



North Kingstown Community Market Study: Appendix

North Kingstown, Rhode Island

June 9, 2014



ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™

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APPENDIX A:

Interview and Focus Group Participants

Interview & Focus Group Participants

The following persons provided direct input into this study either through one-one-one interview or in a focus group. They were identified by the Town staff for their expertise as business owners, developers / land owners, members of civic groups, or staff. Additional conversations were had area brokers to confirm our findings in the real estate supply-demand analysis.

In addition to the list below, we also held a focus group with the North Kingstown Town Council.

Interviewee	Affiliation
Mike Baker	Lafayette Mill
Palmer Beebe	Wickford Village business owner, JW Graham
Tom Breckel	Post Road property owner
Dave Caldwell	EDAB Chair, Developer
Matt Callaghan Jr.	Lawyer, former State Senator
Jim Coughlin	Builder
Dennis Curci	Dry Bridge Commerce Park
Paul Deon	Planning Commissioner
Mark DeStefano	Wickford Village business owner, Pedego Electric Bikes
Francis Dwyer	Wickford Motor Inn
Michael Embury	Town Manager
Curtis Givan	Randall Realtors
John Haddad	Dodge Bailey Property
Mark Hall	Post Road property owner
Mark Hawkins	Dry Bridge Road

Interviewee	Affiliation
Konstantios Karampetsos	Owner, Tavern by the Sea and Diner (Village)
Mary King, Phil Auger	North Kingstown School Department
Joe Lomastro	Signarama / Post Road business owner
Bethany Mazza	Wickford Village business owner, Green Ink
Dave Meegan	Post Road property owner
Paul Milihadies	Developer, Frenchtown Properties
Steve Moran	Developer, Moran Properties
Jim Mundy	Planning Commission Member / Business Owner
Martha Pughe	North Kingstown Chamber of Commerce
Kaitlyn Rooney	Post Road property owner
Stephen Soscia	Post Road property owner
Katherine Trapani	Quonset Development Corporation
Harvey Waxman	Retired business owner

APPENDIX B:

Keypad Polling Report

Keypad Polling Findings

At the November 30, 2013 public meeting, Town staff led the meeting attendees in a short poll, using keypad technology, to determine their preferences for economic development in the Town of North Kingstown. Approximately twenty people attended the meeting. This survey was conducted purely for informational value and did not apply rigorous statistically methodology. Furthermore, the number of participants does not represent a statistically significant sample of the Town of North Kingstown. The complete findings are below.

Q.1 Which is the top priority for NK over the next 10 years?

	1st	2nd	3rd	4th
Improve infrastructure (sewers, roads, etc.)	50%	17%	17%	84%
Redevelop existing commercial spaces	25%	38%	17%	80%
Preserve town character while developing	13%	13%	13%	39%
Increase variety of local industry	0%	25%	9%	34%
Manage tax rates	4%	4%	13%	21%
Increase business development incentives	4%	4%	9%	17%
Preserve open space	4%	0%	9%	13%
Increase leisure activities at places (dining, arts, etc.)	0%	0%	13%	13%
Minimize environmental development impacts	0%	0%	0%	0%
Other	0%	0%	0%	0%

Q.2 What is the single biggest economic issue facing North Kingstown?

Lack of business development	42%
Degradation of infrastructure	13%
Local regulations	13%
Population growth	8%
Degradation of town character	8%
Lack of business diversity	8%
Taxes	4%
Unsure	4%
No major issues	0%
Other	0%

Q.3 Your perception of new business development in NK is:

Generally in favor	27%
Supported if community character maintained	27%
Supported if proper infrastructure in place	23%
Supported if existing businesses not impacted	5%
Supported if only in certain parts of town	14%
Minimally supported	0%
Don't know	5%
Generally not in favor	0%

Q.4 What types of businesses would you like to see more of in Wickford Village?

Office	0%
Restaurants/dining	57%
Arts & Entertainment	0%
Retail – small/medium stores	17%
Retail – large stores	0%
Professional services	4%
Medical services	0%
Nightlife/leisure time locations	13%
Beauty services	0%
Grocery stores/markets	9%

Q.5 What types of businesses would you like to see more of around Wickford Junction?

Retail – small/medium stores	25%
Professional services	21%
Restaurants/dining	13%
Office	8%
Arts/Entertainment	8%
Retail – big box stores	8%
Medical services	8%
Nightlife/leisure time locations	8%
Beauty services	0%
Grocery stores/markets	0%

Q.6 What types of businesses would you like to see more of along Post Road?

Retail – small/medium stores	38%
Restaurants/dining	17%
Office	13%
Retail – big box stores	13%
Professional services	8%
Arts & Entertainment	4%
Medical services	4%
Nightlife/leisure time locations	4%
Beauty services	0%
Grocery stores/markets	0%

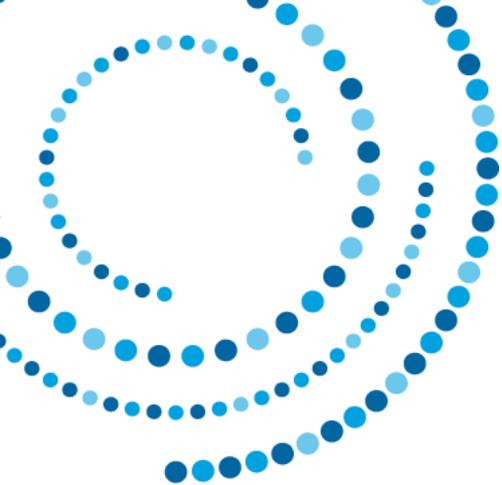
Q.7 What would increase your patronage of North Kingstown shops or restaurants?

Type of shop/restaurant	17%
Ease of parking/travel	4%
Value for money	9%
Quality of service	0%
Atmosphere	0%
Variety of shops/restaurants to choose from	35%
Schedule or operating hours	0%
All of the above	35%

APPENDIX C:

Telephone Survey Findings

Prepared by
GreatBlue Research, Inc.



Town of North Kingstown, RI

Summary of Insights
Residential Study

November 2013



Equip 4ward Planning and the Town of North Kingstown with information and data-driven analytics

Key areas of investigation were:

- Travel to and/or past North Kingstown;
- Economic development issues;
- Frequency of visiting different areas of North Kingstown;
- Future business expansion and/or redevelopment; and
- Demographics.

Research objectives and scope defined by the core team

4ward Planning/North Kingstown

- Darlene Wynne
- Paige Bronk
- Jon Reiner

GreatBlue Research, Inc.

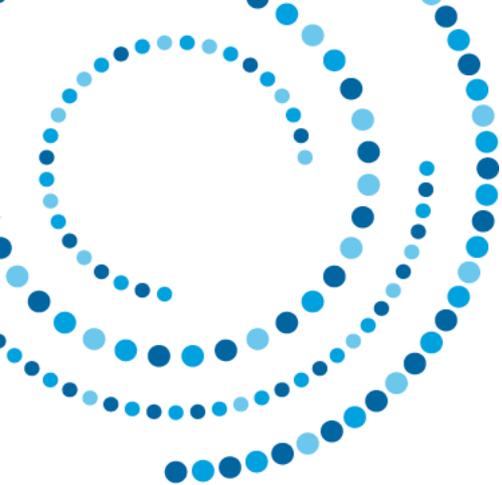
- Michael Vigeant
- Seamus McNamee
- Haley Paris
- Shawn Kincey

Survey design components

- Telephone survey: 48 questions; approximately 15 minutes to complete
- Primarily close-ended with several open-ended questions
- Incentive: none
- Sample: proportionate to population with oversampling in North Kingstown
- Field timing: November 11 – November 21, 2013

Completed surveys

- 400 completed interviews among residents of North Kingstown and those living within a ten-mile radius.



INSIGHTS

Frequency of being in North Kingstown

Two-thirds of respondents visit North Kingstown at least weekly.

This is important to note, as only one-third of the sample reported “living in North Kingstown.” Shopping and/or restaurants are also major drivers to the area.

How often are you in North Kingstown for business, pleasure, recreation or other reasons...	2013 (N=400)
Often (3-5 times per weeks or more)	47.5%
Occasionally (1-2 times per week)	20.0
Seldom (1-2 per month)	18.5
Not very often (1-2 per year)	9.5
Never	4.5
Total often and occasionally	67.5
Total not very often and never	14.0

Top 5 Reasons why:

“Shopping/mall” (34.8%)
“I live in North Kingstown” (33.3%)
“Restaurants” (13.5%)
“Recreation” (12.5%)
“Visit family” (11.0%)

Q2: Living within North Kingstown or in a close proximity to North Kingstown, how often are you in North Kingstown for business, pleasure, recreation or other reasons?

Q3: Please tell me why?

Traveling past North Kingstown

Two-thirds, however, also report traveling past North Kingstown for business, pleasure, recreation, etc.

Of those respondents, 12.3% were from North Kingstown, which may imply they are leaving the town to fulfill those needs. Additionally, 18.3% provided no reason, which may imply they are not aware of the offerings in North Kingstown.

How often do you travel past North Kingstown for business, pleasure, recreation or other reasons...	2013 (N=400)
Often (3-5 times per weeks or more)	40.3%
Occasionally (1-2 times per week)	27.0
Seldom (1-2 per month)	18.5
Not very often (1-2 per year)	10.3
Never	4.0
Total often and occasionally	67.3
Total not very often and never	14.3

Top 5 Reasons why:

- “Shopping/mall” (21.0%)*
- “No reason” (18.3%)*
- “I live in North Kingstown” (12.3%)*
- “Employment” (11.3%)*
- “Just pass through” (9.3%)*

Q4: And, how often do you travel past North Kingstown or for a longer drive time than North Kingstown for business, pleasure, recreation or other reasons?

Q5: Please tell me why?

Top priority over the next 10 years

Overall, development appeared to be the key issue for respondents over the next 10 years.

34.5% reported the top priority of the town should be either “redeveloping existing commercial spaces” (21.0%) or “increasing business development spaces” (13.5%).

Top priority over the next 10 years...	2013 (N=400)
Redeveloping existing commercial spaces	21.0%
Increasing business development incentives	13.5
34.5%	
Improving infrastructure such as sewer systems, roadways, etc.	8.8
Developing a greater variety of industry types	6.5
Minimizing environmental impacts from development	3.5
Management of tax rates	13.3
Preserving open space	11.3
Preserving town character while developing	3.3
Increasing places for residents’ leisure activities such as dining, arts, etc.	6.3

Biggest economic issue

“Taxes” a key issue to almost one-fourth of respondents.

13.3% reported it should be the top priority of the town and 22.8% reported “taxes” were the biggest economic issue.

<i>Biggest economic issue facing North Kingstown...</i>	<i>2013 (N=400)</i>
Taxes	22.8%
Don't know/unsure	21.5
Lack of overall business development	19.8
Lack of diverse businesses	12.3
Degradation of infrastructure	5.5
No major issues	5.3
Population growth	4.0
Degradation of town character	3.8
Local regulations	3.0
Schools/education	0.8

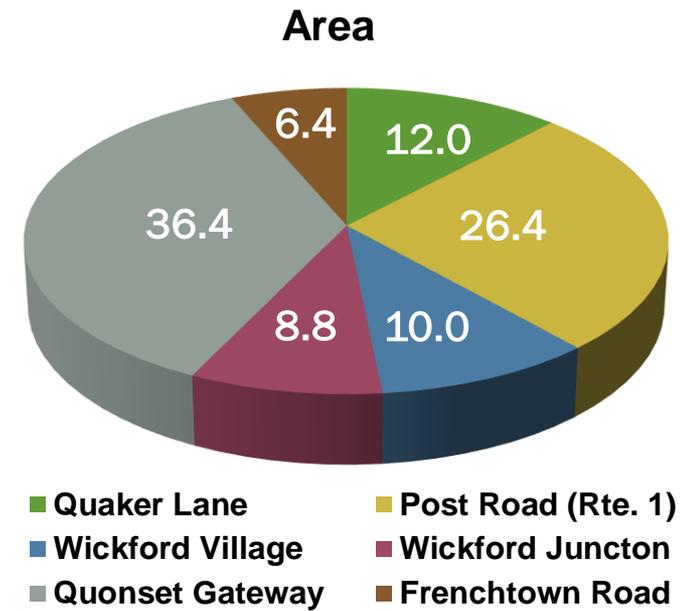
Once again, Business development/diversity emerged as a need for the town

Expansion of business

Town character reported as most important factor when considering the expansion of business.

Over half reported wanting to see the expansion occur in either “Quonset Gateway” (36.4%) or “Post Road” (26.4%), while a smaller percentage wanted to see expansion in Wickford “Village” (10.0%) or “Junction” (8.8%).

Statements...	2013 Yes
Would you be in favor of new business in North Kingstown if it <i>maintained the current character</i> of the town?	88.8%
Would you be in favor of new business in North Kingstown if each business had to go through a <i>design review process</i> ?	73.3
Would you be in favor of new business in North Kingstown if it required <i>infrastructure development</i> such as sewer systems?	76.0
Would you be in favor of new business if it occurred <i>only in certain parts</i> of North Kingstown?	61.8



Q8-11: Now, I will read you a list of questions regarding the expansion of business in North Kingstown. After each question please reply “yes” if you agree with the question or “no” if you disagree.

Q12: And, in which area of North Kingstown would you most like to see this expansion of business occur?

Business types

Restaurants and small/medium sized stores are key areas respondents would like to see expanded upon.

It should be noted, however, “big box” stores received the least support at the time of the survey.

<i>Businesses would like to see expanded or created in North Kingstown...</i>	<i>2013 In Favor</i>
Retail stores – small/medium business	84.8%
Restaurants	83.3
Tourism	76.0
Commercial fishing/aquaculture or fish farming	74.3
Biotech/Medical	73.5
Fitness/recreation	73.5
Agricultural related business	72.0
Alternative energies	71.3
Light industry development including manufacturing, research and assembly	70.5
Office development	69.5
Financial/Investment Services	63.8
Entertainment services	60.8
Manufacturing/industrial	58.5
Retail stores – “Big Box”	50.3

-34.5% gap in favorability between small/med stores and big box stores. Confirms the importance of “town character.”

Frequency of dining, shopping, going out

Post Road (50.3%) and Quonset Gateway (33.3%) frequented more than “once a week” by the highest percentage of respondents.

Very promisingly, these areas correspond with those areas respondents wanted to see the most business expansion.

Please consider, though, that Quaker Lane (37.1%) and Frenchtown Rd. (36.3%) appeared to be frequented more often by “working aged” respondents (<55 years old)

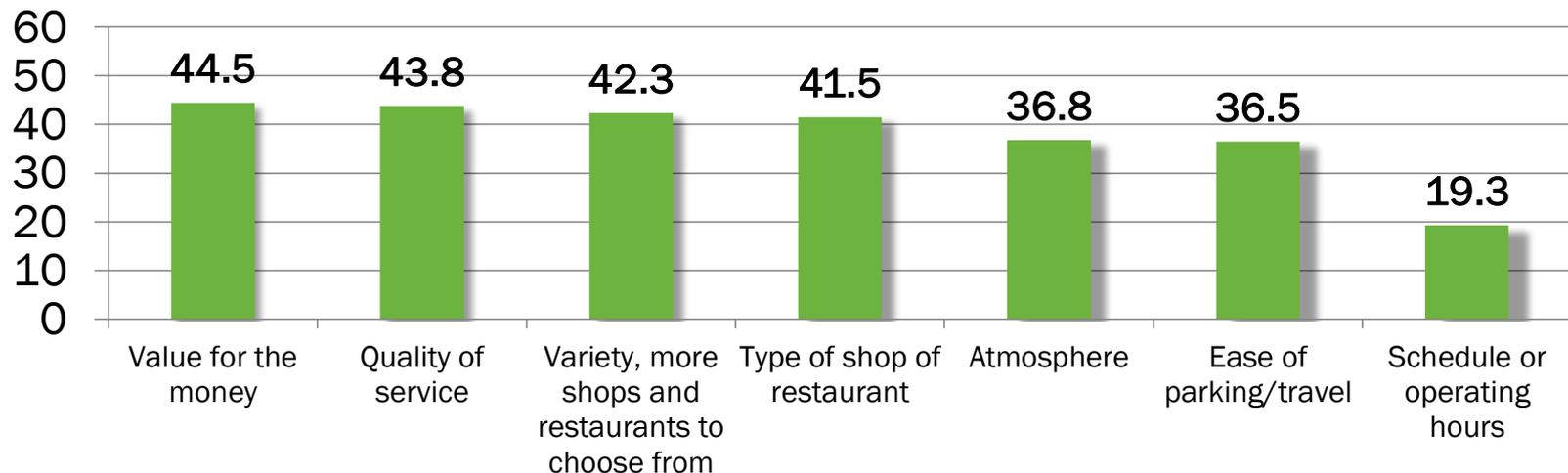
Area...	More than once a week	Once a month	A couple times a year	Almost never
Post Road (Rte. 1)	50.3%	22.8	13.8	13.3
Quonset Gateway	33.3	23.0	12.8	31.3
Wickford Village	30.8	26.5	20.5	22.3
Wickford Junction	30.3	27.5	14.5	27.8
Quaker Lane	29.8	25.5	16.5	28.3
Frenchtown Road	28.5	25.5	16.0	30.0

Increasing Patronage in North Kingstown

Respondents suggest the town may be a viable “destination” shopping area if the overall shopping “experience” continues to improve.

Over two-fifths of respondents cited the quality of service, variety/types of shops, and value for their money all as important factors to going to North Kingstown.

Important factors to increasing patronage in North Kingstown

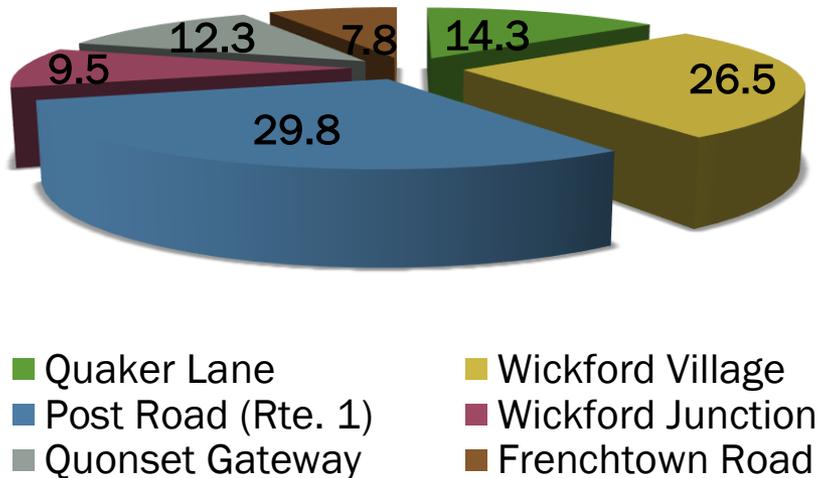


Areas frequented and deterrents

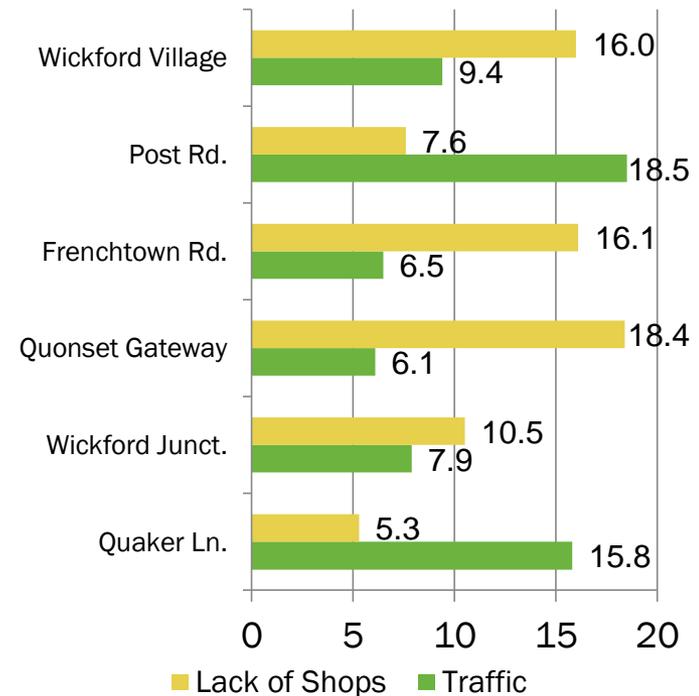
Over one-quarter of respondents report frequenting “Post Road” (29.8%) or “Wickford Village” (26.5%) most often.

While traffic was cited as biggest deterrent for Post Rd. (18.5%), lack of shops was the major deterrent for Wickford Village (16.0%).

Area frequented most often



Frequently Cited Deterrents



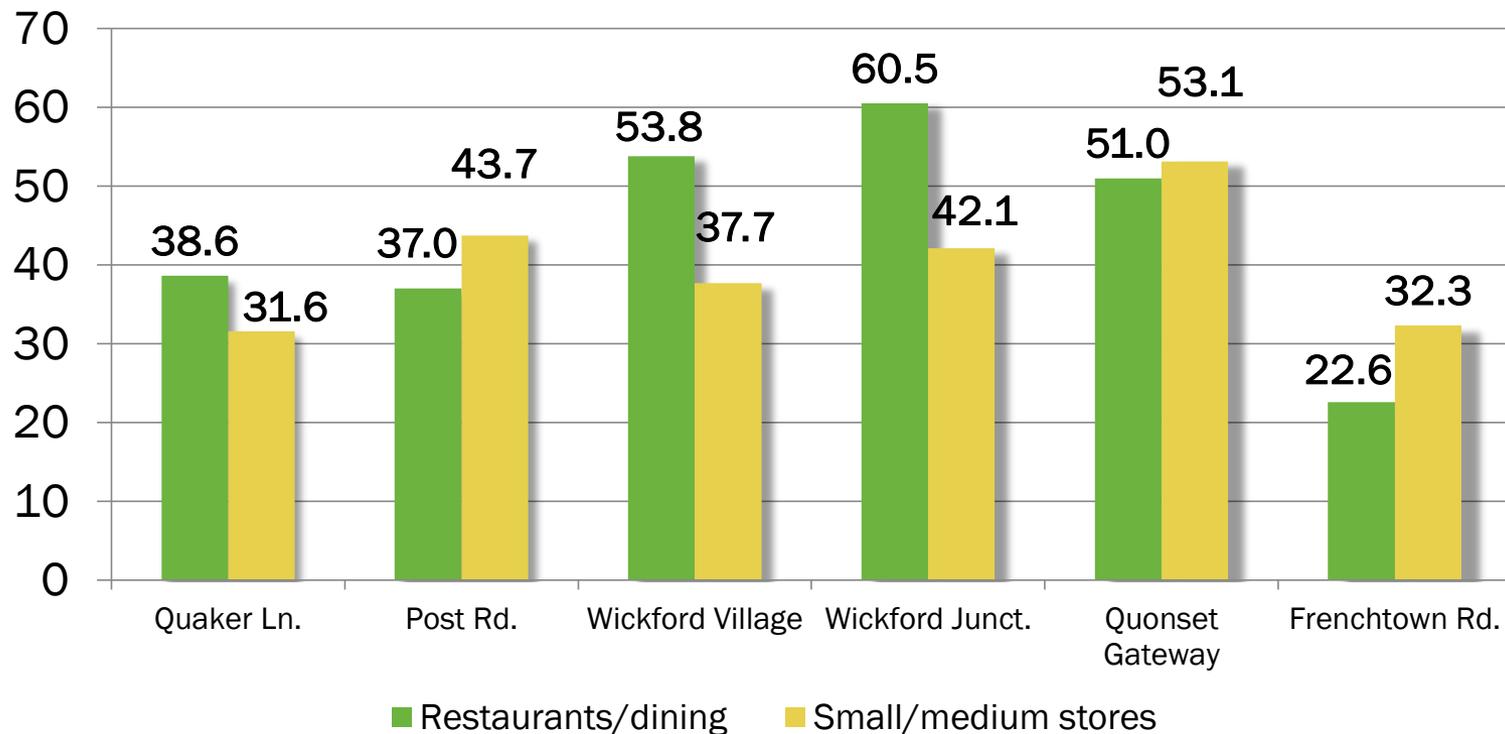
Q34: And, which one area in North Kingstown do you tend to frequent the most often?

Q35: What do you feel is the single biggest deterrent to you not visiting <PROMPT Q34> in North Kingstown more often?

Types of Business Development

Restaurants and small/medium sized stores continue to have the strongest support.

Only those respondents whom frequent Frenchtown Road most often reported a desire to see “arts & entertainment” over restaurants or small/medium sized stores.



Types of Business Development (cont.)

Full breakdown of results is presented below.

	Quaker Lane (N=57)	Post Road (N=119)	Wickford Village (N=106)	Wickford Junction (N=38)	Quonset Gateway (N=49)	Frenchtown Road (N=31)
Office space	15.8%	9.2	3.8	7.9	8.2	9.7
Restaurants/dining	38.6	37.0	53.8	60.5	51.0	22.6
Arts & entertainment	33.3	31.1	18.9	39.5	34.7	41.9
Retail – small/medium stores	31.6	43.7	37.7	42.1	53.1	32.3
Retail – big box stores	21.1	25.2	17.0	21.1	32.7	16.1
Professional services	17.5	14.3	4.7	18.4	12.2	6.5
Medical services	21.1	19.3	9.4	31.6	8.2	22.6
Nightlife/leisure time	15.8	13.4	11.3	21.1	20.4	19.4
Beauty services	15.8	7.6	7.5	18.4	16.3	12.9
Grocery stores	17.5	17.6	28.3	15.8	26.5	16.1
Public transportation	---	---	---	---	2.0	---
Manufacturing	---	0.8	---	---	---	---
Agricultural services	5.3	---	---	---	---	---
None at this time	---	3.4	3.8	---	2.0	3.2
Don't know/unsure	12.3	11.8	11.3	5.3	6.1	25.8

Moving Forward...

Recommendations*

- Area residents appear welcoming to business development/ expansion in North Kingstown
 - Town-wide efforts should be concentrated to attracting restaurants and/or small to medium size businesses
 - It may not be as important to focus efforts on big businesses as residents were less welcoming to those types of stores and some residents fear it may damage the town character.
- Fostering the “experience” of shopping and dining in North Kingstown
 - Data suggests, a variety of “niche” shops or restaurants may cause residents whom are already going to North Kingstown to spend more time in the town.
 - This also builds off the existing strength of the town’s character and differing sections of the town.
 - As business expansion/development occurs, outreach efforts should also be undertaken as data suggest some residents may not be aware of what exists in North Kingstown.

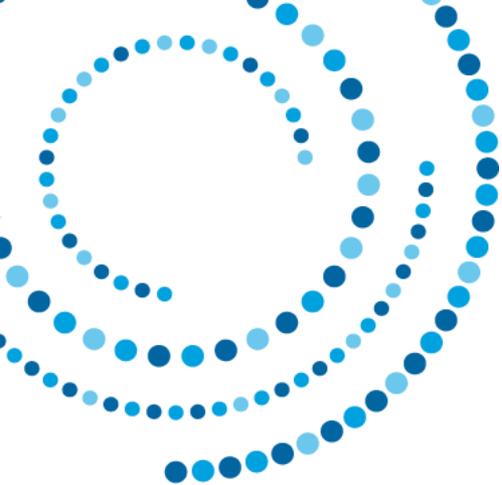
*All recommendations reflect the thoughts of GreatBlue Research and, upon review of the data, North Kingstown/4ward Planning may develop their own conclusions/recommendations.

