likely to own a dog and tend to purchase used cars and drive mid-sized vehicles, truck, van or sport utility vehicles. This market is ranked among the highest for buying videos at discount stores. Their media preferences include watching videos, listening to country (western) radio, and reading magazines such as *Field & Stream*, *Country Living*, and *Popular Mechanics*, as well as reading romance and religious books.

GROUP 8. DOWNTOWN RESIDENTS

Consumer Type 8D: Hardtimes

Hardtimes workers face the economic challenges of poverty, single parenthood, and public assistance, plus the generation squeeze of caring for the young and elderly at the same time.

Demographic: Hardtimes is a population of extremes, very young and very old. The dependency ratio of young (<15 years) and old (>65 years) to the working age (15-64 years) population is 24 percent higher than the U.S. ratio. Although nearly one third of the households are occupied by singles, many are single-parent or multigenerational, shared households. The median age of 32.6 summarizes the extremes in the age distribution. The majority of the population is Black (86.1 percent).

Socioeconomic: Median household income is \$16,200, about 50 percent below the national level. About 40 percent of the households are below poverty; one-fourth receive income from public assistance; 40 percent, from Social Security. The unemployment rate of 18 percent is almost three times the U.S. level. Among the employed, over half work part-time, mainly in the service industry. Over half of the adult population have not completed high school.

Residential: There is a 50-50 mix of renters and owners in a 60-40 mix of single-family and multi-unit dwellings. Home value and rent are low. Over 80 percent of owner-occupied housing units are valued below \$50,000; more than 80 percent of renter households pay less than \$300 monthly. These neighborhoods are located in central cities. Hardtimes can be found in most states, with high concentrations in Southern states of Alabama, Louisiana, and Mississippi.

Buying Habits: Economic reality limits their purchasing power. The majority of their budgets go to the basics, like rent and groceries. They tend to participate in their community by raising funds, working for political candidates, jury duty, and participating in public activities. They are top-ranked for buying major household kitchen appliances and baby products such as soap, oils, lotions, and wipes. They also tend to purchase fast food and takeout food from chicken restaurants. This market ranks high for using pest control services. Media preferences include watching television programs such as *America's Most Wanted* and *Family Matters*, however, they tend not to rent videos. They do read magazines such as *Entertainment Weekly*, *Health*, *The National Enquirer*, bimonthly and weekly publications, and listen to urban/new adult contemporary radio.

Consumer Type 8E: Urban Working Families

Urban Working Families are markets of young, active families. Their homes are typically older row houses and apartments in the city.

Demographic: More than a third of the population is under the age of 20; the median is 30.1 years. This is a family market with a high percentage of single-parent households. There are also a number of adult children living at home. This dependency stems from economic necessity. Over 80 percent of the population in these neighborhoods is Black.

Socioeconomic: This market is the working poor. Labor force participation rates are well above average, but the rates of unemployment and poverty are double those for the

United States. Most of the work force is full-time, with just under half of the households earning less than \$25,000. Median household income is \$25,400.

Residential: Neighborhoods are older, pre-war residential developments of townhouses and small, multi-unit buildings. There is a 50-50 mix of renters and owners. These homes have low value and low rent. About 60 percent of specified owner-occupied housing units are valued at less than \$50,000. These neighborhoods are primarily located inside urbanized areas. These areas are scattered throughout the United States. Only the District of Columbia has a high concentration of Urban Working Families.

Buying Habits: Urban Working Families are top-ranked for making purchases of major household appliances such as grills and climate control machines, and buying educational toys. They also tend to spend on takeout Chinese, men's sportswear, warm-up suits, casual shoes, and baby products. Leisure activities include shopping at the mall, belonging to book clubs, and watching videos. This market ranks high for owning 4+ televisions, VCRs, and stereos, and buying religious books. Their media preferences include television and magazines, specifically *The Disney Channel*, *Parents Magazine*, *Soap Opera Digest*, and *T.V. Guide*. They rank high for reading weekly publications, and are ranked among the highest for listening to urban/new adult contemporary music.

