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Merrimack Valley Planning Commission Regional Assets Study

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MERRIMACK VALLEY PLANNING COMMISSION

REGIONAL ASSETS STUDY

June 1999

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INTRODUCTION

A. BACKGROUND

As we approach the millennium, it is clear that the quality of life of the citizens of the Merrimack Valley is to be highly valued. Through a town by town analysis, it is also clear that the Region's environment, educational attainment, economic prospects, physical security, recreational and cultural opportunities and health are all improving. No one is ready to state that the Region is free of problems. However, with virtual unanimity local citizens and officials are proud of their region and its improvements. We have noted this in the national praise for the clean up of the Merrimack River, the hard work of the City of Lawrence officials to revitalize their city and the improvements to the region's downtowns. We have noted this in the commitment of the region to education, infrastructure improvements and health. And we have noted it in the efforts to keep the region economically vibrant. The Merrimack Valley is a vibrant, diverse, hardworking region that is a special place. It deserves special treatment.

B. INTENT OF THIS PROJECT

This report builds on the points noted above: It is intended to illuminate the Region's assets. The motivation for the study is simply this: The assets of the Region have never been comprehensively compiled and, in an age of tremendous economic competition, it is essential that this information be publicly distributed. Moreover, in an era when the negative attributes are typically highlighted, it is essential that a region's assets be trumpeted.

C. METHOD

The study was undertaken through four steps. First, recent plans, reports and documents of the fifteen towns and the region were reviewed and analyzed. A bibliography of these reports is attached. Secondly, informal interviews with local citizens, planners, Chamber of Commerce officials and others were undertaken in order to obtain local perspectives. A list of these key contacts is also attached. Thirdly, a workshop dealing with the region's strengths and opportunities was held. This workshop enabled the participants to discuss the existing and potential assets and to come to a consensus on those that are most important to the region. Finally, the findings from the reports, interviews and the workshop were then incorporated into this report.

D. THE REPORT

The report is divided into two parts. The first is a compilation of the assets from a regional perspective. The second is intended to serve as a technical compendium. It lists the assets on a community by community basis.

E. WHAT IS AN ASSET?

A question may arise concerning the definition of an asset: What is it? We have defined an asset as any attribute that is considered positive by the citizens of the region. It could be, for example, abstract (a strong work ethic), a natural resource (the Merrimack River), social (demographic diversity, educational attainment), economic (a low unemployment rate), infrastructural (three interstate highways), recreational (the beaches), cultural (the museums) and so on. In a final analysis, assets are a region's valued strengths.

PART ONE
REGIONAL PROFILE

THE REGIONAL ASSETS

INTRODUCTION

The Merrimack Valley Region represented by 15 communities is located in the northeastern corner of Massachusetts bordering both New Hampshire and the Atlantic Ocean and just 30 minutes away from Boston. With eight of the fifteen communities classified as rural and four as suburban, the region has many of the attributes that make up the New England community character. They are quiet, well ordered and secure. But within the boundaries of the Region's three central cities the essence changes to activity - vibrancy. They are the homes of old and new industry, long term residents and our newest immigrants and many of our important institutions. The region's diversity is its strength. The region supports vast unspoiled parks and thriving urban centers, high tech industry and blue collar services, sandy beaches and upscale shopping, stately mansions and oceanfront cottages. Yet there are common threads that run through the region as well; the Merrimack River that spawned the industrial revolution and now is a dynamic recreational corridor. It is the spine that unites the people and communities of the Region. The Region is also highly accessible via Logan International Airport and the Interstate system, has a well-educated work-force and is highly respectful of its historical and natural resources.

A. LOCATIONAL ASSETS

The region's location northwest of metropolitan Boston is an asset of increasing importance. The region benefited from the Massachusetts economic boom period of 1984-1987 partly because of its proximity to metropolitan Boston. Now, the construction of the Central Artery Tunnel project through downtown Boston is making it increasingly difficult to travel from the south and west of Boston to Logan International Airport. Time delays through the Boston metropolitan area to reach clients, distributors and vendors are becoming increasingly lengthy and frustrating. The problems will become much worse before they begin to improve. The Merrimack Valley region is ideally situated to take advantage of this situation, precisely because of its excellent surface transportation system and connections to both Logan and Manchester airports. However, the Valley needs to publicize and market its locational and transportation assets.

B. TRANSPORTATION ASSETS

The region's surface transportation network is another of its assets, particularly when compared to neighboring areas. Three interstate, limited access highways cross the region, linking it to the entire interstate system and providing truck access north, south and west. At least one of the interstates passes through 13 of the region's 15 communities, creating unparalleled access to the region's undeveloped land area. The region is also served by two major rail lines providing commuter rail and freight service. There is a state-sponsored proposal to institute high-speed passenger rail service along one line from Portland, Maine to Boston, with one stop to occur in the Merrimack Valley.

In addition, the region is located almost equidistant between Logan International Airport in Boston, and Manchester Airport in Manchester, New Hampshire, both of which are within an hour's driving time from any community in the region. The Lawrence Airport, in the region, provides charter services and can accommodate business jets.

In summary, the region's strong transportation assets include:

1. It is the home of three interstate highways.
2. It has direct railroad freight service to places across the nation.
3. It is the home of two commuter lines that connect to Boston.
4. It hosts an airfield that can handle corporate and private aircrafts.
5. Two major passenger airports and one major freight airport are less than an hour away.

C. NEIGHBORHOOD ASSETS

Neighborhoods in the region are diverse in density, price and character. Rural farm communities with large lots provide privacy and abundant open space. Long established suburban neighborhoods are often found close to schools, community stores and parks. Historic districts provide a unique environment. Many in the Valley are along the rivers and have sweeping views or in the town centers close to shops, restaurants and town greens. Beachfront and island districts offer another unique lifestyle. There are special ecosystems that change through the seasons and provide year round classrooms for art and education, as well as ample opportunities for

recreation. Contemporary subdivisions are creating new neighborhoods, often with their own parks or open space. There are urban choices as well giving residents easy access to cultural amenities, shopping and restaurants. These range from historic townhouses to waterfront condominiums, apartment complexes and studio lofts.

We can identify five critical assets related to neighborhoods:

1. There is significant reinvestment across the Region in residential areas in all of the rural and suburban towns.
2. There are abundant first time home buyer opportunities in the cities.
3. Apartments can still be reasonably rented in older areas.
4. There are a range of single family home types available from those required by young families to the most affluent citizens.
5. There are opportunities to revitalize nineteenth century structures.

D. EDUCATIONAL ASSETS

The Merrimack Valley Region, provides educational services to more than 300,000 students in 90 public schools, 19 private schools, and 4 colleges. The average dropout rate of the region's students is 3.0 which is lower than the State average of 3.4. The region's average educational attainment levels are that 84.1% have graduated from high school or higher institutions and 26.9% have a bachelor's degree or higher. Realizing the need for further education and skills, the region's workforce has helped to create some of the strongest business training and development programs within the Commonwealth of Massachusetts. From pre-school through high school or the regional vocational technical schools, the area's students benefit from some of the finest resources available. Teachers, libraries, arts offerings, special programs, and athletics (which attract spirited community support) all reflect the highest standards of quality in education.

The Valley communities regularly note that their highly reputable private schools attract students both locally and internationally. These schools include: Governor Dummer Academy, the oldest boarding school in the United States (founded in 1763); Phillips Academy, the internationally renowned college preparatory school; The Brooks School, a very highly regarded college

preparatory school; The Pike School, educating bright youngsters from pre-kindergarten through ninth grade; and religiously affiliated high schools including Central Catholic High (for boys), St. Mary's, and the Presentation of Mary Academy.

Four institutions of higher learning grace the region's communities. Bradford College, founded as Bradford Academy in 1803, is an innovative, coeducational, four-year liberal arts college located in Haverhill. Merrimack College, founded by the Augustinian Fathers, offers liberal arts and business degree programs for both day and evening students on a scenic 220-acre campus in Andover. The Massachusetts School of Law provides a quality legal education from its campus in Andover. Finally, the Northern Essex Community College, in Haverhill, offers a wide variety of liberal arts and professionally focused certificate and degree programs to meet the needs of students of all ages.