Moving Forward...(cont.)

Recommendations*

- Post Road, Wickford Village and Quonset Gateway may be the most viable immediate options for expansion/development.
 - All three areas were frequently cited as areas residents are currently visiting and would like to see expansion.
 - While the three had unique challenges (traffic, lack of shops, etc.) residents suggest looking to see similar “new businesses” (restaurants, small/med businesses).
 - Future efforts may want to be concentrated on Quaker Lane and Frenchtown Rd as they were slightly more popular among younger/working aged respondents.
- Finally, while not as frequently mentioned, support existed for nightlife options and arts & entertainment.
 - Support emerged across all sections of North Kingstown.
 - Efforts in these areas may support the “experience” of shopping and staying in the town for longer time periods.
 - These efforts may look to be concentrated in the areas of Frenchtown Rd. and Wickford Junction.

*All recommendations reflect the thoughts of GreatBlue Research and, upon review of the data, North Kingstown/4ward Planning may develop their own conclusions/recommendations.



DETAILED FINDINGS

see Appendix D

APPENDIX D:

Telephone Survey Full Report

Prepared by
GreatBlue Research, Inc.

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



APPENDIX D

STATEMENT OF CONFIDENTIALITY AND OWNERSHIP

All of the analyses, findings, data, and recommendations contained within this report are the exclusive property of 4ward Planning, Inc.

As required by the Code of Ethics of the National Council on Public Polls and the United States Privacy Act of 1974, GreatBlue Research, Inc. maintains the anonymity of respondents to surveys the firm conducts. No information will be released that might, in any way, reveal the identity of the respondent.

Moreover, no information regarding these findings will be released without the express written consent of an authorized representative of 4ward Planning, Inc.

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Survey Instrument
Crosstabulation Table

INTRODUCTION

GreatBlue Research, Inc. (GreatBlue) is pleased to present the results to a *2013 Residential Survey*.

The survey included interviews with 400 residents living in and around North Kingstown, RI.

The survey began with a screener to ensure eligibility. Respondents qualified to answer the survey if they were one of the heads of their household and twenty years of age or older.

This appendix presents statistics collected from residential interviews conducted between November 11 and November 21, 2013. Full results to each question are presented as they correspond with the survey instrument.

The survey instrument for the *2013 Residential Survey* included the following areas for investigation:

- Travel to and/or past North Kingstown;
- Economic development issues;
- Frequency of visiting different areas of North Kingstown;
- Future business expansion and/or redevelopment; and
- Demographics.

Following this Introduction, Section II contains and explains the methodologies employed in completing this *Residential Survey*, the margins for error and the confidence level for the statistics collected.

Section III contains data tables presenting 2013 data for each question. Section IV is second Appendix containing a copy of the survey instrument utilized, and a cross tabulation table.

METHODOLOGY

GreatBlue research staff completed 400 surveys using a quantitative design among residents living in and around North Kingstown. Respondents were twenty years of age or older and one of the heads of their household.

Survey input was provided by the 4Ward Planning team and actual wording of each question may be found in the data tables of this appendix.

Survey design at GreatBlue is a careful, deliberative process to ensure fair, objective and balanced surveys. Staff members, with years of survey design experience, edit out any bias. Further, all scales used by GreatBlue (either numeric, such as one through ten, or wording such as strongly agree, somewhat agree, somewhat disagree or strongly disagree) are balanced evenly. And, placement of questions is carefully accomplished so that order has minimal impact.

Residents were contacted between 5:00 p.m. and 9:00 p.m. weekdays and the survey was conducted between November 11 and November 21, 2013.

GreatBlue used a callback procedure to ensure the randomness of the sample and to reduce non-response bias. When a randomly selected resident was not available during the first telephone contact, additional callbacks were made in order to complete the interview. A demographic profile of respondents may also be found towards the end of this appendix.

All interviews were conducted from GreatBlue headquarters located in Meriden, Connecticut. All facets of the study were completed by GreatBlue's staff. These aspects included: survey design, sample design, pre-test, fielding, coding, data entry, editing, validation, verification, computer analysis, analysis and report writing.

GreatBlue, working with 4Ward Planning and North Kingstown project personnel developed a proportionate to population sample plan, with deliberate oversampling performed among North Kingstown residents. One-third of the respondents came from North Kingstown, while the remaining surveys were drawn proportionally from surrounding towns.

Statistically, a sample of 400 surveys represents a margin for error of +/-5.0% at a 95% confidence level.

In theory, a sample of 400 residents will differ no more than +/-5.0% than if all North Kingstown residents were contacted and included in the survey. That is, if random probability sampling procedures were reiterated over and over again, sample results may be expected to approximate the larger population values within plus or minus 5.0% -- 95 out of 100 times.

DATA **3** TABLES

2. Living within North Kingstown or in a close proximity to North Kingstown, how often are you in North Kingstown for business, pleasure, recreation or other reasons?

<i>How often in North Kingstown for business, pleasure, recreation or other reasons...</i>	<i>2013 (N=400)</i>
Often (3-5 times per weeks or more)	47.5%
Occasionally (1-2 times per week)	20.0
Seldom (1-2 per month)	18.5
Not very often (1-2 per year)	9.5
Never	4.5

3. Please tell me why?

<i>Reason why...</i>	<i>2013 (N=400)</i>
Shopping/mall	34.8%
I live in North Kingstown	33.3
Restaurants	13.5
Recreation	12.5
Visit family	11.0
Conduct business	9.5
Employment	7.5
Visit friends	6.5
No need/nothing there	5.8
Appointments (doctor's, dentist, insurance agent, etc.)	4.5
Outdoors activities	2.3
Just pass through	2.0
Town Hall/Town Services	1.8
Parks	1.8
Attend college/school	0.5
Night life	0.5
Train station	0.3

4. And, how often do you travel past North Kingstown or for a longer drive time than North Kingstown for business, pleasure, recreation or other reasons?

<i>How often travel past North Kingstown for business, pleasure, recreation or other reasons...</i>	<i>2013 (N=400)</i>
Often (3-5 times per weeks or more)	40.3%
Occasionally (1-2 times per week)	27.0
Seldom (1-2 per month)	18.5
Not very often (1-2 per year)	10.3
Never	4.0

5. Please tell me why?

<i>Reason why...</i>	<i>2013 (N=400)</i>
Shopping/Mall	21.0%
No reason	18.3
I live in North Kingstown	12.3
Employment	11.3
Just pass through	9.3
Visit family	4.3
Recreation	4.3
Visit friends	3.8
Conduct business	3.3
Restaurants	3.3
Appointments (doctor's, dentist, insurance agent, etc.)	3.0
Outdoors activities	2.3
Miscellaneous/various activities	2.0
Town hall/Town services	0.8
Attend school/college	0.8
Night life	0.5

6. Thinking about overall economic development issues facing North Kingstown, please tell me which of the following should be the top priority for the town over the next 10 years?

<i>Top priority over the next 10 years...</i>	<i>2013 (N=400)</i>
Redeveloping existing commercial spaces	21.0%
Increasing business development incentives	13.5
Management of tax rates	13.3
Don't know/unsure	12.8
Preserving open space	11.3
Improving infrastructure such as sewer systems, roadways, etc.	8.8
Developing a greater variety of industry types	6.5
Preserving town character while developing	6.3
Minimizing environmental impacts from development	3.5
Increasing places for residents' leisure activities such as dining, arts, etc.	3.3

7. And, what do you feel is the single biggest economic issue facing the North Kingstown?

<i>Biggest economic issue facing North Kingstown...</i>	<i>2013 (N=400)</i>
Taxes	22.8%
Don't know/unsure	21.5
Lack of overall business development	19.8
Lack of diverse businesses	12.3
Degradation of infrastructure	5.5
No major issues	5.3
Population growth	4.0
Degradation of town character	3.8
Local regulations	3.0
Schools/education	0.8
Increase in low income housing	0.8
No town center	0.8

Now, I will read you a list of questions regarding the expansion of business in North Kingstown. After each question please reply “yes” if you agree with the question or “no” if you disagree. (Questions 8-11)

<i>Statements...</i>	<i>2013 Yes w/ DKs</i>	<i>2013 Yes w/o DKs</i>
Would you be in favor of new business in North Kingstown if it maintained the current character of the town?	88.8%	94.4
Would you be in favor of new business in North Kingstown if it required infrastructure development such as sewer systems?	76.0	87.4
Would you be in favor of new business in North Kingstown if each business had to go through a design review process?	73.3	82.8
Would you be in favor of new business if it occurred only in certain parts of North Kingstown?	61.8	71.2

12. And, in which area of North Kingstown would you most like to see this expansion of business occur?

<i>Area of North Kingstown where business expansion would like to be seen...</i>	<i>2013 (N=250)</i>
Quonset Gateway	36.4%
Post Road (Rte. 1)	26.4
Quaker Lane	12.0
Wickford Village	10.0
Wickford Junction	8.8
Frenchtown Road	6.4

Now as I read you the following list of business types, please tell me, generally, which you would like to see expanded or created in North Kingstown. Please indicate if you are in favor or are opposed to each type. (Questions 13-26)

<i>Businesses would like to see expanded or created in North Kingstown...</i>	<i>2013 In Favor</i>	<i>2013 Opposed</i>	<i>2013 Neutral</i>
Retail stores – small/medium business	84.8%	7.3	8.0
Restaurants	83.3	8.3	8.5
Tourism	76.0	12.3	11.8
Commercial fishing/aquaculture or fish farming	74.3	12.3	13.5
Biotech/Medical	73.5	9.3	17.3
Fitness/recreation	73.5	13.8	12.8
Agricultural related business	72.0	7.8	20.3
Alternative energies	71.3	15.0	13.8
Light industry development including manufacturing, research and assembly	70.5	15.8	13.8
Office development	69.5	18.0	12.5
Financial/Investment Services	63.8	18.5	17.8
Entertainment services	60.8	23.0	16.3
Manufacturing/industrial	58.5	25.8	15.8
Retail stores – “Big Box”	50.3	39.8	10.0

How often do you dine, shop, or go out within the following areas in North Kingstown? (Questions 27-32)

<i>Area...</i>	<i>More than once a week</i>	<i>Once a month</i>	<i>A couple times a year</i>	<i>Almost never</i>
Post Road (Rte. 1)	50.3%	22.8	13.8	13.3
Quonset Gateway	33.0	23.0	12.8	31.3
Wickford Village	30.8	26.5	20.5	22.3
Wickford Junction	30.3	27.5	14.5	27.8
Quaker Lane	29.8	25.5	16.5	28.3
Frenchtown Road	28.5	25.5	16.0	30.0

33. Please tell me what factors would be important in your decision to increase your patronage to any new or current shops or restaurants in North Kingstown? (Multiple responses were accepted)

<i>Important factors in decision to increase patronage in North Kingstown...</i>	<i>2013 (N=400)</i>
Value for the money	44.5%
Quality of service	43.8
Variety, more shops and restaurants to choose from	42.3
Type of shop or restaurant	41.5
Atmosphere	36.8
Ease of parking/travel	36.5
Schedule or operating hours	19.3

34. And, which one area in North Kingstown do you tend to frequent the most often?

<i>Area frequented most often...</i>	<i>2013 (N=400)</i>
Post Road (Rte. 1)	29.8%
Wickford Village	26.5
Quaker Lane	14.3
Quonset Gateway	12.3
Wickford Junction	9.5
Frenchtown Road	7.8

35. What do you feel is the single biggest deterrent to you not visiting <PROMPT Q34> in North Kingstown more often?

	<i>Quaker Lane (N=57)</i>	<i>Post Road (N=119)</i>	<i>Wickford Village (N=106)</i>	<i>Wickford Junction (N=38)</i>	<i>Quonset Gateway (N=49)</i>	<i>Frenchtown Road (N=31)</i>
Parking	---%	0.8	8.5	2.6	2.0	3.2
Traffic	15.8	18.5	9.4	7.9	6.1	6.5
Roadwork/construction	3.5	10.1	1.9	2.6	---	---
Distance/too far	22.8	6.7	15.1	18.4	10.2	12.9
Lack of shops and restaurants	5.3	7.6	16.0	10.5	18.4	16.1
Lack of options/things to do	10.5	5.9	3.8	7.9	4.1	12.9
Poor appearance	1.8	1.7	0.9	2.6	8.2	---
Vacant buildings/shops	1.8	3.4	5.7	---	2.0	3.2
Limited operating business hours	---	1.7	0.9	2.6	---	---
No need/nothing there of need	5.3	6.7	6.6	2.6	6.1	3.2
Prices	---	---	3.8	2.6	---	3.2
It's too busy there	---	---	2.8	---	---	---
Personal limitations	1.8	---	2.8	---	2.0	---
More seasonal/touristy	1.8	0.8	0.9	---	---	---
Don't know/unsure	1.8	4.2	1.9	5.3	2.0	3.2
No deterrent/I visit often	28.1	31.9	18.9	34.2	38.8	35.5

36. What types of business development would you like to see more of in <PROMPT Q34>?

	<i>Quaker Lane (N=57)</i>	<i>Post Road (N=119)</i>	<i>Wickford Village (N=106)</i>	<i>Wickford Junction (N=38)</i>	<i>Quonset Gateway (N=49)</i>	<i>Frenchtown Road (N=31)</i>
Office space	15.8%	9.2	3.8	7.9	8.2	9.7
Restaurants/dining	38.6	37.0	53.8	60.5	51.0	22.6
Arts & entertainment	33.3	31.1	18.9	39.5	34.7	41.9
Retail – small/medium stores	31.6	43.7	37.7	42.1	53.1	32.3
Retail – big box stores	21.1	25.2	17.0	21.1	32.7	16.1
Professional services	17.5	14.3	4.7	18.4	12.2	6.5
Medical services	21.1	19.3	9.4	31.6	8.2	22.6
Nightlife/leisure time	15.8	13.4	11.3	21.1	20.4	19.4
Beauty services	15.8	7.6	7.5	18.4	16.3	12.9
Grocery stores	17.5	17.6	28.3	15.8	26.5	16.1
Public transportation	---	---	---	---	2.0	---
Manufacturing	---	0.8	---	---	---	---
Agricultural services	5.3	---	---	---	---	---
None at this time	---	3.4	3.8	---	2.0	3.2
Don't know/unsure	12.3	11.8	11.3	5.3	6.1	25.8

37. Do you have any final comments or questions for North Kingstown?

<i>Final comments/questions...</i>	<i>2013 (N=400)</i>
None/no comment	76.0%
Other	7.0
Develop a greater variety of industry types	4.3
Satisfied with North Kingstown as it is today	3.8
Lower taxes	3.0
Maintain infrastructure (roads, sewers, etc.)	2.8
Increase business development incentives	1.3
Minimize environmental impacts from development	0.8
Poor appearance of town	0.5

DEMOGRAPHICS

<i>Children currently in household under the age of 18...</i>	<i>2013 (N=400)</i>
1 child	11.3%
2 children	10.3
3 or more children	4.3
No children in the home	72.3
Refused to answer	2.0

<i>Preschool Age or School Age...</i>	<i>2013 (N=103)</i>
Preschool Age	13.6%
School Age	74.8
Student, unemployed	11.7
Student, employed	---
Refused to answer	---

<i>Own or rent current residence...</i>	<i>2013 (N=400)</i>
Own	82.5%
Rent	13.8
Don't know/unsure	1.0
Refused to answer	2.8

<i>Current employment status...</i>	<i>2013 (N=400)</i>
Working full-time	40.0%
Working part-time	3.5
Student	1.0
Retired	45.0
Unemployed – looking for work	2.3
Unemployed – not looking for work	0.3
Unemployed – unable to work because of disability	1.3
Homemaker	4.3
Don't know/unsure/other	2.5

<i>Industry of employment...</i>	<i>2013 (N=174)</i>
Professional services	25.9%
Higher education	17.2
Healthcare	14.9
Other	13.8
Refused to answer	5.7
Financial services	4.0
Manufacturing	4.0
Government	3.4
Retail	2.9
Tourism and hospitality	2.9
Technology	2.3
Engineering	1.7
Entertainment	1.1

<i>Age...</i>	<i>2013 (N=400)</i>
18-25	0.5%
26-35	2.3
36-45	9.5
46-55	18.8
56-65	21.3
66-75	21.8
76 or older	19.0
Refused to answer	7.0

<i>Of Hispanic origin...</i>	<i>2013 (N=400)</i>
Yes	0.5%
No	95.0
Don't know/unsure	---
Refused to answer	4.5

<i>Race...</i>	<i>2013 (N=398)</i>
White	93.0%
African-American	0.5
Asian	1.0
Pacific Islander	---
Aleutian, Eskimo or American Indian	0.3
Other	0.3
Refused to answer	5.0

<i>Highest grade of school completed...</i>	<i>2013 (N=400)</i>
Eighth grade or less	0.3%
Some high school	2.5
High school graduate or GED	16.5
Some technical school	1.3
Technical school graduate	1.8
Some college	13.5
College graduate	38.3
Post-graduate or professional degree	22.0
Don't know/unsure	4.0

<i>Total family income before taxes...</i>	<i>2013 (N=400)</i>
Less than \$35,000	8.3%
\$35,000 to less than \$65,000	13.0
\$65,000 to less than \$95,000	18.8
\$95,000 or more	23.0
Don't know/unsure	4.0
Refused to answer	33.0

<i>Gender...</i>	<i>2013 (N=400)</i>
Male	42.0%
Female	58.0

APPENDIX **4**, SECTION IV

INTERPRETATION OF AGGREGATE RESULTS

The computer processed data for this survey is presented in the following frequency distributions. It is important to note that the wordings of the variable labels and value labels in the computer-processed data are largely abbreviated descriptions of the Questionnaire items and available response categories.

The frequency distributions include the category or response for the question items. Responses deemed not appropriate for classification have been grouped together under the “Other” code.

The “NA” category label refers to “No Answer” or “Not Applicable.” This code is also used to classify ambiguous responses. In addition, the “DK/RF” category includes those respondents who did not know their answer to a question or declined to answer it. In many of the tables, a group of responses may be tagged as “Missing” – occasionally, certain individual’s responses may not be required to specific questions and thus are excluded. Although when this category of response is used, the computations of percentages are presented in two (2) ways in the frequency distributions: 1) with their inclusion (as a proportion of the total sample), and 2) their exclusion (as a proportion of a sample sub-group).

Each frequency distribution includes the absolute observed occurrence of each response (i.e. the total number of cases in each category). Immediately adjacent to the right of the column of absolute frequencies is the column of relative frequencies. These are the percentages of cases falling in each category response, including those cases designated as missing data. To the right of the relative frequency column is the adjusted frequency distribution column that contains the relative frequencies based on the legitimate (i.e. non-missing) cases. That is, the total base for the adjusted frequency distribution excludes the missing data. For many Questionnaire items, the relative frequencies and the adjusted frequencies will be nearly the same. However, some items that elicit a sizable number of missing data will produce quite substantial percentage differences between the two columns of frequencies. The careful analyst will cautiously consider both distributions.

The last column of data within the frequency distribution is the cumulative frequency distribution (Cum Freq). This column is simply an adjusted frequency distribution of the sum of all previous categories of response and the current category of response. Its primary usefulness is to gauge some ordered or ranked meaning.

North Kingstown 2013 Survey

Hello, my name is _____ and I am calling from GreatBlue Research and I'm calling on behalf of the town of North Kingstown. The purpose of this call is to gather the opinions of those living in and around the North Kingstown area so that we may better understand the demand for business, commercial, and recreational opportunities within North Kingstown, generally, and within prospective redevelopment commercial areas. May I have about 5-7 minutes of your time to get your feedback? Thank you!

1. Are you twenty years of age or older and one of the heads of your household?
 - 01 Yes
 - 02 No

2. Living within North Kingstown or in a close proximity to North Kingstown, how often are you in North Kingstown for business, pleasure, recreation or other reasons? Would you say...
 - 01 Often **(3-5 times per weeks or more)**
 - 02 Occasionally **(1-2 times per week)**
 - 03 Seldom **(1-2 per month)**
 - 04 Not very often **(1-2 per year)**
 - 05 Never

3. Please tell me why? **(RESEARCHERS: Do not read list & accept multiple responses)**
 - 01 I live in North Kingstown
 - 02 Employment
 - 03 Conduct business
 - 04 Visit family
 - 05 Visit friends
 - 06 Recreation
 - 07 Outdoors activities
 - 08 Restaurants
 - 09 Shopping/Mall
 - 10 Appointments (doctor's, dentist, insurance agent, etc.)
 - 11 Town Hall/Town Services
 - 12 Attend College/School
 - 13 Night life
 - 14 Parks
 - 15 Other: (Specify _____)

4. And, how often do you travel past North Kingstown or for a longer drive time than North Kingstown for business, pleasure, recreation or other reasons? Would you say...
- 01 Often **(3-5 times per weeks or more)**
 - 02 Occasionally **(1-2 times per week)**
 - 03 Seldom **(1-2 per month)**
 - 04 Not very often **(1-2 per year)**
 - 05 Never

5. Please tell me why?

6. Thinking about overall economic development issues facing the North Kingstown, please tell me which of the following should be the top priority for the town over the next 10 years? Would you say... **(Researchers: Do not read list & accept one response)**

- 01 Redeveloping existing commercial spaces
- 02 Increasing business development incentives
- 03 Improving infrastructure such as sewer systems, roadways, etc.
- 04 Developing a greater variety of industry types
- 05 Minimizing environmental impacts from development
- 06 Management of tax rates
- 07 Preserving open space
- 08 Preserving town character while developing
- 09 Increasing places for resident's leisure activities such as dining, arts, etc.
- 10 DK/Unsure
- 11 Other: (Specify _____)

7. And, what do you feel is the single biggest economic issue facing the North Kingstown? Would you say... **(Researchers: Do not read list & accept one response)**

- 01 Taxes
- 02 Degradation of infrastructure
- 03 Population growth
- 04 Degradation of town character
- 05 Lack of overall business development
- 06 Local regulations
- 07 Lack of diverse businesses
- 08 Other: _____
- 09 DK/Unsure
- 10 No major issues

Now, I will read you a list of questions regarding the expansion of business in North Kingstown. After each question please reply “yes” if you agree with the question or “no” if you disagree.

Statement...	Yes	No	Don't know
8. Would you be in favor of new business in North Kingstown if it maintained the current character of the town?	01	02	03
9. Would you be in favor of new business in North Kingstown if each business had to go through a design review process?	01	02	03
10. Would you be in favor of new business in North Kingstown if it required infrastructure development such as sewer systems?	01	02	03
11. Would you be in favor of new business if it occurred only in certain parts of North Kingstown?	01	02 (Go to Q13)	03 (Go to Q13)

12. And, in which area of North Kingstown would you most like to see this expansion of business occur? Would you say...

- 01 Quaker Lane
- 02 Post Road (Rte. 1)
- 03 Wickford Village
- 04 Wickford Junction
- 05 Quonset Gateway
- 06 Frenchtown Rd

Now as I read you the following list of business types, please tell me, generally, which you would like to see expanded or created in North Kingstown. Please indicate if you are in favor or are opposed to each type.

	In Favor	Opposed	Neutral
13. Agricultural related businesses	01	02	03
14. Alternative energies	01	02	03
15. Biotech/Medical	01	02	03
16. Commercial fishing/aquaculture or fish farming	01	02	03
17. Entertainment services	01	02	03
18. Tourism	01	02	03
19. Light industrial development including manufacturing, research & assembly	01	02	03
20. Office development	01	02	03
21. Retail stores – “Big Box”	01	02	03
22. Retail stores – small/medium business	01	02	03
23. Restaurants	01	02	03
24. Manufacturing/industrial	01	02	03
25. Fitness/recreation	01	02	03
26. Financial/Investment Services	01	02	03

How often do you dine, shop, or go out within the following areas in North Kingstown?