APPENDIX 2: BUSINESS MIX

EXISTING BUSINESSES WITHIN THE 2-MILE TRADE AREA

| | | Population: | 2,767 | |
|----------|-----------------------------------------------------------------|--------------|-----------|--------------------|
| | | Pop./Sq.Mi.: | 220 | |
| SIC Code | Description | Businesses | Employees | Sales (\$1,000) |
| 01 | Agricultural Production – Crops | 1 | 0 | \$288 |
| 02 | Agricultural Production – Livestock and Animal Specialties | 0 | 0 | \$0 |
| 07 | Agricultural Services | 1 | 0 | \$84 |
| 15 | Building Cnstrctn – General Contractors & Operative Builders | 1 | 0 | \$381 |
| 16 | Heavy Cnstrctn, Except Building Construction – Contractors | 2 | 3 | \$876 |
| 17 | Construction – Special Trade Contractors | 8 | 7 | \$1,317 |
| 20 | Food and Kindred Products | 0 | 0 | \$0 |
| 23 | Apparel, Finished Prdcts from Fabrics & Similar Materials | 0 | 0 | \$0 |
| 24 | Lumber and Wood Products, Except Furniture | 1 | 35 | \$2,765 |
| 27 | Printing, Publishing and Allied Industries | 2 | 70 | \$7,802 |
| 30 | Rubber and Miscellaneous Plastic Products | 0 | 0 | \$0 |
| 32 | Stone, Clay, Glass, and Concrete Products | 1 | 1 | \$177 |
| 35 | Industrial and Commercial Machinery and Computer Equipment | 0 | 0 | \$0 |
| 37 | Transportation Equipment | 0 | 0 | \$0 |
| 39 | Miscellaneous Manufacturing Industries | 0 | 0 | \$0 |
| 40 | Railroad Transportation | 0 | 0 | \$0 |
| 41 | Local, Suburban Transit & Interurbn HgwY Passenger Transport | 1 | 0 | \$168 |
| 42 | Motor Freight Transportation | 2 | 0 | \$822 |
| 43 | United States Postal Service | 1 | 11 | \$0 |
| 44 | Water Transportation | 0 | 0 | \$0 |
| 45 | Transportation by Air | 2 | 2 | \$503 |
| 47 | Transportation Services | 0 | 0 | \$0 |
| 48 | Communications | 0 | 0 | \$0 |
| 49 | Electric, Gas and Sanitary Services | 2 | 140 | \$25,760 |
| 50 | Wholesale Trade – Durable Goods | 3 | 86 | \$25,914 |
| 51 | Wholesale Trade – Nondurable Goods | 1 | 5 | \$2,040 |
| 52 | Building Materials, Hrdwr, Garden Supply & Mobile Home Deals | 4 | 17 | \$2,143 |