The American workforce is going back to school, according to prominent business educators. The Northern Essex Community College's Center for Business and Industry is the largest center of its kind in New England, in a community college. The Center offers courses in Total Quality Management, Train-the-Trainer Programs, and other technical and professional development areas. Other business training resources include the Computer Learning Center, the City of Lawrence Adult Vocational School, American Training, and the International Institute. The Stevens Estate Conference Center, a gracious mansion situated atop Osgood Hill in North Andover, hosts professional training, educational seminars, and corporate retreats.

The following represent critical educational assets:

1. There is a strong commitment to education at all levels in the Valley.
2. Several of the communities score quite high on public school testing examinations.
3. The drop out rate is well below the state average.
4. Better than 1/4 of all adults have at least a Bachelors degree.
5. There are four vocational/technical schools in the Region.
6. Approximately 77% of recent high school graduates intend to pursue higher education opportunities.

7. The Valley houses several of the nation's most prestigious preparatory schools including Phillips (Andover) Academy, Governor Dummer Academy, The Brooks School and The Pike School.
8. The region is home to a community college, a law school and two colleges.
9. There are wide-spread opportunities for continuing education.

E. HUMAN RESOURCE ASSETS

It was said earlier that the region's most important economic resource is its people. A report for the Massachusetts Executive Office of Economic Affairs by Professor Michael Porter of the Harvard Business School in collaboration with the Monitor Company, *The Competitive Advantage of Massachusetts*, noted that the growth in output per employee in Massachusetts was three times the national average during 1976-1986, the last time the region's productivity growth was studied. Porter goes on that "Massachusetts enjoys a nearly unique pool of highly qualified professionals and highly skilled technicians. We have world-class educational, medical and research institutions." It has also been noted that Massachusetts workers, though expensive, are hard-working, skillful and some of the most loyal in the country, a fact not well known or publicized.

F. ECONOMIC AND FISCAL ASSETS

Another obvious way in which the region's human resources constitute an economic development asset is its unemployed and underemployed labor pool. The region's unemployment rate, the percentage of the labor force not currently working, was 4.4 percent in 1998. This represents a significant drop in recent years in response to the economic boom of the nation. The region, however, is very diverse in its economic profile. For example, the unemployment rates range from a low of 1.7% in Boxford to a high of 8.5% in the City of Lawrence for 1998, nearly four points higher than the region. Also, the unemployment rate for the region has a tendency to be higher than that of the State at 3.3 percent for 1998.

The supply of unemployed workers may have the effect of depressing average wages in the region compared to other areas of the state. A silver lining to this is that depressed wage rates relative to other areas will in time attract labor intensive industries eager to reduce labor costs so as to produce a cheaper and thus more attractive product. In a state that is considered to be a

high-cost state for doing business, a minimal differential in our unemployment rates and average wage rates can be used as an inducement to attract new business and industry.

The region's communities are fiscally sound with strong Bond Ratings. 9 out of 15 communities have A Bond Ratings, 2 are not rated and 4 have B ratings. Georgetown, Newbury, and West Newbury all have a bond rating of A1, the region's highest rating while Haverhill and Lawrence have a bond rating of Baa3, the region's lowest rating.

G. INDUSTRIAL AND OFFICE ASSETS

The Merrimack Valley is a prime market area close to Boston, New Hampshire and Maine. It is served by an excellent transportation infrastructure that links it to the country's major road network and gives it easy access to airline and port facilities. There is a diverse, adaptable, and well-educated workforce and there are progressive, business-friendly cities and towns. These conditions have brought in such companies as Lucent Technologies, the nation's premier telecommunications laboratory. Its presence, along with other companies, makes this area a cutting-edge center for telecommunications research and development. Raytheon, ranked among the 100 largest U.S. companies, is recognized worldwide as a leader in the sophisticated electronics industry. Textile/apparel industries have a foothold in the valley as well, including: KGR, manufacturer of better women's clothing sold by Talbots, Dillard's and Nordstrom and others, Ralph Lauren/Polo, makers of designer clothing, and New Balance, developer of the popular sneaker line.

While these industries have their needs largely met in the Valley's cities, many smaller industries are at home in the Region's smaller communities. Industrial and business parks, revitalized mill buildings, and commercial and industrial zones along major transportation corridors attract an assortment of industries and businesses from machine tooling and metal fabrication to hospitality and health services to retail and consulting services.

The climate for industrial and/or commercial development changes along town borders. While many of the Valley's communities are actively seeking industrial and commercial development there are also towns that prefer to support only residential growth. They are quite comfortable in maintaining their character.

A study of the town's municipal agencies and business organizations provides a clear indication of their predilection for development. Many Economic and Community Development offices throughout the region are aggressive in their approach, updating zoning, creating infrastructure and developing the fiscal framework needed to attract industrial and commercial development. Chambers of Commerce and industry and business alliances are supporting and sometimes leading these efforts.

The availability of industrial and commercial sites is not a limiting factor for further growth in the region. Industrial parks with ample undeveloped sites and water, sewer and highway access, recycled mill buildings, new business park zoning, health district overlay zoning, and abundant commercial sites along major highways all exist in the Merrimack Valley.

In summary, we can identify thirteen critical regional assets concerning industry and commerce:

1. The Valley is located in one of the most economically vibrant areas of the world.
2. It is increasingly an economic center in its own right as areas to the north, south and west expand.
3. It is proxemic to two major passenger airports, one freight airport and one small craft airport.
4. It has ample land that is suitable for industrial/office development.
5. It is the home to several of the best planned industrial parks in New England.
6. It has ample space in its center city mills for manufacturing and/or incubator industries.
7. It has a diverse workforce that matches both traditional manufacturing needs as well as growth industries.
8. It has an ample pool of economic development agencies designed to nurture and attract new industries.
9. It has available water, sewer, electric and fiber optic capacity.
10. It is a home of cutting edge industries.

11. The Region supports a range of clusters including biotechnology, telecommunications, textiles and defense systems.
12. Ten of the Regions eighteen industrial parks are at capacity.
13. Many of the nations most prestigious companies are located in the Valley ranging from Malden Mills to Lucent Technologies and Raytheon.

H. RECREATIONAL AND NATURAL RESOURCE ASSETS

Recreational and natural resources abound in the Merrimack Valley. From the beaches and marshes along the Atlantic Ocean, westward along the Merrimack and Parker Rivers to area ponds, wetlands, parks, forests, reservations, wildlife management areas, trails, and extensive recreation facilities, the Merrimack Valley possesses some of the richest and most impressive recreational and natural resources in the Commonwealth. Land use in the region can be described as predominately coastal lowland with substantial portions of its eastern borders being tidal marsh, estuary and barrier beach. In 1991, approximately 15,000 (or 8.3%) of the 177,465 acres in the region is classified as being wetlands, with approximately 3,000 acres (or 1.6%) being classified as water-based, active, and/or spectator recreation land. Over 10,000+ acres of preserved open spaces and parklands can be found in the Merrimack Valley communities, and approximately 75,000 acres or 42% of the region is classified as forest land.

The Merrimack River is the region's preeminent freshwater resource, and has been cleaned enough to provide substantial fishing and other recreational enjoyment such as canoeing, kayaking, sailing, and swimming. Its 180 mile length flows from Franklin, New Hampshire in the White Mountains south into Massachusetts and then east to the Atlantic in Newburyport at Plum Island. The River connects many of the communities located within the Valley, including Amesbury, Groveland, Haverhill, Lawrence, Merrimac, Methuen, Newbury, Newburyport, North Andover, and Salisbury. For approximately 22 miles, from Haverhill to the Atlantic, the River is tidal. The Merrimack Valley Planning Commission's (MVPC) 1998 Comprehensive Economic Development Strategy report notes the importance of the Merrimack River, identifying it as "the region's most precious natural economic resource", and noting that it is "the only major interstate river in New England that serves as a significant source of drinking water". Although once deemed one of the 10 most polluted rivers in the country, because of sufficient

governmental and citizen intervention, the Merrimack has been brought back to life and once again has become a haven for all types of habitat. In December of 1997, the Merrimack River was even nominated to be an "American Heritage River." Today, the River not only provides a scenic and important wildlife corridor where bald eagles and other wildlife species abound, but its banks have attracted new home construction, substantial parks and trails, gardens, and marinas.