Area...	More than once a week	Once a month	A couple times a year	Almost never
27. Quaker Lane	01	02	03	04
28. Post Road (Rte. 1)	01	02	03	04
29. Wickford Village	01	02	03	04
30. Wickford Junction	01	02	03	04
31. Quonset Gateway	01	02	03	04
32. Frenchtown Rd	01	02	03	04

33. Please tell me what factors would be important in your decision to increase your patronage to any new or current shops or restaurants in North Kingstown? **(Researchers: Read List and Accept Multiple Responses)**

- 01 Type of shop or restaurant
- 02 Ease of parking/travel
- 03 Value for the money
- 04 Quality of service
- 05 Atmosphere
- 06 Variety, more shops and restaurants to choose from
- 07 Schedule or operating hours

34. And, which one area in North Kingstown do you tend to frequent the most often? Would you say...

- 01 Quaker Lane
- 02 Post Road (Rte. 1)
- 03 Wickford Village
- 04 Wickford Junction
- 05 Quonset Gateway
- 06 Frenchtown Rd

35. What do you feel is the single biggest deterrent to you not visiting <PROMPT Q34> in North Kingstown more often?

36. What types of business development would you like to see more of in <PROMPT Q34>?
(Researchers: Accept multiple responses)

- 01 Office space
- 02 Restaurants/dining
- 03 Arts & entertainment
- 04 Retail – small/medium stores
- 05 Retail – big box stores
- 06 Professional services
- 07 Medical services (i.e. Doctor’s offices, Dentists, etc.)
- 08 Nightlife/leisure time locations (i.e. bars, taverns, clubs, etc.)
- 09 Beauty services (i.e. barber shops, salons, etc.)
- 10 Grocery stores, super markets, etc.
- 11 Other: _____
- 12 Don’t know/unsure

37. Do you have any final comments or questions for North Kingstown?

Demographics

38. How many children do you currently have in your household under the age of 18?

- 00 None **(Go to Q40)**
- 01 # _____
- 99 RF **(Go to Q40)**

39. Are they Preschool Age or School Age? (Please select all that apply)

- 01 Preschool Age
- 02 School Age
- 03 Student, unemployed
- 04 Student, employed
- 05 RF

40. Do you own or rent your current residence?

- 01 Own
- 02 Rent
- 03 DK/Unsure
- 04 RF

41. What is your current employment status?

- 01 Working full-time
- 02 Working part-time
- 03 Student
- 04 Retired
- 05 Unemployed – looking for work
- 06 Unemployed – not looking for work
- 07 Unemployed – unable to work because of disability
- 08 Homemaker
- 09 DK/unsure/other

42. What is your industry of employment? **(Ask only if Q41=01,02)**

- 01 Higher Education
- 02 Financial Services
- 03 Healthcare
- 04 Professional Services
- 05 Other: _____
- 06 RF

43. Which of the following best describes your age?

- 01 18-25
- 02 26-35
- 03 36-45
- 04 46-55
- 05 56-65
- 06 66-75
- 07 76 or older
- 08 RF

44. Are you of Hispanic origin, such as Latin American, Puerto Rican, Cuban or Mexican?

- 01 Yes **(Go to Q46)**
- 02 No **(Continue)**
- 03 DK **(Continue)**
- 04 RF **(Continue)**

45. What is your race?

- 01 White
- 02 African-American
- 03 Asian
- 04 Pacific Islander
- 05 Aleutian, Eskimo or American Indian
- 06 Other: _____
- 07 DK
- 08 RF

46. What is your highest grade of school completed?

- 01 Eighth grade or less
- 02 Some high school
- 03 High school graduate or GED
- 04 Some technical school
- 05 Technical school graduate
- 06 Some college
- 07 College graduate
- 08 Post-graduate or professional degree
- 09 RF

47. Which of the following categories best describes your total family income before taxes?

- 01 Less than \$35,000
- 02 \$35,000 to less than \$65,000
- 03 \$65,000 to less than \$95,000
- 04 \$95,000 or more
- 05 DK
- 06 RF

48. Gender (by observation).

- 01 Male
- 02 Female

CROSTABULATION TABLE

		<i>Less than 55 (N=124)</i>	<i>56 or older (N=276)</i>
Quaker Lane			
	More than once a week	37.1%	26.4
	Once a month	25.0	25.7
	A couple times a year	16.1	16.7
	Almost never	21.8	31.2
Post Road			
	More than once a week	53.2	48.9
	Once a month	25.8	21.4
	A couple times a year	14.5	13.4
	Almost never	6.5	16.3
Wickford Village			
	More than once a week	30.6	30.8
	Once a month	28.2	25.7
	A couple times a year	23.4	19.2
	Almost never	17.7	24.3
Wickford Junction			
	More than once a week	33.1	29.0
	Once a month	28.2	27.2
	A couple times a year	19.4	12.3
	Almost never	19.4	31.5
Quonset Gateway			
	More than once a week	37.1	31.2
	Once a month	21.8	23.6
	A couple times a year	18.5	10.1
	Almost never	22.6	35.1
Frenchtown Road			
	More than once a week	36.3	25.0
	Once a month	29.0	23.9
	A couple times a year	15.3	16.3
	Almost never	19.4	34.8

APPENDIX E:

Employer Survey Report

North Kingstown Employer Survey

Q1 What is the name of your business? (optional)

Answered: 26 Skipped: 29

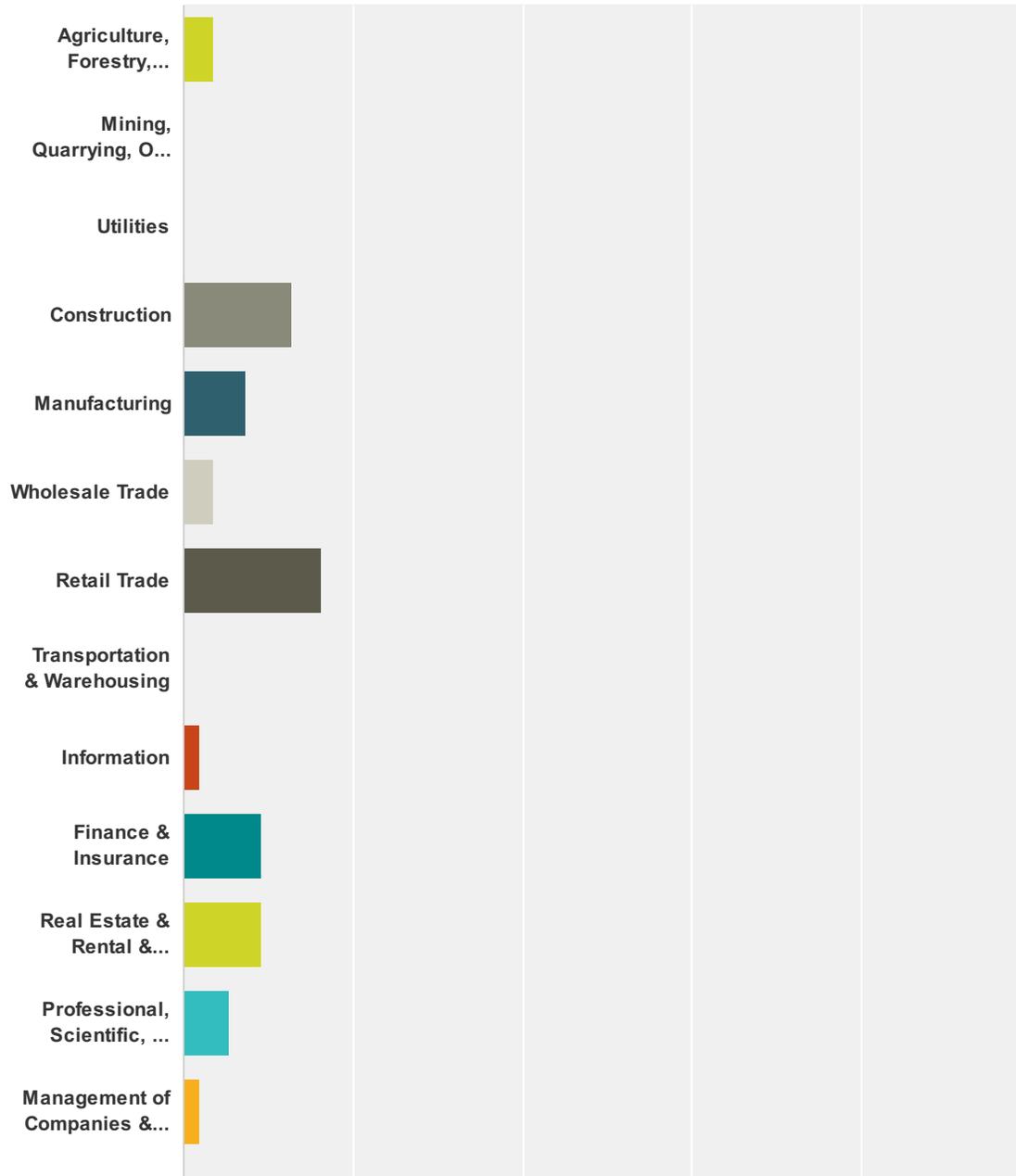
#	Responses	Date
1	Gardner's Wharf Seafood	12/28/2013 2:42 PM
2	Forward 5 Marketing	12/28/2013 11:08 AM
3	Quonset Development Corporation	12/26/2013 7:35 AM
4	BankNewport	12/26/2013 5:34 AM
5	Five Main	12/24/2013 6:14 PM
6	Caldwell & Johnson	12/24/2013 9:28 AM
7	Quonset Development Corporation	12/24/2013 6:12 AM
8	Hamilton Village Inn	12/24/2013 5:53 AM
9	fabric gallery	12/23/2013 3:58 PM
10	Citizens Banking	12/23/2013 1:37 PM
11	OrthoCore Physical Therapy	12/23/2013 10:18 AM
12	STSound	12/23/2013 10:16 AM
13	Natelli Systems, Inc.	12/23/2013 10:09 AM
14	ULTRA Scientific	12/23/2013 9:43 AM
15	Needle Designs	11/25/2013 9:42 AM
16	Pro-Paint Plus, Inc.	11/24/2013 2:52 PM
17	Total Look Salon	11/23/2013 1:38 PM
18	Tavern by the Sea	11/23/2013 7:49 AM
19	Vemaline Products dba Handles Unlimited	11/23/2013 6:13 AM
20	Gree Ink	11/22/2013 6:06 PM
21	Pedego Electric Bikes	11/22/2013 12:17 PM
22	North Kingstown Senior and Human Services	11/22/2013 12:10 PM
23	Sales Rep on the road for the area	11/22/2013 11:58 AM
24	SALK'S HARDWARE & MARINE	11/22/2013 11:56 AM

North Kingstown Employer Survey

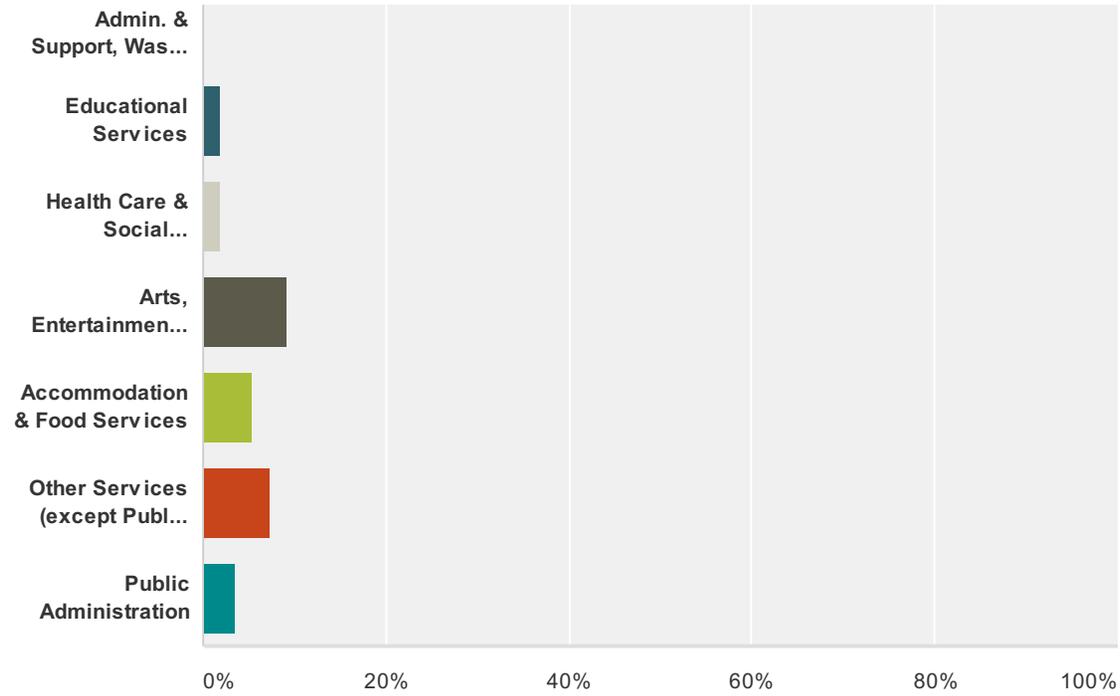
25	Coldwell Banker Residential Brokerage	11/22/2013 11:45 AM
26	Wireless Zone	11/22/2013 11:43 AM

Q2 Which primary NAICS industry code best describes your business?

Answered: 55 Skipped: 0



North Kingstown Employer Survey



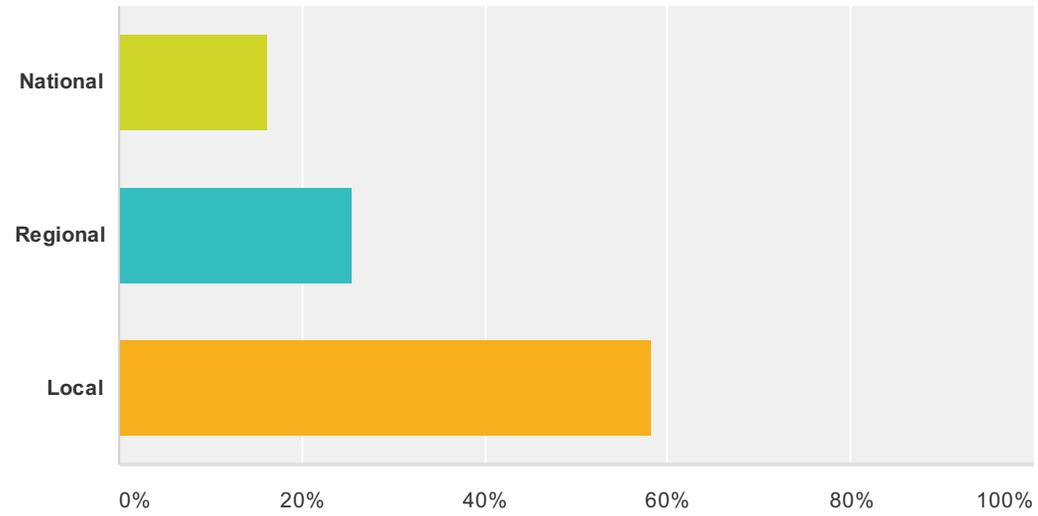
Answer Choices	Responses	
Agriculture, Forestry, Fishing & Hunting	3.64%	2
Mining, Quarrying, Oil & Gas Extraction	0%	0
Utilities	0%	0
Construction	12.73%	7
Manufacturing	7.27%	4
Wholesale Trade	3.64%	2
Retail Trade	16.36%	9
Transportation & Warehousing	0%	0
Information	1.82%	1
Finance & Insurance	9.09%	5
Real Estate & Rental & Leasing	9.09%	5

North Kingstown Employer Survey

Professional, Scientific, & Technical Services	5.45%	3
Management of Companies & Enterprises	1.82%	1
Admin. & Support, Waste Management & Remediation Services	0%	0
Educational Services	1.82%	1
Health Care & Social Assistance	1.82%	1
Arts, Entertainment, & Recreation	9.09%	5
Accommodation & Food Services	5.45%	3
Other Services (except Public Administration)	7.27%	4
Public Administration	3.64%	2
Total		55

Q3 What is the scale of your business?

Answered: 55 Skipped: 0



Answer Choices	Responses	
National	16.36%	9
Regional	25.45%	14
Local	58.18%	32
Total		55

North Kingstown Employer Survey

Q4 How many years have you been in business in North Kingstown?

Answered: 55 Skipped: 0

#	Responses	Date
1	62	1/8/2014 4:10 PM
2	37	1/2/2014 9:00 AM
3	10	12/28/2013 2:42 PM
4	1	12/28/2013 11:08 AM
5	8	12/26/2013 7:35 AM
6	6	12/26/2013 5:34 AM
7	16	12/24/2013 6:14 PM
8	45	12/24/2013 9:28 AM
9	40 years (formerly as the Port Authority)	12/24/2013 6:12 AM
10	18 years (about)	12/24/2013 5:53 AM
11	six	12/24/2013 5:36 AM
12	16	12/24/2013 4:45 AM
13	10	12/23/2013 7:58 PM
14	23	12/23/2013 3:58 PM
15	59 years	12/23/2013 3:25 PM
16	10	12/23/2013 1:37 PM
17	9	12/23/2013 12:54 PM
18	2	12/23/2013 12:38 PM
19	11	12/23/2013 12:25 PM
20	Over 60 years	12/23/2013 11:55 AM
21	3	12/23/2013 11:50 AM
22	1.5	12/23/2013 10:18 AM
23	5	12/23/2013 10:16 AM
24	22	12/23/2013 10:13 AM

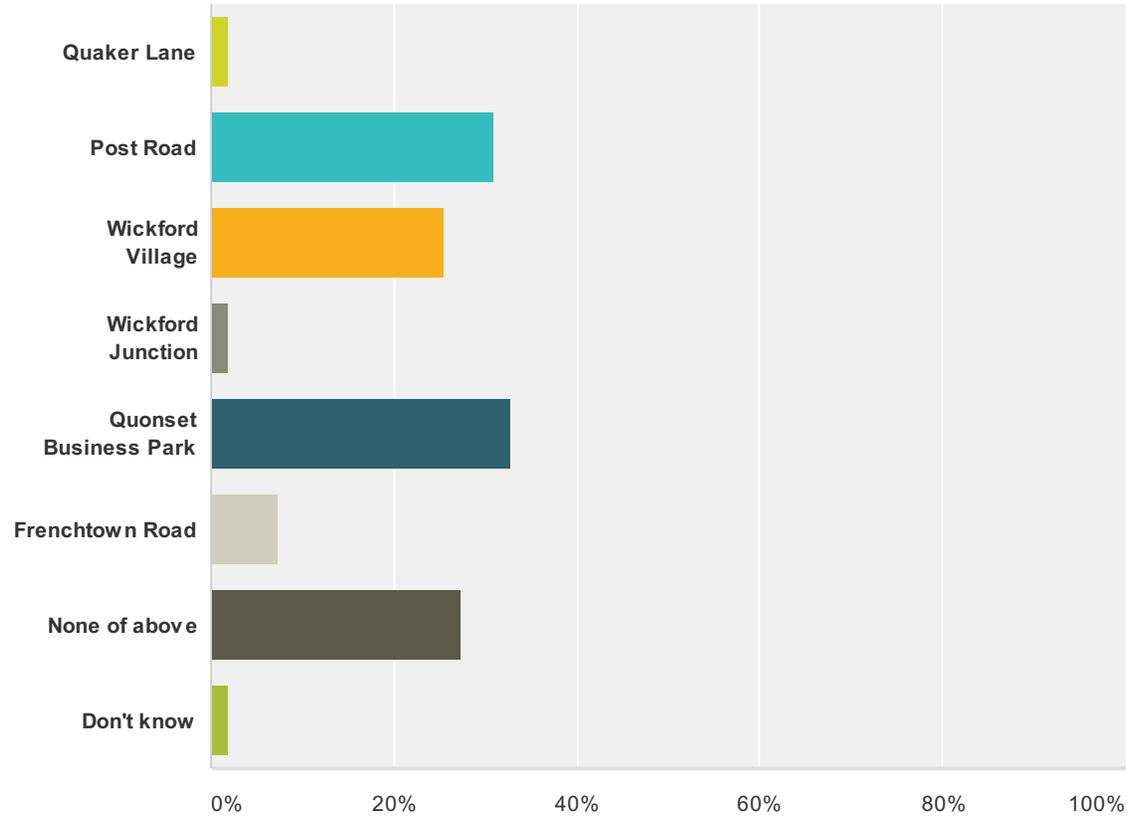
North Kingstown Employer Survey

25	15	12/23/2013 10:09 AM
26	3	12/23/2013 10:02 AM
27	21	12/23/2013 10:00 AM
28	40	12/23/2013 9:57 AM
29	28	12/23/2013 9:55 AM
30	25 years	12/23/2013 9:43 AM
31	2	11/26/2013 10:32 AM
32	9	11/25/2013 9:42 AM
33	33	11/24/2013 2:52 PM
34	seven years (business been there 30 years)	11/23/2013 1:38 PM
35	11	11/23/2013 9:39 AM
36	7	11/23/2013 7:49 AM
37	3	11/23/2013 6:13 AM
38	25 years	11/23/2013 4:20 AM
39	41	11/22/2013 6:06 PM
40	12 years	11/22/2013 4:17 PM
41	54 years	11/22/2013 2:28 PM
42	3	11/22/2013 1:26 PM
43	0	11/22/2013 12:33 PM
44	13	11/22/2013 12:32 PM
45	3 months	11/22/2013 12:17 PM
46	twenty three	11/22/2013 12:12 PM
47	45 yrs	11/22/2013 12:10 PM
48	20 yrs.	11/22/2013 12:06 PM
49	3	11/22/2013 12:06 PM
50	27 yrs	11/22/2013 12:01 PM
51	6	11/22/2013 11:58 AM
52	3	11/22/2013 11:56 AM
53	4	11/22/2013 11:53 AM
54	7	11/22/2013 11:45 AM

North Kingstown Employer Survey

Q5 Is your business located in or near (within a quarter-mile) the following key commercial corridors or business districts? Answer to the best of your knowledge. Select all the apply.

Answered: 55 Skipped: 0



Answer Choices	Responses
Quaker Lane	1.82% 1
Post Road	30.91% 17
Wickford Village	25.45% 14

North Kingstown Employer Survey

Wickford Junction	1.82%	1
Quonset Business Park	32.73%	18
Frenchtown Road	7.27%	4
None of above	27.27%	15
Don't know	1.82%	1
Total Respondents: 55		

North Kingstown Employer Survey

Q6 How many employees do you currently have at ALL locations in North Kingstown (including yourself)? (include contract labor; if sole proprietor, insert "1")

Answered: 50 Skipped: 5

Answer Choices	Responses	
Year-round, full-time	96%	48
Year-round, part-time	40%	20
Seasonal, full-time	26%	13
Seasonal, part-time	30%	15

#	Year-round, full-time	Date
1	4	1/8/2014 4:11 PM
2	1	1/2/2014 9:00 AM
3	1	1/1/2014 9:01 PM
4	4	12/28/2013 2:43 PM
5	1	12/28/2013 11:08 AM
6	43	12/26/2013 7:36 AM
7	10	12/26/2013 5:35 AM
8	1	12/24/2013 6:15 PM
9	8	12/24/2013 9:28 AM
10	2	12/24/2013 5:54 AM
11	1	12/24/2013 5:38 AM
12	1	12/24/2013 4:45 AM
13	1	12/23/2013 7:59 PM
14	one	12/23/2013 4:00 PM
15	"1"	12/23/2013 3:27 PM
16	6	12/23/2013 1:38 PM

North Kingstown Employer Survey

17	3	12/23/2013 12:39 PM
18	1	12/23/2013 12:26 PM
19	6	12/23/2013 11:50 AM
20	1	12/23/2013 10:18 AM
21	1	12/23/2013 10:16 AM
22	11	12/23/2013 10:14 AM
23	1	12/23/2013 10:09 AM
24	5	12/23/2013 10:02 AM
25	5	12/23/2013 9:58 AM
26	15	12/23/2013 9:56 AM
27	48	12/23/2013 9:44 AM
28	6	11/26/2013 10:32 AM
29	1	11/25/2013 9:43 AM
30	3	11/24/2013 2:53 PM
31	8	11/23/2013 1:39 PM
32	2	11/23/2013 9:40 AM
33	18	11/23/2013 6:14 AM
34	1	11/22/2013 6:07 PM
35	0	11/22/2013 4:18 PM
36	4	11/22/2013 2:30 PM
37	2	11/22/2013 1:27 PM
38	1	11/22/2013 12:32 PM
39	1	11/22/2013 12:18 PM
40	3	11/22/2013 12:10 PM
41	18	11/22/2013 12:07 PM
42	6	11/22/2013 12:06 PM
43	7	11/22/2013 12:02 PM
44	1	11/22/2013 11:59 AM
45	4	11/22/2013 11:56 AM
46	16	11/22/2013 11:54 AM

North Kingstown Employer Survey

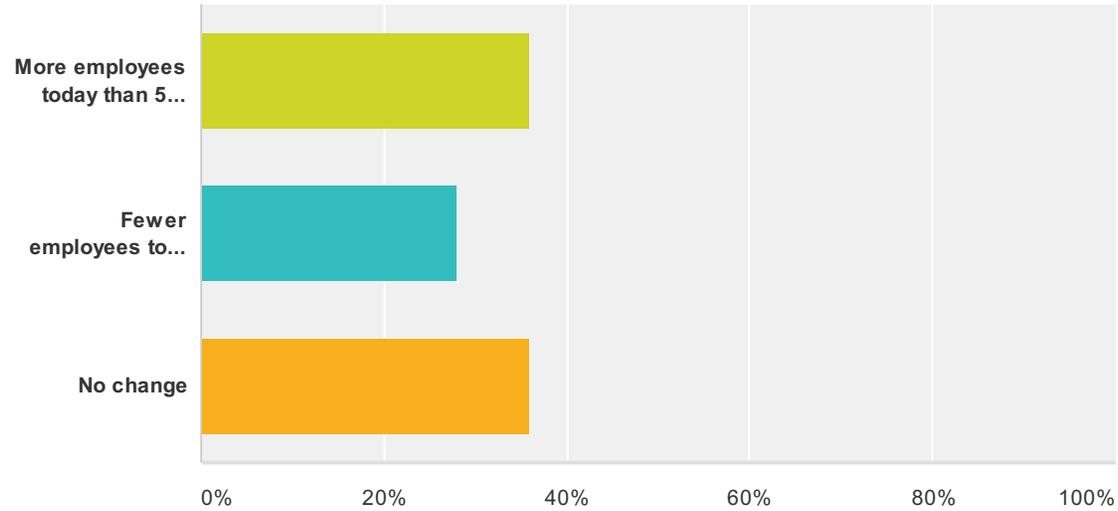
47	1	11/22/2013 11:46 AM
48	4	11/22/2013 11:44 AM
#	Year-round, part-time	Date
1	15	1/8/2014 4:11 PM
2	3	12/28/2013 2:43 PM
3	0	12/28/2013 11:08 AM
4	6	12/24/2013 9:28 AM
5	10	12/24/2013 5:54 AM
6	2	12/24/2013 5:38 AM
7	3	12/23/2013 12:39 PM
8	2	12/23/2013 10:14 AM
9	20	12/23/2013 9:56 AM
10	1	12/23/2013 9:44 AM
11	1	11/26/2013 10:32 AM
12	1	11/23/2013 6:14 AM
13	9	11/22/2013 6:07 PM
14	0	11/22/2013 4:18 PM
15	0	11/22/2013 2:30 PM
16	3	11/22/2013 1:27 PM
17	1	11/22/2013 12:18 PM
18	7	11/22/2013 12:10 PM
19	1	11/22/2013 12:07 PM
20	9	11/22/2013 11:56 AM
#	Seasonal, full-time	Date
1	0	1/8/2014 4:11 PM
2	3	12/28/2013 2:43 PM
3	0	12/28/2013 11:08 AM
4	0	12/24/2013 5:38 AM
5	10	12/23/2013 12:54 PM
6	10	12/23/2013 10:02 AM

North Kingstown Employer Survey

7	4	12/23/2013 9:58 AM
8	0	12/23/2013 9:44 AM
9	0	11/22/2013 4:18 PM
10	0	11/22/2013 2:30 PM
11	1	11/22/2013 12:18 PM
12	00	11/22/2013 12:10 PM
13	2	11/22/2013 12:02 PM
#	Seasonal, part-time	Date
1	3	1/8/2014 4:11 PM
2	5	12/28/2013 2:43 PM
3	0	12/28/2013 11:08 AM
4	1	12/24/2013 6:15 PM
5	4	12/24/2013 5:38 AM
6	2	12/23/2013 12:54 PM
7	50	12/23/2013 12:39 PM
8	7	12/23/2013 11:56 AM
9	12	12/23/2013 9:58 AM
10	7	12/23/2013 9:56 AM
11	0	12/23/2013 9:44 AM
12	0	11/22/2013 4:18 PM
13	0	11/22/2013 2:30 PM
14	2	11/22/2013 12:18 PM
15	0	11/22/2013 12:10 PM

Q7 How does the number of employees you have today compare to the number of employees you had 5 years ago?

