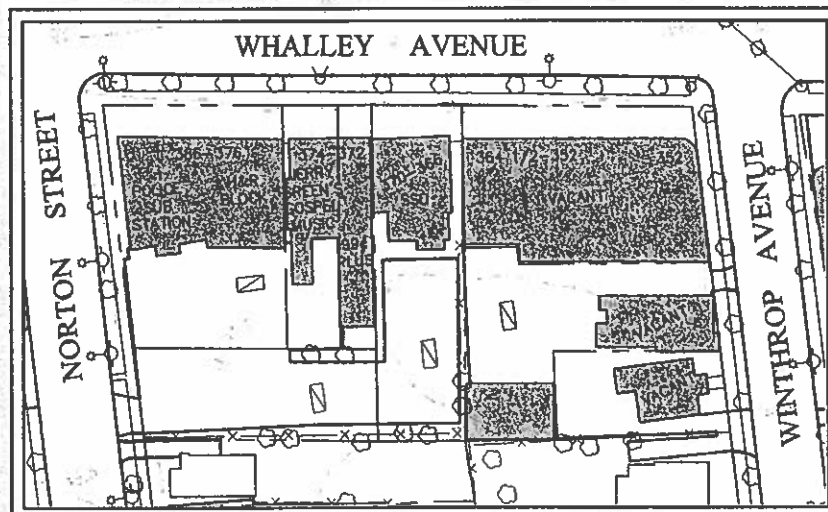


Whalley Avenue Corridor

New Haven, CT

Market Study & Redevelopment Strategy



Prepared for

**Whalley Avenue Special Service District
&
Community Economic Development Fund**

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TPA Design Group



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I. Introduction and Purpose of the Study

The purpose of the Study has been to evaluate the market opportunities and constraints for various retail business uses within the district and to provide recommendations on economic development and/or reuse strategies for specific sites. The goal has been to best optimize the economic and community goals and objectives of the Special Services District, City of New Haven and the community stakeholders.

Specifically, the following areas affecting Whalley Avenue were addressed:

- Demographic and economic forces which will impact strategies for business development along the corridor.
- Real estate characteristics and trends including capacity, use and re-use of properties along the corridor.
- Market support for a spectrum of retail goods and services including business and personal services, dining and recreation opportunities, professional services and wholesale/distribution operations with retail component.
- Physical and public safety issues such as redevelopment initiatives, land use, zoning, traffic and security, as they relate to economic development recommendations.
- Market and site issues and opportunities relating to the redevelopment of Whalley Avenue between Sherman and Norton Streets.

The report begins with analysis of demographic, economic and market information regarding the Whalley Avenue source market area and corridor in order to provide a framework for evaluating business development options. In part this information is important not only in identifying economic development strategies but serves as a benchmark for measuring success in the implementation of such strategies.

Following our analysis of the demographic-economic profile, we reviewed commercial sales trends, vacancies, rents, locational characteristics, trends in rents and vacancies, and demand for goods and services based on consumer expenditure patterns.

Our analysis also included an inventory of businesses and the results of a Merchant Survey targeting businesses and other key stakeholders along the corridor. This research and analysis supports recommendations for targeted goods and services where there are gaps and apparent market strength to support recruitment.

Finally, we provided a block by block analysis of existing uses in the focus area, Sherman Avenue west to the end of the District, in order to determine assets, constraints and opportunities for site assemblage and redevelopment. Our recommendations and ideas are designed to both complement and re-invigorate existing conditions and add to the local economic base within the context of current and future economic realities.

II. Executive Summary

The conclusions and recommendations in this study are based on the collaborative work of AMS Advisory Services, economic development and market consultants and TPA Design Group, land planning and landscape architects.

The study and recommendations have grown out of the need for the Whalley Avenue Special Services District (WASSD) to reorient itself commercially to changing market forces and evolving retail trends. Long known as New Haven's "auto row", Whalley Avenue now serves as much more diverse commercial corridor. Despite socio-economic shifts in the surrounding neighborhoods and retailer gravitation to the suburbs, Whalley continues to function as a marketplace. However, some parts of Whalley work better than others. This study will identify what is working well and recommend strategies for the parts which need improvement. Recognizing that retail districts reflect the residential areas they primarily serve, we have also made recommendations regarding housing and homeownership issues.

The study is comprised of five main sections. The first section establishes the source market area for Whalley Avenue goods and services, the second reviews economic and market trends, the third presents findings from the business community interviews we personally conducted, the fourth analyzes the real estate in the target area and the final section presents our recommendations.

Study and Market Areas

The study area encompasses the entire 1.2 mile Whalley Avenue Special Services District from Park to Pendleton Street at the southwestern end of the District and from Park to Whittlesey Street at the northwestern end, which includes all parcels fronting on Whalley Avenue.

Within the District we have focused redevelopment strategies on that part of the corridor which runs from Sherman Avenue to the western boundary, which aggregates 0.75 miles or 8 blocks. However, from a market standpoint, we have examined demand and supply forces for the entire 1.2 mile corridor.

The source market area for Whalley Avenue goods and services are the western and central neighborhoods of New Haven. The primary market area from which Whalley businesses draw is composed of the following neighborhoods:

- Dwight - census tract 1407
- Edgewood/West River - census tracts 1408-1409
- Beaver Hills - census tract 1414
- Dixwell - census tract 1416
- Yale - census tract 1417

The secondary market area, which is not close enough for convenience shopping on Whalley but uses the corridor or parts of it to access the downtown, is also a source of retail demand. The secondary market is defined as:

- Newhallville - census tract 1415
- West Hills – census tracts 1412 & 1413
- Westville – census tracts 1410 & 1411
- Downtown – census tract 1401
- Northern Hill – census tract 1406.

Demographic Trends

While population and households have trended down in the market area, reflective of New Haven as a whole, the primary and secondary market areas still retain 61,000 in population and 21,000 households, a critical mass of shoppers and buying power. On a ring basis, population and households break out as follows:

- One mile population 36,000; households 13,000
- Three mile population 150,000; households 57,000
- Five mile population 239,000; households 94,500

Other key demographic characteristics include:

- While a majority family household pattern prevails over the area and city, household composition is diverse and includes significant numbers of non-senior single households. This creates demand for a wide mix of goods and services needed to serve such a diverse community.
- Ethnic diversity has already had a major impact on Whalley Avenue with African American ownership or management of one quarter of the district's businesses. While many of the businesses serve primarily an ethnic market, many others serve a more generalized market, again underlining the existing diversity of demand and resulting business concentrations.
- Income diversity also predominates, with 16% of households with income of less than \$20,000, and 18% with incomes of \$75,000 and over. However, mid range incomes of \$20,000 to \$75,000 account for a solid two thirds of the market area.
- Even when compared to the western suburban area of Woodbridge and Bethany, the Whalley market area has a high concentration of upper income ranges. Market area households with incomes of \$75,000 to \$149,000 have a two to one margin over the number of suburban households in this same range.

Consumer Spending Trends and Buying Power

Consumer spending diary data indicates that the strongest consumption patterns in the market area as indexed to national spending norms are for personal care products and services as well as food and beverages. The critical mass market area households translates to high aggregate spending on goods and services, including the following:

- Gas stations with convenience store: \$28 million
- Gas stations without convenience stores: \$13 million
- Grocery store: \$115 million
- Eating places: \$69 million
- Clothing and accessories stores: \$35 million
- Shoe stores: \$5 million

New Haven County ranks in the top100 markets in the country (out of 323 total) in size and effective buying income, a proprietary measurement of disposable or after-tax income.

Metro Market Rankings New Haven – Waterbury - Meriden

Category	Size	Ranking
Total Population	825,500	71
Median Age	37.4	72
Asian Population	22,500	71
African-American	107,700	74
Latino	85,500	62
Total Effective Buying Income (EBI)	\$17,967,739,000	63
Median Household EBI	\$49,222	27
Total Retail Sales	\$11,509,267	67

Source: Sales & Marketing Management *2001 Survey of Buying Power*

While the County's EBI is estimated to be \$17.9 billion, residents of the City of New Haven have an estimated \$2.0 billion in EBI, the largest share of any County city or town.

Housing Trends

- Seventy-one percent of the market area's housing stock hails from the late 1800's through World War II. Much of it is architecturally rich and well built. However, only 13% of all units are in single family homes, with another 42% in 2-4 unit multi-families, and the balance of 45% in apartment buildings.
- The rate of homeownership has been decreasing in the primary source market area, now standing at 23% owner occupied units to 77% renter occupied.
- Absentee landlords account for a sizeable portion of the area's rental stock. There is also a relatively high rate of vacancy, with the last census showing 12% vacant housing units despite a booming regional housing market.

Positive factors at work include:

- ongoing efforts of housing refurbishment by organizations such as Neighborhood Housing Services and initiatives such as the Yale University Homebuyer Program.
- New Haven's Livable Cities Initiative has also brought code enforcement and neighborhood building resources to bear on some of the most impacted areas.
- The housing market overall in New Haven and the region has been active and improving in volume of sales as well as median prices.

Overall, the strength of the ownership housing market represents an opportunity to promote greater levels of homeownership in the market area, where existing housing stock patterns permit.

Crime

Crime in New Haven has been on a downward trend since 1990. The number of reported crime incidents fell by 55% over the period 1990-2000 and appear to be continuing down in 2001. Through May 2001, incidents of reported crime fell 7.6% over the same five month period last year. Whalley Avenue is home to the Beaver Hills Police substation, giving both area residents and merchants good access to police services.

In the survey conducted in conjunction with this study merchants indicated:

- the perception of crime as a greater deterrent to building businesses in the District than the actual incidence of crime.
- Nighttime safety was also cited by merchants. Continuing merchant and shopper concern about the relative safety of Whalley Avenue after dark needs to be addressed in conjunction with commercial and residential redevelopment and ultimately the District marketing campaign.

Employment and Labor Market

The New Haven Labor Market Area gained 26,700 jobs from 1992, the low point of the last recession, through 2000. Overall, this represents an 11.3% increase for the eight year period, a significant recovery overall. The mix of jobs by sector has changed during this timeframe as well, reflecting trends in the state and northeast overall. Jobs in the service industries continue to replace those being lost in manufacturing, with a net gain of 21,900 between 1992-2000.

In the period 1995 to 2000, New Haven added more than 4,000 workers to the resident labor force which totaled 58,700 in July 2001, recovering labor force lost to the long recession of the early 1990's.

New sources of employment continue to come on line in the New Haven area. These include new technology, bioscience space and general office space. In the near term 461,000 square feet of bioscience at 300 George Street and at Science Park building 25 is coming on line with jobs potential of 1,500 to 3,000 based on the standard of 150 to 300 square feet per employee.

Traffic

Whalley Avenue is the major New Haven artery to New Haven from the northwest sectors of the city and adjacent suburbs, running two lanes in each direction for the entire 1.2 miles of the district. Past the District Whalley is served by the Wilbur Cross Parkway, State Route 15, with full north- and south-bound exits at interchange 59. This is the only Route 15 interchange in New Haven and it is about two miles from the western end of the Whalley District. Whalley also collects traffic at key intersections including Fountain and Fitch Streets, the Ella T Grasso Boulevard, which in turn connects to I-95, Sherman Avenue, Winthrop and Orchard Streets.

In terms of peak traffic counts, no other corridor in New Haven comes close to the peak volumes served by Whalley Avenue. District sources have indicated average daily traffic measured prior to the opening of the Shaw's supermarket was in the vicinity of 30,000 per day.

Business Community Interviews

More than 20 interviews with businesses, non-profits and providers of city services were conducted to assist with strategies for future business growth on Whalley Avenue and to identify needs and priorities for a strategic plan. A summary of the most important issues affecting this group follows:

- Parking availability - nearly half voice concern that parking availability is a moderate to severe problem for their businesses.
- Labor availability - while available, labor is not always at the skill level required for the job.
- Adjacent business uses - while half of interviewees think their adjacent business owners are good to excellent, almost half think their neighbors are a moderate to severe problem. Of particular concern were liquor stores, bars, vacant or blighted buildings and to a lesser extent, fast food restaurants due to litter. Absentee landlords of blighted or vacant residential buildings on or near the Avenue were also cited as poor neighbors.
- Whalley Avenue appearance - two thirds indicate the district's appearance is good but needs improvement or is a moderate problem. Due to the 1.2 mile length of the district, many cited the variability of appearance. Trash, unkempt tree belts, poorly maintained planters and bad sidewalks were particular sore spots. There is particular sensitivity to an overall bad impression created in the minds of potential or existing customers traveling the corridor.
- Public safety and crime - many cited the generally safe daytime environment and the less certain nighttime environment, especially late nights over the weekend. They also cited the *perception* of crime rather than *actual* crime as a major problem to be overcome. Loitering, another frequently cited issue, also contributes to this perception.
- City services - two thirds of those interviewed believe city services are either excellent or good, especially police services.

Suggested actions to improve the WASSD included:

- Provide parking - Although many of those interviewed indicated they had enough parking either on street or on site, they nevertheless think additional parking is needed elsewhere in the District.

- Improve security and safety - despite overall favorable input about policing effectiveness, half of those interviewed indicate a moderate need for greater security and safety, especially at night. Current areas of concern are the intersection of Blake Street and Whalley, Winthrop and Whalley, Carmel Street and Sherman at Elm Street.
- Undertake streetscape improvements - while the majority views such upgrades as very important, there was a diversity of views on what is needed. However, a coherent plan for streetscape improvements would make a long stride in promoting the District as a “friendly” place.
- Improve traffic safety and control - the vast majority of those interviewed regards the heavy flow of traffic as their economic lifeblood and sees little reason to change the status quo. However, others cite pedestrian safety and the difficulty of turning left out of businesses.
- Improve retail/merchant/business mix - a very highly rated need in the District with a great variety of opinions as to what new business is needed. With very few exceptions, all viewed the current mix of goods and services as a reasonably good base from which to start. Also with few exceptions, the vision was for upgrade rather than radical transformation. Needed are more shoe and apparel stores, possibly in big box formats near Shaw’s and Staples. There is a desire for more restaurants, especially family style, non-fast food restaurants.
- Deal with blighted buildings - favored by an overwhelming majority, concerns center on vacant storefronts and deteriorated housing on or close to the district. Of particular concern is the property at 352-364 Whalley on the southwest corner of Winthrop and Whalley Avenues.
- Start a marketing program - also favored by a large majority, although considered premature by some. These feel a marketing program should follow implementation of cleanliness, streetscape and façade programs.
- Promote stabilization of immediate neighborhood - although out of the control of the merchants and District, all regarded neighborhood stabilization as a moderate to critical need. Homeownership promotion of appropriate properties is key to those with knowledge of the residential market area.

Market Analysis

The Whalley Avenue SSD is currently home to approximately 180 businesses and non-profit places of employment along its 1.2 mile length. The diverse mix of businesses includes chains, independents and non-profits as well as commercial, wholesale, business to business and professional operations. The historic mix of businesses included more destination or comparison shopping, the best example being the car dealerships.

The current mix is largely driven by traffic counts, which are very high and attractive to chain operators who do volume business on fairly narrow profit margins. Convenience goods and services are examples of this, especially fast food outlets. There remains as well a core of independent businesses which serve both the immediate neighborhood and driving public, which are subject to fairly high rates of turnover due to typically thin capitalization. Following is a table with the current percentages of business by type.

WHALLEY AVENUE BUSINESS MIX

Type of Operation	Percent
Retail	21%
Professional Services	20%
Other Services (including non-profit sponsored)	18%
Restaurants/bars	14%
Personal Services & Convenience	13%
Vehicle Sales & Service	10%
Business to Business	4%
Total	100%

Source: AMS Advisory Services

While retailers are dispersed widely along the corridor, professional services are largely concentrated in one area near the Boulevard. Likewise, automotive sales and services are most likely to be found east of Sherman Avenue, where zoning specifically permits this use. Restaurants and bars, 27 in all, are found along the entire corridor. Business to business operations, while only constituting just 4% of the total, are some of the largest land users.

Anchor businesses, high profile operations which draw business to themselves and other smaller operations, include full service and specialty supermarkets, an office supplier, and a medical/dental professional building. Two other anchors, by virtue of their size and visibility, include a regional meat wholesaler-distributor and a hotel.

Many of these businesses operate from buildings owned and operated by their proprietors and more than one quarter of all businesses are minority owned and operated.

Block Analysis

In order to understand the synergy of existing businesses and potential new businesses a block by block analysis follows below. Our area of specific concentration has been the Whalley Avenue west of Sherman to the conclusion of the district at Pendleton Street on the south side of the avenue and Whittlesey Street on the north. The area is roughly two thirds of a mile and includes seven blocks on the south side of the avenue and seven blocks on the north. Due to the variability of the intersecting street patterns, these fourteen blocks are somewhat irregular in size.