Along with the Merrimack River, the Atlantic Ocean and its tidal wetlands from the New Hampshire/Massachusetts border south to the Rowley/Ipswich line is the recreation and natural resource jewel of the region. Although tidal wetlands are abundant among the 20 communities along the Atlantic on the North Shore, the Towns of Salisbury, Newbury, and Rowley have 40% of the regions tidal wetlands (11,034.3 out of 27,822.5 acres).

The Merrimack Valley provides excellent opportunities for the use of motorized and non-motorized boats. Area ponds and rivers, including the Merrimack, Parker, and Little Rivers provide ample opportunities for canoeing, kayaking, sailing, motor boating and in some cases, even water skiing. There are community (public) boating opportunities in the City of Lawrence, as well as private yachting clubs, such as the 1885 American Yacht Club in Newburyport. The Merrimack River Coast Guard Station, located on the Merrimack River in Newburyport, assists those on or near the water from the New Hampshire/Massachusetts border south to Halibut Point.

We have identified 16 recreational and natural resource assets that are significant to the Region:

1. There are more than 3,000 acres of recreation land in the Region.
2. There are more than 15,000 acres of wetlands that provide unique passive recreation opportunities.
3. There are more than 10,000 acres of open space in the Region.
4. There are more than 75,000 acres of forest land in the Region.
5. The Merrimack River is one of America's treasures: It was recently nominated as an American Heritage river.

6. The Merrimack River is now attracting a wide variety of wildlife species and has been determined to be “fishable.”
7. There are approximately 27,822 acres of tidal wetlands that represent tremendous potential for shell fishing, other seafood and for experiencing nature.
8. There are myriad ocean beaches along the Valley’s coast.
9. There are thirteen golf courses in the Valley providing a range of experiences from the beginner to the near professional.
10. The Parker River National Wildlife Refuge, consisting of 25,500 acres, attracts more than 275,000 visitors per year.
11. There are nine state forests and parks in the Valley, totaling more than 6,000 acres.
12. The Region is the home of Old Hill Town, a Trustees of Reservation property of approximately 495 acres.
13. The Parker River Wildlife Sanctuary, managed by the Massachusetts Audubon Society, is considered one of the top birding sanctuaries in the nation.
14. The Region represents the northeastern curve of the famed Bay Circuit Greenway. First proposed by Charles Eliot II. There are 39 miles of Bay Circuit trails in the Valley.
15. The Essex County Greenbelt Association has been able to preserve 1,555 acres/102 parcels in seven Valley communities.
16. There are more than fifty conservation and outdoor groups in the Valley.

I. HISTORIC AND CULTURAL ASSETS

Every region is unique in its history and culture. What makes it significant and exciting is the degree to which the present embraces those differences; preserves, promotes and celebrates them. The Merrimack Valley region rich in history, brilliant in its architectural beauty and brimming with arts and culture is a celebration of legacy and an expression of optimism.

Historic Assets

The rocky ocean shoreline that defines portions of the Merrimack Valley Region, its sandy beaches and natural harbors, its large salt marshes, forests and rivers help explain the appeal of

the area in the 16th and 17th centuries and why it developed as it did. The coastal and deep river towns still preserve their original colonial patterns of roads, open spaces, and commons, as well as numerous First Period homes. The waterfronts still show how the settlers developed fishing and maritime trades and transformed the harbors with warehouses and wharves, ships and boatyards. Town centers, filled with elegant homes, show how the merchants and sea captains gained wealth by privatizing during the Revolution and then by opening the farthest ports of the world to the tall ships.

The same maritime wealth helped finance the industrial revolution that was born on the shores of the region's rivers. The huge textile mills and shoe factories, the machine shops and tanning plants, the workers' homes and industrialists' mansions still exist today, defining shorefronts, municipal centers and neighborhoods. Home of the nation's seminal labor strike, the region remembers the poignant story of the immigration and labor unrest that accompanied industrial growth.

In its early history agricultural land uses predominated much of the region. From the productive salt marsh hay fields to a wide array of crop and livestock farms, the region's settlers gained sustenance from the valley land. Well into the 1800's agriculture was such a vital component of the region's livelihood that towns were more than 75% cleared and less than 25% forested. Although today outside the urban centers the numbers have been reversed, farms settled from as early as the 17th and 18th centuries are still operational; some in the same families.

At the same time that history in the Merrimack Valley is being protected, the region is delighting in the present and expanding its possibilities for the future. From cultural councils and arts centers, theaters, music halls and galleries, to shopping and dining venues, the region is alive with cultural amenities. Performances, festivals, and community events of all kinds offer year round vivacity.

Directing the preservation of the region's history and promoting its arts and culture are a number of professional and numerous volunteer organizations. The following represent important regional assets:

1. Society for the Preservation of New England Antiquities (SPNEA). SPNEA was founded in 1910 to protect New England's cultural and architectural heritage. SPNEA is an

internationally known museum and national leader in preservation, research and innovative programming. SPNEA's mission is to preserve, interpret, and collect buildings, landscapes, and objects reflecting New England's daily life between the 17th century and the present for the enjoyment and benefit for all. SPNEA owns and operates two Museum properties, three study projects and one historic landscape in the Merrimack Valley.

2. Historical Societies – Most towns within the Merrimack Valley have active Historical Societies that work to identify and preserve the historic resources within their borders. They are active in organizing tours, presenting exhibits, designating properties to the National Historic Register and developing historic preservation plans that offer guidance to municipal planners.
3. Massachusetts Heritage State Parks - The Massachusetts Department of Environmental Management, Division of Forests and Parks develops and manages the Massachusetts Heritage State Parks, one of which is in the Merrimack Valley. Heritage State Parks represent a national model in urban landscape design, historic preservation and economic revitalization. They capture the spirit of the 19th century industrial revolution in their cities and celebrate the people, products and places that have made Massachusetts' history.
4. Municipal & Regional Agencies – Chambers of Commerce and planning agencies throughout the region advance the interests of history, art and culture through education, information dissemination, and financial and administrative support efforts. The Merrimack Valley has the assistance of such regional concerns as the Greater Lawrence Chamber of Commerce, The Newbury Area Chamber of Commerce and Industry, The Merrimack Valley Planning Commission, The North of Boston Convention and Visitors Bureau and The North Shore Chamber of Commerce. In addition most towns in the region have their own chambers that support activities within their town's boundaries.
5. Cultural Councils – The Merrimack Valley enjoys an abundance of active patrons of the arts and culture. They can be found in the local cultural councils that seek to promote excellence, access, education and diversity in the Arts, Humanities and Interpretive Sciences. Often these objectives are accomplished through granting funds for cultural activities, sponsoring exhibits and competitions.

J. HISTORIC SITE ASSETS

With its prominence in the 17th century maritime industry, its early agricultural roots, and its distinction as a leader in the industrial revolution the Merrimack Valley has a historic richness to treasure. There are over 48 recognized historic districts, over 700 historic sites and untold artifacts to enjoy. Some of these resources are preserved in the area's Heritage Parks and Areas, while others are promoted through Museums or presented through tours. Among the most important assets are the following:

1. Lawrence Heritage State Park, developed in 1978 as one of Massachusetts Heritage State Parks, captures the true spirit of the American Industrial Revolution and the people who worked hard to make it happen. The park celebrates the city that drew immigrants from 52 nations and commemorates the site of the great Bread and Roses Strike that sparked the American Labor Movement and brought about national reform of workers' rights laws. Heritage State Park locations throughout the city offer historical exhibits, entertainment and a variety of ethnic foods. A walking tour takes visitors past massive brick mill complexes, canals and the Great Stone Dam. In the heart of the city are beautiful old buildings renovated for contemporary use, an old public library, Victorian mansions and brick buildings that have been converted to offices, contemporary shops and restaurants. The Visitor's Center located in a restored 1840's boarding house boasts the original beams and brickwork and a turn-of-the century kitchen.
2. Essex National Heritage Area is a regional project created in cooperation with the National Park Service. It links landscapes, buildings and artifacts through three theme trails. Included in the Maritime Trail is the Newburyport Cluster of Newburyport, Amesbury, Salisbury and Newbury. This cluster of seacoast communities perched on the shores of the mighty Merrimack River is alive with museums, sea captains' mansions, and a magnificent harbor and boardwalk.
3. Robert S. Peabody Foundation in Andover is home of fifty-three exhibits of North American prehistoric archaeology and general anthropology.
4. Museum of American Textile History of North Andover brings the industrial era to life with antique textile machinery that is operational.