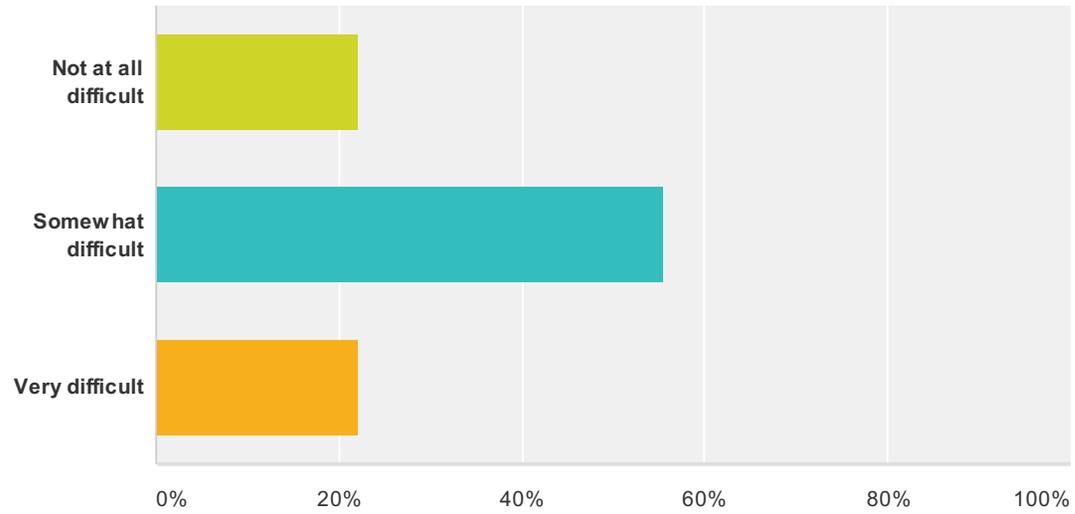
Answered: 50 Skipped: 5



Answer Choices	Responses
More employees today than 5 years ago	36% 18
Fewer employees today than 5 years ago	28.00% 14
No change	36% 18
Total	50

Q8 How difficult has it been to find additional qualified employees?

Answered: 18 Skipped: 37



Answer Choices	Responses
Not at all difficult	22.22% 4
Somewhat difficult	55.56% 10
Very difficult	22.22% 4
Total	18

North Kingstown Employer Survey

Q9 What approximate square footage does your business occupy in North Kingstown? (Include all properties)

Answered: 48 Skipped: 7

Answer Choices	Responses
Building Square Feet	100% 48

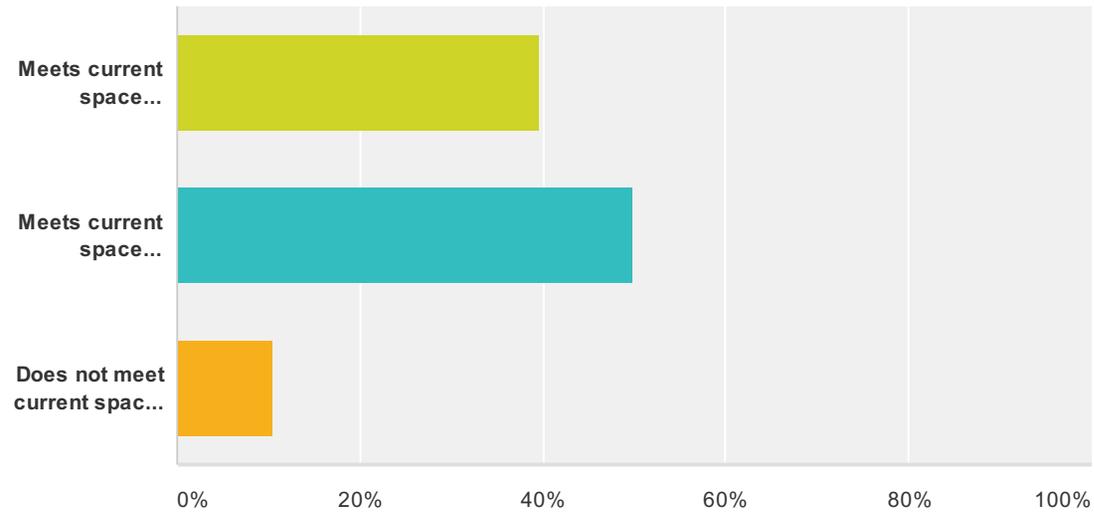
#	Building Square Feet	Date
1	16000	1/8/2014 4:12 PM
2	400	1/2/2014 9:01 AM
3	0	1/1/2014 9:01 PM
4	3500	12/28/2013 2:44 PM
5	400	12/28/2013 11:09 AM
6	2,000,000	12/26/2013 7:36 AM
7	6500	12/26/2013 5:35 AM
8	500	12/24/2013 6:17 PM
9	4000	12/24/2013 9:29 AM
10	Don't know	12/24/2013 5:55 AM
11	1200	12/24/2013 5:39 AM
12	950	12/24/2013 4:46 AM
13	0	12/23/2013 7:59 PM
14	1500	12/23/2013 4:03 PM
15	30,000 sq ft +/-	12/23/2013 3:29 PM
16	300	12/23/2013 1:38 PM
17	8800	12/23/2013 12:55 PM
18	80000	12/23/2013 12:39 PM
19	800	12/23/2013 12:27 PM
20	?	12/23/2013 11:57 AM
21	1000	12/23/2013 11:51 AM

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22	1,400	12/23/2013 10:18 AM
23	120	12/23/2013 10:17 AM
24	9500	12/23/2013 10:14 AM
25	256	12/23/2013 10:10 AM
26	12000	12/23/2013 10:02 AM
27	5000	12/23/2013 9:58 AM
28	100000	12/23/2013 9:57 AM
29	33,000	12/23/2013 9:44 AM
30	2500	11/26/2013 10:32 AM
31	900	11/25/2013 9:43 AM
32	1800 sq.feet	11/24/2013 2:54 PM
33	do not know	11/23/2013 1:41 PM
34	1800	11/23/2013 9:40 AM
35	25,000	11/23/2013 6:14 AM
36	3,300	11/22/2013 6:08 PM
37	1500	11/22/2013 4:18 PM
38	5500	11/22/2013 2:30 PM
39	10,000	11/22/2013 1:28 PM
40	300	11/22/2013 12:33 PM
41	1500	11/22/2013 12:19 PM
42	15,000	11/22/2013 12:08 PM
43	600	11/22/2013 12:07 PM
44	5,000	11/22/2013 12:03 PM
45	na	11/22/2013 11:59 AM
46	12000	11/22/2013 11:57 AM
47	6,000	11/22/2013 11:54 AM
48	.	11/22/2013 11:44 AM

Q10 Which of the following best describes the space (interior and exterior) your business presently occupies?

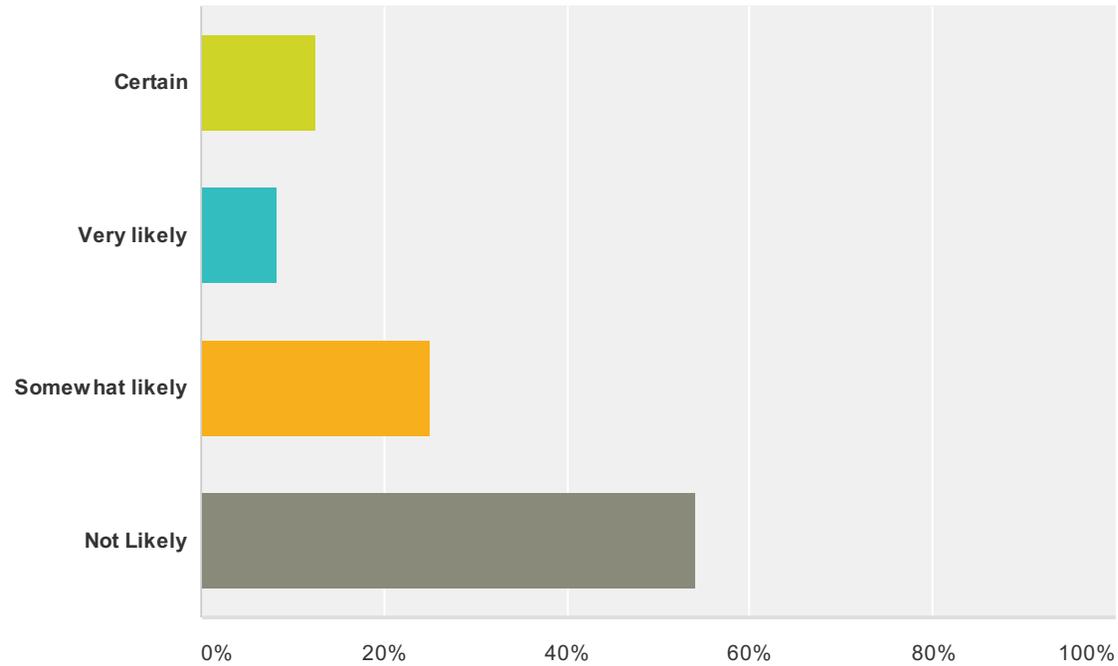
Answered: 48 Skipped: 7



Answer Choices	Responses
Meets current space requirements AND allows for future expansion.	39.58% 19
Meets current space requirements, BUT does not allow for future expansion.	50% 24
Does not meet current space requirements.	10.42% 5
Total	48

Q11 Looking to the future, what is the likelihood that your business will need to expand or relocate?

Answered: 48 Skipped: 7



Answer Choices	Responses
Certain	12.50% 6
Very likely	8.33% 4
Somewhat likely	25% 12
Not Likely	54.17% 26
Total	48

North Kingstown Employer Survey

Q12 What are your future office space needs in approximate square footage?

Answered: 16 Skipped: 39

Answer Choices	Responses
Expanded facility (Building Sq. Ft.)	62.50% 10
New facility (Building Sq. Ft)	68.75% 11

#	Expanded facility (Building Sq. Ft.)	Date
1	N/A	12/28/2013 2:45 PM
2	0	12/26/2013 7:37 AM
3	N/A	12/23/2013 10:15 AM
4	10,000	12/23/2013 9:45 AM
5	same	11/26/2013 10:32 AM
6	1500	11/25/2013 9:45 AM
7	no room to expand	11/23/2013 1:44 PM
8	400	11/22/2013 4:20 PM
9	0	11/22/2013 12:08 PM
10	work from home	11/22/2013 12:00 PM

#	New facility (Building Sq. Ft)	Date
1	500	1/1/2014 9:03 PM
2	12000	12/26/2013 7:37 AM
3	1200	12/23/2013 12:28 PM
4	5000	12/23/2013 11:52 AM
5	5,000	12/23/2013 10:19 AM
6	n/a	11/26/2013 10:32 AM
7	don't know	11/23/2013 1:44 PM
8	25,000	11/23/2013 6:17 AM
9	400	11/22/2013 6:09 PM
10	2000	11/22/2013 12:08 PM

North Kingstown Employer Survey

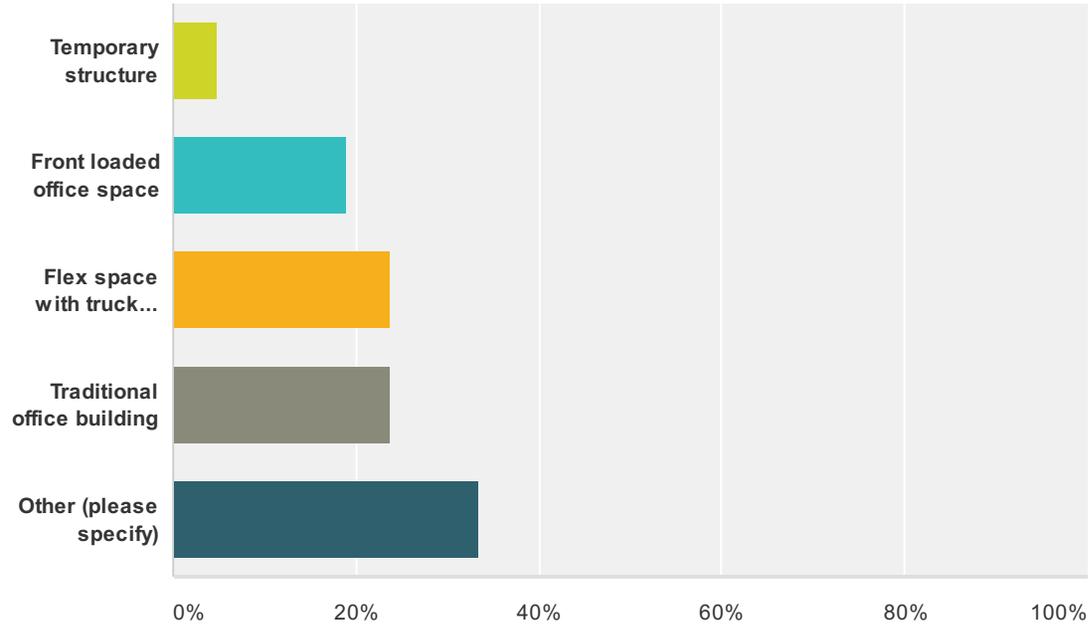
11

none

11/22/2013 12:00 PM

Q13 Which type of building/addition would you be most likely to use?

Answered: 21 Skipped: 34



Answer Choices	Responses
Temporary structure	4.76% 1
Front loaded office space	19.05% 4
Flex space with truck doors in back	23.81% 5
Traditional office building	23.81% 5
Other (please specify)	33.33% 7
Total Respondents: 21	

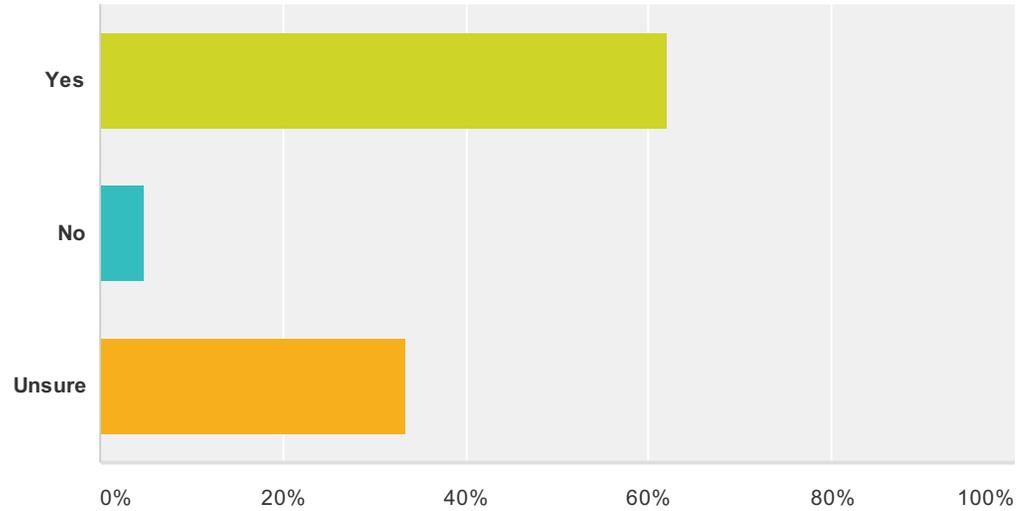
#	Other (please specify)	Date
1	Mobile Building	12/28/2013 2:45 PM

North Kingstown Employer Survey

2	N/A	12/23/2013 10:15 AM
3	showroom in the front, production in the back	11/25/2013 9:45 AM
4	not sure	11/23/2013 1:44 PM
5	considering moving business	11/23/2013 6:17 AM
6	cinder block addition	11/22/2013 4:20 PM
7	home office	11/22/2013 12:00 PM

Q14 Do you anticipate you will be able to meet your addition or expansion needs in North Kingstown?

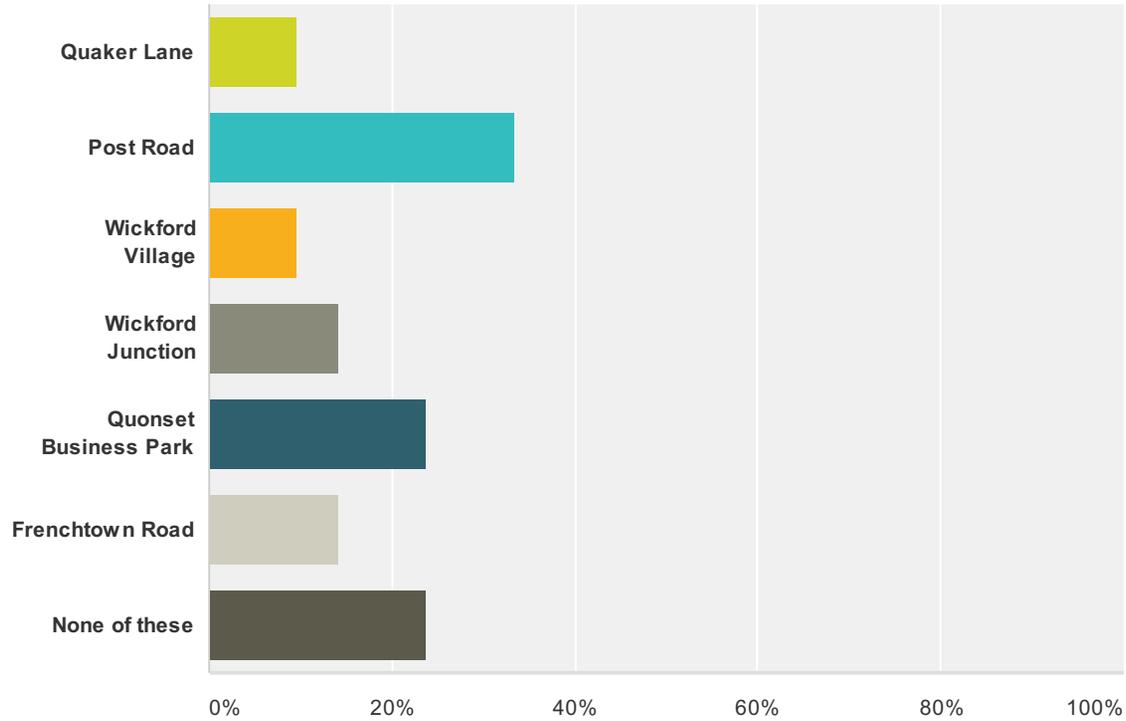
Answered: 21 Skipped: 34



Answer Choices	Responses	
Yes	61.90%	13
No	4.76%	1
Unsure	33.33%	7
Total		21

Q15 If relocating or expanding, would you look to do so in any of the following districts?

Answered: 21 Skipped: 34



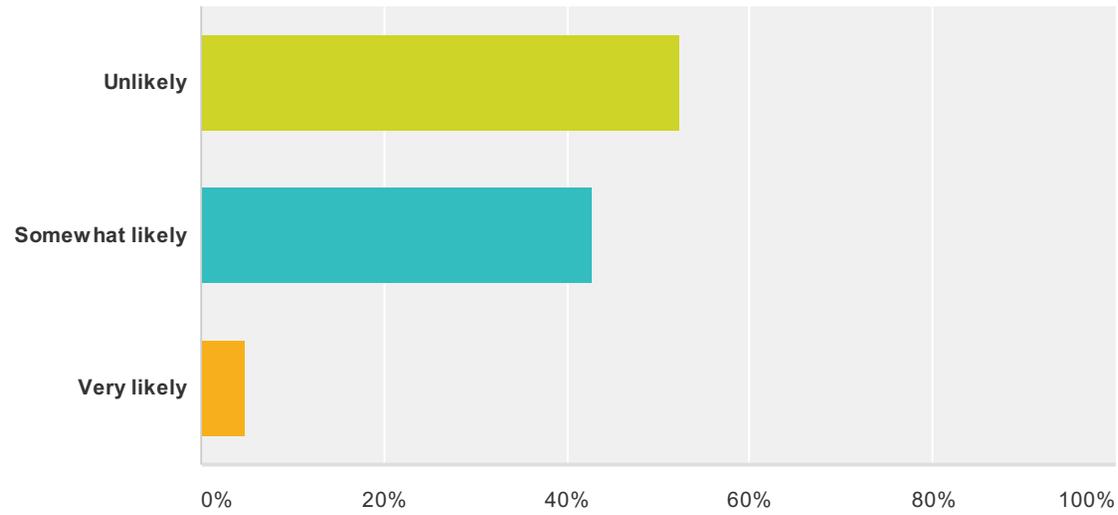
Answer Choices	Responses
Quaker Lane	9.52% 2
Post Road	33.33% 7
Wickford Village	9.52% 2
Wickford Junction	14.29% 3
Quonset Business Park	23.81% 5
Frenchtown Road	14.29% 3

North Kingstown Employer Survey

None of these	23.81%	5
Total Respondents: 21		
#	Other (please specify)	Date
1	Hamilton - Allenton	11/22/2013 4:20 PM

Q16 Looking to the future, what is the likelihood that your business will leave North Kingstown?

Answered: 21 Skipped: 34



Answer Choices	Responses
Unlikely	52.38% 11
Somewhat likely	42.86% 9
Very likely	4.76% 1
Total	21

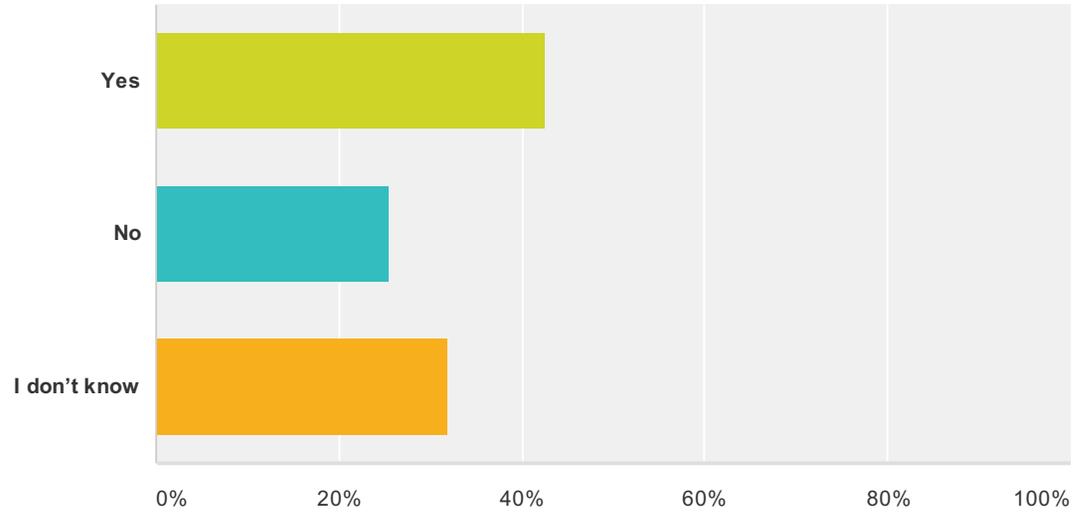
Q17 If your business would likely leave, where would it likely relocate?

Answered: 8 Skipped: 47

#	Responses	Date
1	East Greenwich	12/28/2013 2:46 PM
2	A place that makes sense economically	12/23/2013 12:29 PM
3	Warwick - Providence - Newport	12/23/2013 11:52 AM
4	N/A	12/23/2013 10:15 AM
5	Undecide	12/23/2013 9:45 AM
6	Somewhere where the Town encourages commercial developement	11/23/2013 9:42 AM
7	Fall River, MA or Attleboro, MA	11/23/2013 6:17 AM
8	Warwick - Providence - Newport	11/22/2013 12:08 PM

Q18 To your knowledge, are your employees able to find suitable and affordable housing within North Kingstown?

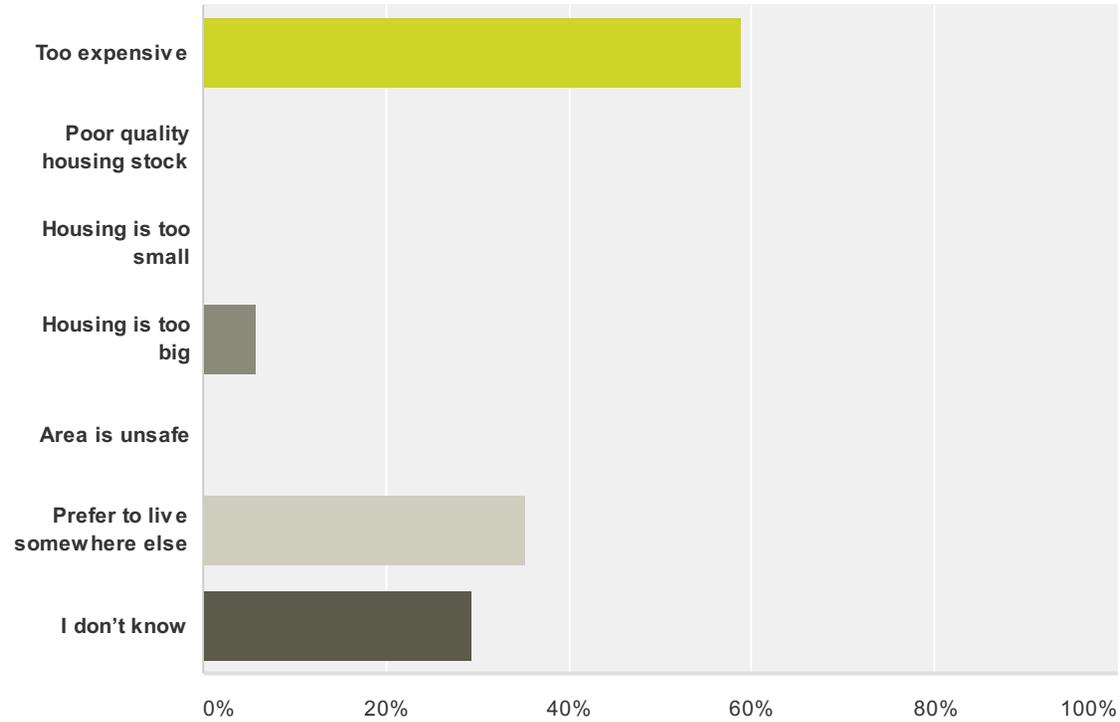
Answered: 47 Skipped: 8



Answer Choices	Responses
Yes	42.55% 20
No	25.53% 12
I don't know	31.91% 15
Total Respondents: 47	

Q19 If no, what is the primary reason(s) why your employees are not able to find suitable and affordable housing within North Kingstown?