To give a coherent context to this analysis we have identified these blocks as belonging to three subsections referenced below:

Whalley Avenue Subsections

- **Whalley West Subsection / Pendleton Street to Ella Grasso Boulevard**
- **Whalley Mid Subsection/ Boulevard to Norton Street**
- **Whalley East Subsection/ Norton Street to Sherman Avenue**

Particular emphasis will be given to Norton Street to Sherman Avenue where redevelopment is most needed and site assemblage may have the greatest potential.

Whalley Avenue West: Pendleton Street to Ella T. Grasso Boulevard

Overview

This subsection includes five blocks, three on the south and two on the north. Most of the commercial development is found on the south side, with the north side being mainly residential. Beyond this area to the west is the Jewish cemetery (north side) and Edgewood Park (south side) and Westville Village. Recent history has included a major fire in one of the subsection's anchors, a mixed office/retail building at 566 Whalley, which displaced several non-profit offices and retailers on the first floor. This building plays a key role in establishing the western gateway to the District and should be a priority for redevelopment.

This western, transitional section of the District faces major challenges and opportunities in connection with its residential profile. The revitalization of the northern side of the street where there is currently an assemblage of eleven deteriorating single and multifamily homes will be a key factor in the redevelopment or repositioning of the commercial sector on both sides of the Avenue. This section is also bordered by the major north-south access to Whalley, the Ella T. Grasso Boulevard. The gateway to the District at this key intersection has been upgraded in recent years by streetscape improvements but should be a particular focus of redevelopment efforts beyond the superficial.

Whalley Avenue Middle: Ella T. Grasso Boulevard to Norton Street

Overview

This subsection includes four blocks in a grid, two north and two south of Whalley Avenue. The north side is largely residential and institutional, anchored by St. Brendan's Church, the Rectory and parochial school. The district's largest office building complex, the Whalley Medical and Professional Center, is also located on the north side of this section. The south side is characterized by commercial and mixed use residential and commercial, with one large anchor, the Walgreen's drug and convenience store located near the Boulevard intersection.

There are no blighted properties in this section, although there are façade, landscaping and streetscape needs on the south side. The north side is one of the strongest areas of the entire corridor. Of the three Whalley subsections, this one is the most functional at present and represents a solid anchoring base for redevelopment occurring to the east or west.

Whalley Avenue East: Norton Street to Sherman Avenue

Overview

This is the block group that requires the most attention from a strategic and redevelopment standpoint. It encompasses two blocks on the south side and three blocks on the north side of Whalley Avenue. The blight and vacancy predominating in the southern Norton – Winthrop block colors perceptions of the district as a whole, encouraging the impression that blight and vacancy on Whalley Avenue are more widespread than is actually the case. This block group also has the largest potential redevelopment site.

There is also much already in place to build on in this subsection, including the successful and wide-drawing Edge of the Woods Supermarket and prepared foods location on the north side of the street. The market, with its healthy diet and natural foods orientation, can be a catalyst for attracting complementary businesses and services to the district.

Evaluation of Existing and Competitive Retail Districts – The New Haven Marketplace

Whalley Avenue is bracketed on two ends by distinct retail districts in addition to shopping and services downtown. The profile of downtown retail has been stagnant for many years with the loss of department store anchors but has rebounded somewhat recently. The demise of the Long Wharf Mall concept has renewed interest in opportunities downtown. The final negotiations are also underway for the formal designation of a developer for the Chapel Square Mall and offices which may bring New Haven some higher end retailers. The Ninth Square retail/office redevelopment area continues to lease up slowly, although still experiencing a high degree of vacancy.

Also experiencing high rates of vacancy is the Chapel Square Mall, where vacancies have increased due to the uncertainty surrounding the redevelopment. A recent survey counted about 30 businesses still in the mall including six national chain stores and a wide cross section of independent retailers. Depending on the ultimate disposition of the mall, some of these might be candidates for space on Whalley Avenue.

Two driving forces of improved retail activity downtown are the increasing population of young single apartment dwellers and Yale's commitment to providing venues for high end goods and services to its community in order to remain competitive in attracting faculty and students. This is most evident on Chapel Street where Yale owns and manages many properties.

Yale's other retail district is the Broadway area, which has just seen the grand opening of a J. Crew store, joining Barnes & Noble and Urban Outfitters as area anchors. Broadway forms the eastern end of Whalley Avenue and the emergence of this area as a retail force has positive implications for Whalley Avenue as well. The sort of traffic that is drawn to these anchors should also be considered in the redevelopment mix for some part of Whalley. With Edge of the Woods already on the Avenue, which is a "peer group" destination store as well, a limited amount of higher end retail may be expected to join this expanding group.

The western bracket of Whalley Avenue is Westville Village, a traditional pedestrian oriented shopping area offering a core of anchors such as Hallock's (furniture and appliances) and 500 Blake Street (catering and dining). Westville Village, long known mainly for its antiques shops, is becoming a well integrated commercial district offering office space in a converted mill, restaurants and a cluster of personal services establishments.

Land Use and Zoning

Land Use

Whalley Avenue's strengths and weaknesses form a suitable foundation upon which a renewed image and improved economic function can be built. Its 100 foot wide right of way places Whalley near the top of New Haven's roadway hierarchy. As a major thoroughfare it carries high traffic volumes, including commuter traffic that could prove critical to sustaining revitalization. However, Whalley's wide, straight configuration encourages speed, impedes safe pedestrian crossing and provides little visual interest to passing motorists.

As the western suburbs have grown, Whalley's transportation function has increased and its residential desirability has diminished. Mixed uses (and later first floor conversions) became more common on lower Whalley until it evolved into an intensely commercial area. This commercial focus is particularly true in the lower part of Whalley Avenue where the Special Services District is located.

There is a mixture of buildings—new and old, single and multi-story, on small and large lots—most conforming to a uniform setback to create a consistent street wall that anchors the linear form of the corridor, visually as well as physically. The age of much of the development, though providing many fine examples of period architecture, requires maintenance and investment to avoid blight, which often fuels negative perceptions and discourages business patronage.

The roadway itself consists of 4 twelve foot +/- travel lanes (two in each direction) and 2 eight foot +/- parking lanes (one in each direction). Along with this expansive travelway, the actual road right-of-way includes a 16 foot +/- sidewalk zone on each side (comprised of an 8 foot +/- planting strip area and an 8 foot +/- sidewalk area) for a total right-of-way width of approximately 100 feet. The right-of-way appears even more generous because buildings are consistently located some 20 feet back from the sidewalk limits of the public right-of-way. This pattern may be a remnant of the days when Whalley Avenue was a residential street with traditional "front yards".

Within a 16-foot band of the public right-of-way, a few elements of what is collectively referred to as the "streetscape" are in generally good condition. Healthy, mature trees fronting ample sidewalks and building "front yards" have now reached heights suitable for "limbing up" to ensure the much demanded viewshed from street to storefront. However, there is no unifying relationship between this public right-of-way and adjacent properties. Rather than being attractively maintained and used as an asset, these wide private front sidewalk areas are often littered and used informally or formally for off-street parking. This area is inconsistently treated so that the pavement, walls, and sparse plantings that do exist appear in hodge-podge fashion. These conditions broadcast disenfranchisement.

West of Norton Street unifying streetscape elements installed in conjunction with a state road project are evident. Future streetscape improvements should consider and be consistent with these improvements, which include scored concrete sidewalk/driveway aprons, accent pavers, Whalley logo signage, ornamental lights, trash receptacles and benches, to establish a unifying design theme for the corridor.

The linear context of Whalley Avenue evolved and has been sustained for decades by its major functions as a roadway and commercial district. Over this same period of time, significant changes in markets, as well as merchandising and shifts in the demographics of the surrounding residential areas, dramatically affected the mix of businesses while the physical context for the most part remains unchanged. The revitalization of Whalley Avenue, in particular its economic recovery, should not emphasize this linear function by adopting the suburban-style, big box retail form of development that has replaced the car lots of the old "automobile row" on lower Whalley. This suburban-style development breaks down the neighborhood scale and does not encourage pedestrian activity.

Zoning

From Sherman Avenue west the Special Services District is zoned Business A – General Business. This zone's predominant purpose is for retail trade of convenience goods and services for one or more neighborhoods. In addition, uses permitted by right or special exception in the RM-2 (High-Middle Density) Residence District are permitted by right in the BA District. In addition to residential use, this permits a range of uses including such things as governmental (police, fire, post office), public and non-profit recreation and cultural facilities, and several types of daycare.

There are some nonconforming uses as well as uses that, though permitted by zoning, are inappropriate to building the caliber of retail services in the corridor. Among the uses that do not support the creation of a strong neighborhood retail core are auto-related uses (more appropriate to the BB Automotive Sales zone east of Sherman Avenue) and the meat distribution operation at Minore's (more appropriate to a Business E Wholesale and Distribution District). Nonconformity will gradually be eliminated through reuse or redevelopment. The Special Services District should work with City Plan to review all of the zoning provisions that apply, with particular emphasis on uses permitted by right, to be sure that zoning provisions serve to improve the retail mix and contribute to an attractive, pedestrian-friendly shopping atmosphere. With this in mind it should be made clear that allowing parking on front yards (permitted by special exception) not only disrupts the streetscape but creates unsafe traffic and pedestrian interface at points of egress that, by necessity, must be located too close to the intersection. Better solutions must be found to meeting parking needs. Front yard parking must be discouraged and gradually eliminated.

Redevelopment & Marketing Options

The Whalley Avenue District must leverage the corridor's chief assets – substantial daily traffic volume and stable or stabilizing neighborhoods – into redevelopment which will complement and strengthen both. Without a large scale plan that takes into consideration the potential of each block within the district, redevelopment will continue to take place sporadically and opportunistically as individual land transactions permit, resulting in a corridor which serves mainly convenience needs. **For these reasons we recommend that the City of New Haven undertake a formal Renewal and Redevelopment Plan on behalf of the District and adjacent residential blocks.**

One major challenge is the sheer length of the avenue at 1.2 miles from Park Street to Pendleton. Most neighborhood retail corridors are considerably shorter and more easily unified and maintained for marketing to a relatively homogenous audience. In addition to the length of Whalley is the width of the avenue and pace of the traffic. This is not a situation where one theme, or look, will work. Whalley's length however does permit it to be different things to different constituencies, and much of what's there now will continue to serve a varied market.

An ongoing challenge will also be to address residential issues impinging on the corridor, strengthening the ranks of homeownership and demand for goods and services. In many cases, urban areas undergoing housing redevelopment find that existing neighborhood commercial areas need upgrading to meet the demand generated by new residents. The situation in this case is somewhat the reverse – a commercial district which has always functioned reasonably well seeks support for the neighborhoods that have always been its primary market.

The key is to pursue a strategy which selectively targets appropriate sites for redevelopment while simultaneously pulling together the blocks that currently function well. The task of assembling appropriate redevelopment sites will be difficult, time-consuming and costly. Care must be taken that any relocation of existing businesses be handled with minimum disruption. Care must also be taken that prospective tenants be tailored to the Whalley marketplace, especially for shoppers goods. The current state of the national retail landscape is discouraging but chances are, if the recession is short and shallow, retailers may be recovering when redevelopment is ready to start.

In the following discussion of recommended options for Whalley Avenue, the main concept is that of a Neighborhood Center in the north and south blocks between Sherman Avenue and Norton Street. In addition, several other buildings and blocks within the District also present opportunities for redevelopment or repositioning and they have been addressed as well. They include:

- The Jacobson commercial building at 566 Whalley
- The group of 11 commonly owned residential structures in the block between the Boulevard and Blake Street
- The Walgreen's block between the Boulevard and Ellsworth
- The billboard buildings at 474-476 Whalley and
- The decked garage at 277-287 Sherman Avenue

A. The Eastern End Core Area: Norton Street to Sherman Avenue

The five blocks in this subsection of Whalley Avenue, aggregating 0.2 miles, represent both the greatest challenges and opportunities within the area we assessed (Sherman to Pendleton). The main challenge is the vacant and blighted three building commercial/residential complex on the corner of Winthrop and Whalley owned by Mast Equities of New York. These three buildings constitute the greatest single source of blight on Whalley Avenue, contributing to negative perceptions of the entire corridor as well as negatively influencing other businesses in the core area.

The main opportunities are twofold. First is the large site currently occupied by Minore's Meats and two other commercial owners in the Winthrop-Sherman block, the only possible assemblage feasible for a store of up to 20,000-25,000 square feet in the area we assessed. The second is the north block running between Carmel and Winthrop, which is owned by just three entities, two of which control 93% of the commercial space and all of the Whalley frontage. This block is just east of the Edge of the Woods – Sylvan Cleaners block.

Whalley Neighborhood Center Overview

As Whalley has evolved away from its automotive past, it has acquired redevelopment in patches, some large enough to sustain big box redevelopment such as those in the eastern end of the District, and some opportunistically located at good intersections such as the Whalley Exxon car care complex and the new CVS. While Whalley has traditionally supported pedestrian scale neighborhood retail and service establishments, the commercial buildings which house many of these smaller businesses have experienced less reinvestment due to a variety of factors: changing markets and demand, lack of parking and the spread out nature of the district.

The Dwight, Edgewood and Beaver Hills neighborhoods need and can support a visually distinct retail center both as a community resource, a source of identity and an economic shot in the arm for the area. While the big box and car-oriented developments on the eastern end of Whalley serve a vital economic purpose, they don't identify the area in any specific way. For these reasons we recommend a Neighborhood Center concept that will establish a sense of arrival with redevelopment on a scale both pedestrian-friendly and geared to provide goods, services and community resources.

As a retail development concept, this five block area has the potential to become what is commonly defined as a community center. Community centers offer convenience goods and personal services but also provide a wider range of soft lines (clothing) and hard lines (hardware and appliances). Many centers are built around a junior department store, variety store, super drugstore or discount department store in addition to a grocery store. It may have a strong specialty store or stores, for example shoes. Typical community centers are 100,000 to 250,000 square feet. As envisioned, the Whalley Neighborhood Center would have a total of 110,000 square feet, of which 65,000 square feet would be in existing buildings and 45,000 square feet would be in new construction.

Neighborhood Center South Blocks

The **Norton-Winthrop block** which includes the blighted Mast Equities properties has four other buildings that altogether aggregate roughly 70,000 square feet or 1.6 acres. Were all of the buildings razed, the resulting site would support 16,000 square feet of retail. Because this block is so intensively developed, with relatively little vacant or parking areas, the cost of razing and abating asbestos and lead would be high. A better approach would be to maintain the current structures on the block with the exception of the Mast Equities complex, which could be redeveloped in concert with the Minore's site, if it were to become available.

Another scenario would include the taking of the three properties owned by Ms. Faught and TMG LLC in midblock, but again the cost to acquire and develop would be high relative to economic feasibility, as these are functioning, fully tenanted buildings. The fourth building at 346-350 Whalley (police substation), while largely vacant at present, is not blighted and its owner Edgewood Corners is already under obligation to rehabilitate and lease out space per an agreement with the city which previously owned it. It would be inadvisable to expend redevelopment resources on this building, which can be made functional and has excellent parking. This building already serves an important public service as the Police substation offices.

In fact, the repositioning of the Edgewood Corners building as a public/non-profit/professional services venue might serve as a catalyst for redevelopment of the Mast Equities complex into a complimentary community services building for day care, training, youth services, etc. This would be a second option to explore in any event if the Minore's site does not become available.

The Minore's site, at 2 acres in the **Sherman-Winthrop block**, is the largest assemblage owned by one entity in the area west of Sherman. We recommend adding to this to the two commercial properties at the corner of Whalley and Winthrop, that house Whalley Pizza and three other retailers. These two properties aggregate 0.4 acres, which when added to the Minore holdings result in the one site which could sustain a 20,000 to 25,000 square foot box or in line strip center. Another advantage to this assemblage is that not as much demolition would have to be done relative to the parcel produced: the six buildings (three commercial, one mixed use and two residential) total 40,800 square feet. Another less costly option would be to leave the Whalley Pizza and adjacent buildings in place, but the resulting redevelopment site would be smaller.

In summary, we see this south side area of Whalley as the biggest piece of the puzzle if it can be acquired. If this is possible, the Mast Equities property will enjoy redevelopment synergy by virtue of its location across Winthrop Avenue. If the Minore site is unavailable, Mast Equities must nevertheless come down for redevelopment as neighborhood retail or community services.

Neighborhood Center North Blocks

The three blocks on the north side are almost completely unrelated to each other by use or scale at present. The most functional of the three blocks is Norton-Winthrop, home to the Edge of the Woods-Sylvan Cleaners retail complex, currently a destination shopping location for greater New Haven by virtue of the good choice of natural groceries and prepared foods. This center could serve as a catalyst for similar food oriented retail and restaurants, and an appropriate redevelopment opportunity exists in the Carmel-Winthrop block immediately east.