| | | | | |
|---------------|-----------------------------------------------------------------|-----------|--------------|-----------------|
| 53 | General Merchandise Stores | 0 | 0 | \$0 |
| 54 | Food Stores | 4 | 15 | \$2,163 |
| 55 | Automotive Dealers and Gasoline Service Stations | 1 | 0 | \$1,227 |
| 56 | Apparel and Accessory Stores | 1 | 1 | \$81 |
| 57 | Home Furniture, Furnishings and Equipment Stores | 1 | 2 | \$344 |
| 58 | Eating and Drinking Places | 5 | 17 | \$1,163 |
| 59 | Miscellaneous Retail | 7 | 37 | \$5,032 |
| 60 | Depository Institutions | 0 | 0 | \$0 |
| 61 | Nondepository Credit Institutions | 0 | 0 | \$0 |
| 62 | Security & Commodity Brokers, Dealers, Exchanges & Services | 0 | 0 | \$0 |
| 64 | Insurance Agents, Brokers and Service | 0 | 0 | \$0 |
| 65 | Real Estate | 2 | 4 | \$448 |
| 70 | Hotels, Rooming Houses, Camps, and Other Lodging Places | 1 | 6 | \$456 |
| 72 | Personal Services | 2 | 3 | \$65 |
| 73 | Business Services | 4 | 23 | \$1,568 |
| 75 | Automotive Repair, Services and Parking | 4 | 6 | \$1,050 |
| 76 | Miscellaneous Repair Services | 1 | 0 | \$83 |
| 78 | Motion Pictures | 0 | 0 | \$0 |
| 79 | Amusement and Recreation Services | 2 | 7 | \$357 |
| 80 | Health Services | 2 | 7 | \$557 |
| 81 | Legal Services | 0 | 0 | \$0 |
| 82 | Educational Services | 3 | 106 | \$0 |
| 83 | Social Services | 2 | 10 | \$0 |
| 84 | Museums, Art Galleries and Botanical and Zoological Gardens | 0 | 0 | \$0 |
| 86 | Membership Organizations | 6 | 3 | \$0 |
| 87 | Engineering, Accounting, Research, Management & Related Svcs | 0 | 0 | \$0 |
| 89 | Services, Not Elsewhere Classified | 0 | 0 | \$0 |
| 91 | Executive, Legislative & General Government, Except Finance | 6 | 1,242 | \$0 |
| 92 | Justice, Public Order and Safety | 7 | 42 | \$0 |
| 93 | Public Finance, Taxation and Monetary Policy | 3 | 9 | \$0 |
| 94 | Administration of Human Resource Programs | 0 | 0 | \$0 |
| 95 | Administration of Environmental Quality and Housing Programs | 1 | 2 | \$0 |
| 96 | Administration of Economic Programs | 1 | 0 | \$0 |
| 97 | National Security and International Affairs | 0 | 0 | \$0 |
| Totals | | 99 | 1,919 | \$85,634 |

EXISTING BUSINESSES WITHIN THE 6-MILE TRADE AREA

| | | Population: 11,909 | | |
|----------|------------------------------------------------------------------|--------------------|-----------|--------------------|
| | | Pop./Sq.Mi.: 105 | | |
| SIC Code | Description | Businesses | Employees | Sales (\$1,000) |
| 01 | Agricultural Production – Crops | 1 | 0 | \$288 |
| 02 | Agricultural Production – Livestock and Animal Specialties | 1 | 2 | \$212 |
| 07 | Agricultural Services | 14 | 20 | \$1,050 |
| 15 | Building Cnstrctn – General Contractors & Operative Builders | 19 | 19 | \$8,841 |
| 16 | Heavy Cnstrctn, Except Building Construction – Contractors | 3 | 18 | \$876 |
| 17 | Construction – Special Trade Contractors | 34 | 76 | \$10,197 |
| 20 | Food and Kindred Products | 0 | 0 | \$0 |
| 23 | Apparel, Finished Prdcts from Fabrics & Similar Materials | 0 | 0 | \$0 |
| 24 | Lumber and Wood Products, Except Furniture | 3 | 39 | \$3,118 |
| 27 | Printing, Publishing and Allied Industries | 5 | 73 | \$8,344 |
| 30 | Rubber and Miscellaneous Plastic Products | 0 | 0 | \$0 |
| 32 | Stone, Clay, Glass, and Concrete Products | 2 | 9 | \$1,225 |
| 35 | Industrial and Commercial Machinery and Computer Equipment | 0 | 0 | \$0 |
| 37 | Transportation Equipment | 1 | 0 | \$550 |
| 39 | Miscellaneous Manufacturing Industries | 5 | 6 | \$680 |
| 40 | Railroad Transportation | 1 | 6 | \$906 |
| 41 | Local, Suburban Transit & Interurbrn Hgwy Passenger Transport | 1 | 0 | \$168 |
| 42 | Motor Freight Transportation | 7 | 7 | \$2,312 |
| 43 | United States Postal Service | 4 | 17 | \$0 |
| 44 | Water Transportation | 2 | 7 | \$679 |
| 45 | Transportation by Air | 2 | 2 | \$503 |
| 47 | Transportation Services | 0 | 0 | \$0 |
| 48 | Communications | 1 | 0 | \$1,854 |
| 49 | Electric, Gas and Sanitary Services | 2 | 140 | \$25,760 |
| 50 | Wholesale Trade – Durable Goods | 15 | 151 | \$50,665 |
| 51 | Wholesale Trade – Nondurable Goods | 4 | 20 | \$36,866 |
| 52 | Building Materials, Hrdwr, Garden Supply & Mobile Home Dealrs | 12 | 38 | \$5,387 |
| 53 | General Merchandise Stores | 0 | 0 | \$0 |
| 54 | Food Stores | 8 | 41 | \$5,324 |
| 55 | Automotive Dealers and Gasoline Service Stations | 11 | 78 | \$21,273 |