Answered: 17 Skipped: 38



Answer Choices	Responses
Too expensive	58.82% 10
Poor quality housing stock	0% 0
Housing is too small	0% 0
Housing is too big	5.88% 1
Area is unsafe	0% 0

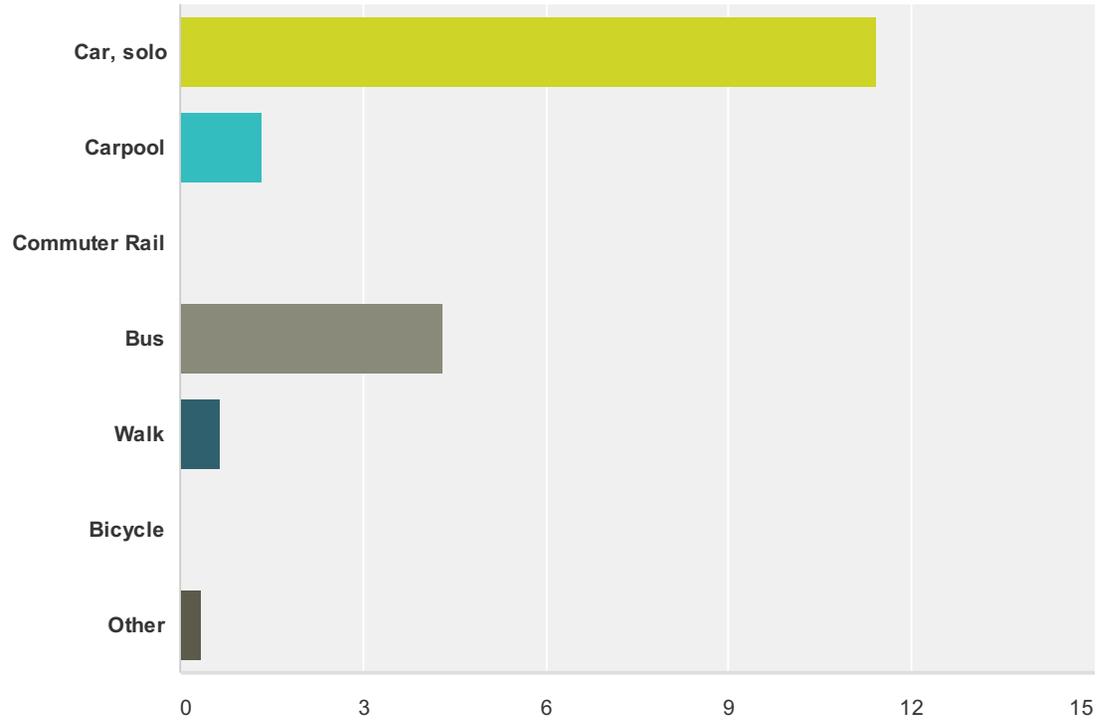
North Kingstown Employer Survey

Prefer to live somewhere else	35.29%	6
I don't know	29.41%	5
Total Respondents: 17		

#	Other (please specify)	Date
1	Property Taxes are too high thus they look elsewhere	12/23/2013 11:53 AM
2	all live in surrounding areas but 1 lives in NK	11/23/2013 1:45 PM
3	I live in Riverside.	11/22/2013 12:19 PM
4	Taxes are extremely high so I don't see people moving into town	11/22/2013 12:00 PM

Q20 How many of your employees commute to work by the following modes? (approximately)

Answered: 47 Skipped: 8



Answer Choices	Average Number	Total Number	Responses
Car, solo	11	492	43
Carpool	1	4	3
Commuter Rail	0	0	1
Bus	4	13	3
Walk	1	2	3
Bicycle	0	0	1

North Kingstown Employer Survey

Other	0	1	3
Total Respondents: 47			

#	Car, solo	Date
1	18	1/8/2014 4:15 PM
2	1	1/2/2014 9:02 AM
3	1	1/1/2014 9:03 PM
4	12	12/28/2013 2:48 PM
5	43	12/26/2013 7:38 AM
6	10	12/26/2013 5:36 AM
7	1	12/24/2013 6:18 PM
8	8	12/24/2013 9:32 AM
9	11	12/24/2013 5:56 AM
10	3	12/24/2013 5:43 AM
11	1	12/24/2013 4:46 AM
12	1	12/23/2013 4:05 PM
13	1	12/23/2013 3:30 PM
14	6	12/23/2013 1:38 PM
15	12	12/23/2013 12:57 PM
16	50	12/23/2013 12:39 PM
17	1	12/23/2013 12:29 PM
18	7	12/23/2013 11:58 AM
19	5	12/23/2013 11:53 AM
20	1	12/23/2013 10:20 AM
21	10	12/23/2013 10:16 AM
22	14	12/23/2013 10:03 AM
23	16	12/23/2013 9:59 AM
24	90	12/23/2013 9:58 AM
25	46	12/23/2013 9:46 AM
26	7	11/26/2013 10:32 AM

North Kingstown Employer Survey

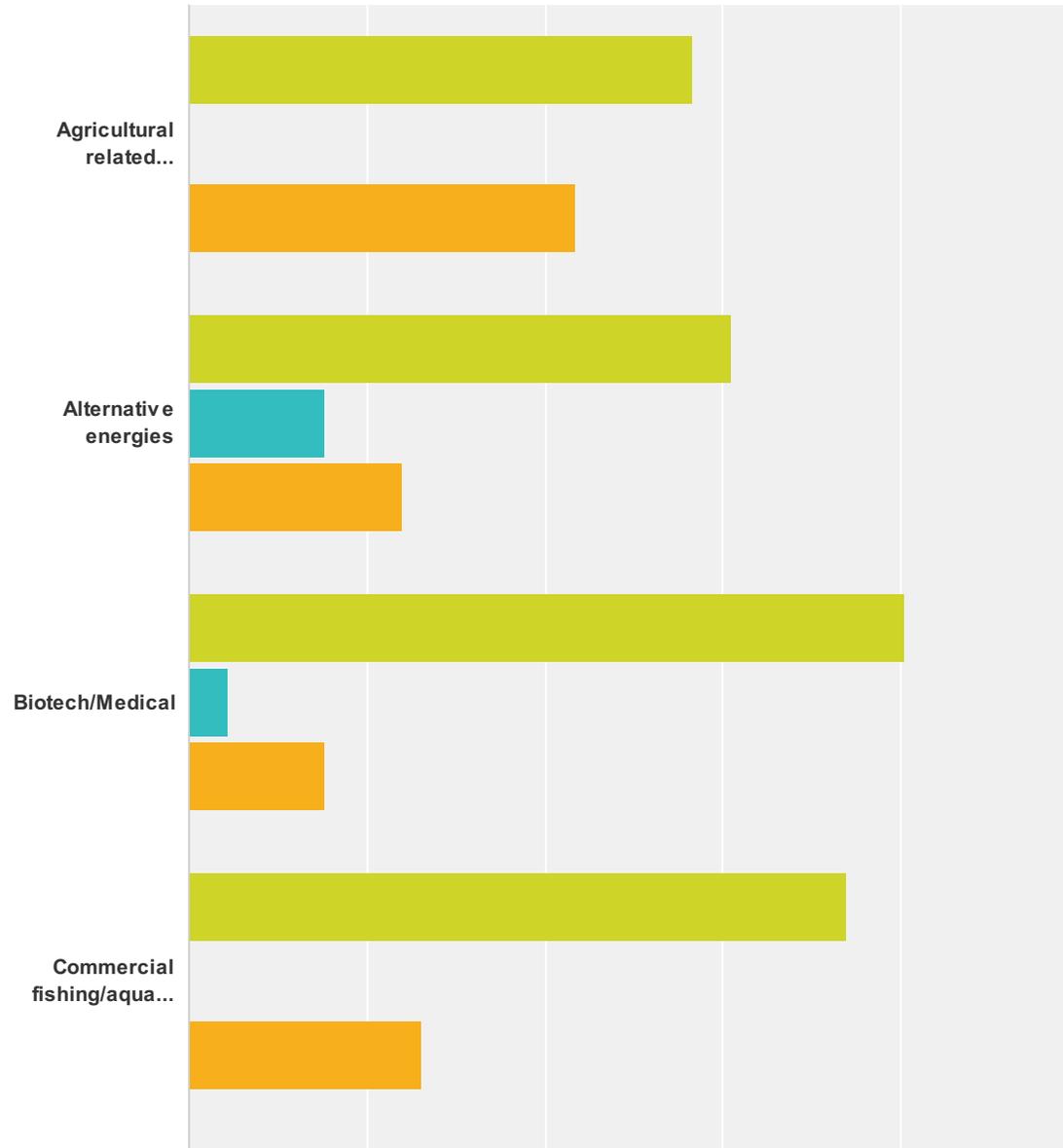
27	1	11/25/2013 9:45 AM
28	3	11/24/2013 2:55 PM
29	8	11/23/2013 1:46 PM
30	2	11/23/2013 9:43 AM
31	17	11/23/2013 6:20 AM
32	10	11/22/2013 6:11 PM
33	20	11/22/2013 4:20 PM
34	3	11/22/2013 2:31 PM
35	5	11/22/2013 1:29 PM
36	1	11/22/2013 12:34 PM
37	1	11/22/2013 12:20 PM
38	6	11/22/2013 12:08 PM
39	7	11/22/2013 12:04 PM
40	1	11/22/2013 12:01 PM
41	13	11/22/2013 11:58 AM
42	16	11/22/2013 11:55 AM
43	2	11/22/2013 11:45 AM
#	Carpool	Date
1	0	12/23/2013 9:46 AM
2	2	11/23/2013 6:20 AM
3	2	11/22/2013 11:45 AM
#	Commuter Rail	Date
1	0	12/23/2013 9:46 AM
#	Bus	Date
1	1	12/24/2013 5:56 AM
2	10	12/23/2013 9:58 AM
3	2	12/23/2013 9:46 AM
#	Walk	Date
1	1	12/23/2013 10:18 AM
2	1	12/23/2013 10:10 AM

North Kingstown Employer Survey

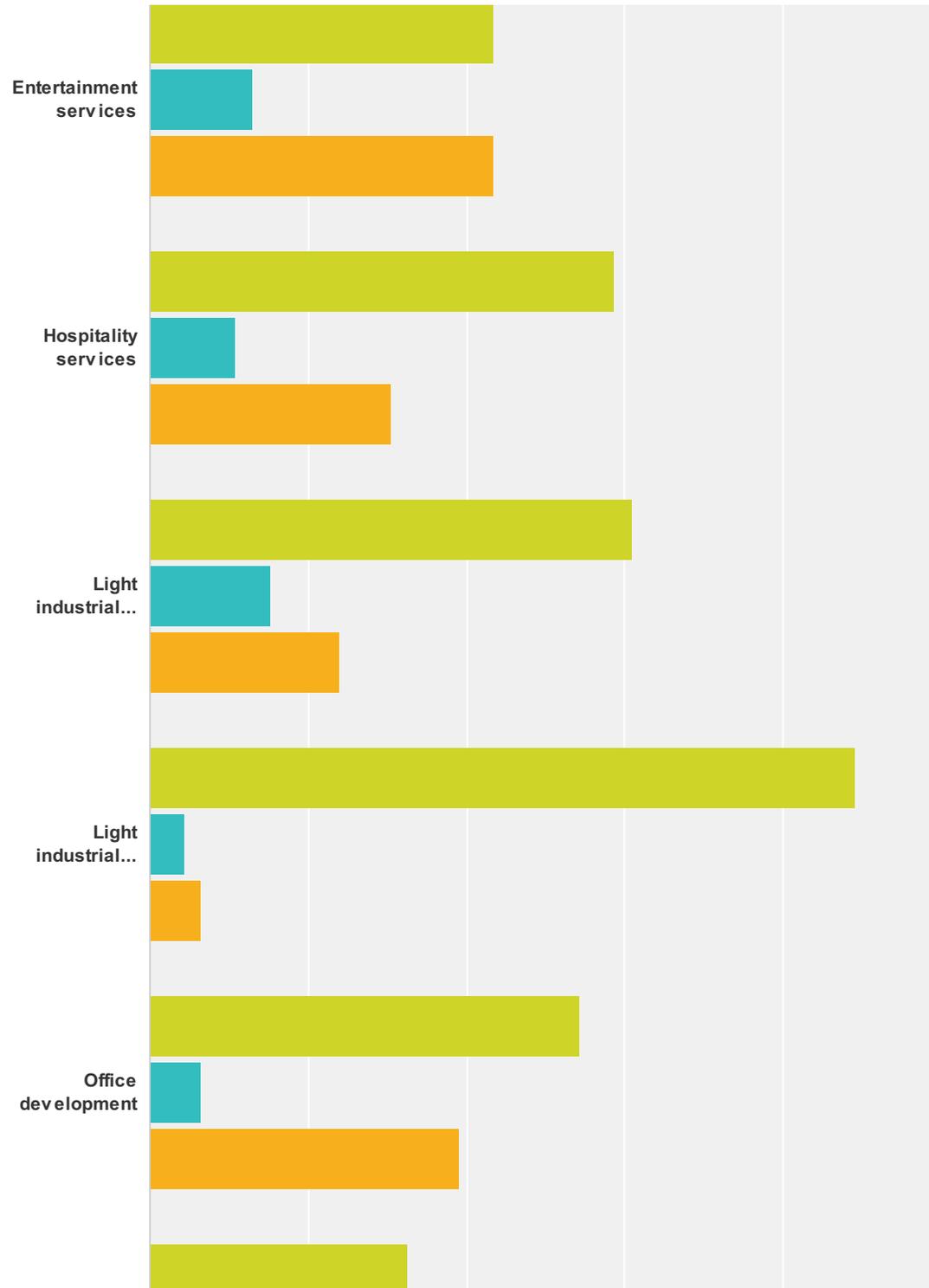
3	0	12/23/2013 9:46 AM
#	Bicycle	Date
1	0	12/23/2013 9:46 AM
#	Other	Date
1	1	12/28/2013 11:10 AM
2	0	12/23/2013 8:00 PM
3	0	12/23/2013 9:46 AM

Q21 What types of businesses would you like to see expanded or created in North Kingstown? Indicate if you are in favor or opposed to each type.

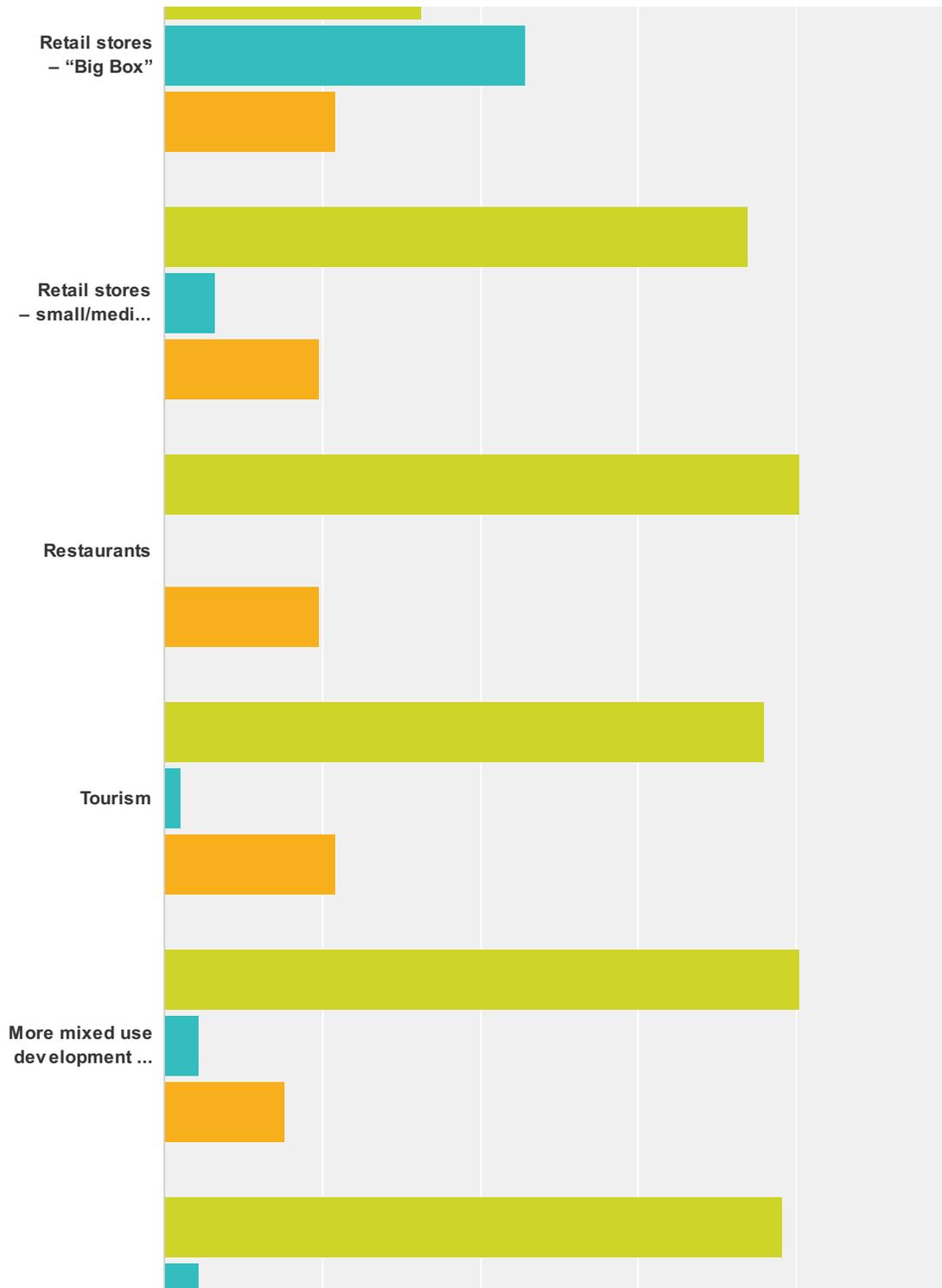
Answered: 46 Skipped: 9



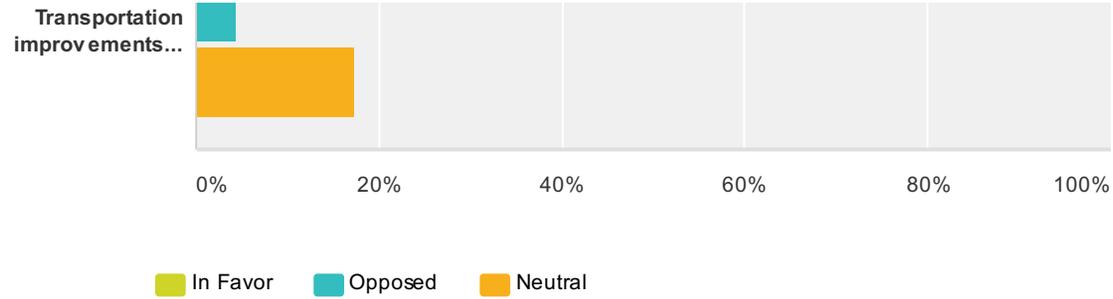
North Kingstown Employer Survey



North Kingstown Employer Survey



North Kingstown Employer Survey



	In Favor	Opposed	Neutral	Total
Agricultural related businesses	56.52% 26	0% 0	43.48% 20	46
Alternative energies	60.87% 28	15.22% 7	23.91% 11	46
Biotech/Medical	80.43% 37	4.35% 2	15.22% 7	46
Commercial fishing/aquaculture or fish farming	73.91% 34	0% 0	26.09% 12	46
Entertainment services	43.48% 20	13.04% 6	43.48% 20	46
Hospitality services	58.70% 27	10.87% 5	30.43% 14	46
Light industrial development including manufacturing, research & assembly OUTSIDE the Quonset-Davisville Park	60.87% 28	15.22% 7	23.91% 11	46
Light industrial development including manufacturing, research & assembly INSIDE the Quonset-Davisville Park	89.13% 41	4.35% 2	6.52% 3	46
Office development	54.35% 25	6.52% 3	39.13% 18	46
Retail stores – “Big Box”	32.61% 15	45.65% 21	21.74% 10	46
Retail stores – small/medium business	73.91% 34	6.52% 3	19.57% 9	46
Restaurants	80.43% 37	0% 0	19.57% 9	46
Tourism	76.09% 35	2.17% 1	21.74% 10	46
More mixed use development at the Quonset- Davisville Park including office, retail, hotel, recreation, waterfront access	80.43% 37	4.35% 2	15.22% 7	46

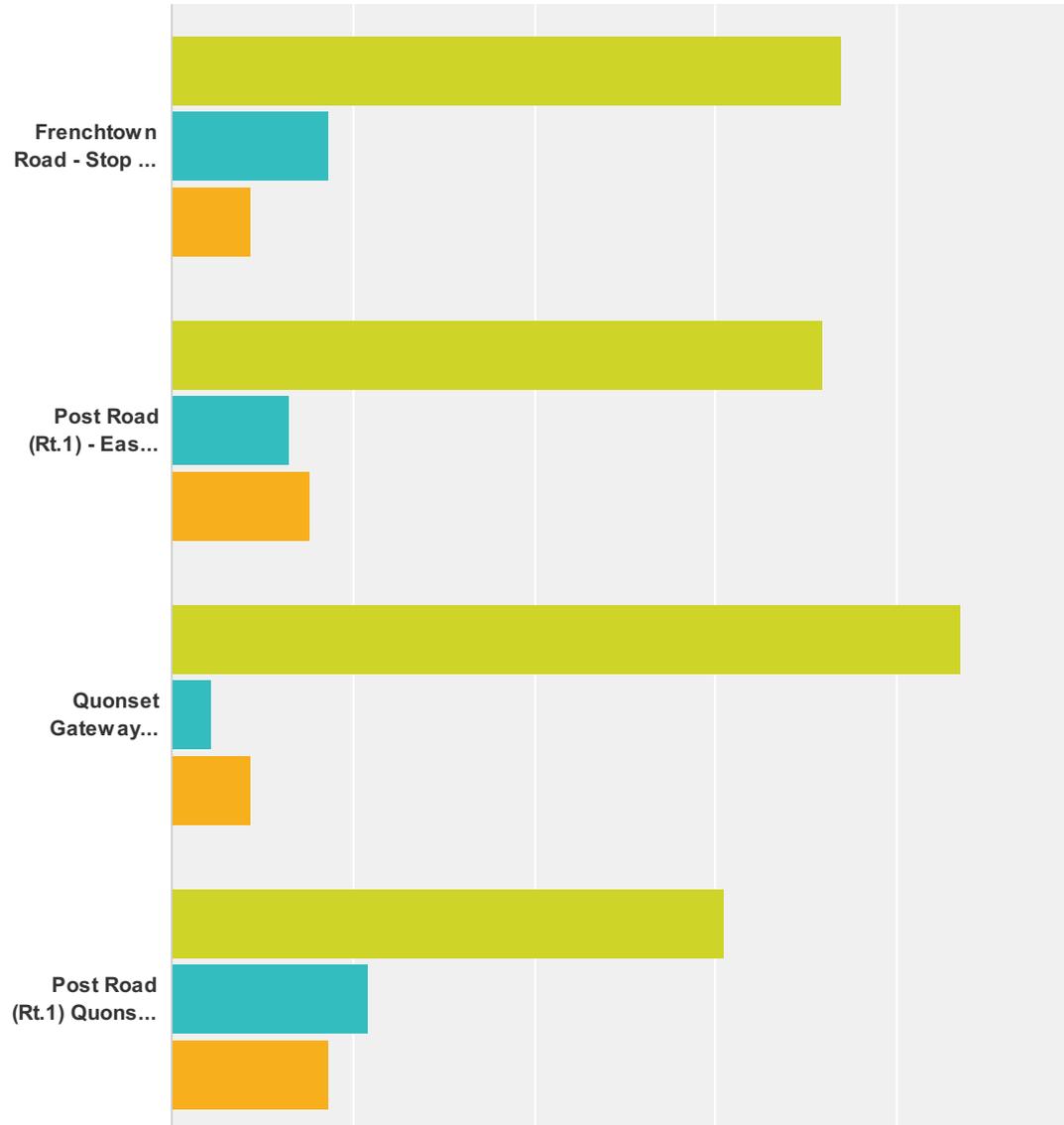
North Kingstown Employer Survey

more mixed use development at the Quonset-Dayville Park including office, retail, hotel, recreation, waterfront access	50.79 % 37	7.99 % 2	19.44 % 7	46
Transportation improvements inside Quonset, including ferry, rail and airport services.	78.26% 36	4.35% 2	17.39% 8	46

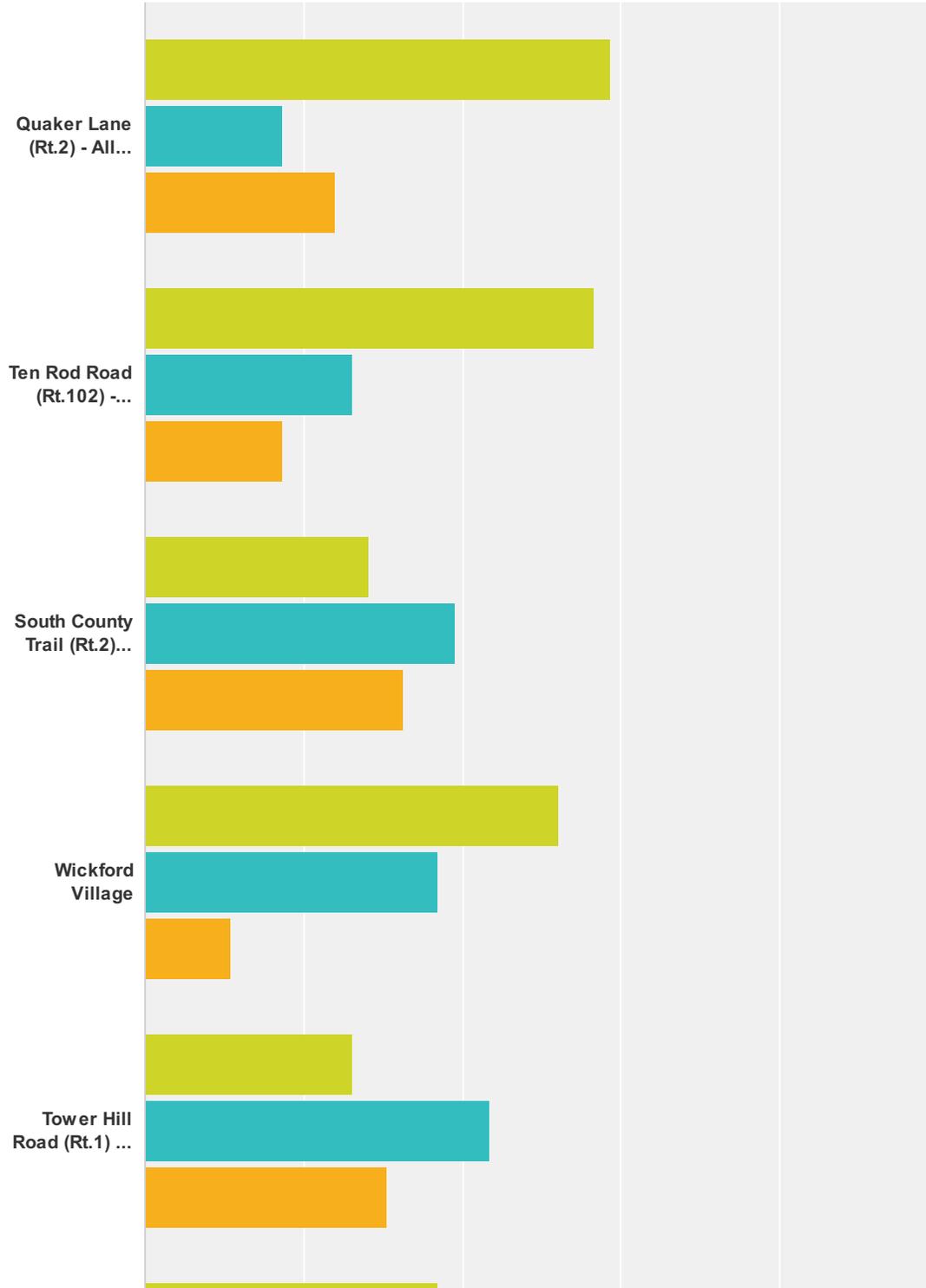
#	Other (please specify)	Date
1	Transportation services including, taxi, water taxi, limousine, shuttles connecting Quonset and the ferry to train stations to the villages. Expanded marine services and amenities for boaters.	12/24/2013 6:32 PM
2	Need to control growth, don't want to look like Warwick/Cranston.	12/23/2013 10:12 AM
3	restaurants restaurants restaurants	11/22/2013 12:02 PM
4	Restaurants and services in Quonset for employees	11/22/2013 11:56 AM

Q22 Commercial development includes retail, office, light industrial and service type business. Would you favor or oppose locating more commercial developments in the following areas?