The **Carmel-Winthrop block** is held by just three owners, two of whom control 93% of the commercial space and the entire Whalley frontage. If this parcel is targeted, action should be taken soon to option these holdings so as to avoid any splitting off of interests. The 1.23 acre site could support 13,000 square feet of retail which should contain a mix of small spaces appropriate for ethnic restaurants, food stores and one larger anchor. Restaurants could include Indian, Asian noodle, African American, a bagel shop and/or kosher foods, possibly a coffee shop. The market would be shop, office tenants and shoppers for lunch and homebound commuters seeking a higher end take-out alternative to fast food.

Transition Area at Sherman Avenue

The zoning changes east of Sherman from BA to BB which allows automotive uses. At 280-286 is the Whalley Exxon Service Center and Car Wash, an eight bay garage facility. This operation is one of the anchors of the mid-Whalley district. The service complex was built on the site of a former new car dealership, of which one vestige, a decked garage, remains behind the gas pumps on the southwestern edge of the property.

This approximately 15,000 square foot structure, built in 1957 as two story car inventory parking, runs 150 feet down Sherman Avenue. It is in poor repair, economically obsolete and should be demolished. The land area at roughly a third of an acre might be redeployed for a more contemporary automotive use or possibly as a training center for auto service skills. Alternatively, one of the garages located farther west in the BA zone might be relocated here. A third possibility would be additional parking for redevelopment in the blocks to the west. At a minimum, any redevelopment of the block to the west would be enhanced by an appropriate reuse of this site.

B. The Boulevard Gateway

The intersection of Whalley Avenue and the Ella T. Grasso Boulevard is the major gateway to the District but other than some streetscape improvements, has a discordant visual impact. The major challenge is that the intersection is neither completely commercial nor residential but an awkward mixture of the two. The Boulevard access in both directions is residential and should remain so with its historic housing stock intact. Whalley Avenue at this juncture is both residential and commercial. Specific recommendations for each corner of the intersection are detailed below:

Northwest Corner: The Maidman Properties

The eleven Maidman-owned residential properties comprise this corner, all but one of which are vacant and deteriorated. They affect not only the perception of the gateway but also redevelopment options for the District west of the intersection discussed in the next recommendations section. As these multi-families are architecturally rich and varied, even now painted to create visual interest, they represent a wonderful opportunity to upgrade the approach to the Whalley district.

Northeast Corner

This corner appears to function well, developed in the 1980's as the Carriage Hill Condominiums. While ownership is largely in the hands of investors now and the occupancy rental, the property is generally well-maintained. The St. Brendan's Church and Rectory also positively contribute to this gateway.

Summary of Redevelopment Recommendations

- **Prepare Redevelopment Plan for the area (with the city).**
- **Evaluate options for Neighborhood Center Overlay Zone (with the city).**
- **Prioritize & Pursue Redevelopment Options on Whalley Ave.**

South Block: Norton-Winthrop

South Block: Winthrop-Sherman

North Block: Winthrop-Carmel

Other: Jacobson Building, Maidman Properties, Walgreen site, Sherman Ave. Garage

- **Undertake Public Right of Ways Improvements**

Sidewalk Bump-outs

Granite Curbing

Textured Sidewalks

Street Trees

Lighting

Furniture

Landscaping

Signage

- **Monitor City's progress on tax foreclosures of targeted properties**
- **Undertake Study for Design Standards (to be included in Overlay Zone)**

Signage

Facades

Private Frontage

- **Undertake Support Studies for Redevelopment & Site Improvements**
(See: General Recommendations - Parking and Traffic Studies)

General Recommendations

Traffic Study

- As the most heavily trafficked central New Haven corridor, Whalley Avenue merits a comprehensive traffic study. Available data is not very current and contradictory. Traffic counts are the lifeblood of most retail concepts and Whalley cannot market itself effectively without a complete analysis of average daily traffic, peak hour flows, etc. Weekend data should be included as well.
- Undertake analysis of one-way streets (Pendleton, Hobart, Winthrop and Carmel) the possibility of making some of them two-way or at least permitting access to off street parking in the rear from Whalley Avenue.

Parking Utilization Study

- The need for parking expressed by merchants and real estate owners varies, with some in control of adequate off-street space to satisfy their needs and others relying on on-street parking. Needs will change as the Norton-Sherman core area is redeveloped and more intensively leased out, even though specific redevelopment sites will include parking for site-specific needs. A baseline survey, which would include surplus curb cuts and side street parking, will help quantify and anticipate the need and location for general parking. The western end of Whalley from the Boulevard on is of primary concern in this regard.

Parking

- When the need for general parking has been quantified, public off street parking as recommended should be developed. If possible, public parking should be at an intersection to better address traffic flow and access.
- General parking should have appropriate signage, security-proof landscaping buffers and lighting to aid with security and visual character of Whalley Avenue.

Pedestrian Safety

- While the lifeblood of Whalley is traffic, often swiftly moving traffic, pedestrian safety concerns must be addressed. One method of improving pedestrian safety is the bump-out curb design, in which the sidewalk bulges out slightly at an intersection on both sides of the corridor. The bump-out both creates a defined area to the on street parking and allows pedestrians to cross more easily. The use of bump-outs could help define the five block eastern core redevelopment area between Sherman and Winthrop Avenues.
- Another pedestrian friendly option would be the use of pedestrian nodes.

Chapel Square Mall Redevelopment

- The District should monitor the ongoing redevelopment of the Chapel Square Mall with respect to the reconfiguration of retail space and possible relocation of businesses. A recent count of businesses in the mall totaled 30 businesses. Many are well established and have been in business for years. Also, a few are chain operations that could serve as credit tenants in a new retail development. Independent stores represent a cross section of shoppers goods, including men's clothing, jewelry, gifts, furniture, women's clothing, toys and children's clothing.

Business to Business

- Whalley Avenue has potential as a central location for business to business development. Given the District's proximity to New Haven's biotechnology redevelopment sites, including 300 George Street and Science Park, Whalley Avenue will be a convenient location for supporting would be warehousing and distribution of laboratory equipment and materials. While most of New Haven's biotech space has yet to be converted and leased, planning for business to business functions on Whalley Avenue should be considered as a later phase.

Security

- Loitering has been identified as a problem in certain locations and times. The District, in addition to the police, should work with all merchants to enlist their support for no loitering in the immediate vicinity of their stores. As target sites are redeveloped, removing blight and vacancy, there will be more merchant voices with a greater stake in the image and viability of the Avenue.
- Lighting for those sections of the Avenue which do not have a high concentration of 24 hour operations should be analyzed. Whalley has a great deal of activity at night and all sections should be well lit.
- Specific trouble spots, including around the old New World Café at 332 Whalley and near the Blake Street intersection, must be aggressively dealt with until such time as any redevelopment takes place. These problem areas and others are detrimental and constitute destabilizing influences on neighboring businesses.
- Any new general parking lots which are created in the future should be subject to a joint District-City Police program to maintain their safety, security and upkeep.

Green Space

- Hand in hand with the anti-loitering initiative, the District should help identify a gathering space or spaces for the neighborhood where recreation and socializing is possible.

Strategic Housing Alliance

- In addition to the foregoing specific recommendations about blighted housing on Whalley which have a direct bearing on the viability of the corridor, the District should forge alliances with private and public housing development groups to address the issues of aging housing stock and homeownership. Neighborhood Housing Services, a significant factor in rejuvenating several market area blocks, is one such potential partner. Yale has recently renewed funding for its successful homeownership subsidy program, another resource which can be brought to bear. The market area's health and desirability is always reflected in the retail and service base it supports.

Retail Labor Market

- While Whalley Avenue based businesses have excellent access to a large pool of potential retail workers, several businesses noted skill levels and work readiness were issues needing attention. With the uptick in retail downtown, on Broadway and Whalley, some form of retail academy along the lines proposed in connection with the Long Wharf Mall would be desirable. A home for such a school could conceivably be found on Whalley itself and might be a good use of Enterprise Zone funds.

Visual Upgrade

- The merchant survey indicated a variety of physical appearance factors, which negatively influence Whalley's image, including trash, litter, unkempt tree belts, poorly maintained planters and bad sidewalks. Not all of this is within the control of the District, but higher standards of trash and litter control as well as improved tree belt and planter maintenance should be priorities. Planters in particular should be tended to or removed.
- The District should design and implement a façade improvement program similar to the one in place for the downtown Ninth Square – Chapel street district, but allowing for greater diversity of design, given the greater diversity of land uses present on Whalley.
- Extend Whalley District signage and create banners identifying the corridor, sponsored by District businesses.
- Upgrade Whalley intersections in addition to the Boulevard gateway, providing landscaping, lighting, signage, fencing and street furniture as appropriate. Property owners located along these intersections should be encouraged to upgrade and improve their frontage.
- Support and monitor city program to undertake repairs and maintenance of previous streetscape improvements.

Marketing, Promotion and Image Building

- While the Whalley District has a logo, the design which incorporates the form of an automobile may no longer be appropriate. This issue should be reviewed when redevelopment plans are farther along and the evolution of Whalley is more of a known quantity. However, Whalley will need to develop a graphic identity that can be used in posters, banners, media alerts and letterhead.
- Continue with the newsletter, a particularly important resource for such a large district. Businesses and property owners will need to be informed on a timely basis during the phases of redevelopment.
- Identify and promote opportunities for positive media and communicate these opportunities through press releases or media alerts. For example, generate releases for grand openings, new improvement program and stories about unique or longstanding businesses on the corridor.

Business Recruitment

- Business recruitment efforts will be twofold; one oriented to potential developers and retailers for redevelopment sites and one for infill store vacancies. As redevelopment site control permits, a potential developer or developers will undertake the business recruitment function, on behalf of the District.
- Infill business recruitment strategies should include a periodic merchandising review to identify gaps in products and services which the market area wants and can support, tenant research as to market and real estate requirements, and maintenance of an available space database in conjunction with building owners.

Implementation

The following represents an implementation process for the recommendations in this report.

Secure & Broaden Community & Business Support

- Secure City support and cooperation on recommendations for Whalley Avenue. Immediate issues include: Redevelopment Plan, Overlay Zone, Public Right of Way Funding (CDBG?), and Tax foreclosure on targeted properties.
- Meet with Neighborhood Organizations active in immediate area (Dwight, Beaver Hills, Edgewood)
- Meet with Yale Representatives

- Set up individual Stakeholder meetings with Business and Community Leaders.
- Undertake presentations or announcements at other public venues: Chamber of Commerce, Area Churches, Synagogues, Non-profit organizations active in area
- Identify opportunities for media exposure on plan.

Define Roles & Responsibilities

- Prioritize the redevelopment objectives. It should be possible to organize this into Phases.
- Define the role of the Whalley Special Service District on recommended initiatives and redevelopment program.

Advocate
Facilitator
Partner/ Project Manager

- Define the role of the Whalley Special Service District on recommended initiatives and redevelopment program.
- Consider the option of forming separate non-profit or CDC. This potentially would open up funding opportunities, and minimize any conflicts in the Special Service District by-laws that might arise in undertaking redevelopment program.
- Identify other Partners, or Partnerships for undertaking specific projects and programs. Begin with determining interest among Whalley Avenue property owners.

Secure Funding for Public Right of Way Improvements

The following represent sources of funding primarily for public improvements. However in certain cases, these sources can also be approached for funding in the actual redevelopment of targeted properties specific to acquisition, demolition, and environmental remediation.

- State Department of Economic & Community Development
- State Bonding
- Federal Community & Development Block Grant Fund

- City of New Haven
- Empower New Haven
- State-wide Agencies and Organizations (CEDF)
- Private (Banks, Yale) and Foundation Sources
- For Housing: HUD, Connecticut Housing & Finance Authority, Fannie Mae, various city & state housing programs.

Secure Redevelopment Tools and Land Use Control

- Work with City in preparing a state-approved Urban Renewal Area for the neighborhood that would include Whalley Avenue. Establishing an Urban Renewal Area and redevelopment plan would provide the City's Redevelopment Agency (a quasi-city agency) powers of eminent domain to acquire and assemble property. It is also possible to include design standards as part of any redevelopment requiring Redevelopment Agency involvement.
- Work with City in determining options for a Neighborhood Center Overlay Zone. Issues covered under overlay zone include acceptable uses, setbacks, building coverages, signage, and landscape/public space requirements. It may be necessary to hire a consultant to prepare appropriate language for regulation for review by city.
- Establish Design Standards and Recommendations for Neighborhood Center and overall Special Service District. These recommendations would be incorporated into the Overlay Zone/Redevelopment Plan.
- Undertake Supporting Studies for Redevelopment: Parking and Traffic Analysis; Highest & Best Use Studies, Environmental Studies.

Pursue and Define Development Options

In many cases before actual development can occur, it will be necessary to have commitments from private developers or tenants supporting the reinvestment. Nevertheless, there are a number of actions that can be undertaken to move the process redevelopment process forward. These include:

- Neighborhood Center Sites: Establish partnerships with existing owners of targeted sites; complete foreclosure on blighted Mast Equities property
- Maidman Properties: Strict Tax Foreclosure; Partnerships for housing, RFP

- Walgreen Site: Discussion with owner and tenant
- Jacobson Building: Highest & Best Use, Training School option
- Sherman Avenue Parking Garage: Highest & Best Use for site, Determine parking options

Engaging Developer & Tenant Interest

It will be necessary to market the redevelopment and infill retail opportunities to appropriate target audiences.

- Undertake local marketing of targeted sites and seek out desired retail mix from area businesses and developers (relocation of businesses from Chapel Square Mall?)
- Solicit interest in redevelopment options from retail chain development and broker community.
- Prepare Requests for Proposals for Targeted Sites.

III. Study and Market Areas

Definition of Study Area

The Market Study Area is generally defined as Whalley Avenue from its eastern origination at Park Street to Pendleton Street to the west, which forms the boundaries of the Whalley Avenue Special Services District. The corridor is 1.2 miles long. A map of the district is shown on the following page.

Within the district we have focused redevelopment strategies on that part of the corridor which runs between Sherman Avenue to the east and Pendleton Street to the west, which aggregates 0.75 miles or 8 blocks. Our purpose for this focus was to review and assess that part of the Whalley Avenue Special Services District which extends beyond the Empowerment Zone area of Park Street to Sherman Avenue and was not studied as part of the EZ planning process.

However, from a market standpoint, we have examined demand and supply forces for the entire 1.2 mile corridor.

Source Market Area

The source market area for businesses on Whalley Avenue varies somewhat depending on the particular goods or services offered. For neighborhood and convenience goods and services, such as foods, drugs, laundry and dry cleaning, personal services, the source market area is walking distance to one mile away in an urban setting. This is generally considered the primary source market area. For shopper's goods and destination shopping for clothing, jewelry, home furnishings, sporting goods, etc., the market area is typically much wider, up to five miles from the particular store or center, depending on competition nearby. The large regional centers developed over the past 30 years, with 1 million square feet or more of store space located on major traffic arteries, attract shoppers from up to 25 miles. Whalley Avenue, with its current mix of business and services, is mainly characterized by neighborhood and convenience businesses but also maintains a number of destination type stores and services which draw from up to five miles away.

Rates of car ownership also have a significant bearing on defining urban commercial market areas. Where the majority of residents must walk or take public transportation to shop and where housing density is high, market areas are typically several blocks to a half mile away for food staples and convenience goods. Such is the case in New York City. However, in the Whalley Avenue corridor market area, car ownership rates are relatively high. According to the 1990 census, the most recent data available, vehicle ownership rates were 65.6% in the primary market area and 72.1% in the secondary market area, which are defined below.

For purposes of this study we have identified census tracts 1407, the Dwight neighborhood, 1408-1409, Edgewood/West River, 1414, Beaver Hills, 1416 Dixwell and 1417, Yale as the primary source market for the Whalley Avenue Special Services District. The secondary market area, which is not close enough to do its convenience shopping on Whalley but uses the corridor or parts of it to access the downtown, is also an underutilized source of retail demand. The secondary market is defined as census tracts 1410 and 1411 (Westville), 1412-1413 (West Hills) 1415 (Newhallville) 1401 (Downtown), and 1406 (northern Hill). The latter two neighborhoods are not accessible by Whalley but have existing shopping patterns and good proximity and access to the eastern end of the District.