| | | | | |
|---------------|-----------------------------------------------------------------|------------|--------------|------------------|
| 56 | Apparel and Accessory Stores | 3 | 17 | \$1,353 |
| 57 | Home Furniture, Furnishings and Equipment Stores | 4 | 18 | \$2,671 |
| 58 | Eating and Drinking Places | 21 | 188 | \$6,814 |
| 59 | Miscellaneous Retail | 26 | 73 | \$8,297 |
| 60 | Depository Institutions | 3 | 18 | \$0 |
| 61 | Nondepository Credit Institutions | 0 | 0 | \$0 |
| 62 | Security & Commodity Brokers, Dealers, Exchanges & Services | 0 | 0 | \$0 |
| 64 | Insurance Agents, Brokers and Service | 0 | 0 | \$0 |
| 65 | Real Estate | 4 | 4 | \$1,152 |
| 70 | Hotels, Rooming Houses, Camps, and Other Lodging Places | 14 | 107 | \$8,658 |
| 72 | Personal Services | 7 | 13 | \$419 |
| 73 | Business Services | 7 | 27 | \$2,208 |
| 75 | Automotive Repair, Services and Parking | 13 | 24 | \$2,388 |
| 76 | Miscellaneous Repair Services | 7 | 19 | \$1,825 |
| 78 | Motion Pictures | 1 | 0 | \$172 |
| 79 | Amusement and Recreation Services | 12 | 70 | \$3,927 |
| 80 | Health Services | 4 | 193 | \$5,869 |
| 81 | Legal Services | 0 | 0 | \$0 |
| 82 | Educational Services | 12 | 863 | \$0 |
| 83 | Social Services | 5 | 150 | \$0 |
| 84 | Museums, Art Galleries and Botanical and Zoological Gardens | 0 | 0 | \$0 |
| 86 | Membership Organizations | 20 | 91 | \$0 |
| 87 | Engineering, Accounting, Research, Management & Related Svcs | 5 | 28 | \$3,136 |
| 89 | Services, Not Elsewhere Classified | 0 | 0 | \$0 |
| 91 | Executive, Legislative & General Government, Except Finance | 16 | 1,301 | \$0 |
| 92 | Justice, Public Order and Safety | 11 | 58 | \$0 |
| 93 | Public Finance, Taxation and Monetary Policy | 5 | 13 | \$0 |
| 94 | Administration of Human Resource Programs | 1 | 1 | \$0 |
| 95 | Administration of Environmental Quality and Housing Programs | 3 | 9 | \$0 |
| 96 | Administration of Economic Programs | 1 | 0 | \$0 |
| 97 | National Security and International Affairs | 0 | 0 | \$0 |
| Totals | | 363 | 4,054 | \$235,967 |