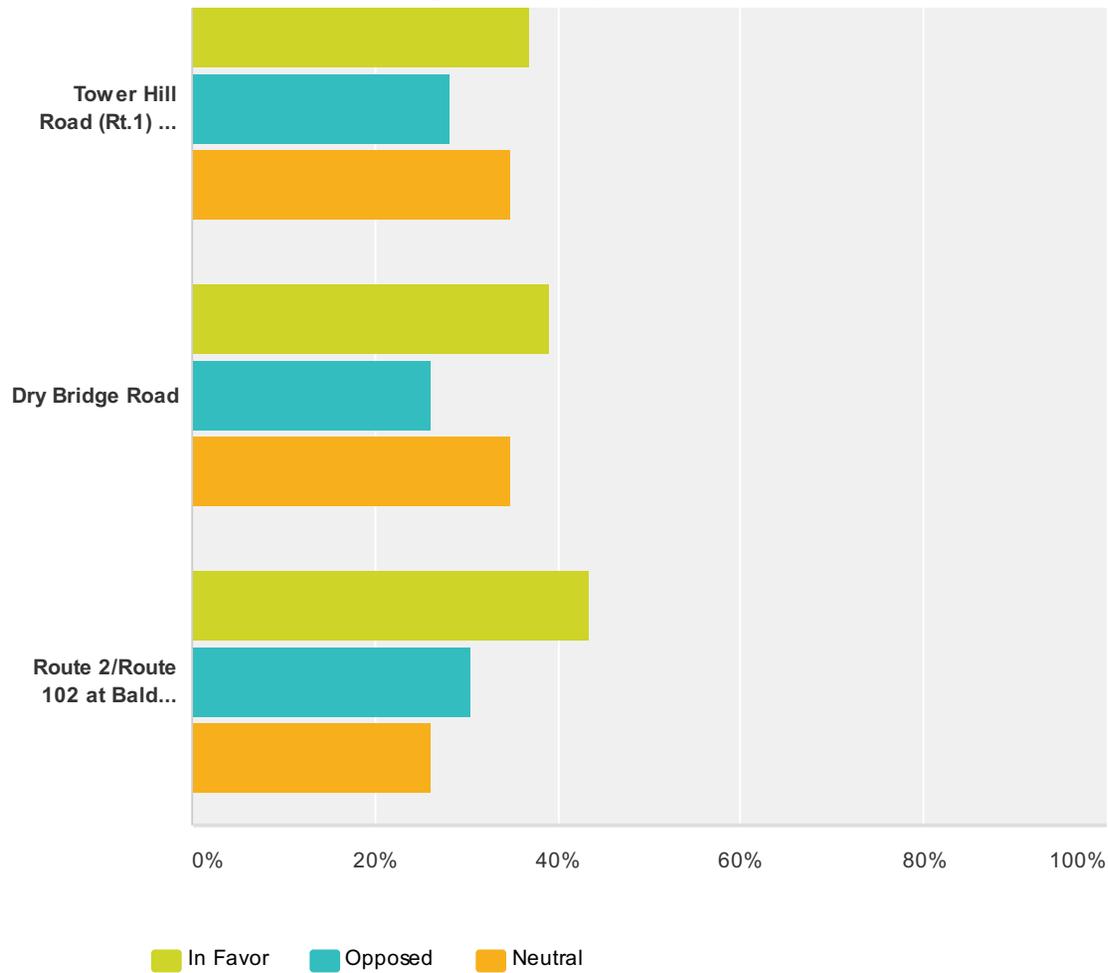
Answered: 46 Skipped: 9



North Kingstown Employer Survey



North Kingstown Employer Survey



	In Favor	Opposed	Neutral	Total
Frenchtown Road - Stop & Shop vicinity	73.91% 34	17.39% 8	8.70% 4	46
Post Road (Rt.1) - East Greenwich to Quonset	71.74% 33	13.04% 6	15.22% 7	46
Quonset Gateway District	86.96% 40	4.35% 2	8.70% 4	46
Post Road (Rt.1) Quonset to Wickford	60.87% 28	21.74% 10	17.39% 8	46

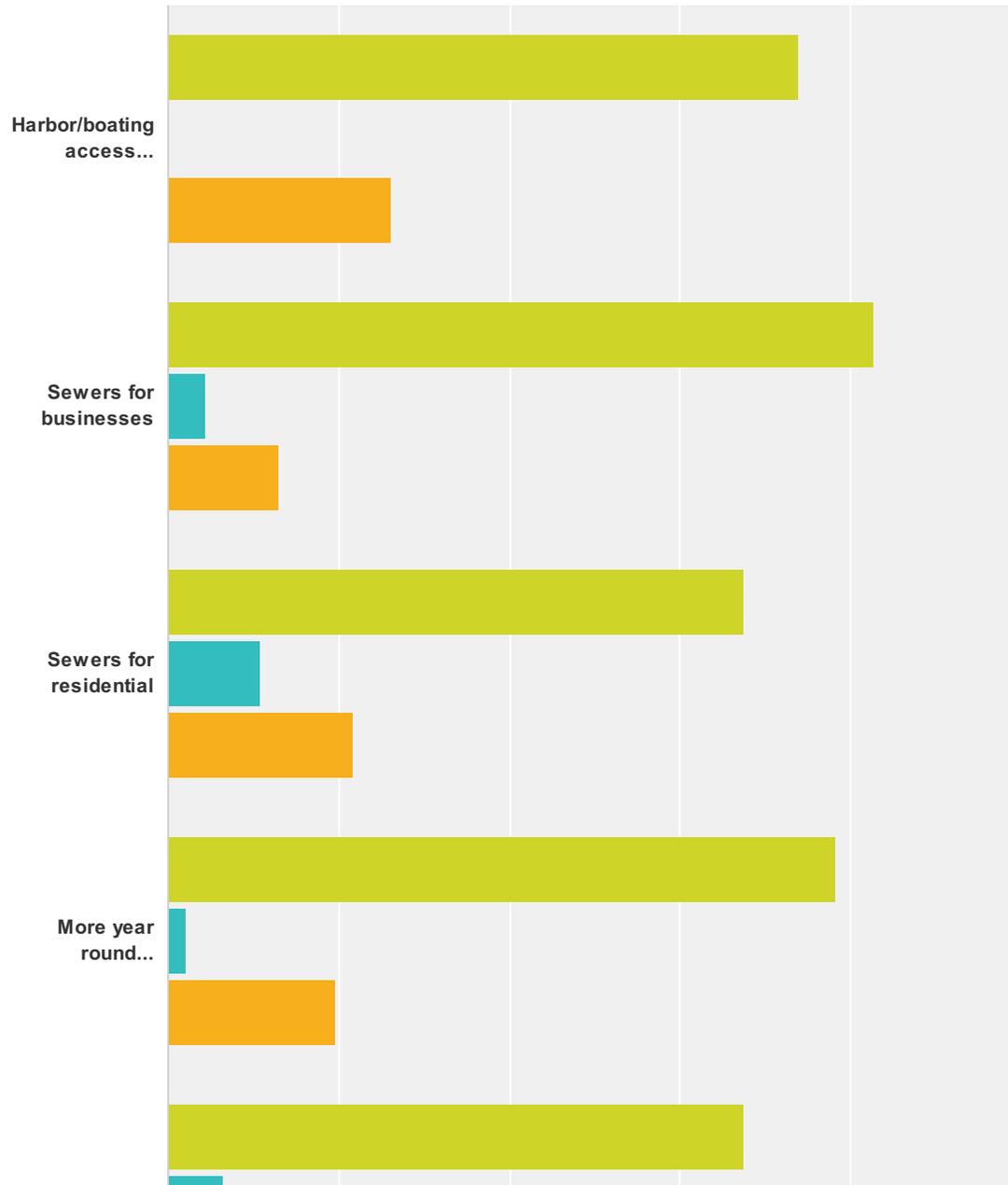
Quaker Lane (Rt 2) - Allies Donuts vicinity	58.70%	17.39%	23.91%	
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North Kingstown Employer Survey

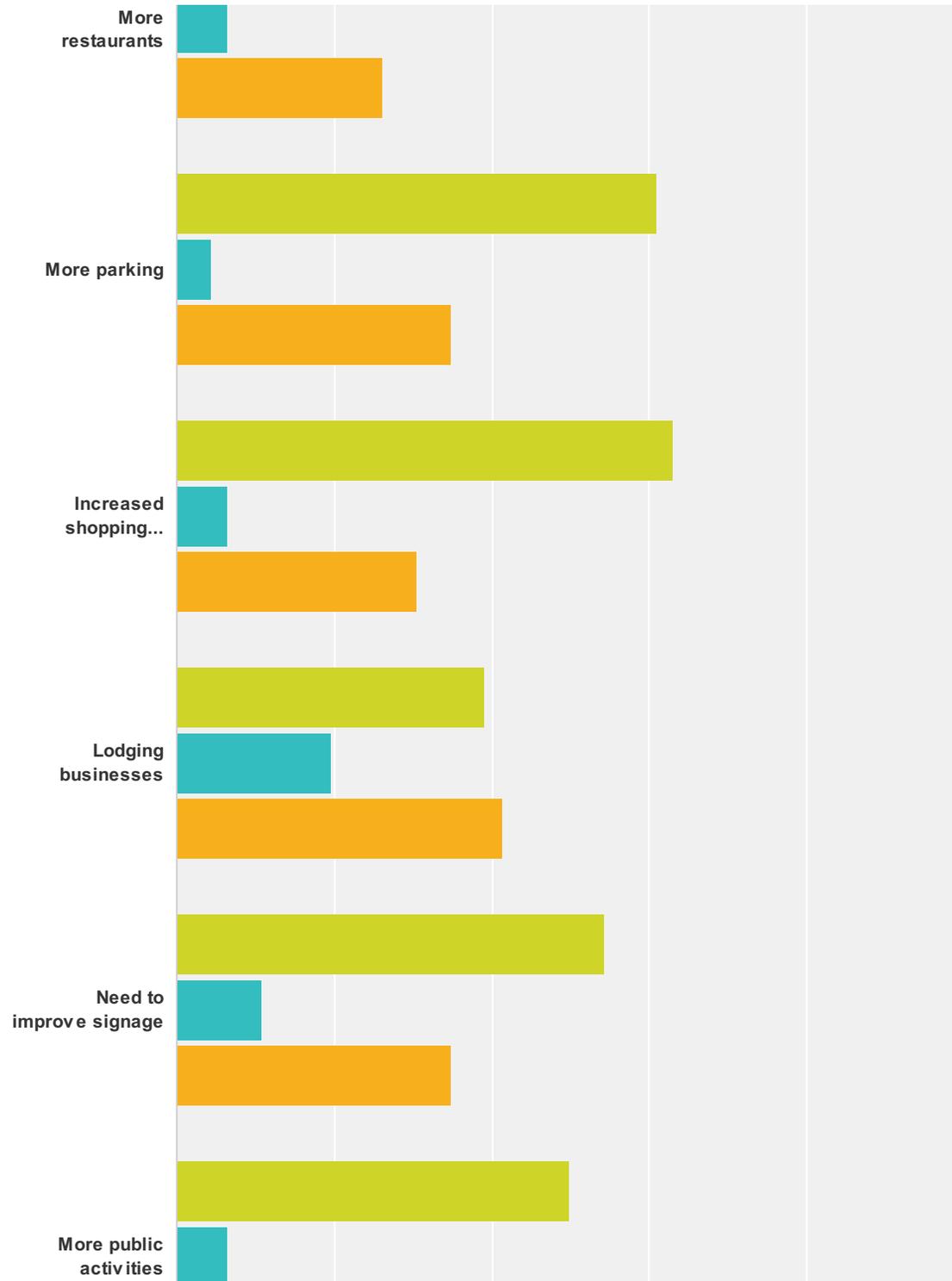
Quaker Lane (Rt.2) - Ames Donuts vicinity	36.17% 27	17.39% 8	28.26% 11	46
Ten Rod Road (Rt.102) - Wickford Junction/ Stop & Shop	56.52% 26	26.09% 12	17.39% 8	46
South County Trail (Rt.2) - Schartner Farm vicinity	28.26% 13	39.13% 18	32.61% 15	46
Wickford Village	52.17% 24	36.96% 17	10.87% 5	46
Tower Hill Road (Rt.1) - West Main Street to Rt.4 Junction	26.09% 12	43.48% 20	30.43% 14	46
Tower Hill Road (Rt.1) at Rt.4 Junction to South Kingstown	36.96% 17	28.26% 13	34.78% 16	46
Dry Bridge Road	39.13% 18	26.09% 12	34.78% 16	46
Route 2/Route 102 at Bald Hill Garden Center/Oatleys/Comer Tavern	43.48% 20	30.43% 14	26.09% 12	46

Q23 What are your opinions regarding the following for Wickford Village?

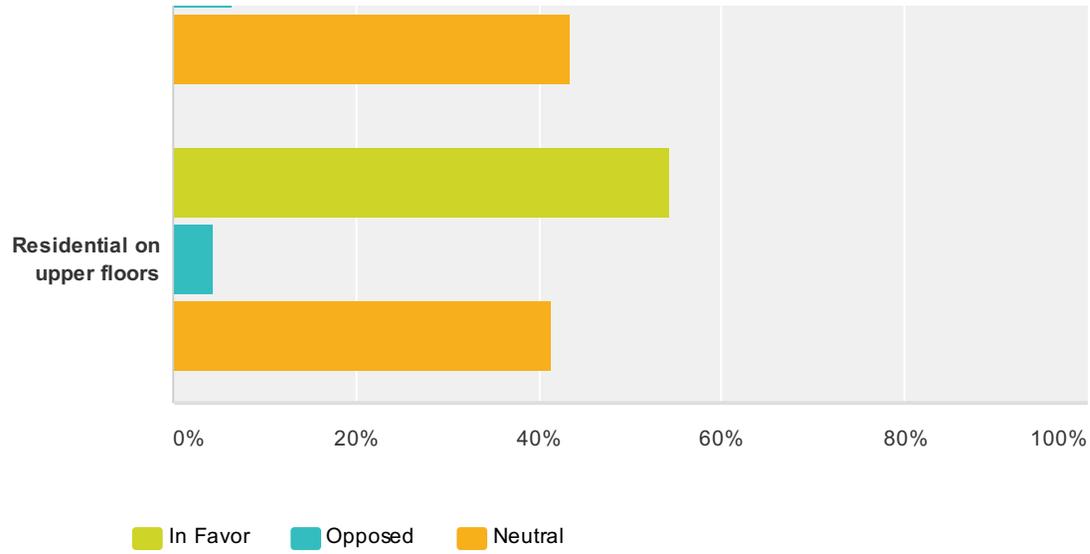
Answered: 46 Skipped: 9



North Kingstown Employer Survey



North Kingstown Employer Survey



	In Favor	Opposed	Neutral	Total
Harbor/boating access improvements	73.91% 34	0% 0	26.09% 12	46
Sewers for businesses	82.61% 38	4.35% 2	13.04% 6	46
Sewers for residential	67.39% 31	10.87% 5	21.74% 10	46
More year round businesses	78.26% 36	2.17% 1	19.57% 9	46
More restaurants	67.39% 31	6.52% 3	26.09% 12	46
More parking	60.87% 28	4.35% 2	34.78% 16	46
Increased shopping offerings	63.04% 29	6.52% 3	30.43% 14	46
Lodging businesses	39.13% 18	19.57% 9	41.30% 19	46
Need to improve signage	54.35% 25	10.87% 5	34.78% 16	46
More public activities	50% 23	6.52% 3	43.48% 20	46
Residential on upper floors	54.35%	4.35%	41.30%	

North Kingstown Employer Survey

Residential on upper floors

57.00 %
25

7.00 %
2

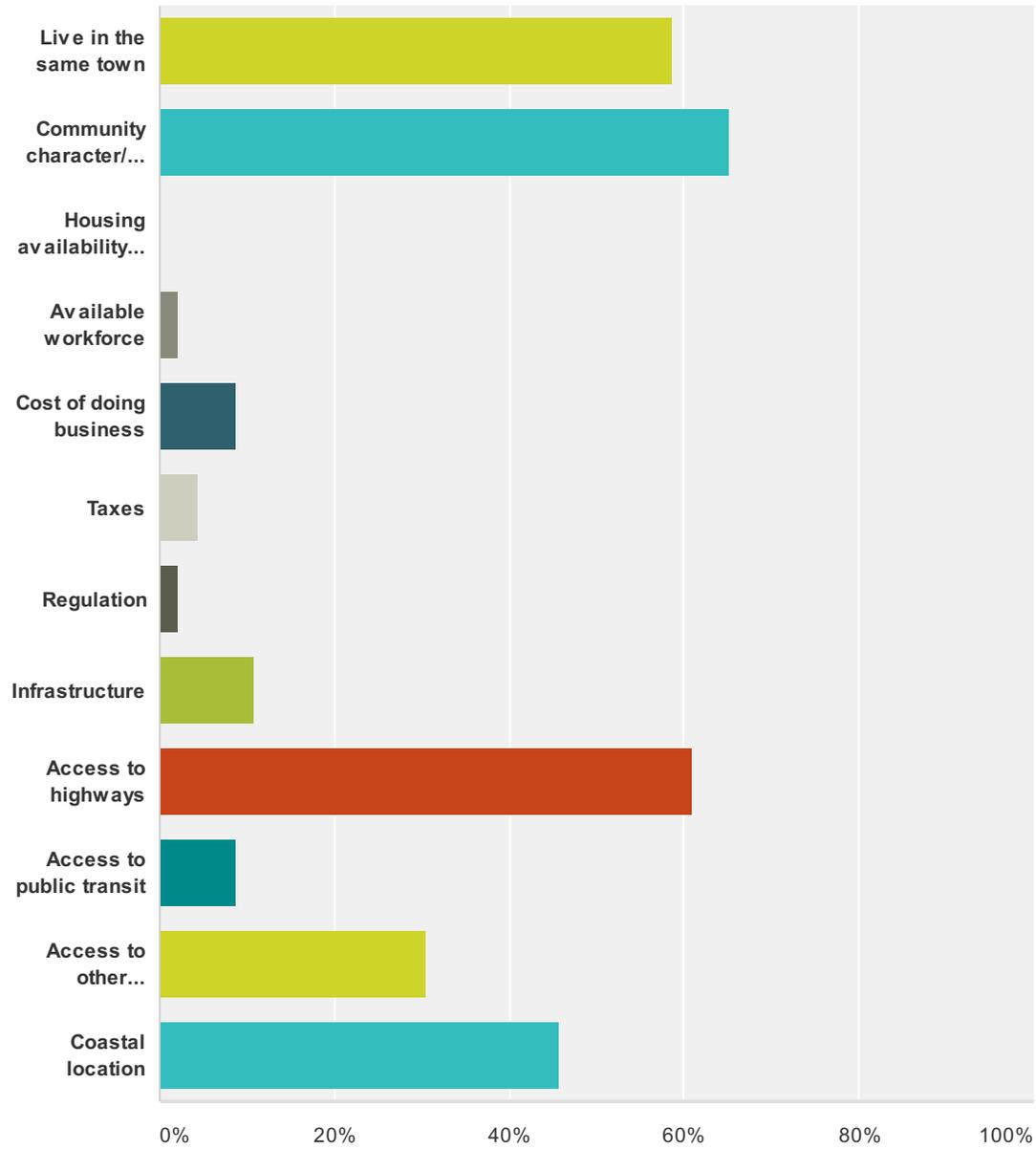
71.00 %
19

46

**Q24 Which of the following would you say
are the top three BENEFITS of doing
business in North Kingstown today?
Choose three (3).**

Answered: 46 Skipped: 9

North Kingstown Employer Survey



Answer Choices	Responses
Live in the same town	58.70% 27
Community character/ quality	65.22% 30

North Kingstown Employer Survey

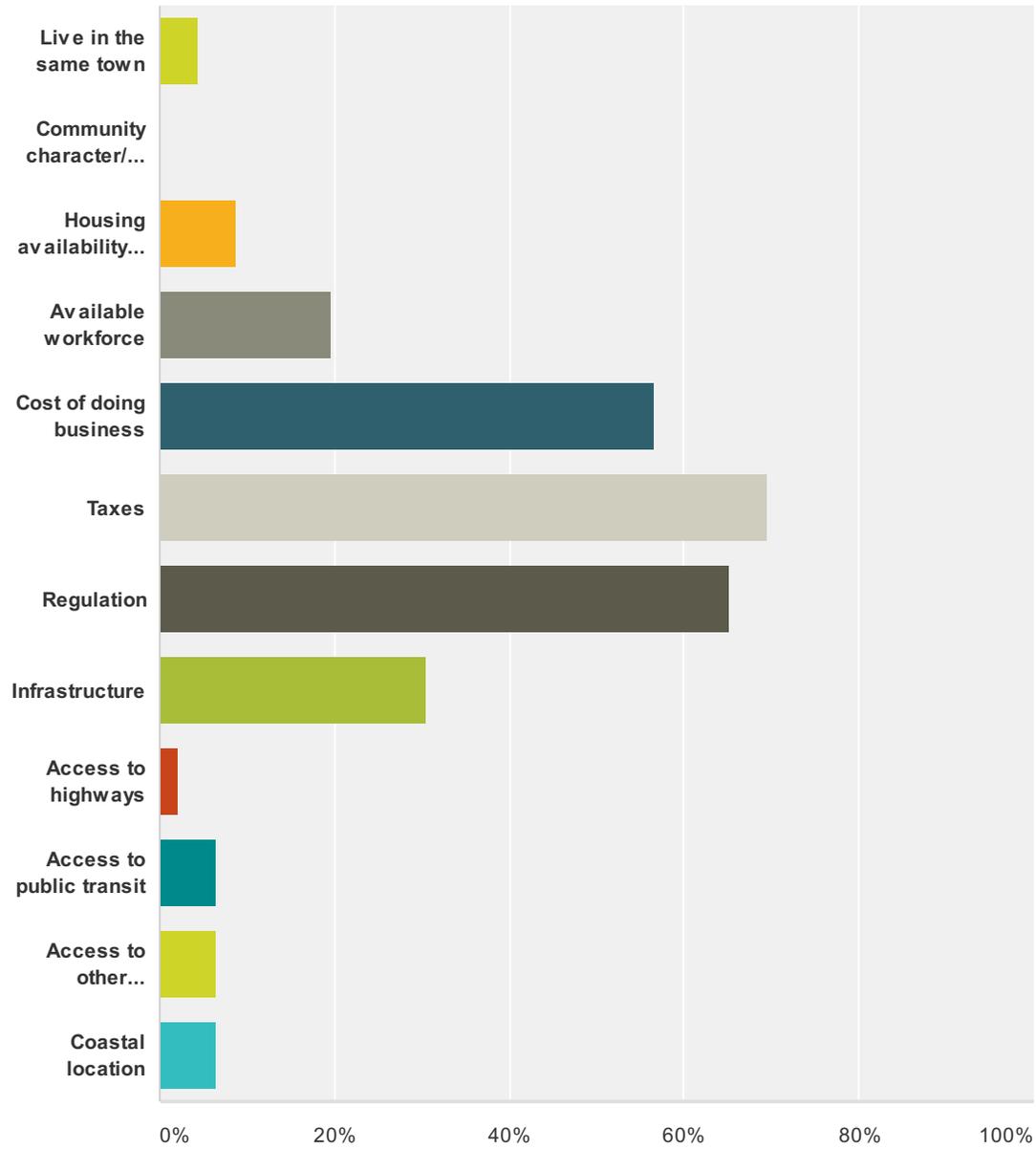
Housing availability for employees	0%	0
Available workforce	2.17%	1
Cost of doing business	8.70%	4
Taxes	4.35%	2
Regulation	2.17%	1
Infrastructure	10.87%	5
Access to highways	60.87%	28
Access to public transit	8.70%	4
Access to other businesses in North Kingstown	30.43%	14
Coastal location	45.65%	21
Total Respondents: 46		

#	Other (please specify)	Date
1	Wickford is a tourist destination	12/24/2013 7:37 PM
2	central location statewide	11/22/2013 2:36 PM
3	Upper income demographics	11/22/2013 1:35 PM
4	Wickford and Jamestown, Newport nearby	11/22/2013 12:06 PM

Q25 Which of the following would you say are the top three CHALLENGES facing business like yours in North Kingstown today? Choose three (3).

Answered: 46 Skipped: 9

North Kingstown Employer Survey



Answer Choices	Responses
Live in the same town	4.35% 2
Community character/ quality	0% 0

North Kingstown Employer Survey

Housing availability for employees	8.70%	4
Available workforce	19.57%	9
Cost of doing business	56.52%	26
Taxes	69.57%	32
Regulation	65.22%	30
Infrastructure	30.43%	14
Access to highways	2.17%	1
Access to public transit	6.52%	3
Access to other businesses in North Kingstown	6.52%	3
Coastal location	6.52%	3
Total Respondents: 46		

#	Other (please specify)	Date
1	Not enough restaurants to attract visitors and sustain business in Wickford. Restaurants close to early in Wickford. The town does not advertise for people to visit. Not enough staff for economic development.	12/24/2013 7:37 PM
2	Lack of expertise of town officials	12/23/2013 3:46 PM
3	Most clients are out of state, client deficit is not an NK, but a State of RI problem.	12/23/2013 10:17 AM
4	need more high end resturants for business lunches	11/26/2013 10:39 AM
5	anti development attitude of previous leadership	11/22/2013 2:36 PM
6	Seasonality	11/22/2013 12:27 PM

North Kingstown Employer Survey

Q26 Please comment on the availability of business space or qualified work force to meet your needs in North Kingstown.

Answered: 21 Skipped: 34

#	Responses	Date
1	FOR MY BUSINESS IT IS FINE	1/2/2014 9:12 AM
2	North Kingstown is an affluent and educated town, Its residence fit in well with the needs of small employers such as myself.	12/28/2013 3:17 PM
3	sole practitioner, NA	12/28/2013 11:20 AM
4	Adequate	12/24/2013 7:37 PM
5	Space is generally available... Lack of sewers is a major issue	12/24/2013 5:52 AM
6	Better business will result from sewers and workforce will improve.	12/24/2013 4:55 AM
7	Not necessary	12/23/2013 8:05 PM
8	no problem	12/23/2013 4:27 PM
9	N/A	12/23/2013 3:50 PM
10	To many low income people/housing in town. These type of people would rather get aide from the town or state than have a full time job.	12/23/2013 1:04 PM
11	no comment	12/23/2013 12:48 PM
12	Home office. Don't need much space.	12/23/2013 10:24 AM
13	n/a. Work out of a home office.	12/23/2013 10:21 AM
14	We are very comfortable with both.	12/23/2013 10:20 AM
15	No problem	11/25/2013 9:54 AM
16	Plenty of business space (vacant)	11/24/2013 3:05 PM
17	Would like more done for the businesses on Post Road we seem to concentrate on Wickford.	11/23/2013 1:59 PM
18	no comment	11/22/2013 4:24 PM
19	No comment	11/22/2013 1:37 PM
20	Plenty of work space but way too much vacancy and vacancy that has been over 10 years. There is a reason for that and it isn't good for NK. NK is known to be very difficult to get permits, get business up and running, unlike East Greenwich, Narragansett, and South Kingstown.	11/22/2013 12:08 PM
21	Hard to find qualified (educated, experienced) professionals in RI	11/22/2013 12:02 PM

North Kingstown Employer Survey

Q27 Please comment on your response concerning leaving the area (i.e. reasons you might or might not leave).