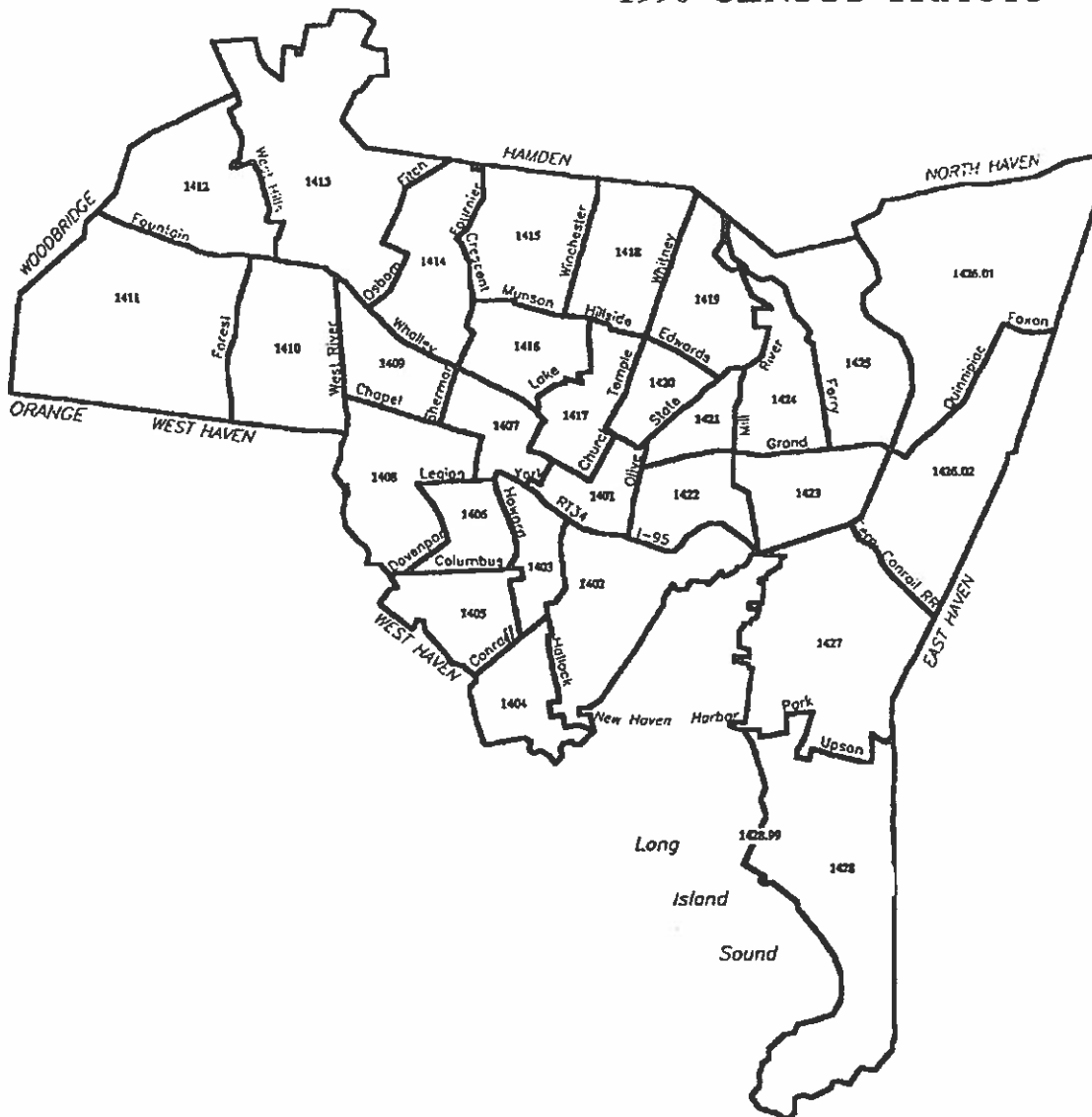
Retailers preliminarily size up the potential of a market area based on the demographics of the households which live nearby, usually within one to five mile circles of a proposed location. Because of the long distance of the corridor we picked the intersection of Whalley and Sherman Avenues as the center of the demographic circles, due to its central location and its importance as north-south access to Whalley Avenue.

Information from the 2000 Census as updated for 2001 by Claritas, a demographic service, indicates that the market area surrounding Whalley Avenue is large and both ethnically and economically diverse, with 150,000 people in 57,400 households living within three miles of Whalley and Sherman. Whalley Avenue will not draw equally from all parts of this area, but does and will continue to draw from its contiguous neighborhoods and western end of the city and beyond. Our study will focus on the demographics of primary and secondary market areas as defined above but will also quantify site potential based on the usual ring approach so commonly used in the retail industry. Analysis of the demographics will be presented in greater detail later in the study.

A map of the primary and secondary market areas follows on the next page.

CITY OF NEW HAVEN

1990 CENSUS TRACTS



Whalley Avenue Source Market Areas:

Primary Source Market Area: Dwight (1407); Edgewood/West River (1408, 1409); Beaver Hills (1414); Dixwell (1416); Yale (1417)

Secondary Source market Area: Newhallville (1415); West Hills (1412, 1413); Westville (1410, 1411); Downtown (1401), Northern Hill (1406)

IV. Economic and Market Trends

Population Trends

Population trends from the 1990 to 2000 census reflect a slight down trend in the primary market area, but not material change. Dixwell saw a dip in population due to relocations associated with the Homes at Monterey redevelopment which should be temporary in nature. The secondary market area saw a greater loss of population, but altogether the 61,000 primary and secondary market area population still represents a significant concentration one to two miles distant from the corridor's approximate midpoint at Sherman and Whalley Avenue.

POPULATION TRENDS 1990-2000

New Haven Tracts	1990	2000	Percent	Number
<i>Primary Market Area</i>				
Dwight (1407)	6799	6619	-2.6%	-180
Edgewood/West R. (1408)	4525	4149	-8.3%	-376
Edgewood/West R. (1409)	4371	4684	7.2%	313
Beaver Hills (1414)	4953	4965	0.2%	12
Dixwell (1416)	6298	5011	-20.4%	-1287
Yale (1417)	5383	6042	12.2%	659
TOTAL Primary	32329	31470	-2.7%	-859
<i>Secondary Market Area</i>				
CBD (1401)	908	1919	111.3%	1011
Northern Hill (1406)	6261	4815	-23.1%	-1446
Lower Westville (1410)	3827	3641	-4.9%	-186
Upper Westville (1411)	3077	2803	-8.9%	-274
West Hills (1412)	4548	4545	-0.1%	-3
West Hills (1413)	6772	5313	-21.5%	-1459
Newhallville (1415)	7722	6478	-16.1%	-1244
TOTAL Secondary	33115	29514	-10.9%	-3601
Total Primary & Secondary	65,444	60,984	-6.8%	-4,460
Total New Haven	130,474	122,222	-8,252	-6.3%

Source: U.S. Census

Household Trends

The combined primary and secondary market areas contain roughly 21,600 households per the 2000 census, down from 1990 but not significantly. Family households aggregate half of all households in the area, as shown below.

In terms of types of households, the market area is very diverse. Edgewood/West River, Dixwell, Beaver Hills, West Hills and the North Hill have one quarter to one third female-headed family households while Westville, West Hills (1412) Beaver Hills and the North Hill have one quarter to over half married couple families. Dwight, Yale and the CBD have majority non-family households, primarily characterized as single, non-elderly. There are no major concentrations of single elderly households in the immediate market areas. Data follows on the next page.

Note that the CBD has witnessed a doubling of its households, an increase of more than 500 from 1990. This reflects the success of new housing initiatives downtown. Dwight also added households over the period.

With respect to average household size, the market area and New Haven reflect regional and national trends – households are getting smaller as the population ages. The City's average household size decreased from 2.66 to 2.59 in 2000, while the market area's average is slightly larger, 2.83 in 2000 as opposed to 2.83 in 1990.

Implications of the population and household data are:

- Despite slight declines from 1990 levels, a large population base of 61,000 people in 21,600 households continues to live in the Whalley Avenue and western New Haven “watershed” of Whalley Avenue.
- While a majority family household pattern prevails over the area and city, household composition is diverse and includes significant numbers of non-senior single households. This creates demand for a wide mix of goods and services needed to serve such a diverse community.
- Ethnic diversity has already had a major impact on Whalley Avenue with African American ownership or management of one quarter of the district's businesses. While many of the businesses serve primarily an ethnic market, many others serve a more generalized market, again underlining the existing diversity of demand and resulting business concentrations.
- Income diversity also predominates, with 16% of households with income of less than \$20,000, and 18% with incomes of \$75,000 and over. However, mid range incomes of \$20,000 to \$75,000 account for a solid two thirds of the market area.
- Even when compared to the western suburban area of Woodbridge and Bethany, the Whalley market area has a high concentration of upper income ranges. Market area households with incomes of \$75,000 to \$149,000 have a two to one margin over the number of suburban households in this same range.

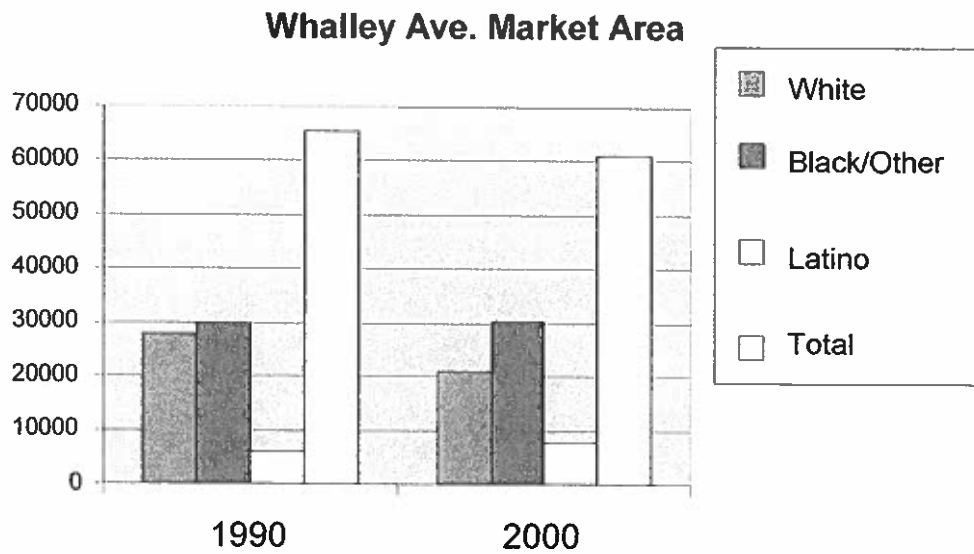
HOUSEHOLD TRENDS
1990 -2000

New Haven Tracts	1990	2000	Percent	Number					% All Households
					1990	2000	Percent	Number	
					Households		Family Households		
<i>Primary Market Area</i>									
Dwight (1407)	3263	3336	2.2%	73	1101	991	-10.0%	-110	29.7%
Edgewood/West R. (1408)	1571	1401	-10.8%	-170	930	848	-8.9%	-82	60.5%
Edgewood/West R. (1409)	1923	1881	-2.2%	-42	953	1078	13.1%	125	57.3%
Beaver Hills (1414)	1836	1814	-1.2%	-22	1160	1188	2.4%	28	65.5%
Dixwell (1416)	2173	1537	-29.3%	-636	1340	850	-36.6%	-490	55.3%
Yale (1417)	370	353	-4.6%	-17	151	68	-54.9%	-83	19.3%
TOTAL Primary	11136	10322	-7.3%	-814	5635	5022	-10.9%	-613	48.7%
<i>Secondary Market Area</i>									
CBD (1401)	532	1074	101.9%	542	99	237	139.8%	138	22.1%
Northern Hill (1406)	1909	1515	-20.6%	-394	1341	1012	-24.5%	-329	66.8%
Lower Westville (1410)	1694	1678	-0.9%	-16	956	899	-5.9%	-57	53.6%
Upper Westville (1411)	1237	1096	-11.4%	-141	927	777	-16.2%	-150	70.9%
West Hills (1412)	1767	1730	-2.1%	-37	1189	1187	-0.2%	-2	68.6%
West Hills (1413)	1864	1733	-7.0%	-131	1066	889	-16.6%	-177	51.3%
Newhallville (1415)	2682	2439	-9.1%	-243	1877	1600	-14.8%	-277	65.6%
TOTAL Secondary	11685	11265	-3.6%	-420	7455	6602	-11.4%	-853	58.6%
Total Primary & Secondary	22,821	21,587	-5.4%	-1,234	13,090	11,624	-11.1%	-1,466	53.8%
Total New Haven	48,986	47,094	-3.9%	-1,892	28,042	25,852	-7.8%	-2,190	54.9%

Source: U.S. Census

Race & Ethnicity

The market area is ethnically and racially diverse, with slight increases in minority populations since 1990. Latino population is becoming more of a factor but not to the same extent seen in other parts of the city. Essentially, the area is one half Black and Other, one half white and Latino.



Income Trends

As household income data from the 2000 census is not yet available at the tract level, we have reviewed income estimates prepared by Claritas, Inc. for 2001. Claritas is a widely accepted source of census and estimated demographic data.

The Whalley Avenue market area includes a wide range of household income as demonstrated in the chart below. The lower spectrums of income are largely associated with the very youngest and very oldest households, those whose affordable housing needs are met by the area's plentiful rental housing stock. Senior households make up just 16% of all households in the area but account for 23% of households with incomes under \$25,000. The upper mid range incomes of \$35,000 to \$75,000 are more typical of householders aged 25 to 64.

Above the \$75,000 level are an estimated 4,526 households or nearly one in five in the market area. This represents a critical mass of relatively affluent households in close proximity to Whalley Avenue.

As the average household income data indicates, there was a sharp rise over the 1989-2001 period of roughly 40%.

INCOME CHARACTERISTICS 2001

Attribute	Primary	Secondary
2001 Households by Hhld Income:..	11049 %	13449 %
Under \$10,000.....	1687 15.3	1621 12.1
\$ 10,000 to \$ 19,999.....	2115 19.1	2165 16.1
\$ 20,000 to \$ 24,999.....	742 6.7	710 5.3
\$ 25,000 to \$ 29,999.....	655 5.9	747 5.6
\$ 30,000 to \$ 34,999.....	734 6.6	1013 7.5
\$ 35,000 to \$ 49,999.....	1834 16.6	1955 14.5
\$ 50,000 to \$ 74,999.....	1663 15.1	2331 17.3
\$ 75,000 to \$ 99,999.....	761 6.9	1320 9.8
\$100,000 to \$149,999.....	552 5.0	982 7.3
\$150,000 and Over.....	306 2.8	605 4.5
Avg. hhld inc.: 2001.....	\$42222	\$52439
1989 (Census) ..	\$30640	\$36391
% Change 89-01	37.8	44.1

Source: Claritas, Inc.

It is also of interest to compare estimated 2001 income data for two of the western suburbs, Woodbridge and Bethany, to the Whalley Avenue market area. Clearly there is a high concentration of wealthy households in the suburban area. However, the number of households in the Whalley market area with incomes of \$75,000 and up is greater than those in the suburban area by a factor of 1.4. Considering the number of households in the \$75,000 to \$149,000 income range, the Whalley market area margin is 2 to 1 over the suburban area (3,615 to 1,754 households).

**COMPARATIVE HOUSEHOLD INCOME DISTRIBUTION
WHALLEY MARKET AREA &
WOODBIDGE/BETHANY
2001**

Attribute	Whalley Market Area		Woodbridge/Bethany	
Total Households	24,498		4,925	
Under \$10,000	3308	17.5%	51	1.0%
\$10,000-\$19,999	4280	5.9%	165	3.4%
\$20,000-\$24,999	1452	5.7%	121	2.5%
\$25,000-29,999	1402	7.1%	54	1.1%
\$30,000-\$34,999	1747	15.5%	126	2.6%
\$35,000-\$49,999	3789	16.3%	412	8.4%
\$50,000-\$74,999	3994	8.5%	765	15.5%
\$75,000-\$99,999	2081	6.3%	814	16.5%
\$100,000-\$149,999	1534	3.7%	940	19.1%
\$150,000 and over	911	0.0%	1477	30.0%
\$75,000-\$149,999	3,615		1,754	
\$75,000 and above	4,526		3,231	

Source: Claritas, Inc.

Consumer Trends

Spending in the Whalley market area as measured by consumer expenditure diaries is modest when compared to U.S. norms. The strongest consumption areas are personal care products and services as well as food and beverages. Close to national spending norms are expenditures for apparel and electronics. Spending data by product category is shown below. The U.S. Index is on a scale of 100, where 100 equals the national spending norm. Numbers above 100 show stronger purchasing while numbers below show lower spending patterns.

