

Upper Washington Avenue Study:

A quantitative analysis to determine market opportunities for economic growth

September 26, 2013

Project Components

- Study Area and Purpose
- Demographic, Industry, and Consumer Expenditure Data
- Existing Use of Space
- Anticipated Population Shifts
- Retail Gap Analysis
- Housing Demand Analysis
- Spatial Distribution of Retail (Gravity Model)

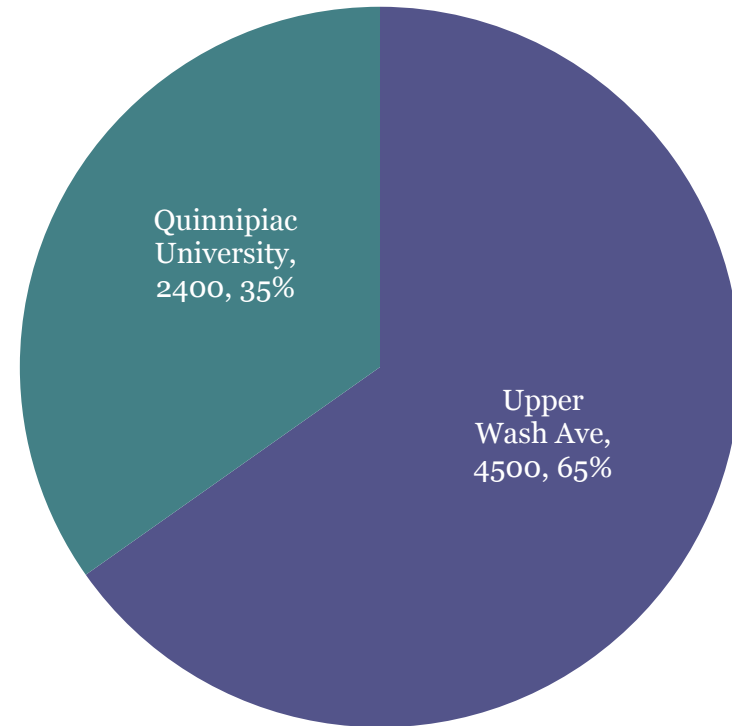
Determine Potential Impact on Retail Demand

- Quinnipiac University law, medical and nursing schools
- Upper Washington Ave. Multi Use (UWAMU) Development Zone, to allow for construction of an additional 300 units of housing

Key Findings - Demographics

- North Haven
 - Older
 - Affluent
 - Well-educated
 - High rates homeownership
- Upper Washington Ave
 - Older
 - Less affluent
 - Lower education levels