Answered: 25 Skipped: 30

#	Responses	Date
1	WHEN I RETIRE IT IS WAY TOO EXPENSIVE TO STAY IN N.K.	1/2/2014 9:12 AM
2	Cost of being located directly on the coast is becoming cost prohibitive. Lack of ability to expand because no sewers, flood insurance, tidal rise etc...	12/28/2013 3:17 PM
3	recently moved here, no plans to leave	12/28/2013 11:20 AM
4	We are here to stay for the long-term. Redevelopment of Post Road from EG to Wickford is key. We need to bring more diversified businesses and restaurants to draw people in.	12/26/2013 5:41 AM
5	Other coastal communities in RI our prospering much more than in Wickford, largely due to more restaurants, restaurants staying open later, and alternative businesses/services made available as a result of adequate sewers. Because if this, businesses are not thriving in Wickford as they should be, and there is a strong incentive to leave Wickford.	12/24/2013 7:37 PM
6	Dealing with local regulations and the struggle to get anything done relating to the town government is an issue...	12/24/2013 5:52 AM
7	No sewers will force business to go elsewhere.	12/24/2013 4:55 AM
8	High cost of living and doing biz in RI	12/23/2013 8:05 PM
9	regulations and lack of care for the concerns of small businesses-ignoring concerns of business without looking at the individual situations and seeking a solution to help the business not hurt it	12/23/2013 4:27 PM
10	N/A	12/23/2013 3:50 PM
11	taxes, regulation.	12/23/2013 12:48 PM
12	Property taxes must be the highest in the state or at least in the top 5% of municipalities	12/23/2013 12:00 PM
13	Don't plan to leave.	12/23/2013 10:24 AM
14	RI economy is terrible mostly due to the tax situation and idiocy of our elected officials. If I could sell my house, I would have left already.	12/23/2013 10:21 AM
15	Have no intentions of leaving. Refurbished our building to suit our specific needs.	12/23/2013 10:20 AM
16	Would hate to leave - developed many relationships with all	12/23/2013 10:06 AM
17	Cost of doing business and taxes, not strictly related to N. Kingstown, would drive this business to other cities and states which are more business friendly. Expansion will likely take place outside RI.	12/23/2013 9:54 AM
18	local business...no intention of leaving the area	11/25/2013 9:54 AM

North Kingstown Employer Survey

19	Tax burden / seems that vital necessities in NK are more expensive than elsewhere Poor management of town Poor business enviroment	11/24/2013 3:05 PM
20	We would only leave if there was no possible way of getting a bigger location when the time comes.	11/23/2013 1:59 PM
21	no comment	11/22/2013 4:24 PM
22	unlikely in the next 10 years	11/22/2013 1:37 PM
23	I am in the process of relocating. Taxes are too high, overdevelopment is on the march, too many housing projects are jacking up the cost of schools and public safety. Very sad to see the demise of my hometown. It's not so much that I am leaving North Kingstown - North Kingstown has left me.	11/22/2013 12:45 PM
24	If property taxes keep going up, will defintely be a consideration. It's ridiculously high what I pay for property taxes in comparison to Narragansett.	11/22/2013 12:08 PM
25	Just establised presence in RI so no plans on leaving	11/22/2013 12:02 PM

North Kingstown Employer Survey

Q28 Please share your ideas and/or suggestions in regards to balancing business, housing, and transit needs to create a better business environment in North Kingstown.

Answered: 25 Skipped: 30

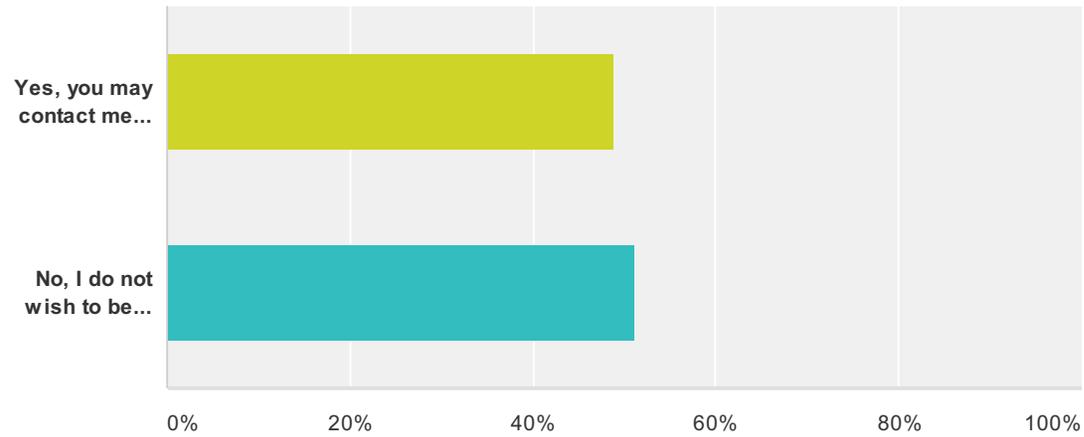
#	Responses	Date
1	BUILDING REGULATIONS ARE GETTING OUT OF HAND	1/2/2014 9:12 AM
2	North Kingstown needs to fix what we have today. It was a thriving area during the time in which the Navy occupied Quonset. Nothing has been maintained since their departure in the early 70's. Update the Post Road corridor to this century and businesses will feel proud to be part of North Kingstown's business district.	12/28/2013 3:17 PM
3	Wickford village needs more more restaurants, evening activities and a few better retailers to attract locals year round.	12/28/2013 11:20 AM
4	Wickford is the jewel of North Kingstown and there is a strong case for how sewers in Wickford will benefit all of NK. Because of this, I suggest the cost of adding sewers to Wickford should be distributed town wide and not fall solely on Wickford residents. This is the most important change that is necessary to create a better business environment in Wickford. When Wickford prospers, all of North Kingstown benefits.	12/24/2013 7:37 PM
5	Just get the onerous Zoning, Planning and overall regulations off businesses back... Do the basics such as sewers, and stop the bureaucratic intrusion.. The rest will take care of itself. Larger government intrusion in trying to regulate or "provide" everything costs too much in many ways... Basta !!!	12/24/2013 5:52 AM
6	Get sewers to improve the water quality and that awful smell in Wickford. Shops can expand business opportunities.	12/24/2013 4:55 AM
7	no ideas	12/23/2013 4:27 PM
8	N/A	12/23/2013 3:50 PM
9	I think creating new commerce centers will cause the already struggling Post road corridor to become a bight and further create socio-economic stress on NK. Property values on the north end of town will suffer as will tax revenue. Schools will suffer and further increase the economic divide between north and south end of town. I wonder when the town is going to slow down on section eight housing. I know what this sounds like. My concern is the tax rate those property owners is much less than what I, a single family homeowner, pays. Yet, the tenants use all the same town services that I do (roads, police, fire, schools, recycling, etc.).	12/23/2013 12:48 PM
10	1. Sewers in Wickford and Wickford Junction. 2. Provide tax incentives to increase vacancy on Post Road. 3. Post Rd could be deemed a "blight" and as such could potentially qualify for TIF tax district. 4. Lower property taxes dramatically by eliminating pension plans for future employees.	12/23/2013 12:00 PM
11	Lower taxes, fees for a single proprietorship business.	12/23/2013 10:24 AM
12	Need to improve public transit. RIPTA is lame, routes are irrelevant or keep changing. State is small enough to support a good state-wide commuter rail system, but is too NIMBY to do it.	12/23/2013 10:21 AM
13	Do a major long term assesment and make plans to change the city layout.	12/23/2013 10:06 AM

North Kingstown Employer Survey

14	More employees would use bus service except that it stops at the entrance to the park. There are too many cars with single occupants entering the park every day. There is no availability nor support for public, cost-effective transportation.	12/23/2013 9:54 AM
15	Our business also leases space in Quonset and many tenants and prospective tenants have inquired and complained about the lack of high end restaurants' open for lunch. Also, many of the businesses along Post Road look rather "tired".	11/26/2013 10:43 AM
16	Quonset has huge potential for a business like mine. Keep the development going.	11/25/2013 9:54 AM
17	Lower taxes / less burden on business	11/24/2013 3:05 PM
18	As I said before too much concentration is put on just Wickford (is important but other businesses are in need)	11/23/2013 1:59 PM
19	no comment	11/22/2013 4:24 PM
20	Review every ordinance and regulation. Some seem to make no sense. Repeal or replace the ones that don't or are counterproductive or redundant.	11/22/2013 2:39 PM
21	no comment	11/22/2013 1:37 PM
22	Stop the insanity - Wickford train station is a white elephant, Kingstown Crossings has brought in crime and higher education costs. The development near Oatleys and Shartner Farms will be the last nail in the coffin and we won't be any different than Johnston.	11/22/2013 12:45 PM
23	Install sewers all of Post Road, all of Wickford Village and Wickford Junction area. Offer \$0 property tax or other incentives for Post Road redevelopment. Identify ways to cut town expenses and drastically reduce property taxes - reputed to be the highest in the state. Identify out-of-the-box new revenue streams that do not rely on taxes. Redesign traffic flow at Boston Neck/Brown/Phillips and push state DOT to change the driving lane striping from Plum Point Rd to Plum Beach Rd - this could flow much better simply by striping it similar to the way it was done near Rt.4/Rt.102 intersection. Continue to send these surveys - much easier than voicing opinions at meetings - great job asking for opinions and input. Stop listening to the 'not in my backyard' folks who do not want change. Eliminate these obscene pensions for town employees: who gets pensions now in private industry or business? No one. Offer a matching 401K instead. Rolling Green development will be good for town - continue support for it. Impressed with pragmatic and positive attitude with planning, zoning, building depts. Hiring Paige B. was a great coup - keep him! All in all it looks like the council is working well. Keep it up thank you.	11/22/2013 12:32 PM
24	Need sewers, that's a must. We cannot grow or expand on Wickford, clean up the water (which is so bad), and compete with surrounding towns that are expanding their main streets right and left, without sewers. It has to be done fast, over night 24 hour construction, not dragged out for months on end.	11/22/2013 12:08 PM
25	Need more support services for Quonset - restaurants, Citizens Bank, Staples, dry cleaners, meeting spaces for conferences (ie. large hotel with services)	11/22/2013 12:02 PM

Q29 May we contact you directly if there are any questions regarding your responses or for future surveys?

Answered: 45 Skipped: 10



Answer Choices	Responses	
Yes, you may contact me (please provide info below)	48.89%	22
No, I do not wish to be contacted	51.11%	23
Total		45

North Kingstown Employer Survey

Q30 Please provide your contact information

Answered: 21 Skipped: 34

Answer Choices	Responses
Contact Name	100% 21
Business Name	100% 21
Business Address	100% 21
Phone	100% 21
Email	100% 21

#	Contact Name	Date
1	Stephen E. Souls	1/1/2014 9:11 PM
2	Pete Chevalier	12/28/2013 3:18 PM
3	Paul Waxman	12/28/2013 11:20 AM
4	Robert Maddock	12/26/2013 5:42 AM
5	Ellen Waxman	12/24/2013 7:38 PM
6	Dave Caldwell	12/24/2013 9:35 AM
7	Mrs. Deanna K. Celico	12/23/2013 4:32 PM
8	Stanley Spink	12/23/2013 10:25 AM
9	Guy Natelli	12/23/2013 10:23 AM
10	Ian Manning	12/23/2013 10:23 AM
11	Michael Sweatt	12/23/2013 9:55 AM
12	Susan Collier	11/26/2013 10:44 AM
13	Jack Bauer	11/25/2013 9:55 AM
14	Thomas Marsocci	11/24/2013 3:06 PM
15	marie magnette	11/23/2013 2:01 PM
16	Joe Lomastro	11/23/2013 9:49 AM
17	Bethnay Mazza	11/22/2013 6:21 PM

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18	Fred Schick	11/22/2013 2:41 PM
19	Mark DeStefano	11/22/2013 12:29 PM
20	Kristine Mangan	11/22/2013 12:10 PM
21	JEFF SALK	11/22/2013 12:03 PM
#	Business Name	Date
1	Social Rhode Marketing	1/1/2014 9:11 PM
2	Gardner's Wharf Seafood	12/28/2013 3:18 PM
3	Forward5 Marketing	12/28/2013 11:20 AM
4	BankNewport	12/26/2013 5:42 AM
5	Five Main	12/24/2013 7:38 PM
6	Caldwell & Johnson	12/24/2013 9:35 AM
7	Fabric Gallery	12/23/2013 4:32 PM
8	STSound	12/23/2013 10:25 AM
9	Natelli Systems, Inc.	12/23/2013 10:23 AM
10	OrthoCore Physical Therapy	12/23/2013 10:23 AM
11	I already provide it at the start of the survey, redundant question	12/23/2013 9:55 AM
12	Riggs & Gallagher, Inc	11/26/2013 10:44 AM
13	Needle Designs	11/25/2013 9:55 AM
14	Pro- Paint Plus, Inc.	11/24/2013 3:06 PM
15	total look salon	11/23/2013 2:01 PM
16	Sign A Rama	11/23/2013 9:49 AM
17	Green Ink	11/22/2013 6:21 PM
18	Heritage Homes, Inc.	11/22/2013 2:41 PM
19	Pedego Electric Bikes	11/22/2013 12:29 PM
20	Providence Media	11/22/2013 12:10 PM
21	SALK'S HARDWARE & MARINE	11/22/2013 12:03 PM
#	Business Address	Date
1	114 Rosemary Drive	1/1/2014 9:11 PM
2	170 Main Street	12/28/2013 3:18 PM
3	115 West Main Street, Wickford	12/28/2013 11:20 AM

North Kingstown Employer Survey

4	184 John Clarke Road, Middletown, RI	12/26/2013 5:42 AM
5	5 Main St.	12/24/2013 7:38 PM
6	6500 Post Rd	12/24/2013 9:35 AM
7	606 Ten Rod Road	12/23/2013 4:32 PM
8	15 Barolay Drive	12/23/2013 10:25 AM
9	135 Greenwood Road	12/23/2013 10:23 AM
10	7610 Post Rd unit 5	12/23/2013 10:23 AM
11	250 Smith Street	12/23/2013 9:55 AM
12	50 Whitecap Drive, Suite 102	11/26/2013 10:44 AM
13	7448 Post Rd.	11/25/2013 9:55 AM
14	211 Babcock Road	11/24/2013 3:06 PM
15	7419 Post Road	11/23/2013 2:01 PM
16	6855 Post Rd.	11/23/2013 9:49 AM
17	89 Brown St	11/22/2013 6:21 PM
18	7736 Post Road	11/22/2013 2:41 PM
19	1 Brown Street	11/22/2013 12:29 PM
20	73 Congdon Ave North Kingstown	11/22/2013 12:10 PM
21	5939 POST ROAD	11/22/2013 12:03 PM
#	Phone	Date
1	4014650891	1/1/2014 9:11 PM
2	401-295-4600	12/28/2013 3:18 PM
3	781-248-8966	12/28/2013 11:20 AM
4	845-8663	12/26/2013 5:42 AM
5	401-487-5167	12/24/2013 7:38 PM
6	885-1770	12/24/2013 9:35 AM
7	401-295-2760	12/23/2013 4:32 PM
8	401 295-8495	12/23/2013 10:25 AM
9	401-294-4811	12/23/2013 10:23 AM
10	401-667-0131	12/23/2013 10:23 AM
11	401-294-9400	12/23/2013 9:55 AM

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12	401-583-4100	11/26/2013 10:44 AM
13	401-267-0800	11/25/2013 9:55 AM
14	401-268-3900	11/24/2013 3:06 PM
15	401-477-3678	11/23/2013 2:01 PM
16	401-886-5000	11/23/2013 9:49 AM
17	401-294-6266	11/22/2013 6:21 PM
18	(401) 884-7500	11/22/2013 2:41 PM
19	401-675-2000	11/22/2013 12:29 PM
20	4012698292	11/22/2013 12:10 PM
21	401-885-2700	11/22/2013 12:03 PM
#	Email	Date
1	sesouls@gmail.com	1/1/2014 9:11 PM
2	pete@gardnerswharfseafood.com	12/28/2013 3:18 PM
3	paulw@forward5.com	12/28/2013 11:20 AM
4	robert.maddock@banknewport.com	12/26/2013 5:42 AM
5	fivemain@verizon.net	12/24/2013 7:38 PM
6	dave.caldwell@caldwellandjohnson.com	12/24/2013 9:35 AM
7	dkc@fabricgalleryri.com	12/23/2013 4:32 PM
8	Stsound@cox.net	12/23/2013 10:25 AM
9	gnatelli@natellisystems.com	12/23/2013 10:23 AM
10	ianm@orthocorept.com	12/23/2013 10:23 AM
11	Msweatt@ultrasci.com	12/23/2013 9:55 AM
12	scollier@rgdesignbuild.com	11/26/2013 10:44 AM
13	needledesignsri@gmail.com	11/25/2013 9:55 AM
14	thomas@propaintplus.com	11/24/2013 3:06 PM
15	mariem311@verizon.net	11/23/2013 2:01 PM
16	joe@signaramank.com	11/23/2013 9:49 AM
17	bethany@greeninkboutique.com	11/22/2013 6:21 PM
18	fredschick1@gmail.com	11/22/2013 2:41 PM
19	mark@pedegori.com	11/22/2013 12:29 PM

North Kingstown Employer Survey

20	kristine@providenceonline.com	11/22/2013 12:10 PM
21	JEFF@SALKSHARDWARE.COM	11/22/2013 12:03 PM

APPENDIX F:

Improvement to Land Value Supporting Material

Introduction

This supplementary analysis accompanies the North Kingstown Community Market Study, prepared by 4ward Planning Inc. It provides more detail to the improvement-to-land value (ILV) analysis provided therein. Additionally, the full outputs of the ILV Analysis are provided at the end of the document.

Methodology

This study provides a deeper look at certain low ILV parcels along the Post Road Corridor study area and within Wickford Village. Specifically, the parcels analyzed are those that fit one of the following descriptions:

- The parcel has no improvement value;
- The parcel has a very low improvement-to-land value ratio;
- The parcel has a low improvement-to-land value ratio and is also either large or is clustered with another low ILV parcel.

Such parcels and clusters are analyzed because they are of special interest to developers.

For this analysis, 4ward Planning considers *very low* ILV to be less than half of the *low* ILV target (0.5965 for mixed use and 0.335 for commercial). This makes the *very low* ILV targets 0.29825 for mixed use properties and 0.1675 for commercial properties (there are no low ILV industrial parcels in either study area).

Low ILV parcels further have to meet the criteria of being either large (larger than the median parcel size of 2.49 acres), or contiguous to another or clustered with other low ILV parcels.

Along the Post Road corridor study area, there are 14 low ILV parcels. Eleven of these 14 have no improvements. One parcel with a low ILV value is contiguous with another parcel; the other two parcels are small and isolated.

There are ten low ILV commercial parcels in Wickford Village, two without improvement value. Five of the remaining parcels fit the criterion of being contiguous to another low ILV parcel.¹

There are seven low ILV mixed use parcels in Wickford Village. All have improvements, but three of these parcels fit the criterion of being contiguous to another low ILV parcel.

A chart showing details of each of these parcels is on the following page.

¹ One of the remaining parcels (26 Brown Street) technically fits the criterion of being *very low* ILV, but as it is only just barely *very low* ILV (0.166 as compared to 0.1675), appears to be the location of a successful shop (JW Graham), and does not fit any of the other criteria, it was excluded from this analysis.

Improvement-to-land Value (ILV) Analysis Supporting Material

Parcel ID	Address	Land Use	Owner	Improvement Value (\$)	Land Value (\$)	Area (acres)	ILV Ratio
108-108	7684 POST RD	Commercial	DWYER, FRANCIS M & EMILY ANN	0	179,100	0.95	0
108-56	7664 POST RD	Commercial	DWYER, FRANCIS M & EMILY ANN	0	164,500	0.87	0
135-10	POST RD	Commercial	R & N CROSS LLC	0	213,100	3.99	0
135-19	7605 POST RD	Commercial	LACROIX, NANCY E REV LIVING TRUST	0	134,600	0.76	0
136-9	POST RD	Commercial	EAST VIEW DEVELOPMENT LLC	0	239,000	7.82	0
138-81	POST RD	Commercial	7260 POST ROAD LLC	0	306,100	16.19	0
138-90	7400 POST RD	Commercial	7400 POST ROAD LLC	0	147,200	1.15	0
146-67	POST RD	Commercial	PART THREE LLC	0	113,900	0.34	0
147-17	6875 POST RD	Commercial	MANSOLILLO FAMILY LLC	0	242,200	2.98	0
157-144	6525 POST RD	Commercial	DELS FAMILY LIMITED PARTNERSHP	26,700	163,100	0.52	0.16
157-77	POST RD	Commercial	POST RD SERVICE CENTER LLC	0	20,400	1.65	0
157-95	6630 POST RD	Commercial	WELLFLEET PROPERTIES LLC	0	355,800	1.51	0
117-153	15 W MAIN ST	Mixed Use	WHEELER, KATHERINE A	179,800	304,600	0.16	0.59
117-155	13 W MAIN ST	Mixed Use	STONE, DON W & CAROLE A TRUSTEES	112,900	274,500	0.05	0.41
117-157	2 MAIN ST	Commercial	BERRY, DAVID S TRUST	29,100	171,300	0.04	0.17
117-158	6 MAIN ST	Mixed Use	FRENCH REALTY CO INC	126,000	331,800	0.26	0.38
117-191	BROWN ST	Commercial	OSJ OF WICKFORD LLC	0	73,600	0.04	0
117-193	BROWN ST	Commercial	OSJ OF WICKFORD LLC	0	14,700	0.01	0
117-213	BROWN ST	Commercial	PJC REALTY CO INC	2,800	63,900	0.06	0.04
117-214	BROWN ST	Commercial	OSJ OF WICKFORD LLC	11,800	336,500	0.27	0.04
117-217	93 BROWN ST	Commercial	CARLSON, PATRICIA A	68,600	240,200	0.08	0.29
117-218	95 BROWN ST	Commercial	WICKFORD CLUB, THE	72,600	220,500	0.06	0.33

Parcel/Cluster Descriptions: Post Road

7470 Post Road

7470 Post Road is a commercial parcel, currently home to Little Tree Nursery. This 1.38 acre property has an ILV ratio of 0.14, with assessed improvements of \$45,700 and assessed land value of \$17,300. The fact that this parcel is a nursery with limited building improvement accounts for its low ILV ratio, and as such, is most likely not a prime candidate for redevelopment.

7664 and 7684 Post Road

These parcels are both currently empty commercial lots with \$0 assessed improvements. 7664 Post Road has an assessed land value of \$164,500, and is 0.87 acres, while 7684 Post Road has an assessed land value of \$179,100, and is 0.95 acres. Both are owned by Francis and Emily Dwyer.

Post Road parcel 135-10 and 7605 Post Road

Both of these parcels are commercial vacant lots with \$0 assessed improvements. Parcel 135-10 is owned by R & N Cross LLC, and has an assessed land value of \$213,100. This parcel is 3.99 acres. 7605 Post Road is owned by Nancy E Lacroix Rev Living Trust. The land of the 0.76 acre plot is valued at \$134,600.

Post Road Parcel 136-9

This commercial parcel is owned by East View Development LLC. It is a 7.82 acre tree-covered lot with \$0 assessed improvements. The land is assessed at \$239,000.

Post Road Parcel 138-81

This commercial parcel is owned by 7260 Post Road LLC. It is also a tree-covered lot, and covers 16.19 acres. There is \$0 of assessed improvements, and the land is assessed at \$306,100.

7400 Post Road

7400 Post Road is a vacant lot between Post Road Shell and small strip commercial area whose tenants include Nunnery Orthotic and Prosthetic, Dynamic Dance Academy, and Flooring Trends Decorators. This 1.15 acre parcel is commercial and is owned by 7400 Post Road LLC. It has \$0 of assessed improvements, and \$147,200 of assessed land value.

6875 Post Road

6875 Post Road is an empty, commercial lot, owned by Mansolillo Family LLC. It has \$0 assessed improvement value and \$242,200 assessed land value. The parcel is 2.98 acres.

Post Road Parcel 157-77 and 6525 Post Road

Parcel 157-77 is owned by Post Rd Service Center LLC; it has \$0 assessed improvements and \$20,400 assessed land. The 1.65 acres is located behind Post Road Service Center and abuts 6525 Post Road, which is home to Dels' Lemonade. Dels' is a small shop with a drive through and surrounded by parking. The assessed value of the building improvement is \$26,700, and the assessed land value is \$16,310. Dels' land is 0.52 acres with an ILV ratio of 0.16. The nature of this business and the small building space it requires mean that this parcel may have a low ILV ratio, even if the business is successful. The parcel is still of interest, however, in that it is contiguous with the empty lot owned by Post Rd Service Center LLC.

6630 Post Road

6630 Post Road is owned by Wellfleet Properties LLC. It is a commercial property with \$0 assessed improvements and a land assessment of \$355,800. It covers an area of 1.51 acres.

Parcel/Cluster Descriptions: Wickford Village

13 and 15 West Main Street

Both of these parcels are mixed use. 13 West Main Street is owned by Don and Carole Stone, Trustees, and is home to the Standard Times newspaper. The assessed improvement value of the building is \$112,900, and the land value is \$274,500. This parcel is 0.05 acres, and has an ILV ratio of 0.41. It is next to 15 West Main Street, owned by Katherine Wheeler. This parcel appears to be the location of Grateful Heart, a local shop, although Grateful Heart's location is given as 17 West Main Street. The improvement value of this parcel is \$179,800 and the land value is \$304,600, giving it an ILV ratio of 0.59. The parcel is 0.16 acres.

2 and 6 Main Street

2 Main Street is a commercial property owned by David Berry Trust. The 0.04 acre parcel has an improvement value of \$29,100 and a land value of \$171,300, giving it an ILV ratio of 0.17. 6 Main Street is a mixed use parcel owned by French Realty Co Inc., with an improvement value of \$126,000 and a land value of \$331,800. The parcel has an ILV ratio of 0.38 and is 0.26 acres. 6 Main Street is currently home to Bambole Hair Salon.

Brown Street, Parcel 117-191

This commercial parcel is owned by OSJ of Wickford LLC. There is \$0 assessed improvement value on this parcel, and the land value is \$73,600. It is 0.04 acres.

Brown Street, parcel 117-193

This commercial parcel is also owned by OSJ of Wickford LLC. There is \$0 assessed improvement value on this parcel, and the land value is \$14,700. This parcel is 0.01 acres, and is on the bank of Wickford Cove.