EXISTING BUSINESSES WITHIN THE 10-MILE TRADE AREA

| | | Population: | 34,294 | |
|----------|-----------------------------------------------------------------|--------------|-----------|--------------------|
| | | Pop./Sq.Mi.: | 109 | |
| SIC Code | Description | Businesses | Employees | Sales (\$1,000) |
| 01 | Agricultural Production – Crops | 2 | 1 | \$384 |
| 02 | Agricultural Production – Livestock and Animal Specialties | 1 | 2 | \$212 |
| 07 | Agricultural Services | 37 | 75 | \$4,368 |
| 15 | Building Cnstrctn – General Contractors & Operative Builders | 60 | 103 | \$35,791 |
| 16 | Heavy Cnstrctn, Except Building Construction – Contractors | 11 | 189 | \$4,763 |
| 17 | Construction – Special Trade Contractors | 96 | 323 | \$38,580 |
| 20 | Food and Kindred Products | 3 | 85 | \$28,315 |
| 23 | Apparel, Finished Prdcts from Fabrics & Similar Materials | 1 | 2 | \$196 |
| 24 | Lumber and Wood Products, Except Furniture | 5 | 40 | \$3,510 |
| 27 | Printing, Publishing and Allied Industries | 7 | 78 | \$8,803 |
| 30 | Rubber and Miscellaneous Plastic Products | 1 | 4 | \$588 |
| 32 | Stone, Clay, Glass, and Concrete Products | 3 | 13 | \$1,837 |
| 35 | Industrial and Commercial Machinery and Computer Equipment | 2 | 5 | \$405 |
| 37 | Transportation Equipment | 2 | 15 | \$1,975 |
| 39 | Miscellaneous Manufacturing Industries | 6 | 7 | \$765 |
| 40 | Railroad Transportation | 1 | 6 | \$906 |
| 41 | Local, Suburban Transit & Interurbn Hgwy Passenger Transport | 2 | 0 | \$336 |
| 42 | Motor Freight Transportation | 11 | 15 | \$3,177 |
| 43 | United States Postal Service | 12 | 41 | \$0 |
| 44 | Water Transportation | 20 | 71 | \$9,128 |
| 45 | Transportation by Air | 2 | 2 | \$503 |
| 47 | Transportation Services | 3 | 13 | \$833 |
| 48 | Communications | 3 | 24 | \$3,390 |
| 49 | Electric, Gas and Sanitary Services | 4 | 210 | \$65,745 |
| 50 | Wholesale Trade – Durable Goods | 32 | 177 | \$78,527 |
| 51 | Wholesale Trade – Nondurable Goods | 18 | 30 | \$74,466 |
| 52 | Building Materials, Hrdwr, Garden Supply & Mobile Home Deals | 28 | 121 | \$20,087 |
| 53 | General Merchandise Stores | 5 | 5 | \$5,494 |
| 54 | Food Stores | 46 | 376 | \$53,851 |
| 55 | Automotive Dealers and Gasoline Service Stations | 37 | 380 | \$131,145 |