5. Hibernian Cultural Center in Lawrence is a library and cultural center containing extensive material on Irish heritage, including books, artifacts, and genealogy.
6. Coffin House, operated by SPNEA chronicles the evolution of domestic life in rural New England over three centuries.
7. Charles Tenney Estate is a Victorian era castle now owned by St. Basil's Seminary.
8. Searles Castle is a beautiful 19th century castle with impressive stone walls lining East Street. It is now home to Presentation of Mary Academy.
9. Ring's Island Museum illustrates the history of boat building, fish drying and other historic activities.

K. CULTURAL AND ARTISTIC ASSETS

Enthusiasm for cultural activities in the Merrimack Valley is matched only by its wealth of cultural centers and offerings. From the Firehouse Center for the Performing and Visual Arts to Methuen Memorial Music Hall and an abundance of art galleries, music venues, concert series, exhibits and performances, there is a vitality that honors the arts. Key among these cultural treasures are:

1. Methuen Memorial Music Hall, long recognized as "the premier showcase for organ performance talent on an historic instrument in the country" is home of the world-famous Walcker organ, built in Germany for the Boston Music Hall in 1863.
2. Addison Gallery of American Art is located at Phillips Academy, the prestigious preparatory school founded in 1778. It maintains excellent, varied collections of 18th and 19th century American paintings, sculpture, prints, photos and an historic collection of ship models.
3. J. Everett Collins Center for the Performing Arts with seating for 1200 is the largest of four performing arts theaters in Andover.
4. The Whittier Chamber Orchestra.
5. Firehouse Center for the Performing and Visual Arts in Newburyport offers world class-musical and stage productions as well an on-going concert series. It houses a restaurant, a theater for drama, dance and musical productions and an art gallery.

6. Maudslay Arts Center is set in a natural amphitheater, formerly part of a magnificent private estate. In this setting, music of all variety is performed all summer long. Maudslay also features regular productions of *Theater in the Open* and sponsors an Outdoor Sculpture Show. The Maudslay Community Concert Band plays free concerts at the Arts Center.
7. Stevens-Coolidge Place is a neo-colonial county estate of 165 acres with main house featuring Chinese porcelains, early American furniture, oriental runs and cut glass. Five landscaped acres include gardens and specimen trees.

L. FARM ASSETS

Agriculture is an important part of the Valley's cultural heritage and both families and entire communities are intent on preserving the farms that remain. The following represent important assets:

1. Bradstreet Farm in Rowley is the nation's second oldest farm to be continuously owned and occupied by the same family.
2. Pettingill Farm in Salisbury has endured for over 200 years and now offers visitors the opportunity to enjoy the plantings and farm animals as well as attend gardening classes
3. Bartlett's Farm produces fresh seasonal produce and flowers that are a 325-year tradition in the beautiful Salisbury Plains.

M. SHOPPING, LODGING AND DINING ASSETS

Shopping, dining and lodging in Merrimack Valley provide a cornucopia of experiences. Shoppers will be delighted with all they find in the region, from small town country markets and roadside stands, to antique stores, upscale boutiques, factory outlet stores, and a major mall.

1. Lawrence factory stores are the genuine article – the sneakers, sportswear and designer clothing in these stores are actually made here. They include such names as New Balance Shoe, Oomphies-Ludington Shoe, Bugle Boy and Polo/Ralph Lauren.
2. Newburyport offers upscale specialty shops in distinct and unique shopping areas. Inn Street, was a narrow crowded little pathway full of small wooden buildings. In 1975, the Inn Street Mall was constructed as a part of the Urban Renewal Program. The successful

conversion was awarded a citation for design excellence by the Boston Society of Architects in 1984. Today fine shops line the historic brick path. In nearby Market Square in the heart of downtown and the Tannery, a restored complex of buildings housing a variety of stores, basic provisions, local specialties and the unique and unusual can be found.

3. Georgetown is a thriving antique center with over 50 antique businesses.
4. Lawrence with its ethnic diversity offers variety typically found only in larger metropolitan areas.
5. Newburyport is a restaurant Mecca of renown. Over thirty restaurants are within walking distance in the charming downtown.
6. Haverhill's revitalized downtown offers an established restaurant district that is appreciated for its Queen Anne style industrial streetscapes.

N. FESTIVAL ASSETS

The spirit of a region can be seen in their celebrations. The number and diversity to be found in the Merrimack Valley attest to the region's community values, respect for its heritage and optimism for its future. Most towns provide a list of events through their chambers. Whether the event is local or draws regional, state or even New England wide attention it enhances the essence of community and strengthens the sense of place. The following events begin to show the breadth of form these community celebrations take.

1. St. Patrick's Day Parade is an annual event in Lawrence directed by the Lawrence Hiberian Cultural Center.
2. Bread and Roses Labor Day Heritage Festival in Lawrence commemorates the seminal strike of 1912 by the mill workers in the valley that brought about labor reform laws during the industrial revolution.
3. Annual Sheepshearing Festival takes place on the Old North Andover Common.
4. Friends of the Library Road Race in Groveland enhances awareness of the town's library as a cultural and educational resource.
5. Yankee Homecoming is a 9-day celebration in Newburyport with over 100 events.

6. Holiday Invitation Nights in Newburyport draw people into the festive shops with musicians, carolers, roasted chestnuts, hot-cider and good cheer.
7. Amesbury Days is a weeklong celebration culminating in music and fireworks at Woodsom Farm.
8. Riverfest sponsored in multiple towns along the river celebrates the history and future of the mighty Merrimack.
9. Hispanic Week Celebration in Lawrence honors and celebrates Hispanic people and their culture.

O. RELIGIOUS ASSETS

The Merrimack Valley Region has over 170 churches and temples within its 15 towns and cities. Denominations include: Methodist, Quaker, Pentecostal, New Lutheran, Baptist, Catholic, Seventh Day Adventist, Episcopalian, Congregational, Greek Orthodox, Jewish, Interdenominational, Latter Day Saints, Roman Catholic, Protestant, Salvation Army, Unitarian, Jehovah's Witnesses, and Christian Science.