Brown Street, Parcels 117-213 and 117-214

Both of these parcels are commercial. Parcel 117-213 is owned by PJC Realty Co Inc. It has an assessed improvement value of \$2,800 and assessed land value of \$63,900, giving it an ILV ratio of 0.04. The parcel is 0.06 acres. This parcel is adjacent to parcel 117-214, which is owned by OSJ of Wickford LLC. This parcel has an improvement value of \$11,800 and land value of \$336,500, giving it an ILV ratio of 0.035. The parcel is 0.27 acres.

93 and 95 Brown Street

Both of these properties are commercial. 93 Brown Street is co-owned by Patricia Carlson and Pamela Medeiros. It currently houses Wickford Village Antiques, and has an improvement value of \$68,600, a land value of \$240,200, and an ILV ratio of 0.285595. The parcel is 0.08 acres. 95 Brown Street is owned by The Wickford Club, and is the location of The Place Restaurant. The parcel has assessed improvements of \$72,600 and assessed land value of \$220,500, giving it an ILV ratio of 0.33. The parcel is 0.06 acres.

APPENDIX G:

Financial Analysis of Four Prospective Redevelopment Sites in North Kingstown

Background

4ward Planning earlier completed a market analysis, with a focus on specific commercial areas (Post Road, Wickford Village and Wickford Junction). As part of its charge, 4ward Planning was tasked with performing financial feasibility analysis associated with hypothetical redevelopment scenarios of four property sites:

- The former nursing home site located at 691 Ten Rod Road
- The former Tarbox Toyota car dealership site located at 6975 Post Road and Devil's Foot Road
- The former Bailey Dodge car dealership site located at Post Road and Chadsey Road
- The currently operational Dry Bridge Sand & Stone Company site located on Dry Bridge Road.

(Specific land-use metrics associated with the four project site areas and financial modeling scenarios examined are identified under the scenarios and methodology section of this memorandum).

The above four sites were selected by North Kingstown economic development officials, based on these sites offering relatively significant redevelopment potential over the next several years.

The principle objectives for performing the financial feasibility analyses are **(a)** to determine the minimum development density (e.g., units of housing and commercial square footage) and land-use mix (e.g., residential, retail and/or office) which could be financially viable – permitting a sufficient market rate of return given the associated risk for undertaking a development project within each of the project sites – and **(b)** to identify public financial assistance which might be required to facilitate redevelopment, should financial returns prove insufficient without public financial assistance (in the form of infrastructure development, tax abatement or a long-term payment in lieu of tax (PILOT) agreement).

Methodology

4ward Planning developed its land-use development assumptions, based on each property's total acreage, likely zoning to be in place and market receptivity (earlier identified via the market analysis performed). Conventional and locally germane metrics were used for site work and construction cost estimates (4ward Planning's local developer interview findings were particularly instructive for developing locally relevant construction metrics).

Further, to ensure that our analysis was realistic, known and/or assumed pre-development costs were identified and modeled within the financial development pro forma (e.g., property acquisition, demolition, and general site improvements).

The financial analysis performed (e.g., development and operating pro forma for each scenario examined) were performed on an unleveraged basis – that is, each development scenario was modeled without the assistance of debt, which is customary when performing a financial feasibility analysis for real estate development. Market area financial benchmarks such as the cash-on-cash rate of return (ROE – a simple investment return measure which calculates the annual average cash flow generated by a project and divided by the upfront equity (cash) invested at the beginning of the project) and the internal rate of return (IRR – a more complex investment return measure where the time value of money is incorporated and future cash flow values are increasingly discounted by a hurdle or opportunity cost of capital rate) were incorporated into the operating pro forma to allow analysis of financial viability (4ward Planning used identified financial benchmarks based on interview findings with local developers experienced with similar scale and types of development). We made an assumption that a project sale (the entire mixed-use project within a given scenario) would be sold in year 15, which is a reasonable hold period for projects of this size analyzed.

4ward Planning created two alternative development and operating pro-forma for each of the four prospective redevelopment opportunities examined. Separating out the financial analysis in this way permitted a meaningful financial return comparison, based on land-use mix and/or development intensity.

The minimum IRR needing to be satisfied ranged from a low of 5.5 percent for multi-family residential and/or multi-family residential and retail projects to 10 percent for office and/or office and retail projects. The lower IRR associated with multi-family residential reflects a lower market risk, relative to office development, given current market and financial conditions. An IRR of 8.5 percent was used for modeling for-sale residential (e.g., townhouses and condos), based on a slightly higher risk than multi-family rental, but lower than commercial office space. In 4ward Planning's experience, these financial return metrics are reasonable, given North Kingstown's current market conditions for housing and commercial space, as well as the perceived development risk (e.g., the likelihood of completing a development project in a reasonable period of time).

However, we recognize that the above financial return rate metrics will vary according to a developer's tolerance for risk, personal interests in the development and changing market conditions.

Redevelopment Scenarios Modeled and Key Assumptions

4ward Planning developed an Excel based financial model which allowed for creation of development and operating pro forma associated with the four North Kingstown development project scenarios.

Much detail was built into both the development and operating pro forma, including estimated annual average inflation rates, estimated hard and soft construction costs per square foot, estimated site work, estimated demolition costs, estimated per square foot multi-family rental and commercial lease rates, etc. (see development and operating assumptions at the end of the financial analysis section write-up for development scenarios).

The pro forma variables having most influence on the prospective financial return rates for each redevelopment scenario (e.g., cash-on-cash and internal rate of return) are as follows:

- Residential construction costs per square foot
- Property acquisition costs
- Market residential rental rates
- Office construction costs
- Office lease rates
- Residential and commercial space density

While adjustments to any of the above variables had a noticeable impact on return rates within the cash-flow model, it should be understood that all of these variables, with little exception, are subject to market forces and, therefore, cannot be arbitrarily adjusted for purposes of achieving a desired financial result.

We were also careful to input variables which are considered market supportable, based on a prospective mixed-use development project. So, for example, the average per square foot multi-family residential rental rate used is \$1.50, which is based on inquiries with area developers and a review of current market rental rates for new apartment units near to shopping amenities. The estimated per square foot construction hard cost used for the residential units ranged from \$115 per square foot for low-rise multi-family housing units to \$175 per square foot for single-family detached housing units (Dry Bridge Road scenario).

Financial Analysis Findings

The projected financial analysis findings are exhibited in the below table:

Site/Building	Residential Units			Square Footage			Total	15-Yr.	Realization Time Horizon
	Site Acreage	Rental Units	For Sale Units	Retail Space	Office Space	Flex/R&D Space	Project Costs	Average ROE	
Bailey Dodge Site									
Scenario 1	2.8	0	0	19,622	0	0	\$3,444,510	10.7%	2 to 5 Years
Scenario 2	2.8	0	0	19,622	5,000	0	\$4,292,380	9.7%	2 to 5 Years
Tarbox Toyota Site									
Scenario 1	3.5	31	14	10,000	0	0	\$8,078,828	7.6%	2 to 4 Years
Scenario 2	3.5	69	31	0	0	0	\$14,627,129	6.9%	2 to 4 Years
Nursing Home Site									
Scenario 1	0.68	21	9	0	0	0	\$4,374,184	6.2%	2 to 5 Years
Scenario 2	0.68	0	0	0	18,024	0	\$1,533,912	12.8%	3 to 6 Years
Dry Bridge Road Site									
Scenario 1	290	0	286	0	0	0	\$107,609,502	NA	4 to 7 Years
Scenario 2	290	0	0	0	0	2,500,000	\$319,504,500	7.7%	8 to 12 Years

What follows is a summary of each of the prospective redevelopment scenarios:

Bailey Dodge Site – This former auto dealership and nearly three-acre site is currently vacant. The property owner is currently entertaining a re-use of the site for retail (a proposed pharmacy and accessory retail use comprising a total of 19,622 square feet), which is detailed as Scenario 1, in the above table. Based on current market area conditions for the type of retail being considered, inclusive of current rental rates, this proposed scenario could be realized within the next two to five years and generate an acceptable 10.7 percent market return on equity (ROE) rate (dependent on the land-owner moving forward with this proposed site plan and receiving necessary approvals and tenant leases being secured).

4ward Planning identified a second viable redevelopment option for the Bailey Dodge site (Scenario 2), which contains the 19,622 square feet of total retail square footage contemplated in Scenario 1, and adds 5,000 square feet of medical office space (which would be developed as a second story above the larger of the two retail spaces). 4ward Planning’s real estate supply/demand analysis identified medical office space as one of the strongest commercial market sectors in the North Kingstown area (indeed, it is this type of use, in particular, which is thriving along Post Road). Incorporating a

medical office use with retail pharmacy is also highly compatible. Our financial analysis demonstrates that Scenario 2 could be realized within the next two to five years (given the same qualifiers as Scenario 1) and generate an acceptable 9.7 percent ROE for the property owner.

Tarbox Toyota Site – This former auto dealership and 3.5 acre site is currently vacant. The property owner is currently entertaining a re-use of the site for gasoline sales and convenience retail (a proposed 10,000 square foot convenience retail store with outside gas pumps). 4ward Planning added to this proposed use a prospective 45-unit residential (31 rental apartments and 14 townhouses), which could be accommodated within the site's current acreage, inclusive of surface parking. Based on current market area conditions for the type of retail being considered, inclusive of current rental rates and sales prices for town houses, this proposed scenario could be realized within the next two to four years and generate an acceptable market 7.6 percent return on equity (ROE) rate (dependent on the land-owner moving forward with this proposed site plan and receiving necessary approvals and tenant leases being secured).

4ward Planning identified a second viable redevelopment option for the Tarbox Toyota site (Scenario 2), which eschews the 10,000 s.f. of retail contemplated in Scenario 1 and, instead, incorporates 100 residential units (31 town houses and 69 low-rise rental units - up to three stories). 4ward Planning's real estate supply/demand analysis identified multi-family rental housing, in particular, as in relative short supply in the North Kingstown market area (and a land-use demonstrating strong demand over the next ten years). Given the presence of the multi-family housing units immediately to the rear of the Tarbox Toyota site (as well as the apparent success of these units being absorbed in a relatively short period of time), 4ward Planning believes Scenario 2 to, not only be viable, but complimentary to the recently developed residential project. Our financial analysis demonstrates that Scenario 2 could be realized within the next two to four years (given the same qualifiers as Scenario 1) and generate an acceptable 6.9 percent ROE for the property owner.

Nursing Home Site - This former nursing home and three quarter of an acre site is currently vacant. The property owner has not made known any particular reuse plans for the more than 18,000 square foot masonry building (spread over a total of four floors and a basement). Based on current market area conditions and findings from its earlier real estate supply/demand analysis, 4ward Planning modeled two prospective reuse scenarios for the building: *Scenario 1*: Demolition of the existing building and new construction of 30 multi-family units (9 condominium units and 21 rental units); *Scenario 2*: Adaptively reuse the existing 18,000 square foot building for professional and/or medical office space.

Based on the estimated metrics used in modeling the multi-family rental new construction in Scenario 1, this proposed scenario could be realized within the next two to five years and generate a respectable 6.2 percent market return on equity (ROE) rate (dependent on the land-owner moving forward with this proposed site plan and receiving necessary approvals and tenant leases being secured). The average residential unit gross floor area is estimated at 750 square feet (encompassing, primarily, one- and two-bedroom units) for this analysis and is consistent with area rental space dimensions.

Scenario 2 assumes an adaptive reuse of the existing building for commercial office use (either all small professional office space, medical office space or some combination). Converting this building's space to commercial office requires far less capital investment than would adaptively reusing the space for multi-family residential, given the existing floorplan. Our financial analysis demonstrates that Scenario 2 could be realized within the next three to six years (given the same qualifiers as Scenario 1) and generate a very attractive 12.8 percent ROE for the property owner.

Dry Bridge Road Site - This active quarry is nearly 300 acres in size and features few critical utilities (e.g., water, sewer and power) throughout the site. The property owner is currently entertaining a re-use of the site for 286 single-family detached housing units (at approximately 15,000 square feet per lot or just over a quarter acre), detailed in Scenario 1. Based on current market area conditions for the type of residential being considered, inclusive of cost of construction, sales absorption factor for single-family housing units and current mortgage underwriting standards, this proposed scenario would, likely, be realized over the next four to seven years (no 15-year return on equity is listed, as these units would, ostensibly, be sold well within the 15-year hold period and are not intended to generate long-term cash-flow, as is the case with the project types examined above. Further, it should be noted that of all project scenarios examined in this analysis, this scenario, in particular, faces the greatest challenge of achieving its transaction goal in the near-term (namely, selling 286 single-family detached units within the next five years), due to current market demand, employment markets and demographic trends outlined in within 4ward Planning's broader North Kingstown market and real estate analyses.

4ward Planning identified a second viable redevelopment option for the Dry Bridge Road site (Scenario 2), which eschews the 286 single-family detached housing units contemplated in Scenario 1 and, instead, envisions 2.5 million square feet of research and development and flex office/warehouse business park. 4ward Planning's real estate supply/demand analysis, interviews with officials at the Quonset Business Park (located within North Kingstown's borders), and its current statewide economic analysis performed under the Rhode Map Rhode Island study, suggests there will, likely, be long-term need for R&D and flex warehouse space in the North Kingstown market area. While the realization horizon for this build-out is significantly longer than any of the other prospective project scenarios examined in this financial analysis, the likely economic impact and positive fiscal implications for such a redevelopment are far more significant than any of the other redevelopment scenarios examined. Further, the Dry Bridge Road Scenario 2 assumes there would be some degree of public participation, in terms of infrastructure investment, in order for this scenario to be realized.

Our financial analysis demonstrates that Scenario 2 could be realized within an eight- to twelve-year time frame (assuming infrastructure investments are put forth and a sound marketing campaign developed for the business park) and generate an acceptable 7.7 percent ROE for the property owner.

Exhibited on the following pages are the more detailed metrics associated with each of the above identified redevelopment scenarios.

Dodge Property Scenario I

Acreage Acquired	2.80
Property Acquisition Cost	\$0
Demolition Cost	\$150,000
Relocation Costs	\$0
Site Work Cost	\$30,995
Multi-family Residential Units Developed	0
Multi-family Residential Development Costs	\$0
Townhouse Residential Units Developed	0
Townhouse Residential Development Costs	\$0
Retail Square Footage Developed	19,622
Retail Development Costs	\$2,824,783
Office Square Footage Developed	0
Office Development Costs	\$0
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	78
Total Surface Parking Costs	\$274,708
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$164,024
Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	\$455,703
Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	\$2,824,783
Total Phase I Costs	\$3,444,510

Dodge Property Scenario II

Acreage Acquired	2.80
Property Acquisition Cost	\$0
Demolition Cost	\$150,000
Relocation Costs	\$0
Site Work Cost	\$38,990
Multi-family Residential Units Developed	0
Multi-family Residential Development Costs	\$0
Townhouse Residential Units Developed	0
Townhouse Residential Development Costs	\$0
Retail Square Footage Developed	19,622
Retail Development Costs	\$2,824,783
Office Square Footage Developed	5,000
Office Development Costs	\$747,000
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	93
Total Surface Parking Costs	\$327,208
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$204,399
Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	\$516,198
Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	\$3,571,783
Total Phase I Costs	\$4,292,380

Tarbox Site Scenario I

Acreage Acquired	3.50
Property Acquisition Cost	\$0
Demolition Cost	\$0
Relocation Costs	\$0
Site Work Cost	\$77,013
Multi-family Residential Units Developed	31
Multi-family Residential Development Costs	\$4,037,880
Townhouse Residential Units Developed	14
Townhouse Residential Development Costs	\$1,768,860
Retail Square Footage Developed	10,000
Retail Development Costs	\$1,439,600
Office Square Footage Developed	0
Office Development Costs	\$0
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	130
Total Surface Parking Costs	\$455,000
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$300,475
Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	\$532,013
Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	\$7,246,340
Total Phase I Costs	\$8,078,828

Tarbox Site Scenario II

Acreage Acquired	3.50
Property Acquisition Cost	\$0
Demolition Cost	\$0
Relocation Costs	\$0
Site Work Cost	\$139,780
Multi-family Residential Units Developed	69
Multi-family Residential Development Costs	\$9,347,200
Townhouse Residential Units Developed	31
Townhouse Residential Development Costs	\$3,930,800
Retail Square Footage Developed	0
Retail Development Costs	\$0
Office Square Footage Developed	0
Office Development Costs	\$0
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	200
Total Surface Parking Costs	\$700,000
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$509,349
Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	\$839,780
Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	\$13,278,000
Total Phase I Costs	\$14,627,129

Nursing Home Site Scenario I

Acreage Acquired	0.68
Property Acquisition Cost	\$0
Demolition Cost	\$270,000
Relocation Costs	\$0
Site Work Cost	\$39,129
Multi-family Residential Units Developed	21
Multi-family Residential Development Costs	\$2,523,675
Townhouse Residential Units Developed	9
Townhouse Residential Development Costs	\$1,179,240
Retail Square Footage Developed	0
Retail Development Costs	\$0
Office Square Footage Developed	0
Office Development Costs	\$0
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	60
Total Surface Parking Costs	\$210,000
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$152,140
Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	\$519,129
Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	\$3,702,915
Total Phase I Costs	\$4,374,184

Nursing Home Site Scenario II

Acreage Acquired	0.68
Property Acquisition Cost	\$0
Demolition Cost	\$0
Relocation Costs	\$0
Site Work Cost	\$15,086
Multi-family Residential Units Developed	0
Multi-family Residential Development Costs	\$0
Townhouse Residential Units Developed	0
Townhouse Residential Development Costs	\$0
Retail Square Footage Developed	0
Retail Development Costs	\$0
Office Square Footage Developed	18,024
Office Development Costs	\$1,319,357
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	54
Total Surface Parking Costs	\$189,252
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$10,217
Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	\$204,338
Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	\$1,319,357
Total Phase I Costs	\$1,533,912

Dry Bridge Rd. Scenario I

Acreage Acquired	290.00
Property Acquisition Cost	\$0
Demolition Cost	\$0
Relocation Costs	\$0
Site Work Cost	\$2,499,640
Multi-family Residential Units Developed	0
Multi-family Residential Development Costs	\$0
Townhouse Residential Units Developed	286
Townhouse Residential Development Costs	\$99,985,600
Retail Square Footage Developed	0
Retail Development Costs	\$0
Office Square Footage Developed	0
Office Development Costs	\$0
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	572
Total Surface Parking Costs	\$0
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$5,124,262
Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	\$2,499,640
Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	\$99,985,600
Total Phase I Costs	\$107,609,502

Dry Bridge Rd. Scenario II

Acreage Acquired	290.00
Property Acquisition Cost	\$0
Demolition Cost	\$0
Relocation Costs	\$0
Site Work Cost	\$22,540,000
Multi-family Residential Units Developed	0
Multi-family Residential Development Costs	\$0
Townhouse Residential Units Developed	0
Townhouse Residential Development Costs	\$0
Retail Square Footage Developed	0
Retail Development Costs	\$0
Office Square Footage Developed	2,500,000
Office Development Costs	\$255,500,000
Lodging Square Footage Developed	0
Lodging Development Costs	\$0
Parking Spaces - Structured	0
Total Structured Parking Costs	\$0
Parking Spaces - Surface	7500
Total Surface Parking Costs	\$26,250,000
Performance Venue Space Developed	0
Performance Venue Development Costs	\$0
Developer Fee	\$15,214,500
 Sub-Total Phase I Acquisition, Site, Demo & Infrastructure Costs	 \$48,790,000
 Sub-Total Phase I Building Construction Costs (Hard and Soft Combined)	 \$255,500,000
 Total Phase I Costs	 \$319,504,500

APPENDIX H:

Business Recruitment Resources

Business Recruitment

In order to assist North Kingstown with business recruitment, we used our subscription to the proprietary database, InfoFree (the country's largest and most accurate business database) to itemize specific businesses, names, contact information, sizing requirements, preferred location, and other related business type descriptions. Note that InfoFree is approximately 90 percent accurate. We identified businesses within the market-feasible sectors for each focus area, listed below by NAICS code. We identified specific businesses already located within Washington, Newport, or Kent counties with annual sales greater than \$2.5 million and 20 or more employees:

[812112.02] Spas

[713940.01] Physical Fitness Clubs and Centers

[624410.02] Child Day Care Centers

[621] Ambulatory Health Care Services

[812112] Beauty Salons

[812320.06] Dry Cleaners

[722515.02] Bakeries

[722515.01] Coffee Shops

[722513.01] Sandwich Shops and Stands

[448120.05] Boutiques

[721191] Bed-and-breakfast Inns

Because of the sensitive nature of this information, it has been provided separately to town staff.

Business Benchmarks

4ward Planning used national data sources to assess the general operation pattern for the industry and specific business types that are market-feasible in North Kingstown’s focus areas. The result is a set of benchmarks which the town can use to compare possible businesses to optimal industry business models. We used a national database, BizMiner, to determine the following metrics for the above industries within the United States, Rhode Island, and where applicable North Kingstown or Washington County:

- number of establishments,
- number of small businesses (defined as a single-site firm with less than 25 employees),
- average annual sales,
- sales growth since 2010,
- annual sales per employee, and
- startup cessation rate (using a time period of 2011 through Q2 2013).
- All metrics are current as of Q2 2013

Post Road Corridor

		# of Establishments	# of Small Businesses	Average Annual Sales	Sales Growth Since 2010	Annual Sales Per Employee	Startup Firm Cessation Rate
Health Club	Washington County	26	17	\$191,847	4.9%	\$28,341	33.30%
	Rhode Island	142	84	\$338,868	16.2%	\$38,281	41.67%
	United States	36,436	21,819	\$415,689	6.9%	\$37,441	41.14%
Child Care	North Kingstown	10	9	\$486,065	5.9%	\$41,544	N/A
	Rhode Island	348	307	\$532,193	3.4%	\$41,544	23.08%
	United States	106,403	93,122	\$431,437	8.1%	\$40,825	36.76%
Medical Office	North Kingstown	161	154	\$596,520	-0.8%	\$114,197	20.00%
	Rhode Island	9,922	9,607	\$540,105	-5.3%	\$114,197	38.00%
	United States	2,150,230	2,071,291	\$672,064	-7.5%	\$125,838	28.65%
	N/A – No startups recorded since 2011						

Wickford Village

		# of Establishments	# of Small Businesses	Average Annual Sales	Sales Growth Since 2010	Annual Sales Per Employee	Startup Firm Cessation Rate
Bed and Breakfast	Washington County	43	41	\$242,221	5.3%	\$61,997	60.00%
	Rhode Island	128	126	202,943	6.60%	\$61,997	60.00%
	United States	11,583	11,411	186,952	-3.10%	58,675	31.09%
Spa	n/a						
	Rhode Island	44	40	287,868	7.40%	\$30,440	60.00%
	United States	12,363	11,687	\$238,525	-7.80%	\$31,185	48.82%
Boutiques	n/a						
	Rhode Island	32	31	246,262	2%	112,577	75%
	United States	13,716	13,158	501,863	9.40%	148,247	53.82%
Full-Service Restaurant	North Kingstown	22	14	781,900	8.3%*	50,151	0% (1 out of 1)
	Rhode Island	1,138	719	883,944	11.60%	50,151	10.53%
	United States	244,198	129,931	1,025,075	24.30%	50,087	26.02%

*small business restaurants grew by 5.1% during same time period

Wickford Junction

		# of Establishments	# of Small Businesses	Average Annual Sales	Sales Growth Since 2010	Annual Sales Per Employee	Startup Firm Cessation Rate
Salon	North Kingstown			No data			
	Rhode Island	1175	1123	159,626	-14.90%	\$42,989	28.24%
	United States	276,608	255,348	\$180,137	2.60%	\$42,760	36.67%
Health Club	Washington County	26	17	\$191,847	4.9%	\$28,341	33.30%
	Rhode Island	142	84	338,868	16.20%	\$38,281	41.67%
	United States	36,436	21,819	415,689	6.9%	37,441	41.14%
Bakery	North Kingstown			No data			N/A
	Rhode Island	253	52	926,262	18.00%	59,067	N/A
	United States	22,898	11,578	671,734	27.70%	58,791	30.56%
Coffee Shop	North Kingstown			No data			
	Rhode Island	68	48	645,302	13.10%	59,218	0% (4 for 4)
	United States	21,374	10,717	684,837	17.70%	58,941	43.37%
Dry Cleaners	North Kingstown			No data			
	Rhode Island	170	165	168,952	6%	46,251	11.11%
	United States	44,401	41,872	206,837	9.40%	50,252	36.34%
Sandwich Shop	North Kingstown			No data			
	Rhode Island	171	42	505,126	16.80%	48,309	N/A
	United States	51,793	12,868	534,249	19.30%	51,898	33.38%

N/A – No startups recorded since 2011

APPENDIX I:

Recommended Financial Tools

Financing Tools: Supplement to Recommendations

Tax Increment Financing District

Tax increment financing (TIF) is the use of projected increased local tax revenues from an anticipated development to fund site and area improvements or provide incentives to developers which, in Rhode Island, means property taxes. TIF can be used for land assembly and acquisition, demolition, infrastructure development, to match federal grant sources and to provide developer incentives. Local governments benefit from higher property tax revenues once the bonds are retired and may receive more wage taxes if the development project results in a creation of new jobs. TIF can also advance broader policy objectives, such as MBE/WBE programs, linkage programs such as affordable housing, and public amenities such as open space. This financing tool is currently being used in East Providence.

North Kingstown would designate a portion of the tax increment resulting from increased property values and additional development (anticipated to result from sewer investment) for the benefit of certain projects described in the required Redevelopment Plan and Project Plan. These projects could include additional infrastructure and public improvements contemplated in this Community Market Study, such as public access and improvements in Wickford Harbor, Complete Streets efforts along Post Road, and conversion of obsolescent properties into open space (due to the utility easement) along Post Road, among others.

Financing Tools: Supplement to Recommendations

Business Improvement District

A Business Improvement District (BID) is a designated area of the Town in which property owners form a legal entity to be able to fund projects within the district, purchase services that improve their property values, improve their ability to rent to high quality tenants and attract more visitors to the downtown. Specific services provided by BIDs include: cleaning streets, providing security, making capital improvements, construction of pedestrian and streetscape enhancements, and marketing the area. These services are over and above what the City provides. Providence has more than one BID and Pawtucket conducted a detailed study recommending they establish a BID, which could be a great resource for North Kingstown.

To pay for the services, the property owners pay an agreed-upon percentage of their property's value (a tax levy) into a pool that the BID leadership manages. The BID is often funded primarily through the levy but can also draw on other public and private funding streams, including fundraising.

Similar to a TIF, state legislation is necessary to permit local governments to create BIDs. Steps for approval can be as follows: First, businesses in the area petition the local government to create the BID. Second, the local government determines that a majority of businesses want the BID. Third, the local government enacts legislation creating the BID. Once the property owners have established the structure of the BID, it must be approved by the Town Council and the state legislature. Sixty percent of property owners in the proposed district must vote in favor of establishing the BID. However, once approved, all property owners in the district must pay the tax levy.