| | | | | |
|---------------|-----------------------------------------------------------------|--------------|---------------|------------------|
| 56 | Apparel and Accessory Stores | 18 | 51 | \$4,961 |
| 57 | Home Furniture, Furnishings and Equipment Stores | 27 | 90 | \$16,488 |
| 58 | Eating and Drinking Places | 111 | 1,240 | \$52,867 |
| 59 | Miscellaneous Retail | 90 | 190 | \$24,843 |
| 60 | Depository Institutions | 15 | 78 | \$0 |
| 61 | Nondepository Credit Institutions | 3 | 4 | \$12,000 |
| 62 | Security & Commodity Brokers, Dealers, Exchanges & Services | 3 | 7 | \$1,240 |
| 64 | Insurance Agents, Brokers and Service | 2 | 1 | \$344 |
| 65 | Real Estate | 24 | 60 | \$8,990 |
| 70 | Hotels, Rooming Houses, Camps, and Other Lodging Places | 40 | 288 | \$22,769 |
| 72 | Personal Services | 36 | 87 | \$3,180 |
| 73 | Business Services | 25 | 75 | \$7,534 |
| 75 | Automotive Repair, Services and Parking | 27 | 60 | \$5,874 |
| 76 | Miscellaneous Repair Services | 26 | 35 | \$3,459 |
| 78 | Motion Pictures | 4 | 13 | \$731 |
| 79 | Amusement and Recreation Services | 49 | 240 | \$16,279 |
| 80 | Health Services | 22 | 491 | \$22,462 |
| 81 | Legal Services | 3 | 5 | \$575 |
| 82 | Educational Services | 25 | 1,450 | \$483 |
| 83 | Social Services | 15 | 282 | \$600 |
| 84 | Museums, Art Galleries and Botanical and Zoological Gardens | 1 | 0 | \$0 |
| 86 | Membership Organizations | 56 | 150 | \$0 |
| 87 | Engineering, Accounting, Research, Management & Related Svcs | 18 | 66 | \$6,828 |
| 89 | Services, Not Elsewhere Classified | 1 | 4 | \$416 |
| 91 | Executive, Legislative & General Government, Except Finance | 67 | 3,008 | \$0 |
| 92 | Justice, Public Order and Safety | 26 | 863 | \$0 |
| 93 | Public Finance, Taxation and Monetary Policy | 7 | 28 | \$0 |
| 94 | Administration of Human Resource Programs | 4 | 1,277 | \$0 |
| 95 | Administration of Environmental Quality and Housing Programs | 8 | 47 | \$0 |
| 96 | Administration of Economic Programs | 4 | 206 | \$0 |
| 97 | National Security and International Affairs | 3 | 16 | \$0 |
| Totals | | 1,221 | 12,825 | \$791,003 |

**APPENDIX 3:
FINDINGS FROM SURVEY OF
SMALL AIRPORT BUSINESS PARKS**

Accomomack Airport Industrial Park

| | |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Accomomack Airport Industrial Park |
| Location | Eastern Shore of Virginia Melfa, VA |
| Total acreage | |
| Available acreage | 245 acres, subdividable |
| Range of sites | 3 to 52 acres |
| Infrastructure | water, sewer, drainage, electric, telecommunications |
| Tenants | <ul style="list-style-type: none"> • Piedmont Aviation Services (repair & overhaul of auxiliary power units for jet engines) • Insul-Tech (prefabricated wall panels) • Truss-Tech (roof trusses for residential and commercial construction) • Interad (design & manufacture of communications electronics) • Blue Bay Crab Co. <p>Major employers on the Eastern Shore of Virginia (outside of the industrial park):</p> <ul style="list-style-type: none"> • NASA Wallops Island Flight Facility (rocket launch and support) • AEGIS Combat Systems Center (surface warship combat systems) • Parksley Apparel CO. (garment manufacturing) • Tankard nurseries (plant nursery) • Cherrystone Aquafarms (aquaculture) • Dynachem Technologies, Inc. (automotive & industrial chemical products) • Tyson farms, Inc. (poultry processing) • Eastern Shore Seafood (seafood processing) • Bayshore Concrete Products Corp (prestressed structural components) • NOAA CDA Station (command & data acquisition) • Franklin Jones Lumber Co. (wood harvesting and processing) • Stubbs Seafood (seafood) • New Ravenna Inc. (tile mosaics) |
| Comments | <p>Airport opened November 1997. Runways are 5000 feet. The park is adjacent to Eastern Shore Community College.</p> <p>The business park is designed to have a "park-like" setting and is located within an Enterprise Zone offering financial incentives.</p> <p>The sites are offered far below the going market rate in surrounding areas and financing assistance is available through the use of industrial development bonds.</p> |