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INTERESTING FACTS

1. The Merrimack Valley Region contains 90 public schools, 19 private schools, and 4 colleges.
2. There are four colleges in the Valley: Bradford College, Merrimack College, Massachusetts School of Law, and Northern Essex Community College.
3. The public school systems of Andover, Methuen, and North Andover are rated as being among the best in the state.
4. There are 8 regional junior/senior high schools in the region.
5. The average dropout rate of the region's students is 3.0, which is lower than the state average of 3.4.
6. Governor Dummer Academy is the oldest boarding school in the United States (founded in 1763).
7. Phillips Academy is internationally renowned as one of the best college preparatory schools.
8. The Northern Essex Community College's Center for Business and Industry is the largest center of its kind in New England, as set up by a community college.
9. The Stevens Estate Conference Center, a gracious mansion situated atop Osgood Hill in North Andover, hosts professional training, educational seminars, and corporate retreats.
10. The average teacher's salary in the region is \$37,853. (Lowest is \$22,746 at Essex Agricultural Tech and the highest is \$60,878 at Andover High School)
11. The average number of students per teacher in the district's public schools is 20.9. (Lowest is 15.3 in Newburyport and highest is 31.3 at Whittier Vocational)
12. The region's average residential tax rate is \$15.51 versus the state's \$16.93. (Lowest is \$13.47 in West Newbury and highest is \$19.62 in Lawrence)
13. Communities within the region have strong Bond Ratings. 9 out of 15 communities have **A** Bond Ratings, 2 are not rated and 4 have **B** ratings. Georgetown, Newbury, and West Newbury all have a bond rating of A1, the region's highest rating while Haverhill and Lawrence have a bond rating of Baa3, the region's lowest rating.
14. The region's average capital for new growth is \$589,066. (Lowest is \$95,447 in West Newbury and the highest is \$1,843,750 in Andover)

15. The region's average capital for the levy limit is \$19,952,800. (Lowest is \$4,981,209 in Merrimac and the highest is \$58,922,638 in Andover)
16. The region's unemployment rate is 4.4% versus the state's 3.3%. (Lowest is 1.7% in Boxford and highest is 8.5% in Lawrence)
17. Raytheon is the region's largest employer with approximately 7,000 full/part-time employees.
18. North Andover is home to 6 industrial parks that encompass 745 acres.
19. The region's industrial parks contain nationally recognized companies like Lucent Technologies, Hewlett-Packard, Johnson & Johnson, Eastpack, AT&T Technologies/Bell Labs, Gillette, Digital Equipment Corp., Columbo Yogurt, Pepsi-Cola Bottlers, Sun Microsystems, and Saab/Scania of America.
20. The region has a strong apparel cluster that contains the Grieco Bros., (creators of the classic Southwick suits favored by JFK, Cary Grant, and George Bush), Ralph Lauren/Polo, makers of designer clothing (including a recent tux for President Clinton) and KGR, a manufacturer of fine women's clothing, that markets its products to Talbots, Dillards, and Nordstroms.
21. Amesbury has over 1,000 acres of land available for commercial and industrial uses.
22. Newburyport is planning an access road that will produce 300 acres of land for new industries.
23. Salisbury created a new Office Park zoning district in conjunction with Amesbury.
24. Salisbury has the "Golden Triangle", which is the intersection of I-95, I-495, and Route 110, that is zoned for industry.
25. Lawrence and North Andover are working together to create a 50 acre industrial park on excess land at the Lawrence Municipal Airport.
26. Lawrence has a \$3 per square foot rate within reusable mill space for industry or commercial uses.
27. Newburyport has a waiting list for retail businesses wanting to locate there.
28. Lawrence drew immigrants from 52 countries during the industrial revolution.
29. Georgetown has over 50 antique businesses.

30. The Bread and Roses strike in Lawrence was the seminal strike of 1912 by the mill workers in the valley that brought about labor reform laws during the industrial revolution.
31. The average commuting time for residents of the Merrimack Valley is under 30 minutes.
32. You can essentially walk along the Bay Circuit Trail from Plum Island in Newburyport all the way to the Charles River southwest of Boston.
33. Plum Island is home to over 800 species of birds, plants and animals.
34. There is geologic evidence that the Merrimack River once emptied into the Atlantic in the area of Boston Harbor.
35. The Merrimack River is the only major interstate river in New England that serves as a significant source of drinking water.
36. There is a proposal to create a bikeway from the New Hampshire border in Salisbury to the City of Boston.
37. The Town of Newbury poses the greatest amount of ditched salt marshes (3,100.2 acres) in the North Shore region.
38. The 20,000 acres of salt marsh that lie between Cape Ann and the New Hampshire border is the largest continuous stretch of salt marsh north of Long Island.
39. The Parker River National Wildlife Refuge is considered one of the country's top birding spots with nearly 300 species inhabiting the Refuge seasonally.
40. Newburyport is the birthplace of the Coast Guard, with the first Revenue Cutter built and commissioned there in 1790.
41. The region has more than 42,000 acres of Open Space.
42. The Merrimack River is considered by many to be the cleanest it has been since prior to the Civil War.
43. Over 60% of the homes in Newburyport were built before 1939.
44. The second oldest farm in the nation to be continuously occupied by the same family is in Salisbury.
45. The oldest stone arch bridge in the country is in Rowley.

46. The historic Courthouse in Newburyport was designed by famed architect Bullfinch.
47. Lowell's Boat Shop in Amesbury is the country's oldest continuous boat building.
48. There are over 700 historic sites and over 48 historic districts in the Valley.
49. Methuen Memorial Music Hall, long recognized as "the premier showcase for organ performance talent on an historic instrument in the country" is home of the world-famous Walcker organ, built in Germany for the Boston Music Hall in 1863.
50. The Merrimack Valley has over 170 churches and temples within its 15 towns and cities.

PART TWO
COMMUNITY PROFILES

**ECONOMIC POTENTIAL FOR THE MERRIMACK VALLEY
USING CONTROLLED REMI FORECASTS TO THE YEAR 2020**

June 1999

ECONOMIC POTENTIAL FOR THE MERRIMACK VALLEY REGION

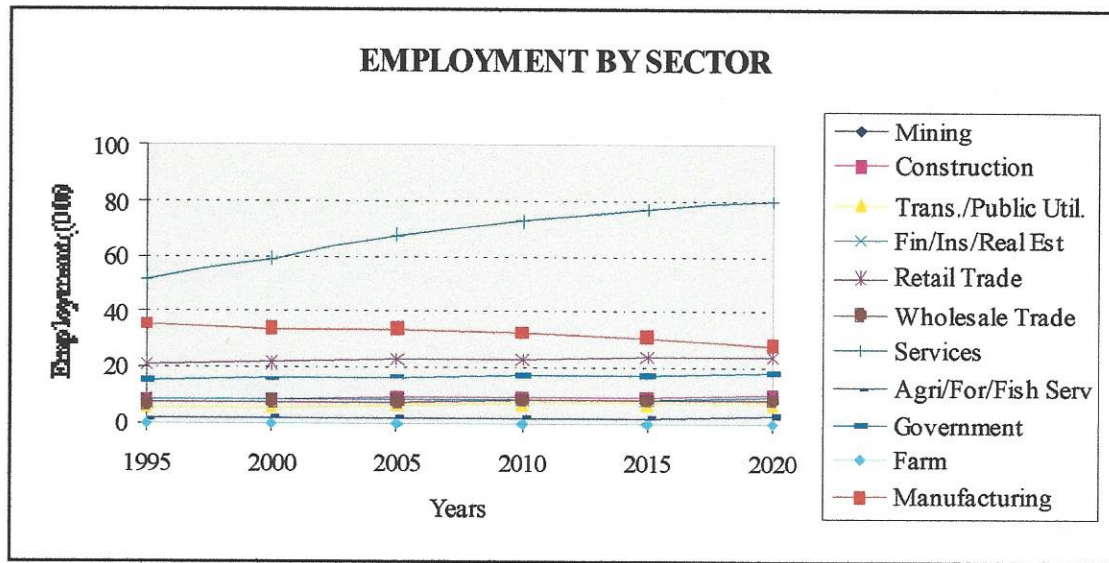
This report assesses the future economic potential for the Merrimack Valley region. It uses the controlled forecast generated by the regional REMI Model. This report assesses economic indicators such as the employment profile, laborforce characteristics, industrial output and regional competitiveness.

Employment Profile

The Merrimack Valley has a relatively balanced economy. Service, manufacturing and trading sectors are currently strong and forecasted to remain that way. Service jobs lead by a substantial margin followed by manufacturing and retail trade jobs. Furthermore, it is expected that service jobs will increase by approximate 25% in the next 20 years. Trading jobs will increase at a slower rate of about 8% while the manufacturing sector will loose another 15% of its employment base by the year 2020. It is important to note that even with the loss of manufacturing jobs, the sector will still play a critical role in the region's economy (jobs in the manufacturing sector will continue to exceed those in the trading sector).