Population when QU at full capacity

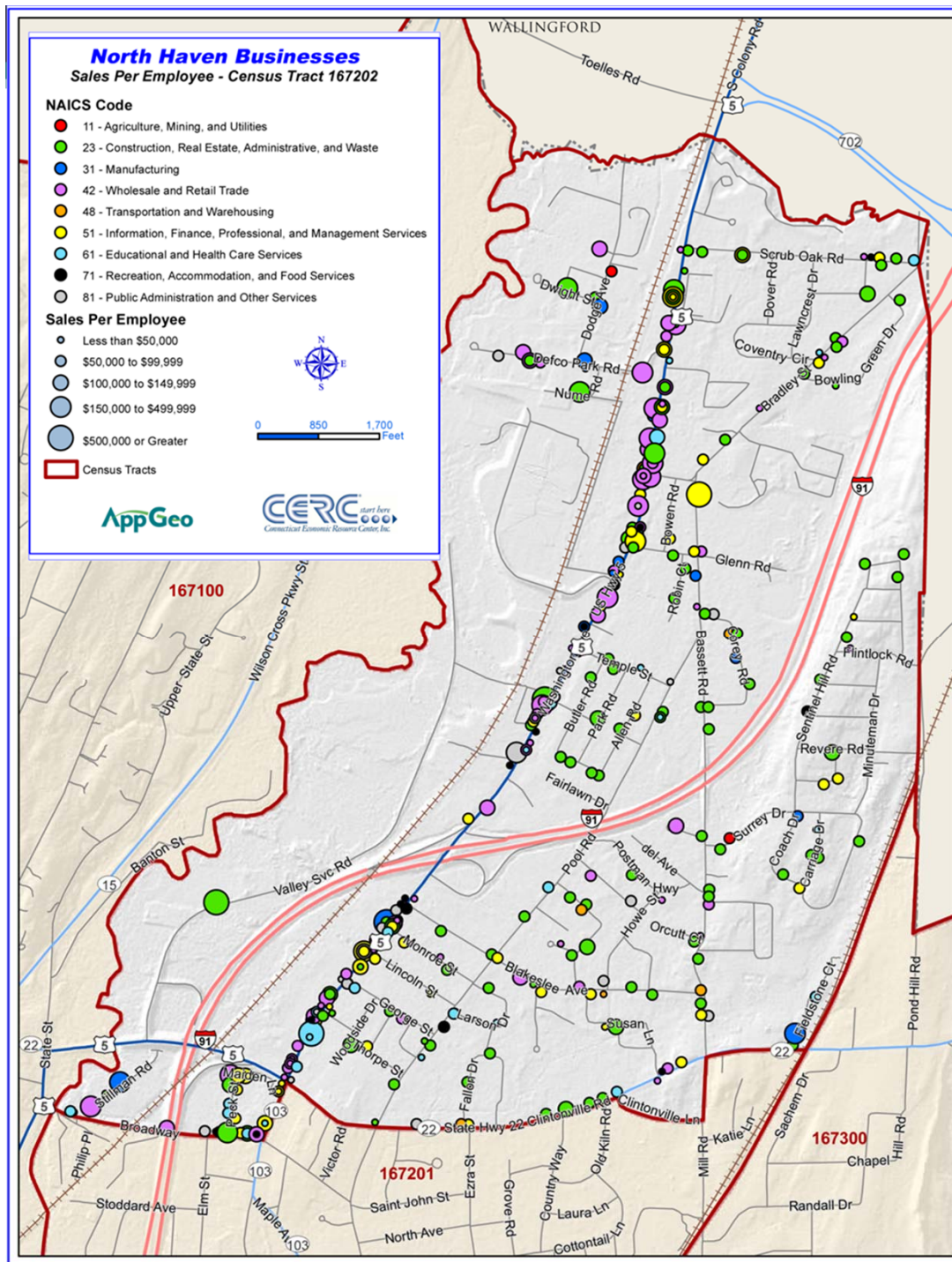


Key Findings - Regional Industry Strengths

- Highest rates of employment growth
 - Education
 - Healthcare
 - Finance
- Regional competitiveness
 - Precision metal manufacturing
 - Medical devices

Key Findings – Consumer Spending

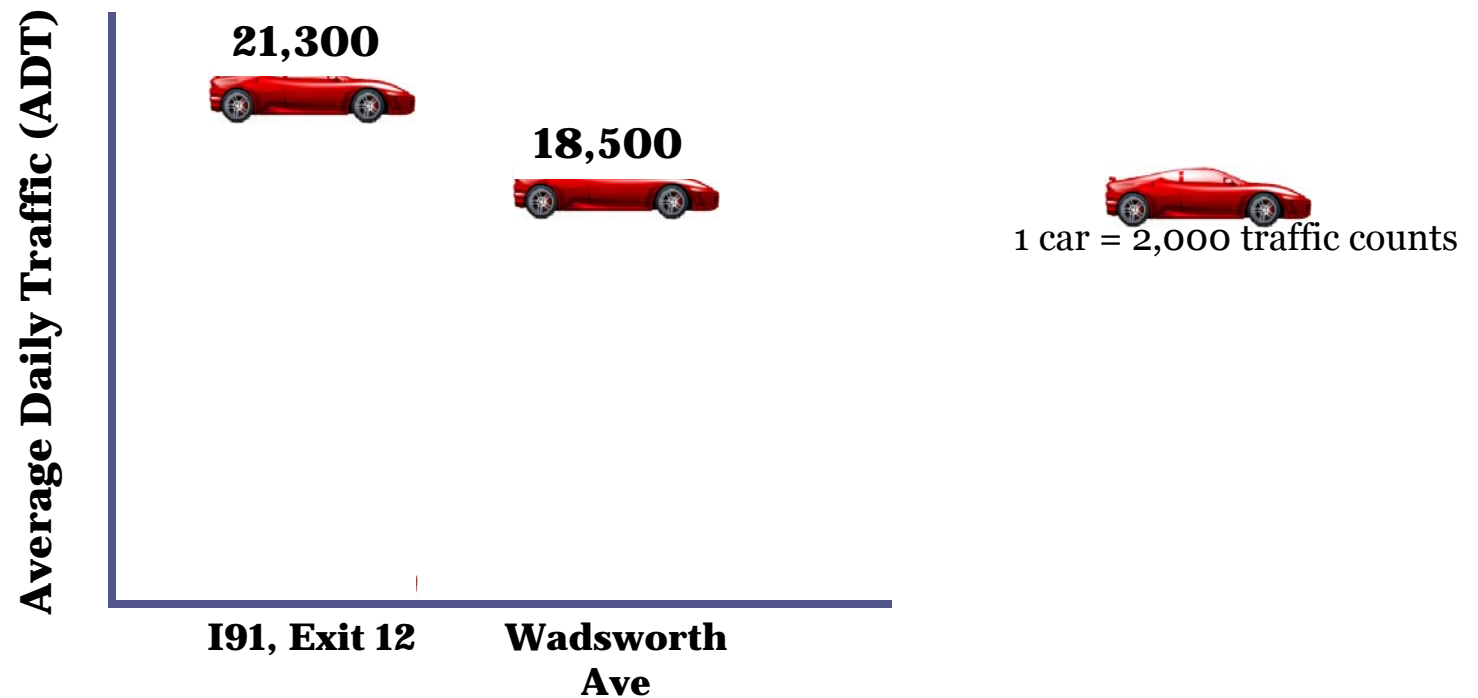
- Key discretionary spending sectors
 - Food and beverages
 - Entertainment
 - Apparel
 - Automobiles
- Existing retail strengths
 - Automobile dealers and supplies
 - Restaurants
 - Specialty food and grocery stores
 - Office supplies