Consumer Spending Patterns Expenditures by Selected Product 2001

Attribute	Primary		Secondary	
	U.S. Index	(\$000s)	U.S. Index	(\$000s)
Categories (in thousands of dollars): (\$000s)				
Food at Home	88	\$44113	95	\$58268
Food Away From Home	88	\$40109	96	\$53033
Alcoholic Beverages at Home	110	\$8765	108	\$10550
Alcoholic Beverages Away From Home	109	\$8576	113	\$10781
Personal Care Products	96	\$5496	100	\$6956
Personal Care Services	98	\$3172	107	\$4228
Nonprescription Drugs	84	\$1579	91	\$2093
Women's Apparel	88	\$12314	99	\$16788
Men's Apparel	89	\$7302	97	\$9650
Girls' Apparel	73	\$2260	92	\$3467
Boys' Apparel	74	\$1781	91	\$2661
Infants' Apparel	81	\$1155	98	\$1686
Footwear (Excl. Infants)	85	\$4146	94	\$5585
Housekeeping Supplies	81	\$2622	91	\$3583
Lawn/Garden Supplies (Incl. Plants)	49	\$835	67	\$1402
Domestic Services	62	\$1095	88	\$1895
Household Textiles	72	\$4384	88	\$6545
Furniture	67	\$4989	85	\$7784
Floor Coverings	63	\$2428	82	\$3825
Major Appliances	70	\$4761	85	\$7108
Small Appliances & Housewares	50	\$4671	74	\$8404
TV, Radio & Sound Equipment	83	\$14478	94	\$19951
Transportation	62	\$37278	76	\$55950

Source: Claritas, Inc.

Spending by type of store is consistent with the purchase category data. Eating, drinking, apparel, shoes, computer and electronics stores show the strongest patterns with respect to U.S. norms.

While spending norms are useful in documenting and forecasting demand, they do not quantify the *buying power* which urban areas possess regardless of lower mean income levels. Below is expenditure data by store type, similar to the consumer purchase data shown in the prior table, but including in the right hand column data from the Woodbridge/Bethany suburban area immediately west of the city and the Whalley market area. Clearly the suburban area shows greater per capita spending capacity, well above U.S. norms. However, when the gross amount spent by type of store is compared, the primary and secondary areas outspend the suburban group, sometimes by large margins. For example:

- Gas stations with convenience store spending for the primary and secondary areas totals \$28 million as compared to \$9 million. The Westville section of Whalley Avenue has seen two service stations with mini-mart upgrades in recent years, with one just re-opening in November in acknowledgement of this market strength.
- Gas stations without convenience stores accounts for another \$13 million in market spending as compared to \$5 million farther west. This may be due to the prevalence of older cars not under warranty that are typically serviced by garages rather than dealers.
- Grocery store spending is \$115 million in the market area; three times greater
- Eating places spending is \$69 million; also three times greater
- Clothing and accessories store spending is \$35 million; twice as great
- Shoe stores spending is \$5 million, also twice as great.

2001 Expenditures by Selected Store Type

Type (in thousands of dollars):	Primary		Secondary		Woodbridge-Bethany	
	(\$000s)	Index	(\$000s)	Index	(\$000s)	Index
Building Materials & Garden Equip.	\$4442	55	\$7391	75	\$8817	243
Hardware Stores	\$337	56	\$552	76	\$656	246
Lawn/Garden Equipment/Supply Store	\$1568	58	\$2525	76	\$2691	222
Home Centers	\$1015	54	\$1709	74	\$2100	249
Gasoline Stations w/Convenience Str	\$12162	79	\$15818	85	\$9259	135
Gasoline Stations w/out Conven. Str	\$5624	77	\$7426	84	\$4807	148
Grocery Stores	\$49655	88	\$65343	95	\$35609	141
Health & Personal Care Stores	\$8572	68	\$12205	79	\$9326	165
Eating Places	\$30033	94	\$38651	100	\$23091	163
Drinking Places	\$3029	107	\$3832	111	\$2551	201
Department Stores (Excl. Leased)	\$25400	77	\$36209	90	\$33686	229
Clothing & Clothing Accessory Store	\$14743	86	\$20115	96	\$18227	239
Shoe Stores	\$2276	84	\$3090	94	\$2700	224
Furniture	\$4527	67	\$7032	85	\$8001	265
Other Home Furnishing Stores	\$3205	64	\$5063	84	\$5762	260
Household Appliance Stores	\$1363	66	\$2086	83	\$2315	252
Radio/TV/Other Electronics Stores	\$3524	75	\$5035	88	\$5240	249
Computer & Software Stores	\$1458	83	\$2066	96	\$2013	256

Source: Claritas, Inc.

Buying Power

The foregoing table gives some idea of the relative buying power of the Whalley market area. In order to put this in a regional context which retailers and developers generally do when assessing marketplace choices, we have also reviewed the *2001 Survey of Buying Power* published by Sales and Marketing Management, which is a leading guide to market rankings. As can be seen from the following chart, New Haven County ranks in the top100 markets in the country (out of 323 total) in size and effective buying income. The latter is a proprietary measurement of disposable or after-tax income.

Metro Market Rankings New Haven – Waterbury - Meriden

Category	Size	Ranking
Total Population	825,500	71
Median Age	37.4	72
Asian Population	22,500	71
African-American	107,700	74
Latino	85,500	62
Total Effective Buying Income (EBI)	\$17,967,739,000	63
Median Household EBI	\$49,222	27
Total Retail Sales	\$11,509,267	67

Source: Sales & Marketing Management *2001 Survey of Buying Power*

While the County's EBI is estimated to be \$17.9 billion, residents of the City of New Haven have an estimated \$2.0 billion in EBI, the largest share of any County city or town.

EBI fuels retail sales as well as savings accounts, housing costs and other living expenses. Direct correlation between EBI levels and retail sales are hard to quantify, but generally the retailing power of an area can be determined by comparing EBI to retail sales. In the case of Milford, for example, EBI is \$1.187 billion while retail sales are \$1.568 billion. Clearly Milford is a net absorber of retail spending. New Haven, on the other hand, had retail sales of \$948 million in comparison to EBI of \$2.0 billion. Even more clearly, New Haven is an exporter of retail sales, despite having the highest concentration of effective buying income in New Haven County.

Housing Trends

The Whalley Avenue primary market area, as defined by Census Tracts 1407, 1408, 1409, 1414, 1416 and 1417, had 11,743 housing units as of the 2000 census. This number decreased by 529 units from 1990, the last census count, mainly due to removal of blighted public and private housing in the Whalley Ave market area as part of an overall city stabilization program. The demolition of 475 Elm Haven public housing units was the major source of this decrease, with some but not all of the 454 new rental and ownership units ready as of the 2000 census count.

Elm Haven in Dixwell had a total of 475 family units and will be replaced by 413 renter and 41 home ownership units. One hundred one Section 8 certificates were issued to the 207 households in residence when redevelopment began – they will have the option of returning on completion. The City anticipates that 1,243 households will live there with between 250 and 350 children. Thus some households now living near Whalley may relocate to Dixwell Avenue.

The privately owned market area housing stock, 71 % of which was built before 1960 (1990 census data), has often suffered from blight and disinvestment resulting from the recession and real estate collapse of the early '90s. Complicating matters with regard to promoting stability in the neighborhood, single family units make up only 12.6% of the area's housing stock, and two families another 16.2%, which limits owner occupancy opportunities. Increasingly multi-families have been bought and rented out as investment property by absentee landlords. This results in a concentration of multi-family rental rather than ownership property.

HOUSING CHARACTERISTICS WHALLEY AVENUE MARKET AREA 1990

Census Tracts 1990	Total Units	Single Family (%)	2-4 Family (%)	5 Units and larger (%)
1407 (Dwight)	3,619	132 (3.6%)	859 (23.7%)	2,590 (71.6%)
1408 (West River)	1,732	182 (10.5%)	981 (56.6%)	552 (31.9%)
1409 (Edgewood)	2,089	206 (9.9%)	1,216 (58.2%)	641 (30.7%)
1414 (Beaver Hills)	2,000	695 (34.8%)	960 (48.0%)	321 (16.1%)
1416 (Dixwell)	2,401	296 (12.3%)	978 (40.7%)	1,087 (45.3%)
1417 (Yale)	431	31 (7.2%)	136 (31.6%)	255 (59.2%)
Totals for Census Tracts	12,272	1,542 (12.6%)	5,130 (41.8%)	5,600 (45.6%)

Source: U.S. Census

Vacant housing accounted for 11% of all units in 2000, up slightly from 9.4% in 1990. In the Whalley Avenue market area, West River, Yale and Dixwell reported vacancy rates higher than the city average. A portion of the Yale tract vacancy reflects the seasonal occupancy of student housing.

**OCCUPIED and VACANT HOUSING UNITS
New Haven & Whalley Area Census Tracts
1990 and 2000**

Area	Total Units	Occupied Units	% Occupied	Vacant Units	% Vacant
New Haven 1990	54,057	48,986	90.6%	5,071	9.4%
New Haven 2000 Census Tracts 2000	52,941	47,094	89.0%	5,847	11.0%
1407 (Dwight)	3,675	3,336	90.8%	339	9.2%
1408 (West River)	1,637	1,401	85.6%	236	14.4%
1409 (Edgewood)	2,076	1,881	90.6%	195	9.4%
1414 (Beaver Hills)	2,006	1,814	90.4%	192	9.6%
1416 (Dixwell)	1,906	1,537	80.6%	369	19.4%
1417 (Yale)	443	353	79.7%	90	20.3%
Totals for Census Tracts	11,743	10,322	87.9%	1,421	12.1%

Source: 1990 & 2000 Census

Two local housing concerns have made headway against the forces of blight and abandonment. Neighborhood Housing Services of New Haven, located at 333 Sherman Avenue, has rehabbed and sold to owner occupiers homes on Elm, Winthrop, Sherman, Carmel over a period of 20 years. The second is the non-profit owners of Edgewood Corners, who have bought and remediated several rental properties on the south side of Whalley Avenue.

Also a force for neighborhood stability has been the Yale University Homebuyer Program. Since the program began in 1994, Yale has assisted approximately 400 employees in home purchases throughout the qualifying neighborhoods of New Haven.

Housing Tenure

In terms of population in owner occupied versus renter occupied housing, the 2000 census reflects 32% in owner-occupied units to 68% in renter occupied units citywide. In comparison, the Whalley market area has a higher concentration of renters, representing 76.7% overall. Beaver Hills, with a larger component of single family housing stock, is the only market area census tract with a lower percentage of renting population than the city average. Again, this pattern is largely due to the lack of owner-occupant, single family housing stock in these census tracts.

POPULATION BY TENURE New Haven & Whalley Area Census Tracts 2000

Census Tract	Total Population	Owner Occupied	% Owner Occupied	Renter Occupied	% Renter Occupied
New Haven	113,027	36,148	32.0%	76,879	68.0%
Census Tracts					
1407 (Dwight)	6,405	598	9.3%	5,807	90.7%
1408 (West River)	3,594	779	21.7%	2,815	78.3%
1409 (Edgewood)	4,649	1,059	32.8%	3,590	77.2%
1414 (Beaver Hills)	4,930	2,284	46.3%	2,646	53.7%
1416 (Dixwell)	3,712	838	32.5%	2,883	77.5%
1417 (Yale)	611	12	2.0%	599	98.0%
Totals for Census Tracts	23,901	5,570	23.3%	18,340	76.7%

Source: 2000 Census

Whalley Avenue itself has a minimal amount housing stock along the corridor, with what there is concentrated at the western end near the Boulevard. There is a fair amount of mixed use housing above commercial space where multi-families have been converted on the ground floor to retail. While many urban corridors see substantial vacancy above street level, this is not as often the case on Whalley Avenue.

Complexes include Brendan Towers, apartments which are set back behind St. Brendan's Church, and Carriage Hill, a condominium complex developed during the 1980's. These two complexes aggregate roughly 165 units, a large residential concentration at the Whalley-Boulevard intersection, with additional apartment structures along Boulevard heading north. Carriage Hill is reported to be operating primarily as a rental community at present.

At the northwestern corner of Whalley and Boulevard an assemblage was made during the late 1980's by Mitchell Maidman of New York, who intended to build mid-rise luxury apartment housing. He acquired 11 multi-family houses including five on Whalley, one on Blake and five on the Boulevard but never pursued the project due neighborhood objections and the sustained downturn in the real estate market. These properties are now largely vacant, blighted and constitute a negative influence on Whalley, their block and surrounding neighborhood. While the assemblage aggregates nearly 1.5 acres, all would be appropriate for refurbishment as owner-occupancy multi-families.

Housing Values

Reflecting an improving housing market in New Haven, sales volume for residential homes within the city has steadily increased each year since 1996. Overall, the city witnessed a 55.3% jump in the number of sales between 1996 and 2000, representing the largest percentage increase in the region. This upward trend has continued through 1999 and 2000, as compared to declines or flat trends in towns in the surrounding areas, indicating a stabilizing and liquid housing market in the city.

Residential Sales Volume New Haven and Urbanized Suburbs 1996-2000

Town	Total Sales					Percent Change	
	1996	1997	1998	1999	2000	1996-2000	1999-2000
New Haven							
Residential	900	1111	1240	1288	1398	55.3%	8.5%
Condo	182	199	249	264	294	61.5%	11.4%
West Haven							
Residential	544	648	722	823	829	52.4%	0.7%
Condo	98	95	138	158	155	58.2%	-1.9%
Hamden							
Residential	716	793	968	961	940	31.3%	-2.2%
Condo	166	187	193	209	187	12.7%	-10.5%
East Haven							
Residential	341	359	396	458	461	35.2%	0.7%
Condo	137	121	172	225	203	48.2%	-9.8%

Source: Warren Information Systems

Median sales trends also indicate a strong residential marketplace in the region. All the towns saw appreciation in values, with the trend continuing from 1999 to 2000. New Haven remains the most affordable community in the immediate area, with a median home priced at \$92,500 in 2000.

Notably, condominium prices in New Haven have improved considerably in the past five years, jumping by 30%. Based on reports from brokers who indicate that most condominiums are sold to owner-occupants as opposed to investors, the jump in condominium prices is an important bell-weather of homeownership housing in New Haven, along with healthy sales volumes as witnessed in the previous table.

**Residential Sales Prices
New Haven and Urbanized Suburbs 1996-2000**

Town	Total Sales					Percent Change	
	1996	1997	1998	1999	2000	1996-2000	1999-2000
New Haven							
Residential	\$75,000	\$75,600	\$82,000	\$86,000	\$92,500	23.3%	7.6%
Condo	\$59,900	\$62,000	\$65,000	\$63,000	\$78,000	30.2%	23.8%
West Haven							
Residential	\$85,000	\$87,100	\$92,000	\$102,000	\$111,500	31.2%	9.3%
Condo	\$55,000	\$56,900	\$57,000	\$61,500	\$70,000	27.3%	13.8%
Hamden							
Residential	\$108,000	\$112,000	\$120,000	\$125,000	\$137,500	27.3%	10.0%
Condo	\$75,000	\$84,000	\$85,000	\$85,000	\$91,000	21.3%	7.1%
East Haven							
Residential	\$109,000	\$100,000	\$108,000	\$115,000	\$118,720	8.9%	3.2%
Condo	\$67,500	\$65,000	\$73,000	\$77,500	\$77,000	14.1%	-0.6%

Source: Warren Information Systems

Overall, the strength of the ownership housing market as well as an improved market for rentals represent an opportunity to promote greater levels of homeownership in the market area, where existing housing stock patterns permit. This process is already underway in Dixwell with the Homes at Monterey taking the place of Elm Haven. Edgewood and West River are also strategically important in increasing homeownership rates, due to their large inventories of two to four family housing stock. Beaver Hills, a neighborhood with a relatively new and desirable stock of single family homes, is also important in this regard.

Housing Observations

While the primary focus of this study is the market for commercial redevelopment, investigation of commercial issues has led to recommendations on neighborhood housing issues:

- The primary market area for Whalley is the neighborhoods which abut it and housing trends with certain key exceptions have been negative in recent years. Owner occupancy levels have decreased, vacancy has increased. Merchants surveyed in connection with this study have cited the need for stabilizing the residential base of the neighborhood as critical to the continuing health of their business prospects.
- One area requires immediate attention and resolution - the assemblage of 11 multi-families at the Boulevard intersection, five of which front on Whalley. Almost entirely vacant, this group of houses contributes to the destabilization of the entire block and detracts from a major gateway to the Whalley Avenue corridor.
- The ownership housing market in New Haven and the region has been buoyant in recent years after a long period of decline and stagnation. While we have not performed an analysis of the market area neighborhoods, we note that both volume and prices have increased impressively since 1996 for the city. Overall, the strength of the ownership housing market represents an opportunity to promote greater levels of homeownership in the market area, where existing housing stock patterns permit.
- This process is already underway in Dixwell with the Homes at Monterey taking the place of Elm Haven. The Edgewood and West River neighborhoods are also strategically important in increasing homeownership rates, due to their large inventories of two to four family housing stock. Beaver Hills, a neighborhood with a relatively new and desirable stock of single family homes, is also important in this regard.
- New homeowners in urban neighborhoods are particularly vulnerable to economic downturns and while New Haven and Connecticut as a whole are faring well at present, foreclosures have recently ticked up. Promotion of homeownership must include resources to keep new homeowners in their homes.