Table 1: Employment Profile (in thousands)

Major Industrial Sectors	1995	2000	2005	2010	2015	2020
Farm	0.344	0.312	0.294	0.279	0.265	0.252
Agriculture/Forestry/Fisheries	1.618	1.858	2.033	2.229	2.456	2.663
Mining	0.107	0.181	0.183	0.168	0.151	0.134
Construction	8.32	8.594	9.141	9.329	9.596	9.767
Transportation/ Public Utilities	5.426	5.975	6.712	7.037	7.256	7.338
FIRE	8.3	8.377	8.61	8.754	8.948	9.104
Retail Trade	20.907	21.596	22.914	23.2	23.734	23.835
Wholesale Trade	7.208	7.572	8.081	8.38	8.62	8.635
Services	51.727	59.148	67.363	72.513	76.753	80.105
Manufacturing	35.482	33.772	33.812	32.487	30.706	28.248
Government	15.288	16.015	16.58	17.116	17.476	17.814



Within the service sector, the health industry is the strongest and is expected to grow. Computers and data processing industries followed by the educational sector are also leaders within the service sector. Within the manufacturing sector the key industries are electronic components and accessories, aerospace technologies and medical equipment. The important factor to note is that the industries within the manufacturing sector are high technology and R&D related firms. High tech firms, in general, have a better success rate in Massachusetts than low-end, labor intensive industries.

Table 2: Employment within the Service Sector (in thousands)

Major Industrial Sectors	1995	2000	2005	2010	2015	2020
Hotels and other lodging places	1.247	1.337	1.412	1.529	1.66	1.776
Beauty and barber shops	1.087	1.165	1.2	1.254	1.311	1.353
Services to buildings	1.306	1.436	1.557	1.599	1.628	1.633
Personnel supply services	3.211	3.764	4.583	4.881	5.06	5.149
Computer and data processing services	3.335	4.389	6.13	6.685	6.9	6.963
Miscellaneous business services	1.712	1.878	2.118	2.297	2.468	2.595
Amusement and recreation services, nec	1.241	1.415	1.631	1.786	1.921	2.043
Offices of health practitioners	5.6	6.575	7.478	8.206	8.861	9.44
Nursing and personal care facilities	5.183	6.032	6.766	7.277	7.699	8.038
Hospitals	5.246	5.73	5.739	5.99	6.286	6.514
Health services, nec	3.331	4.116	5.073	5.659	6.12	6.532
Educational services	3.415	3.709	4.006	4.31	4.625	4.926
Miscellaneous social services	2.112	2.465	2.918	3.216	3.462	3.684
Child day care services	1.778	1.992	2.191	2.225	2.205	2.16
Residential care	1.817	2.164	2.651	2.944	3.17	3.372
Membership organizations	2.352	2.508	2.576	2.626	2.655	2.651

Table 3: Employment within the Manufacturing Sector (in thousands)

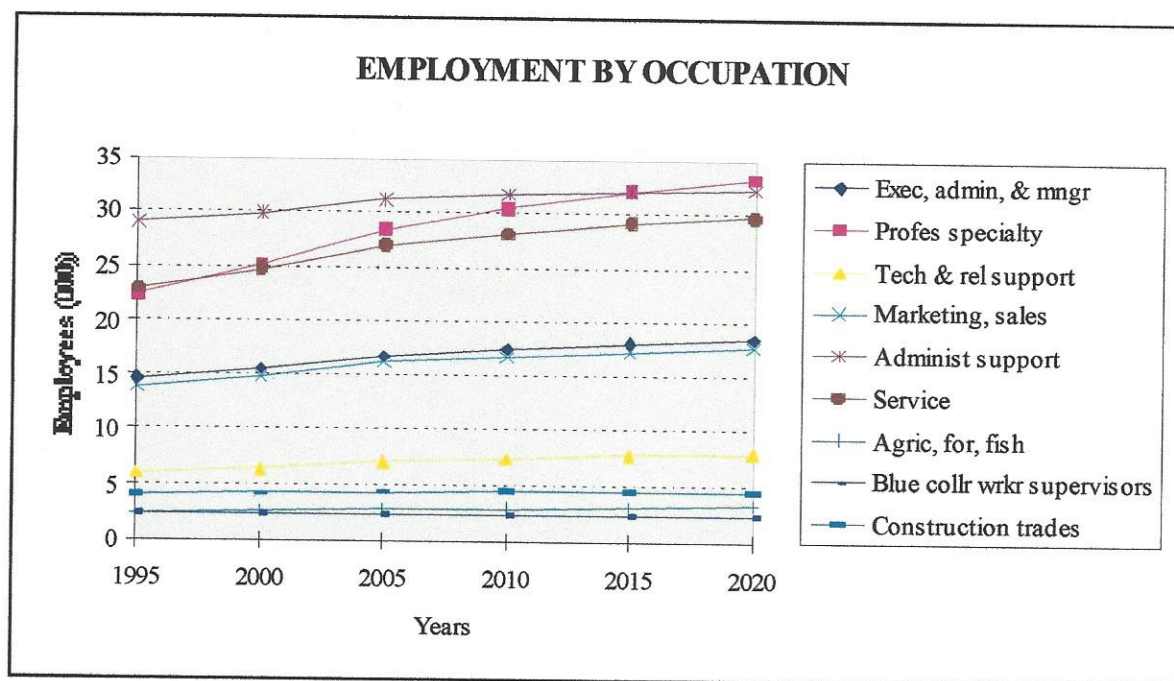
Major Industrial Sectors	1995	2000	2005	2010	2015	2020
Special industry machinery	1.645	1.413	1.586	1.761	1.909	1.933
Industrial machinery, nec	1.04	0.929	1.116	1.171	1.172	1.099
Communications equipment	2.411	2.187	2.247	2.029	1.728	1.398
Electronic components and accessories	2.763	2.761	3.063	2.734	2.277	1.794
Aerospace	2.585	2.617	2.694	2.683	2.684	2.598
Search and navigation equipment	1.931	1.656	1.379	1.174	0.977	0.785
Medical equipment, instruments and supplies	2.316	2.369	2.509	2.401	2.192	1.943
Knitting mills	1.727	1.625	1.501	1.286	1.067	0.872
Miscellaneous plastics products,	1.68	1.724	1.826	1.824	1.81	1.738

Occupational Characteristics

The occupational characteristics match the prominent industrial sectors. Employment is highest within administrative support staff, white-collar professionals, service support staff, executive managerial employees and those in marketing and sales. It is important to note that these are generally well paying sectors.

Table 4: Employment by Occupational Sector (in thousands)

Major Occupational Sectors	1995	2000	2005	2010	2015	2020
Executive, administrative, & managerial	14.661	15.597	16.931	17.598	18.128	18.425
Professional specialty	22.279	25.15	28.415	30.402	31.982	33.22
Technical & related support	5.973	6.493	7.146	7.517	7.8	7.994
Marketing, sales	13.963	14.896	16.224	16.828	17.438	17.771
Administrative support	29.00	29.822	31.11	31.711	32.154	32.181
Service	22.833	24.757	26.938	28.096	29.107	29.746
Agriculture, forestry, fisheries	2.36	2.557	2.732	2.896	3.077	3.228
Blue collar worker supervisors	2.441	2.415	2.472	2.446	2.405	2.324
Construction trades	4.011	4.14	4.409	4.497	4.604	4.66