Adirondack Airport Business Park

| | |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Adirondack Airport Business Park |
| Location | Lake Clear, NY |
| Total acreage | 290 acres |
| Available acreage | |
| Range of sites | |
| Infrastructure | |
| Tenants | Targeted businesses include: <ul style="list-style-type: none"> • Aviation distribution - parts supply (air freight) • Biotech & High Tech business • Technical support back office • Light assembly furnished through airport services • Companies that value outdoor recreation for advertising purposes. |
| Comments | 6,500 foot runway. Park contains a 10,000 square foot Incubator Building. |

Belfast Airport Industrial Park

| | |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Belfast Airport Industrial Park |
| Location | Belfast, Maine |
| Total acreage | 48 acres |
| Available acreage | |
| Range of sites | Minimum 40,000 square feet |
| Infrastructure | Water, sewer to half of project area |
| Tenants | <ul style="list-style-type: none"> • Ducktrap River Fish Farms (processor of gourmet & specialty fish products) • Young's Shellfish (seafood processing & distribution) • Larrabee Plumbing (plumbing fabrication) • Recycling facility • Harborside Graphics (commercial textiles printing) • Group Home (life skills for low skill labor force: base of operations) |
| Comments | The City owns the land, paid for infrastructure but businesses pay for extensions and tie-ins. No TIFFs or other financial incentives. |

Concord Airport Industrial Park

| | |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Concord Airport Industrial Park |
| Location | Concord, NH |
| Total acreage | 75 acres |
| Available acreage | 10 acres |
| Range of sites | 5 lots available |
| Infrastructure | water, gas, sewer |
| Tenants | <ul style="list-style-type: none"> • Alpha Metal Fabricating, Inc. • Wikoff Color Labs • Early Enrichment Center • U.S. Postal Service • Page Belting Company • New England Employee Benefits Co. • Granite State Independent Living Foundation • Eastern Analytical, Inc. • Allegro MicroSystems, Inc. • Secure Care Products • Whittemore Holdings/Department of Revenue • Mellen Company, Inc. |
| Comments | 6,000 foot runway, full navigation support systems; Jet fuel and AVGAS, aircraft maintenance, storage and tie-down capacity. Corporate hangers and T-hangers available |

Dansville Industrial Park

| | |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Dansville Industrial Park |
| Location | Dansville, NY |
| Total acreage | 139 acres |
| Available acreage | All still available except for one lot |
| Range of sites | 3 acre minimum |
| Infrastructure | Natural gas, electric, water, on-site secondary and tertiary sewage treatment, on-site rail service |
| Tenants | Fire & Flood damage salvage company (purchase contract stage) |
| Comments | <p>Sites are available for purchase or Capitalized Lease option terms up to 20 years. Design guidelines are in place. Environmental Audits have been completed for the entire Industrial Park. Incentives available including 78% property tax abatement and no sales tax during construction.</p> <p>Sites are pre-certified and pre-qualified (i.e. infrastructure is such that any tenant could move in within 90 days). Located adjacent to interstate 90/390, rail, and airport. Heavily promoting transportation access as major selling point of the park. Marketing through direct mail, brochures, and Internet. Starting to work with site relocation firms. Park is targeting light manufacturing, parts distributors, businesses that rely on speed, and businesses that need large acreage.</p> |

Elizabethtown Airport Industrial Park

| | |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Elizabethtown Airport Industrial Park |
| Location | Bladen County, NC |
| Total acreage | 225 acres |
| Available acreage | 24 subdivided lots |
| Range of sites | 5.3 acres to 18.8 acres |
| Infrastructure | Some lots served by water, sewer, and electric with potential for extensions. |
| Tenants | <ul style="list-style-type: none"> • Somerset Technologies |
| Comments | New development of 180 acre general aviation airport and adjacent industrial park. 5,000 foot runway. Private hangers available for lease and potential for corporate hangers in the future. |