Crime

Crime in New Haven has been on a downward trend since 1990. The number of reported crime incidents fell by 55% over the period 1990-2000 and appear to be continuing down in 2001. Through May 2001, incidents of reported crime fell 7.6% over the same five month period last year. Whalley Avenue is home to the Beaver Hills Police substation, giving both area residents and merchants good access to police services. Substation management works closely with the District on areas of common concern.

In the survey conducted in conjunction with this study merchants frequently cited the perception of crime as a greater deterrent to building businesses in the District than the actual incidence of crime. Perceptions take a long time to change, but recent evidence of increased foot traffic in the central business district supports the conclusion that perceptions are changing with respect to downtown.

Merchants also cited night time safety. This has been addressed in part by Yale as retail landlord requiring that tenant merchants be open and brightly lit as late as 10:00 PM. Continuing merchant and shopper concern about the relative safety of Whalley Avenue after dark needs to be addressed in conjunction with commercial and residential redevelopment and ultimately the District marketing campaign.

Employment

The New Haven LMA gained 26,700 jobs from 1992, the low point of the last recession, through 2000. Overall, this represents an 11.3% increase for the eight year period, a significant recovery overall. The mix of jobs by sector has changed during this timeframe as well, reflecting trends in the state and northeast overall. Jobs in the service industries continue to replace those being lost in manufacturing, with a net gain of 21,900 between 1992-2000.

Nonfarm Employment New Haven Labor Market Area Annual Averages in 000's 1990-2000

Sector	1990	1992	1995	2000	% Change 90-00	% Change 92-00
Total Jobs (000's)	254.6	237	241	263.7	3.6%	11.3%
Goods Producing	55.4	50.4	47.7	49.1	-11.4%	-2.6%
Construction	10.4	7.8	8	10.9	4.8%	39.7%
Manufacturing	45	42.6	39.7	38.2	-15.1%	-10.3%
Service Producing	199.2	186.6	193.3	214.6	7.7%	15.0%
Trans, Comm,	16.9	15.8	16.2	16.1	-4.7%	1.9%
Util						
Trade	55.6	49.3	49.7	54.2	-2.5%	9.9%
Wholesale	13.1	11.7	11.5	13.6	3.8%	16.2%
Retail	42.5	37.5	38.2	40.6	-4.5%	8.3%
Finance, Ins, R.E.	16.9	15.2	13.8	12.4	-26.6%	-18.4%
Services	77.7	74.5	82.7	96.4	24.1%	29.4%
Government	32.2	32	30.9	35.6	10.6%	11.3%
Sector	1990	1992	1995	2000	Number Change 90-00	Number Change 92-00
Total Jobs (000's)	254.6	237	241	263.7	9.1	26.7
Goods Producing	55.4	50.4	47.7	49.1	-6.3	-1.3
Construction	10.4	7.8	8	10.9	0.5	3.1
Manufacturing	45	42.6	39.7	38.2	-6.8	-4.4
Service Producing	199.2	186.6	193.3	214.6	15.4	28.0
Trans, Comm,	16.9	15.8	16.2	16.1	-0.8	0.3
Util						
Trade	55.6	49.3	49.7	54.2	-1.4	4.9
Wholesale	13.1	11.7	11.5	13.6	0.5	1.9
Retail	42.5	37.5	38.2	40.6	-1.9	3.1
Finance, Ins, R.E.	16.9	15.2	13.8	12.4	-4.5	-2.8
Services	77.7	74.5	82.7	96.4	18.7	21.9
Government	32.2	32	30.9	35.6	3.4	3.6

Source: CT Dept. of Labor

The City of New Haven has been slower to recover from the sharp loss of jobs sustained since 1990, with the low point for the 1990's not reached until 1997 when total jobs were 72,040 as of June 30. Three years later, the most recent data available indicates total jobs had rebounded 6%. Gains were led by service producing industries, including the general services category and government employment, which together produced 6,220 new jobs during that period.

**New Haven Nonfarm Employment
June 30 Data
1990-2000**

Sector	1990	1992	1995	1997	2000	% Change 90-00	% Change 92-00	% Change 97-00
Total Jobs (000's)	91,870	75,770	76,150	72,040	76,550	-16.7%	1.0%	6.3%
Goods Producing	9,560	7,450	7,300	6,450	6,540	-31.6%	-12.2%	1.4%
Construction	1,790	1,250	1,170	1,190	1,210	-32.4%	-3.2%	1.7%
Manufacturing	7,770	6,200	6,310	5,260	5,330	-31.4%	-14.0%	1.3%
Service Producing	82,310	68,330	68,850	65,590	70,010	-14.9%	2.5%	6.7%
Trans, Comm, Util	9,110	7,770	7,990	7,140	*	NA	NA	NA
Trade	11,820	9,030	7,960	7,880	7,690	-34.9%	-14.8%	-2.4%
Wholesale	2,360	1,910	1,680	1,490	1,470	-37.7%	-23.0%	-1.3%
Retail	9,460	7,120	6,290	6,390	6,220	-34.2%	-12.6%	-2.7%
Finance, Ins, R.E.	6,000	4,550	3,810	3,360	*	NA	NA	NA
Services	43,970	36,530	38,480	37,190	42,060	-4.3%	15.1%	13.1%
Government	11,410	10,450	10,600	10,020	11,370	-0.4%	8.8%	13.5%
Sector	1990	1992	1995	1997	2000	No. Change '90-'00	No. Change '92-'00	No. Change '97-'00
Total Jobs (000's)	91,870	75,770	76,150	72,040	76,550	-15,320	780	4,510
Goods Producing	9,560	7,450	7,300	6,450	6,540	-3,020	-910	90
Construction	1,790	1,250	1,170	1,190	1,210	-580	-40	20
Manufacturing	7,770	6,200	6,310	5,260	5,330	-2,440	-870	70
								0
Service Producing	82,310	68,330	68,850	65,590	70,010	-12,300	1,680	4,420
Trans, Comm, Util	9,110	7,770	7,990	7,140	*	NA	NA	NA
Trade	11,820	9,030	7,960	7,880	7,690	-4,130	-1,340	-190
Wholesale	2,360	1,910	1,680	1,490	1,470	-890	-440	-20
Retail	9,460	7,120	6,290	6,390	6,220	-3,240	-900	-170
Finance, Ins, R.E.	6,000	4,550	3,810	3,360	*	NA	NA	NA
Services	43,970	36,530	38,480	37,190	42,060	-1,910	5,530	4,870
Government	11,410	10,450	10,600	10,020	11,370	-40	920	1,350

* Not broken out in 2000

Source: CT Department of Labor Office of Research

New sources of employment continue to come on line in the New Haven area. These include new technology, bio-science space and general office space. In the near term 461,000 square feet of bioscience at 300 George Street and at Science Park building 25 is coming on line with jobs potential of 1,500 to 3,000 based on the standard of 150 to 300 square feet per employee. Long term plans call for a total of 3,313,000 square feet. If it all gets built and occupied, which is a bigger "if" now that the national economy is in recession, as many as 20,000 jobs could result, which would increase the LMA jobs base by 7.5%. These initiative include the following:

- 300 George Technology Center: 518,000 SF multi-tenant biotech and technology building – 250,000 SF immediately available.
- Science Park – Lyme Properties Building 25 rehabilitation of 211,000 SF by end of 2001; when complete, there will be more than 2 million SF of new and renovated mixed-use space with amenities including restaurants, cafes, business services, landscaped parks and ample parking.
- Granite Square, second phase at Audubon and State, will be 55,000 square feet, the first regular office building in more than 10 years.
- Hamden Bioscience Campus 740,000 SF lab space; site plan approval, no commitments yet.

Labor Market

While jobs recovery has been somewhat slower in the City than in the Greater New Haven area as a whole, the City is regaining resident workers faster than the area as a whole. This is consistent with the City's abundance of rental housing, permitting new entrants ease of access to jobs throughout the area in addition to affordability. Indeed area landlords report the best rental housing market in many years.

Resident Workforce City and Labor Market Area Annual Averages 1990-2000; July 2001

Area	1990	1992	1995	2000	July 2001	Change 1990-2000	Change 1995- 2000
New Haven Workforce	59,744	61,356	53,979	58,075	58,685	-1,669	4,096
Unemployment Rate	6.6	8.1	7.5	3.3	4.5	-2.8%	7.6%
Labor Market Area Workforce	289,366	283,143	268,477	282,088	284,510	-7,278	13,611
Unemployment Rate	4.9	7.3	5.5	2.3	3.4	-2.5%	5.1%

Office Market

As with the residential housing market, the office market has strongly rebounded in the last three years. In 1998, New Haven County had office inventory of 8.5 million square feet, with 1.4 million vacant, or 16.9%. New Haven's CBD had 3 million square feet of which was 20.7% vacant, translating to roughly 600,000 square feet. By the end of 2000, the CBD's vacancy had fallen to 6.5%, or roughly 200,000 square feet, the recent low point. By mid year 2001, the vacancy rate had risen to roughly 350,000 square feet or 11.5%. Despite the retreat from year 2000 levels, general expectations for New Haven and the region are that it will continue to be viewed as a viable alternative to Fairfield County, where the average rent of all types of space is \$32/SF as compared to \$18/SF in New Haven.

Increased occupancy of CBD office space translates to more workers downtown. Even with the recent increase of office vacancy, office workers are occupying 250,000 square feet more space than in 1998, which translates to 1,000 to 1,500 more people circulating downtown. The implications for downtown pedestrian retail are best but opportunities along access corridors like Whalley Avenue are increased as well.

One significant constraint to the growth of CBD office market has been lack of parking in the financial district, which has moved from the western end of Church Street since the 1980's to the eastern end between Elm and Trumbull Streets. An 800 to 850 space garage to be located in the Church, Orange, Wall and Elm block may start construction in 2002 but some of the land and easements are still being acquired.

Despite the softening in the economy, and increase in all office space available, Class A space remains in short supply. The investor group which bought the former SNET headquarters at 227 Church may refurbish that building which would add 156,000 square feet to the inventory of high end space. Alternatively, they may convert the space to residential. Either use will indirectly benefit retail activity on Whalley Avenue.

Whalley Avenue Office Market

While concentrated in a few locations along Whalley, a service provider/professional office market exists and there is potential for more. The trend to greater convenience is not just a retail phenomenon. Service providers have been increasingly moving into retail locations to serve the public. The most visible office/professional location in the WASSD is the Whalley Medical and Professional Center Building at 419 Whalley, where there is a concentration of dental and medical service providers.

Given the District's proximity to New Haven's biotechnology redevelopment sites, including 300 George Street and Science Park, Whalley Avenue will be a convenient location for supporting business to business development. An example of supporting business development would be warehousing and distribution of laboratory equipment and materials. While most of the biotech space has yet to be converted and leased, planning for biotech and other business to business functions on Whalley Avenue should be considered as a potential later phase.

New Businesses in New Haven

A review of businesses registered from February through August of this year, just seven months, indicates 155 new businesses started up in zip code area 06511 and 06510, the CBD. One third are from the East Rock area, one third are from CBD and the remainder from other parts of zip area 06511, including Whalley Avenue.

New businesses on Whalley have included a mix of retail and services, including an ethnic clothing store, two dollar discount stores, and two convenience food stores. Given the existing configuration of mainly small shop space and a lack of vacant stores (in viable buildings) for rent, Whalley Avenue at present does not have capacity to welcome any new users of larger space. The one exception is the new CVS for which space was created on the vacant site of a car dealership.

New Business Filings Zip Code 06511 and 06510 February 2001-August 2001

Corridor/Area	Number of firms	Corridor/Area	Number of firms
Whalley Avenue	7	Dixwell Ave Area	3
Near Whalley	5	Science Park	3
Edgewood Ave	5	Long Wharf/Sargent	5
York/Howe/Broadway	7	Whitney	10
Grasso Blvd	2	Orange	11
Chapel Street	8	State	6
		Other East Rock	23
CBD 06510	57	Other 06511	3

Source: Business New Haven website

Building Transactions

A review of building sales transactions indicates that prices have been modest but that some liquidity has re-emerged in the market after the long recession. The most valuable property on a price/SF basis was 474 Whalley-1462 Boulevard, which sold for \$64 per square foot. This reflects the fact that the two small buildings located at the key Boulevard intersection have a billboard on the roof, once again demonstrating the power of the traffic counts.

Transactional data for Whalley Avenue in Westville have been included to give some context to the Whalley District values. During this period Westville sales have trended higher as this comparatively small commercial district that serves the secondary market area and western suburbs has developed some new anchors and small businesses around its core businesses.

Sales of Improved Retail Properties Whalley Ave SSD and Westville 1998-5/30/01

Address	Sale Date	Price	Land Area in Acres	Building Area in SF	Floors	Year Built	Price per Square Foot	Use
WHALLEY AVE SSD								
383-385 Whalley	1/98	\$150,000	0.16	7,478	2.5	1910	\$20.60	4 apt, rest, church
139 Whalley	10/98	\$87,000	0.20	3,656	2.0	1923	\$23.80	Ret/wh
372 Whalley	10/98	\$75,000	0.05	2,280	1.0	1946	\$32.89	Retail
366-370 Whalley	11/98	\$100,000	0.25	6,114	3.0	N/A	\$16.36	Ret/apt
139 Whalley	12/98	\$36,000*	0.20	3,656	2.0	1923	\$9.85	Ret/wh
379 Whalley	3/00	\$650,000	0.26	11,599	1.0	1920	\$56.04	Market
352 Whalley	4/00	\$199,109	0.24	13,683	2.0	1920	\$14.55	Retail/office
474 Whalley-1462 Boulevard	8/00	\$185,000	0.09	2,884	1.0	N/A	\$64.15	Rest/Blbrd
538 Whalley	12/00	\$138,500	0.13	2,937	1.0	N/A	\$47.16	Market
* Foreclosure						AVG	\$21.60	
WESTVILLE								
843 Whalley/ 414 W Rock Ave.	9/98	\$200,000	0.31	6,330	1.5	N/A	\$31.60	Retail
845 Whalley; 11 Tour Ave.	1/99	\$115,000	0.21	5,021	2.0	N/A	\$22.90	Ret/apt
865 Whalley	8/99	\$110,000	0.12	2,581	1.5	N/A	\$42.62	Rest/apt
867-869 Whalley	2/00	\$234,000	0.14	5,460	2.0	1940	\$42.86	Ret/ofc
920-924 Whalley	12/00	\$282,500	0.11	6,337	2.0	N/A	\$44.58	4 apt, 2 stores
						AVG	\$36.91	

Source: Conn-Comp Transactions Summaries Database

The Whalley Avenue commercial landscape continues to evolve through business and especially retail cycles. As traffic plays such an important part in retail site selection, Whalley Avenue will continue to attract and sustain volume-oriented businesses. We have seen this in recent months where the site of a former auto dealership has been razed for new construction of a CVS drugstore. In a testament to the staying power of the corridor, the transaction involved a ground lease rather than the outright land sale to the new operator.

The inherent value of land in a good retail location has been noted by William Beckeman of Finard & Company, a leading New England brokerage and investment advisory firm specializing in retail real estate.

“Over time, the quality and characteristics of the bricks and mortar on a given property become less relevant: it’s the underlying land value that determines long-term values and appreciation. Maybe more importantly, properties zoned for retail use tend to be the most flexible for conversion to other uses. ...Because of the unwelcome traffic retail properties usually generate, appropriate transportation and parking infrastructure must already exist, which usually satisfies the needs of alternative uses. The users who may place the highest value on a retail site in the future may not even be retailers.”¹

Another parcel owned by the same interests who have leased the ground rights to CVS is now offered for lease as well. The quarter acre lot is across Orchard Street from the CVS site and is offered at \$25,000 a year. Assuming that the site could support 2,500 square feet of retail, the land lease would cost \$10/SF of retail space.

¹ Finard Retail Review, Finard & Company, September 2001, www.finard.com/FRRpdf.htm

Traffic

Whalley Avenue is the major New Haven artery to New Haven from the northwest sectors of the city and adjacent suburbs, running two lanes in each direction for the entire 1.2 miles of the district. Past the District Whalley is served by the Wilbur Cross Parkway, State Route 15, with full north- and south-bound exits at interchange 59. This is the only Route 15 interchange in New Haven and it is about two miles from the western end of the Whalley District. Whalley also collects traffic at key intersections including Fountain and Fitch Streets, the Ella T Grasso Boulevard, which in turn connects to I-95, Sherman Avenue, Winthrop and Orchard Streets.

In terms of peak traffic counts, no other corridor in New Haven comes close to the peak volumes served by Whalley Avenue. A comparative chart follows on the next page.