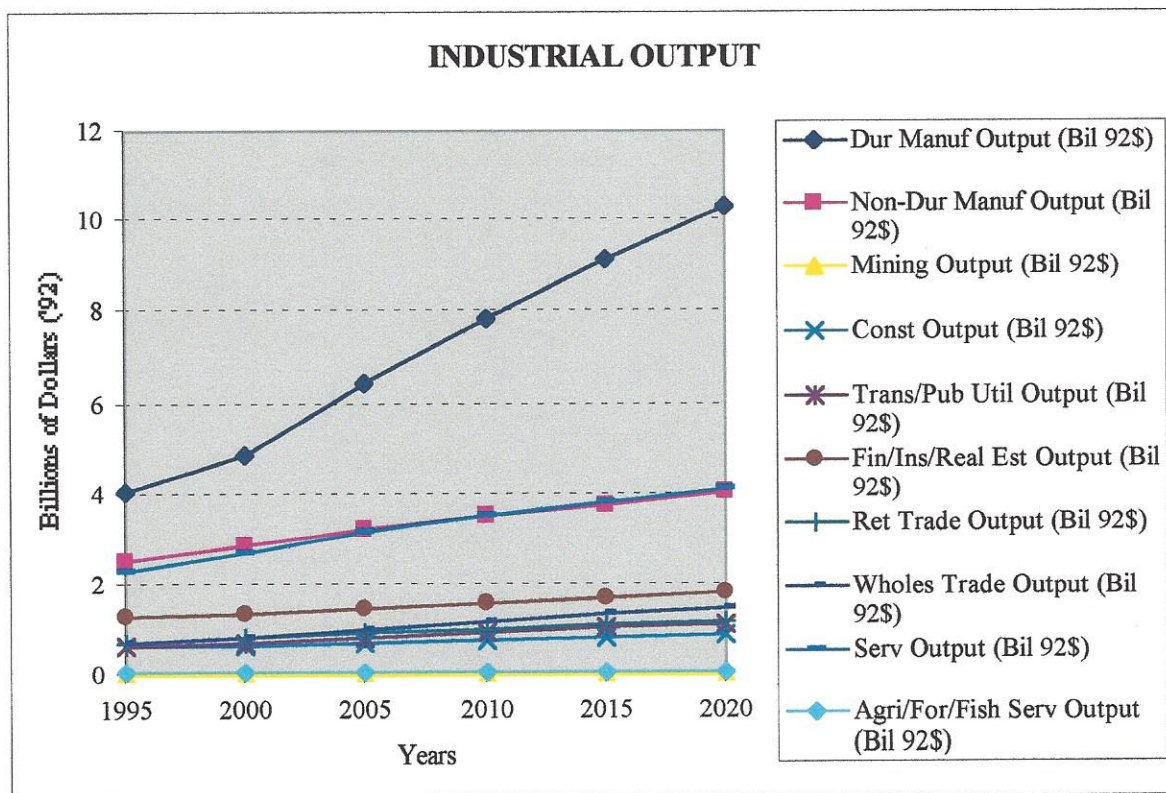
Industrial Output, Value Added and Labor Productivity

Industrial output refers to the amount of production (of goods and service) generated by industrial sector. Value added is generally the profit margin for an industry. Labor productivity is the output per employee. Industrial output, value added and labor productivity are good indicators of industrial health and sustainability.

Table 5: Industrial Output (in billions 92\$)

Major Industrial Sectors	1995	2000	2005	2010	2015	2020
Durable Manufacturing Output (Billions 92\$)	4.059	4.864	6.462	7.819	9.156	10.314
Non-Durable Manufacturing Output	2.506	2.891	3.216	3.486	3.771	4.032
Mining Output	0.008	0.013	0.014	0.016	0.017	0.018
Construction Output	0.616	0.645	0.715	0.761	0.817	0.868
Transportation/Public Utilities Output	0.626	0.716	0.833	0.934	1.036	1.127
Fin/Ins/Real Estate Output	1.273	1.365	1.49	1.595	1.71	1.823
Retail Trade Output	0.717	0.802	0.913	1.001	1.105	1.197
Wholesale Trade Output	0.72	0.846	1.008	1.165	1.33	1.479
Service Output	2.269	2.675	3.15	3.489	3.81	4.102
Agriculture/Forestry/Fisheries Output	0.036	0.04	0.044	0.048	0.053	0.057

As can be seen from the output table, the manufacturing sectors create the most production by dollar volume. Production is greatest within the aerospace technologies and electronic components industries. Furthermore, aerospace industrial output is expected to grow by 200%. As such it is an important sector to nourish and sustain. It is interesting to note that even with the expected decline in employment within the manufacturing sector, the output is expected to increase steadily. This is an indication that the manufacturing sector will continue focus on high technology products with high value rather than labor intensive sectors. Within the service sector, it is the health industry that generates the greatest output followed by computer and data processing services. This is expected to double by the year 2020.



The value added indicators mirror the output indicators. Manufacturing sectors far exceed any other industrial sector. Again, the profit margin for manufacturing industries is expected to grow in the future.

Table 6: Value Added (profit) Component (in billions of 92\$)

Major Industrial Sectors	1995	2000	2005	2010	2015	2020
Durable Manufacturing Output	1.69	2.052	2.76	3.348	3.921	4.417
Non-Durable Manufacturing Output	1.02	1.19	1.339	1.454	1.574	1.682
Mining Output	0.006	0.009	0.01	0.011	0.012	0.013
Construction Output	0.294	0.312	0.352	0.377	0.404	0.429
Transportation/Public Utilities Output	0.343	0.399	0.471	0.53	0.588	0.64
	0.84	0.913	1.011	1.085	1.163	1.241
Retail Trade Output	0.444	0.507	0.589	0.648	0.716	0.775
Wholesale Trade Output	0.487	0.583	0.707	0.82	0.936	1.041
Service Output	1.353	1.608	1.909	2.119	2.314	2.491
Agriculture/Forestry/Fisheries Output	0.02	0.023	0.026	0.028	0.031	0.034

For labor productivity, once again the manufacturing sector out performs any other industrial sector. It also reinforces the fact that the manufacturing sector in the Merrimack Valley is strong and critical to the economic health of the region.

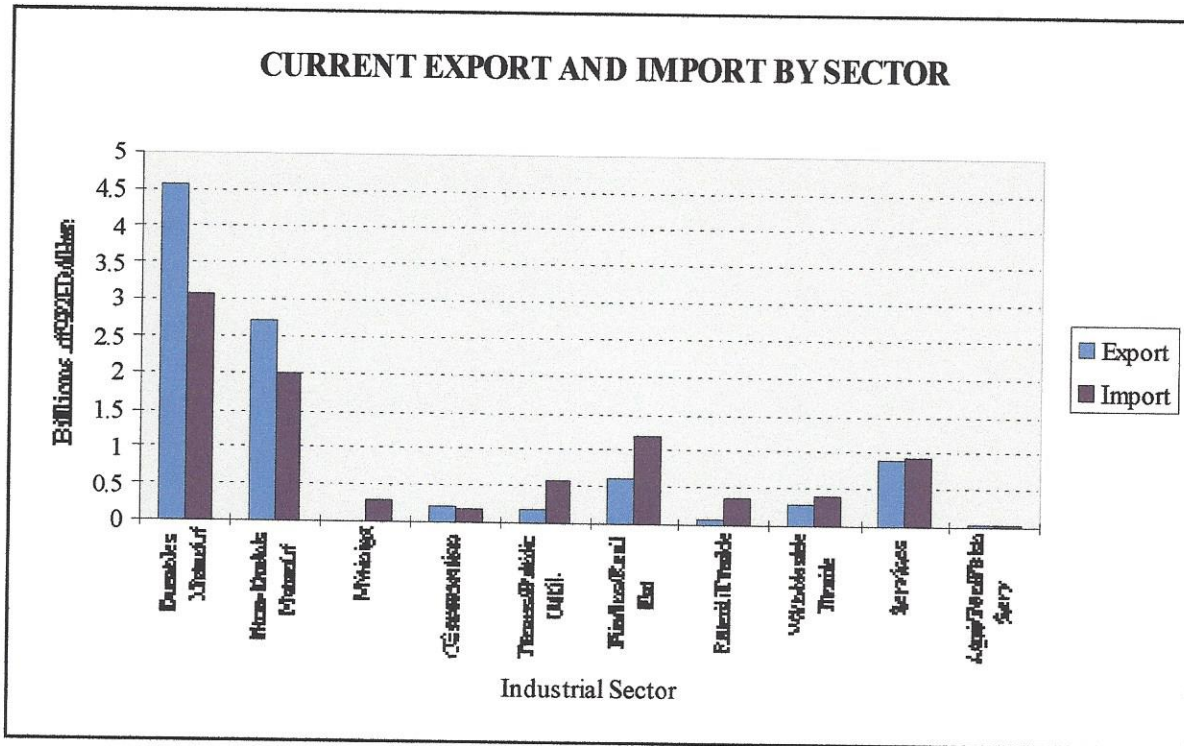
Table 7: Labor Productivity (Output/Employee in thousands 92\$)