Hopedale Airport Industrial Park

| | |
|-------------------|-----------------------------------------|
| Name of Park | Hopedale Industrial Park |
| Location | Hopedale, MA |
| Total acreage | 55 |
| Available acreage | 5 |
| Range of sites | |
| Infrastructure | Water, sewer, gas, electric |
| Tenants | |
| Comments | Established park with one remaining lot |

Lebanon Airport Business Park

| | |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Lebanon Airport Business Park |
| Location | West Lebanon, NH |
| Total acreage | 45 acres |
| Available acreage | 7.5 acres, trying to add an additional 40-50 acres (doing wetlands analysis) |
| Range of sites | 1 lot available of original 7.5 |
| Infrastructure | Water, sewer |
| Tenants | Warehousing; light industrial development; abrasives; manufacturing including parts for steel mills; thermal spray guns, wood stoves, injection molds, and work clothes; property management office; biotech firm; business lawyer; ski equipment distributor; carpet warehouse |
| Comments | Park had immediate success due to aggressive commercial development trends in the 1980s. The majority of lots were sold to local businesses looking to expand, proximity to airport was less of a factor than available affordable land. Sales were handled through a local commercial real estate broker; no other marketing was necessary due to hot market for commercial land. |

Montague Airport Industrial Park

| | |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Montague Airport Industrial Park |
| Location | Montague, MA |
| Total acreage | 64 acres |
| Available acreage | 55 |
| Range of sites | |
| Infrastructure | electric, gas, sewer, water, fiber optics |
| Tenants | <ul style="list-style-type: none"> • Hillside Plastics • New England Extrusion • Aquafuture • Hallmark Color Labs |
| Comments | Industrial Park is within an Economic Target Area. Airport has one 3,000 foot runway. Municipal airport & regional vocational school co-operative programs in every trade located at the park. Park overlooks Connecticut River and is adjacent to a 2,000 acre wildlife management area. |

North Central Industrial Air Park

| | |
|--------------------------|------------------------------------------|
| Name of Park | North Central Industrial Air Park |
| Location | Lincoln, RI |
| Total acreage | 160 acres |
| Available acreage | 10 acres |
| Range of sites | |
| Infrastructure | Water, sewer, gas, electric |
| Tenants | |
| Comments | Previous Superfund site |

Plymouth Airport Industrial Park

| | |
|--------------------------|--------------------------------------------------------------------------------------|
| Name of Park | Plymouth Airport Industrial Park |
| Location | Plymouth, MA |
| Total acreage | 150 acres |
| Available acreage | 100 acres |
| Range of sites | 1 acre minimum |
| Infrastructure | electric, gas, fiber optics |
| Tenants | Newly established: no tenants |
| Comments | 20 year maximum lease available. Prices ranges from \$0.25 to \$0.35 per square foot |

Westover Airpark North

| | |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Westover Airpark North |
| Location | Chicopee, MA |
| Total acreage | 101 acres |
| Available acreage | 30 acres |
| Range of sites | 2 acre minimum |
| Infrastructure | electric, gas, sewer, water, fiber optics |
| Tenants | <ul style="list-style-type: none">• Avery Dennison• Dunsim Industries• Leonische of America, Inc. |
| Comments | Master-planned park offering protective restrictions, expedited site plan approval, low electric rates and site planning and permitting assistance from Westover Metropolitan Development Corporation |

Westover Metropolitan Airport

| | |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Park | Westover Metropolitan Airport |
| Location | Chicopee, MA |
| Total acreage | 188 acres |
| Available acreage | 110 acres |
| Range of sites | subdivide to suit |
| Infrastructure | electric, gas, sewer, fiber optics |
| Tenants | <ul style="list-style-type: none">• Gas Turbine Corporation• Laminated Papers• Mass. State Police• Metro Air Service |
| Comments | 11,600 foot runway on-site |