Average daily trip information analysis has been inconclusive. A recently completed draft report for the Park Street-Sherman Avenue section of the district indicates 18,000 trips on a weekday and 7,000 on a Saturday from the Traffic and Parking Department. However, District sources have indicated average daily traffic measured prior to the opening of the Shaw's supermarket was in the vicinity of 30,000 per day. We strongly recommend a detailed and thorough study of average daily traffic counts to currently and accurately document this key factor in attracting retail development.

Retail Requirements

This section serves as a preliminary orientation to site and market criteria for various chain store retail locations as published by Trade Dimensions, which publishes a comprehensive retail tenant directory. The retailers selected for inclusion were suggested by District interests and/or would be supported by consumer demand in the market area, although not all are appropriate for the market or location on Whalley Avenue. The universe of choices is larger than presented here, but this selection provides some guidelines as to format size in square feet and land requirements. The appendix provides additional information on types of locations considered, customer base targeted, preferred co-tenants and new units planned.

Operating Chain	# stores	Formats in SF	Acreage Needed
TJX Companies www.tjx.com Operating names:	1,421	25,000-32,000	2.5-3.2
HomeGoods	81	25,000-30,000	2.5-3.0
A.J. Wright	25	25,000	2.5
T.J. Maxx	662	29,000	2.9
Winners Apparel	117	25,000-30,000	2.5-3.0
Marshalls	536	32,000	3.2
Gap, Inc. www.inc.com Operating names:	3,039	6,000-46,000	0.6-4.6
Banana Republic	389	6,000-12,000	0.6-1.2
Gap/Gap Outlet	1,242	11,000-46,000	1.1-4.6
GapKids/Baby Gap	730	6,500-8,500	0.7-0.9
Old Navy	648	20,000-35,000	2.0-3.5
Bed Bath & Beyond www.bedbathandbeyond.com	300	20,000-85,000	2.0-8.5
Linens N Things www.lnthings.com	267	35,000-45,000	3.5-4.5

Operating Chain	# stores	Formats in SF	Acreage Needed
US Factory Outlets www.usforetail.com	28	36,000-52,000	3.6-5.2
Consolidated Stores Discount Division www.cnstores.com	1,297	10,000-30,000	1.0-3.0
Big Lots		20,000-30,000	2.0-3.0
Big Lots Furniture		10,000-15,000	1.0-1.5
MacFrugals Bargains Close-outs		20,000-25,000	2.0-2.5
Odd Lots		20,000-30,000	2.0-3.0
Loehman's www.loehmanns.com	44	20,000-60,000	2.0-6.0
Ocean State Job Lot (401) 295-2672	54	25,000	2.5
Rainbow Apparel Companies* www.rainbowshops.com	700	1,800-15,000	0.18-1.5
Ritz Camera Centers, Inc.* www.ritzcamera.com	963	1,400-2,000	0.14-0.2
RadioShack Corp.* www.radioshack.com	9158	1,000-2,450	0.10-0.25
Venator Athletic Group www.footlocker.com	2,674	1,800-10,000	0.18-1.0
Foot Locker*	1,604	2,500-10,000	0.25-1.0
Kids Foot Locker	399	1,800-2,500	0.18-0.25
Lady Foot Locker*	671	2,500	0.25
One Price Clothing Stores www.oneprice.com	647	6,000	0.6
Payless ShoeSource www.paylessshoesource.com	4,926	2,400-3,000	0.24-0.3
J. Silver Clothing www.jsilverclothing.com	36	3,000-3,500	0.3-0.35
* Current tenants of Chapel Square Mall			

We note that only one block, South Block Winthrop-Sherman, has the required size for some of the larger format stores operated by TJX and Gap, and most would be a tight fit on the 2.26 acres site which could conceivably be produced.

V. WHALLEY AVENUE BUSINESS COMMUNITY INTERVIEWS SUMMARY

Objectives

In order to obtain input from a cross section of the Whalley Avenue business community we conducted personal interviews among a select cross section of businesses and institutions located in the Whalley Avenue Special Services District. The District encompasses the 1.2 mile stretch of Whalley Avenue from Tower Parkway to Hubinger Street. In total, principals of 16 businesses, three non-profit organizations and one branch of city services were interviewed during June, July and August 2001. Efforts were made to obtain a fair representation of Whalley Avenue's businesses, ranging from the small and privately-owned to the large and publicly-owned. We also strove to include both long-established companies and those which have joined the community more recently.

The interview format was designed to elicit responses to the following:

- To gauge business growth and explore plans for future business expansion on Whalley Avenue.
- To identify the major assets and constraints of Whalley Avenue as a place to do business.
- To identify specific needs and priorities which can be addressed in the Strategic Plan.

General Background Information

As noted above, a total of 20 on-site interviews were conducted. A chart identifying those interviewed appears as an exhibit following this report. General background characteristics are as follows:

- Six were tenants in buildings owned by others, 10 were owner-occupiers of their buildings and four were owner-managers of real estate on Whalley leased as stores or as mixed use stores and apartments. Seven of the real estate owners owned more than one property on Whalley and/or in the immediate neighborhood.
- Three of the owners had made improvements to their buildings during the past year.
- Total Whalley Avenue-based employment for this group is 300 full time and 200 part time jobs, indicating the importance of this corridor as a center of employment in New Haven.

- Most of those interviewed have had a long association with Whalley Avenue. On average, these businesses and institutions have been in their present locations for 19 years, with some having been in operation in excess of 65 years. One car dealer with 30 years experience on Whalley, Brandfon Honda, relocated to East Haven one year ago. Holding the record for longevity is Whalley Glass, in operation since 1945.
- Half of the group has related entities operating in locations outside of Whalley Avenue, although only two are regional or national companies.
- A slight majority of firms principally serve the immediate neighborhood market, with remainder serving mainly New Haven and greater New Haven as well as the immediate neighborhood.

Issues Affecting Whalley Avenue Commercial District

Overall, 70% of those we interviewed have a positive opinion of Whalley Avenue as a commercial district. Those with a negative opinion totaled 15%; 10% have a mixed opinion and 5% had no opinion. When probed for specific areas of strength or concern, the interviewees rated the following in terms of their own businesses:

Issue	Excellent	Good, but needs improvement	A moderate Problem	A severe problem	No opinion
Parking availability	36.8%	15.8%	21.1%	26.3%	0.0%
Building location on Ave.	63.2%	26.3%	0.0%	10.5%	0.0%
Location in New Haven	78.9%	10.5%	5.3%	5.3%	0.0%
Building capacity	52.6%	26.3%	15.8%	5.3%	0.0%
Labor Availability	27.8%	16.7%	33.3%	16.7%	5.7%
Access to capital/financing	47.4%	21.1%	0.0%	5.3%	26.3%
Adjacent Business uses	25.0%	25.0%	15.0%	30.0%	10.0%
Whalley Ave. Appearance	10.5%	42.1%	26.3%	15.8%	5.3%
Public Safety/Crime	27.8%	38.9%	22.2%	11.1%	0.0%
City Services	36.8%	31.6%	21.1%	10.5%	0.0%

- Parking availability - generally we expect parking availability to be a major source of concern for urban retailers, which is not so much the case here. This may be due in part to the preponderance of owner-occupiers in this group with off street parking on premises. Nonetheless, nearly half voice concern that parking availability is a moderate to severe problem for their businesses. Some of those with only on street parking were frustrated by restrictions placed on spaces without notice or appeal.

- Building location on Whalley and in New Haven - the vast majority feel their businesses are well located on Whalley and that a location in New Haven is favorable.
- Building capacity - the majority are satisfied with the size of the space they occupy relative to their needs or they have room to expand as necessary. Where problems were cited it was usually a case of limited off street parking.
- Labor availability - while available, labor may not be at the skill level required for the job. Lack of good work readiness habits, educational background and ambition to rise through the ranks were also cited. Those requiring lower skilled employees were the most satisfied. Those requiring skilled suburban workers cited difficulty overcoming the perception of crime in attracting and retaining employees.
- Access to capital and financing - not a problem in most cases, again perhaps due in part to the preponderance of real estate owners with collateral for loans.
- Adjacent business uses - while half of interviewees think their adjacent business owners are good to excellent, almost half think their neighbors are a moderate to severe problem. Of particular concern were liquor stores, bars, vacant or blighted buildings and to a lesser extent, fast food restaurants due to litter. Absentee landlords of blighted or vacant residential buildings on or near the Avenue were also cited as poor neighbors.
- Whalley Avenue appearance - two thirds indicate the district's appearance is good but needs improvement or is a moderate problem. Due to the 1.2 mile length of the district, many cited the variability of appearance and rated appearance from their particular locations; generally better appearance on the lower end near Yale and at the intersection of the Boulevard, generally worse near the corner of Winthrop. Trash, unkempt tree belts, poorly maintained planters and bad sidewalks were particular sore spots. For those seeking to serve Greater New Haven, there is particular sensitivity to an overall bad impression created in the minds of potential or existing customers traveling the corridor.
- Public safety and crime - many cited the two realities of Whalley Avenue, the generally safe daytime environment and the less certain night time environment, especially late nights over the weekend. Most of those interviewed are on Whalley during daylight hours only and feel safe and confident of operating there and serving the general public. They recognize that suburbanites view the area differently and overwhelmingly cite the *perception* of crime rather than *actual* crime as a major problem to be overcome. Loitering, another frequently cited issue, also contributes to this perception.

- City services - two thirds of those interviewed believe city services are either excellent or good, especially police services. Only one cited slow response time regarding police, another lack of beat officers (on foot) and poor traffic enforcement. Public works also came in for moderate criticism.

Need for actions to improve the district

We also asked interviewees to rate the need for a variety of actions in terms of improving the commercial district as a whole. Responses were as follows:

Action	Critical Need	Moderate Need	Low Need	No Need	No Opinion
Provide Parking	42.1%	31.6%	10.5%	5.3%	10.5%
Improve Security/Safety	27.8%	50.0%	16.6%	0.0%	5.6%
Undertake Streetscape Improvements	42.1%	26.3%	21.1%	10.5%	0.0%
Improve Traffic Safety & Control	15.8%	31.6%	31.6%	15.8%	5.3%
Start a Façade Program (with grants)	52.6%	31.6%	10.5%	0.0%	5.3%
Start a Business Loan Program	26.3%	16.6%	26.3%	10.5%	21.1%
Improve Retail/Merchant/Business Mix	42.1%	36.8%	15.8%	5.3%	0.0%
Deal with Blighted Buildings	73.7%	21.1%	0.0%	5.3%	0.0%
Start Marketing Program for Whalley Ave.	47.4%	36.8%	0.0%	5.3%	10.5%
Strengthen Merchant Organization	30.0%	25.0%	30.0%	5.0%	10.0%
Promote Stabilization of Neighborhoods	68.4%	31.6%	0.0%	0.0%	0.0%
Improve Communications with City	26.3%	26.3%	26.3%	15.8%	5.3%

- Provide parking - Although many of those interviewed indicated they had enough parking either on street or on site, they nevertheless think additional parking is needed elsewhere in the District. One observed that with any increased store occupancy levels, adequate parking for the present might become tighter. Any lease-up or marketing campaign should bear this in mind. Diagonal parking where possible was suggested.

- Improve security and safety - despite overall favorable input about policing effectiveness, half of those interviewed indicate a moderate need for greater security and safety, especially at night. This ties in with the need for changing perceptions of safety from those outside the neighborhood, for as one observed the sense of safety “is in the eye of the beholder”. Calls for more foot patrols were also noted. And while the police department has effective strategies to address drug dealing, they do not always have the resources to carry the strategies out. Current areas of concern are the intersection of Blake Street and Whalley, Winthrop and Whalley, Carmel Street and Sherman at Elm Street.
- Undertake streetscape improvements - while the majority views such upgrades as very important, there was a diversity of views on what is needed. Some stated that without more attention to cleanliness and control of green belts, planters, etc. the impact of streetscape improvements would be undermined. While some stretches of sidewalk have been replaced, others are in sore need of upgrade and no timetable has been announced. A few cited the loitering behavior sometimes associated with benches. Others have had problems with tree roots breaking up the sidewalk in front of their businesses and branches obscuring their signage. There is a sense among some that streetscape improvements create more problems than they are worth. However, most cited the need to give the “barren” District more visual appeal. The improvements at the intersection of Whalley and the Boulevard were cited positively as a good use of street lighting. A coherent plan for streetscape improvements would make a long stride in promoting the District as a “friendly” place.
- Improve traffic safety and control - ranking at the bottom of the action area criteria was improved traffic safety and control. The vast majority of those interviewed regards the heavy flow of traffic as their economic lifeblood and sees little reason to change the status quo. They acknowledge that traffic moves fast and heavy but don’t see how traffic calming or re-sequencing of the lights to slow the flow would help their businesses. They do not want to lose the flow to other arteries if the perception gets out that Whalley is not the fastest way to get from the west and north downtown and visa versa.
- Start a façade program - as with streetscape improvements, some felt that basic cleanliness must be a given before façade programs can be truly successful. Many also think the length of the District at 1.2 miles poses problems to achieving a uniformity of look, which may not be appropriate or feasible in any event. Some businesses have benefited from façade programs in the past and found such expenditures beneficial. Others cited similar successful efforts in the Chapel Street district.
- Start a business loan program - not a high action area priority for this group.

- Improve retail/merchant/business mix - a very highly rated need in the District with a great variety of opinions as to what new business is needed. For those who view the district as essentially there to serve the immediate neighborhood's day to day needs, the belief is that the mix is good and has been improving as the Avenue diversifies somewhat from its automotive origins. For those who view the district as both serving the convenience needs of the neighborhood and destination or shopper's goods for greater New Haven, the desire is for more variety in higher end goods and services. With very few exceptions, all viewed the current mix of goods and services as a reasonably good base from which to start. Also with few exceptions, the vision was for upgrade rather than radical transformation - no "Rodeo Drive" retailers needed. While some admire the success and business mix of the pedestrian oriented Chapel Street District, many believe that Whalley's potential lies in traffic counts supporting larger stores. Businesses in plentiful supply on Whalley include dollar stores, liquor stores and personal care services such as nail salons. Needed are more shoe and apparel stores, possibly in big box formats near Shaw's and Staples. The desire for more restaurants, especially family style, non-fast food restaurants is also widespread.
- Deal with blighted buildings - favored by an overwhelming majority, concerns center on vacant storefronts and deteriorated housing on or close to the district. Efforts to market the district prior to dealing with this issue will be premature. The Livable City Initiative needs district assistance to deal with this issue most effectively, at least for properties on Whalley Avenue. The demolition backlog is very long even after the City takes title. Of particular concern is the property at 352-364 Whalley on the southwest corner of Winthrop and Whalley Avenues.
- Start a marketing program - also favored by a large majority, although considered premature by some. These feel a marketing program should follow implementation of cleanliness, streetscape and façade programs. Again, due to the diversity of businesses and the length of the district, it will be difficult and ineffective to craft one program for all. The program should be realistic about the nature of the corridor and market area, not aimed at attracting a typical suburban retail mix. It would however be a sensible opportunity to co-market lower Whalley with the Broadway area, certainly to the Yale community.
- Strengthen merchant organization - there was a fairly wide divergence of opinion on this subject, with the current WASSD executive and board leadership getting high marks by many. Others cited the following as needing strengthening; greater merchant participation and attendance at meetings, finding ways for WASSD to be more effective in dealing with a sometimes hostile city, greater participation and leadership from anchor merchants, and better management of services provided, especially cleaning and mowing. Capacity building may be needed as the District grows and prospers. Lastly, the District office should be upgraded and smoke free to encourage attendance at meetings.

- Promote stabilization of immediate neighborhood - although out of the control of the merchants and District, all regarded neighborhood stabilization as a moderate to critical need. While the neighborhood's supply of affordable ownership and rental housing is a boon to the District's primary customer base, some regard density as too great in some cases, especially in multi-family homes with more than three units. Smaller multi-families encourage homeownership, larger ones encourage absentee landlords. Homeownership promotion of appropriate properties is key to those with knowledge of the residential market area. A tougher issue involves dealing with problems caused by inadequately supervised children who hang out, ride bikes in traffic and contribute to litter problems. On the positive side, strengthened block watch groups and kids programs have made "huge strides" in one part of the District.
- Improve communications with the city - response to this issue was fairly evenly divided. On one hand, there are those who perceive relations with the city have improved or who have ongoing effective contact with their Alderman, LCI staffer, WASSD, substation, etc. Some feel unconnected, unsupported and have moved or are moving. Some feel they have a voice and are heard but there is not enough follow through on requests or services promised.