Major Industrial Sectors	1995	2000	2005	2010	2015	2020
Durable Manufacturing Output	196.914	251.528	322.513	406.687	512.858	646.979
Non-Durable Manufacturing Output	168.509	200.316	233.465	262.842	293.397	327.631
Mining Output	76.725	70.302	78.143	93.195	113.014	137.12
Construction Output	74.095	75.025	78.174	81.594	85.1	88.825
Transportation/Public Utilities Output	115.368	119.855	124.141	132.704	142.784	153.635
Fin/Ins/Real Estate Output	153.404	162.909	173.057	182.137	191.069	200.267
Retail Trade Output	34.272	37.132	39.86	43.128	46.54	50.218
Wholesale Trade Output	99.835	111.684	124.733	139.013	154.34	171.295
Service Output	43.871	45.224	46.755	48.118	49.643	51.213
Agriculture/Forestry/Fisheries Output	22.141	21.466	21.436	21.493	21.479	21.469

Export and Import Potential

Exports indicate the amount of local production (in billions of 92 dollars) exported out of the region to the US and rest of the world. The imports indicate the amount of goods and services produced outside the region and are consumed locally. Ideally, a region should strive to export as much as possible while import very little. Export industries create economic multipliers than

strengthen the economic climate in a region. These industries, also known as “basic industries” are considered the economic growth engines of a region. As can be seen from the following graph, the manufacturing sector is the only one where exports exceed the imports.



The Merrimack Valley region should strive to increase its export base, especially in the service and FIRE sectors. Import substitution is an economic strategy that explores those sectors where imports are heavy and then targets industries within those sectors for the region. The fact that imports are locally consumed, indicates that there is a local demand for that industrial sector.

The Industrial Mix and Competitiveness

The industrial mix is an index that compares regional growth to the US. When the index is greater than 1, it indicates that the industrial sector has a higher rate of growth within the region than the national average. Albeit variations, the regional growth rates are similar to the national averages.

Table 8: Industrial Mix Index

INDUSTRIAL MIX INDEX	1995	2000	2005	2010	2015	2020
Durable Manufacturing	0.944	0.959	0.968	0.97	0.97	0.97
Non-Durable Manufacturing	0.998	0.989	0.984	0.983	0.983	0.983
Construction	1	1	1	1	1	1
Transportation/Public Utilities	0.988	0.976	0.973	0.972	0.972	0.972
FIRE	0.986	0.968	0.953	0.95	0.95	0.95
Retail Trade	1.001	1.002	1.004	1.005	1.005	1.005
Wholesale Trade	1	1	1	1	1	1
Services	1.027	1.038	1.051	1.054	1.054	1.054
Agriculture/Forestry/Fisheries	0.969	0.941	0.931	0.929	0.929	0.929

Sales prices and production costs in the region relative to the US are indicators of competitiveness. As can be noted from the following table, the Merrimack Valley region has a higher cost of doing business than the national average.

Table 9: Business Costs

Comparative Indices	1995	2000	2005	2010	2015	2020
Relative Selling Prices	1.058	1.055	1.054	1.053	1.053	1.054
Relative Factor Input Cost	1.033	1.019	1.019	1.018	1.018	1.02

Laborforce Participation Rates and Migration

In order to sustain the industrial sectors, it is important to have an available and qualified labor force. High labor productivity indicates that the laborforce is qualified. Labor participation rates are an indication of the number of people between the ages of 16 and 65 that are actually working. This indication can provide insights to mis-matches between skills of the workforce and those required by the industrial sectors. It is also an indicator of cultural and ethnic influences. Ethnic women have traditionally been less likely to be a part of the active workforce than whites. As can be noted in the following table, blacks have the lowest participation rates. Their participation in the work place is expected to increase in the future. The overall participation rate, however is less than 80%. This indicates that 20% of the working age population is either not employed and/or is not looking for employment.

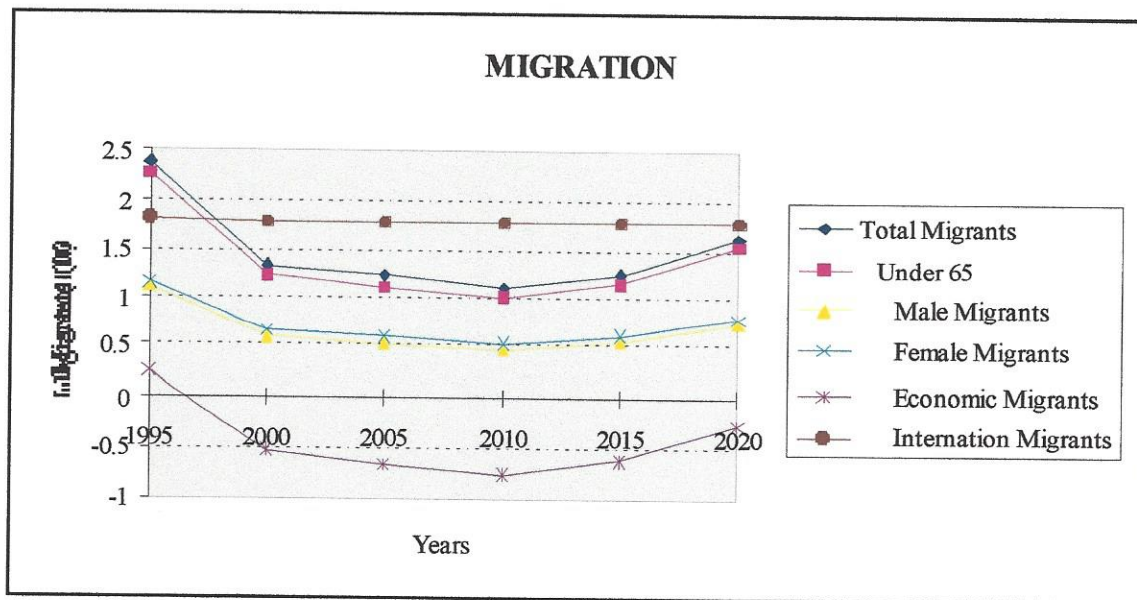
Table 10: Labor Participation Rates (as a percentage)

Variables	1995	2000	2005	2010	2015	2020
Total (Ages 15-64)	78.562	78.818	78.034	77.833	78.019	77.942
White (Ages 15-64)	80.98	81.412	81.14	81.466	81.994	82.585
Black (Ages 15-64)	46.415	58.661	57.713	60.643	63.882	64.522
Other (Ages 15-64)	73.736	72.156	71.47	72.085	73.447	74.348
Hispanic (Ages 15-64)	61.813	62.292	62.317	62.685	63.721	63.978

There is a net increase in migrants to the region. In other terms, in-migration exceeds out-migration from the region. There are indications that people will continue to leave the region for economic opportunities elsewhere. However, international migrates entering the region exceeds the out migration from the region. This does raise issues regarding labor participation rates, skill levels and diverse needs of multiple publics.

Table 11: Migrant Population

Variables	1995	2000	2005	2010	2015	2020
Total Migrants	2.376	1.343	1.224	1.113	1.254	1.618
Under 65	2.263	1.23	1.113	1.006	1.154	1.528
Male Migrants	1.115	0.58	0.525	0.47	0.546	0.733
Female Migrants	1.148	0.65	0.588	0.535	0.609	0.795
Economic Migrants	0.239	-0.509	-0.661	-0.762	-0.623	-0.253
International Migrants	1.809	1.782	1.782	1.782	1.782	1.782



In Conclusion

The economic prospects for the Merrimack Valley region look strong. The economy is balanced, the service and trade sectors are growing, the manufacturing sector, although expected to lose employment is projected to show dramatic increases in industrial output, labor participation rates are strong and the region will continue to see an influx in migrant population. The industrial sectors currently existing in the region and expected to grow over the years are technology and R&D related. The region is well poised for a sustainable economic future.