The study area has a diverse mix of uses: high-end auto dealers, gas stations, restaurants, grocery stores, hair stylists, martial arts studios, and more.

Key Findings - Traffic Counts

4,000 cars and trucks do not currently travel to points north of Wadsworth Avenue



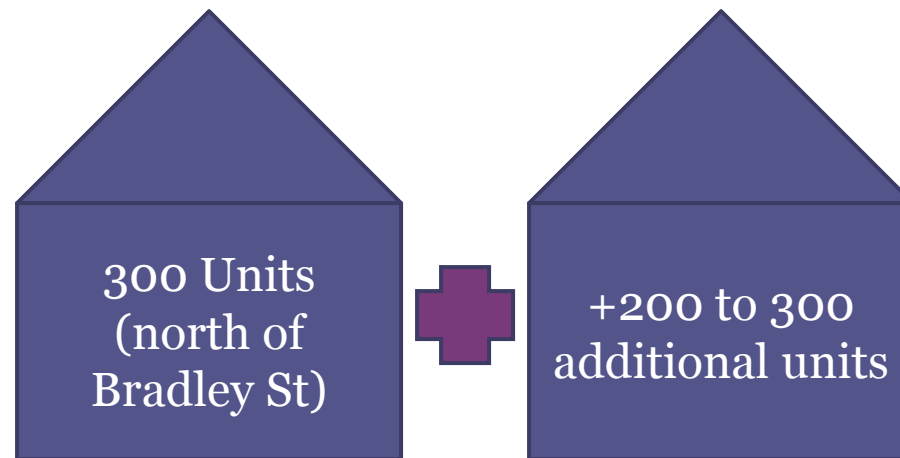
Key Findings & Implications – Retail Gap Analysis/Opportunities

Based on current and anticipated population:

- Specialty Food Stores
- Restaurants (full and limited service)
- Traveler Accommodations
- Snack and Nonalcoholic Beverage Bars
- Office Supplies and Stationery Stores
- Dry Cleaning and Laundry Services
- Barber Shops, Beauty Salons, Nail Salons

Key Findings & Implications – Housing Demand

- Total 300-600 housing units



Assumes the majority of students live in two-person apartments.

Key Findings & Implications – Gravity Model

Positioned to develop retail in area:

- Automobile Dealers
- Beer, Wine, Liquor Stores
- Electronics and Appliance Stores
- Gasoline Stations
- Grocery Stores
- Health and Personal Care Stores
- Home Furnishings Stores
- Jewelry, Luggage, Leather Goods Stores
- Special Food Services
- Specialty Food Stores
- Traveler Accommodations
- Used Merchandise Stores

Synthesis: Key Opportunities for Economic Growth

- Banking Institutions
- Pubs
- Book, Periodical & Music Stores
- Dry Cleaning & Laundry Services
- Traveler Accommodation
- Full-Service Restaurants
- Health & Personal Care Stores
- Limited-Service Restaurants
- Office Supplies & Stationary Stores
- Specialty Food Stores
- Automobile Dealers

Beyond the Analyses

- Which types of uses fit with vision for the upper Washington Avenue area
 - Make sure the features are in place to attract businesses (for example, putting correct zoning in place, marketing features).
- Planning exercise could help determine what new developments should look like
 - In terms of form, use, and density
 - Whether additional infrastructure (such as pedestrian or bike paths) is necessary



Thank You

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