Whalley Avenue's most positive and negative qualities

These were the most positive qualities given for Whalley Avenue:

- High traffic volume, good cross section of traffic, diversified merchant base
- The corridor has good potential for expanding businesses and increasing the volume of existing business
- Shaws, Staples and Edge of the Woods are good anchors
- Shaws and Staples occupy a presentably redeveloped section of the corridor near Yale
- Customer loyalty

These were the most negative qualities given for Whalley Avenue:

- Blighted vacant buildings, absentee landlords
- Perceptions of lack of safety on Whalley and in neighborhood's residential core
- Unkempt, barren appearance in some sections
- The corridor is going down hill and offers no shopping or services of interest to an upscale audience

Clientele/Sources of Business

Among the 15 entities which reported the geographic source area of their client base, eight indicated that 75% or more of their business comes from the immediate neighborhood. Of the four that indicated that 50% or more of their business comes from beyond New Haven:

- one is primarily a business to business retailer,
- one is a location which serves as a staging point for service calls to the suburbs as well as providing service on site,
- one is a specialty automotive repair shop and
- one is a temporary employment service.

A chart of geographic source of sales follows below.

Source of Sales	Neighborhood	New Haven	Outside New Haven
75% & up	8 (53.3%)	0 (0%)	1 (6.7%)
50%-75%	1 (6.7%)	2 (13.3%)	3 (20.0%)
25%-50%	2 (13.3%)	6 (40.0%)	2 (13.3%)
0%-25%	4 (26.7%)	7 (46.7%)	9 (60.0%)
Total	15 (100%)	15 (100%)	15 (100%)

Most of those interviewed had not observed changes in clientele in term of place of residence or purchasing patterns during recent years. Those that did commented as follows:

- traffic count appears to be up, due to Shaw's and greater office employment levels downtown
- more Yale-related customer support
- more suburban customers
- fewer suburban customers
- sustained economic expansion has benefited African American and Latino customer base but signs of softening are now apparent.

Most do not target goods and services to a specific ethnic market but the six that do target primarily the African American market and to a limited extent the Latino market. One of these serves the statewide African American market.

These businesses rely primarily on Yellow Page ads, the New Haven register and radio for marketing visibility, as well as direct mail, TV and billboards in a few cases. Only one reported advertising in a community weekly.

Recent Operating Conditions & Sales Results

Of the retailers, those that are open seven days a week and 24 hours or until the late evening reported heavy traffic throughout the day and evening hours. Most businesses however are open until 5:00 or 6:00 during the week and a half-day on Saturday.

None of these businesses reported much in the way of heavy seasonality to their sales. As would be expected, the Christmas and Easter holidays are busier for some of the retailers. Those closer to Yale reported that their summer sales are somewhat lower than those of other seasons.

Of those businesses which responded, seven rated their 2001 sales as good, with two rating them as excellent and two as fair. Just one reported poor results year to date. In comparison to last year, seven reported sales were up slightly, four reported sales being roughly the same and two reported lower results. They feel that any coming recession is not here yet but some are starting to see signs of one in lower sales or less being spent per trip.

Future Business Prospects & Major Priorities

In line with their sales level ratings, eight view their future prospects as good while one views them as excellent and one as fair. None rated their prospects as poor but three said future results will depend on certain factors. Two of these comments came from managers who do not own the businesses they manage. One stated that the challenges of operating in this area and serving this market require a special level of expertise which must always be in place. The second, a temporary manager, indicated that the incoming manager will have to operate in a fully saturated, mature market and will have to hustle to maintain market share. The third, a real estate owner, wants to see more emphasis on destination-oriented, suburban shopping.

Most have no plans to expand their businesses in the next year. However, three will expand their product lines and one has just bought the building in which the business operates and will expand its own shop in the process. One is overhauling a service area. Two of the non-profits are involved in new housing or commercial initiatives as well on or near the District.

Most of those interviewed plan to stay where they are for the time being, but two indicated that they are leaving, including one whose business has already left. The other's real estate is for sale and the business will move to another location in the suburbs or possibly Whitney Avenue in New Haven. Two others are considering moving or consolidating with other locations and one is looking for a larger space in the immediate area.

The major priorities identified for improving the commercial district's viability reflected themes previously discussed, including:

- Reduce blight and vacancy levels, improve cleanliness, and seek to improve the perception of Whalley Avenue as a safe and convenient place to shop or do business.
- Get better visibility and acceptance of the District through a realistic (not overselling) marketing program.
- Encourage the mix of businesses to include more destination shopping, anchors and restaurants and discourage the addition of more personal services and dollar stores.
- Maximize parking where currently needed and plan for future parking needs as vacancy levels drop.
- Address traffic speed and flow but don't adversely impact the average daily traffic count.

Other issues and concerns not addressed in the survey:

- Area residents need parks and other places to congregate and socialize to relieve the pressure on Whalley Avenue, especially at night.
- Bring back the concrete trashcans.
- Merchants and landowners want to be kept up to date on problem properties such as the corner of Winthrop and Whalley.
- LCI and all anti-blight and housing revitalization efforts must be fully supported to ensure such efforts are timely.
- Merchants should be trained or disciplined as necessary to enforce cleanliness and minimal loitering in front of their stores, especially the liquor stores and fast food outlets.
- Street sweeping appears to be selective.
- Strategic motor vehicle law enforcement is very effective in reducing crime, but the police need kits for road blocks and radar units in each patrol car.

VI. Market Analysis

Introduction

New Haven's retail landscape is more flux now than it has been for many years due to the demise of the proposed Long Wharf mall. The demise of the mall concept plus economic momentum created by the at-long-last recovery from the 1990's recession and the emergence of Yale as a dominating force in retail real estate have combined to reshape New Haven's retail persona.

Whalley Avenue has also witnessed change in a process that started after World War II. Always a key arterial into New Haven, Whalley Avenue nevertheless served its neighboring residential market with pedestrian oriented shops for both comparison and convenience goods. However, as the urban edge neighborhoods and suburbs emerged as residential areas, Whalley's importance as a fast, direct way to employment downtown started to change the fabric of the Avenue to the detriment of pedestrian shopping. "The faster traffic and wider pedestrian crossing have increasingly made the streets places for vehicles only. The more that streets became devoted to cars, the less people wanted to walk along them, the more retail stores moved to internal malls and the less vibrant and safe the city felt."²

With the supremacy of the car came businesses dependant on cars and the heavy volume of traffic created. These businesses tended to be large in scale, especially dealerships, again impacting the ability of pedestrian-oriented shops to compete. Those wishing to capture business from increased car traffic were often in buildings which did not provide off-street parking. Meanwhile their traditional market, the residents of the adjacent neighborhoods, were impacted by decreasing populations (especially after 1990) and a thinning of the middle class resulting in stagnate income levels and purchasing power.

Then in the 1990's, the car dealerships left, taking with them the last of Whalley Avenue's major destination, comparison shopping venues to established suburban clusters. New uses have been found for these relatively large sites and they are and will continue to be welcome additions to the retail community. However, they are all convenience shopping destinations, with the exception of Staples, which offers both convenience and comparison shopping goods. It is car count and access which has driven most of the new retail development on Whalley Avenue in the recent past.

² Yale University A Framework for Campus Planning, April 2000, Cooper, Robertson & Partners

Business Inventory

The Whalley Avenue SSD is currently home to approximately 180 businesses and non-profit places of employment along its 1.2 mile length. The diverse mix of businesses includes chains, independents and non-profits as well as commercial, wholesale, business to business and professional operations. The historic mix of businesses included more destination or comparison shopping, the best example being the car dealerships.

The current mix is largely driven by traffic counts, which are very high and attractive to chain operators who do volume business on fairly narrow profit margins. Convenience goods and services are examples of this, especially fast food outlets. There remains as well a core of independent businesses which serve both the immediate neighborhood and driving public, which are subject to fairly high rates of turnover due to typically thin capitalization. Following is a table with the current percentages of business by type.

WHALLEY AVENUE BUSINESS MIX

Type of Operation	Percent
Retail	21%
Professional Services	20%
Other Services (including non-profit sponsored)	18%
Restaurants/bars	14%
Personal Services & Convenience	13%
Vehicle Sales & Service	10%
Business to Business	4%
Total	100%

Source: AMS Advisory Services

While retailers are dispersed widely along the corridor, professional services are largely concentrated in one area near the Boulevard. Likewise, automotive sales and services are most likely to be found east of Sherman Avenue, where zoning specifically permits this use. Restaurants and bars, 27 in all, are found along the entire corridor. Business to business operations, while only constituting just 4% of the total, are some of the largest land users. More detail on the business mix can be found in the appendix.

Anchor businesses, high profile operations which draw business to themselves and other smaller operations, include full service and specialty supermarkets, an office supplier, and a medical/dental professional building. Two other anchors, by virtue of their size and visibility, include a regional meat wholesaler-distributor and a hotel.

Many of these businesses operate from buildings owned and operated by their proprietors and more than one quarter of all businesses are minority owned and operated.

Market & Real Estate Assessment by Block

In order to understand the synergy of existing businesses and potential new businesses a block by block market and real estate analysis follows.

Our area of specific concentration has been the Whalley Avenue west of Sherman to the conclusion of the district at Pendleton Street on the south side of the avenue and Whittlesey Street on the north. The area is roughly two thirds of a mile and includes seven blocks on the south side of the avenue and seven blocks on the north. Due to the variability of the intersecting street patterns, these fourteen blocks are somewhat irregular in size.

To give a coherent context to this analysis we have identified these blocks as belonging to three subsections referenced below:

Whalley Avenue Subsections

- **Whalley West Subsection / Pendleton Street to Ella Grasso Boulevard**
- **Whalley Mid Subsection/ Boulevard to Norton Street**
- **Whalley East Subsection/ Norton Street to Sherman Avenue**

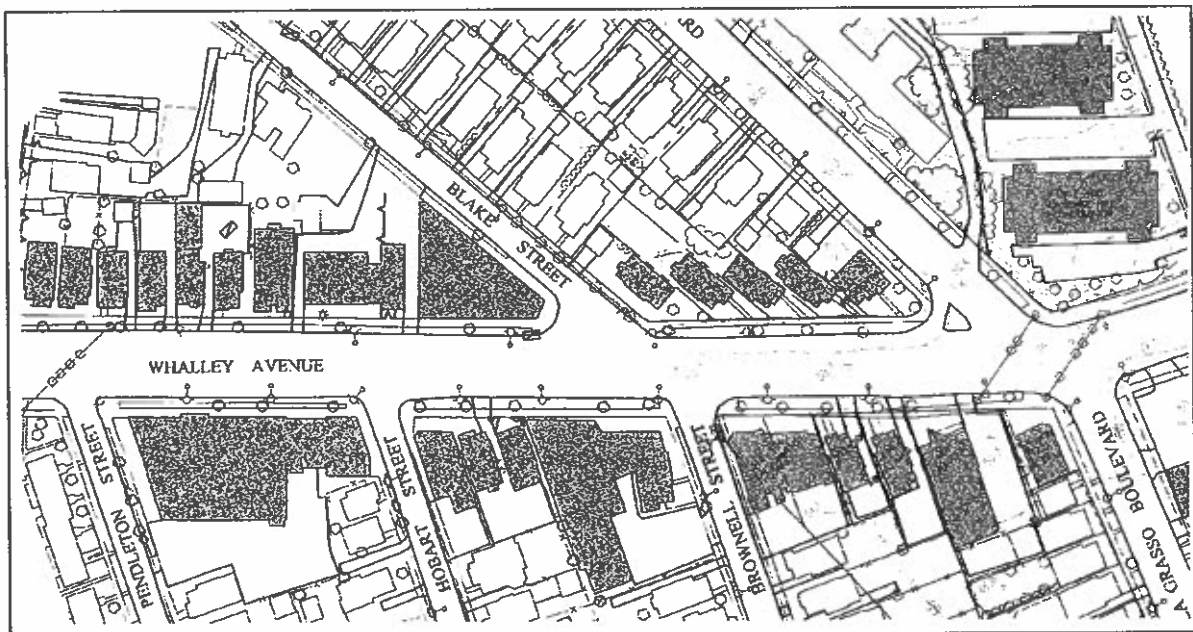
Particular emphasis will be given to Norton Street to Sherman Avenue where redevelopment is most needed and site assemblage may have the greatest potential.

WHALLEY AVENUE WEST: Pendleton Street to Ella T. Grasso Boulevard

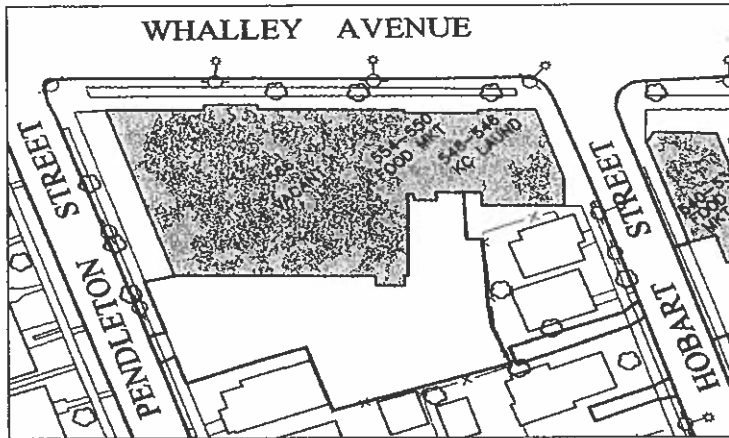
Overview

This subsection includes five blocks, three on the south and two to the north. Most of the commercial development is found on the south side, with the north side being mainly residential. Beyond this area to the west is the Jewish cemetery (north side) and Edgewood Park (south side) and Westville Village. Recent history has included a major fire in one of the subsection's anchors, a mixed office/retail building at 566 Whalley, which displaced several non-profit offices and retailers on the first floor.

This western, transitional section of the District faces major challenges and opportunities in connection with its residential profile. The revitalization of the northern side of the street will be a key factor in the redevelopment or repositioning of the commercial sector on both sides of the Avenue. This section is also bordered by the major north-south access to Whalley, the Ella T. Grasso Boulevard. The gateway to the District at this key intersection has been upgraded in recent years by streetscape improvements but should be a particular focus of redevelopment efforts beyond the superficial.



Southside Whalley Block Between Pendleton & Hobart (Within the Whalley Ave. West Subsection)



The most prominent feature of this block is the 28,839 square foot, two story building at 566 Whalley Avenue which suffered extensive damage from a fire this past summer. This building had served a niche market of non-profit offices on the second floor and three retailers on the first, all of whom have had to relocate. The building has paved parking in the rear, with the total site encompassing half an acre. Although the building is on the corner of Pendleton and Whalley, access to the parking is via Pendleton, which currently runs one way north, meaning the building's parking cannot be accessed from Whalley to Pendleton. Cars must go around the block via Hobart and Elm Streets to reach Pendleton and turn into the lot. Serious consideration should be given to making Pendleton two way, at least for the block between Whalley and Eldert Street.



Extensive Fire Damage at 566 Whalley Avenue

Southside Whalley Block/ Pendleton to Hobart (cont'd)

On the eastern side of 566 Whalley are two more buildings which complete the commercial development of this block, shown in the picture below. The middle building at 550-554 Whalley is a mixed use two family up and two stores down, one vacant and one occupied by the Whalley Avenue Food Market, a convenience store. This property has no access from Whalley for its rear parking area, but parking can be accessed via the abutting 566 Whalley Avenue lot. The last building on this block is 546-548 Whalley, a single story, two store building on the corner of Hobart. Tenants of this building are KC Laundromat and Sing Wah Chinese Restaurant. Hobart Street is also one way, in this case running southerly.



550-554 Whalley Avenue and
546-548 Whalley Avenue

A one family house at 146 Hobart abuts the corner commercial building. Were this residential parcel to be joined with the three commercial parcels which front on Whalley, a three quarter acre development parcel would be formed. A summary table follows on the next page.

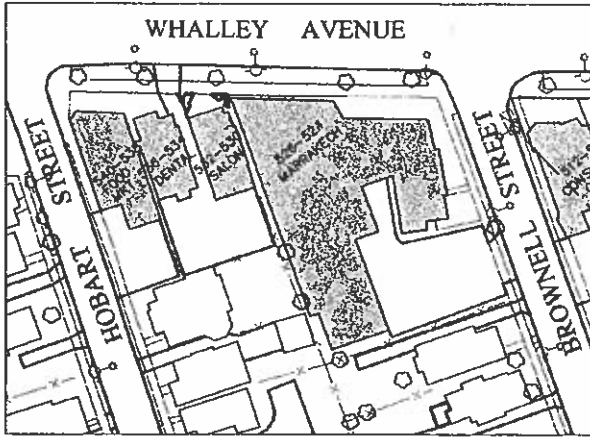
Southside Whalley Block/ Pendleton to Hobart (cont'd)

Southside Block/ Pendleton-Hobart Characteristics

Southside Block Pendleton-Hobart	Owner	Parcel SF	Parcel Acre	Building SF	Notes
560-566 Whalley	Jacobson	22,983	0.53	30,231	retail/office
550-554 Whalley	Kabul	4,912	0.11	2,968	mixed use
546-548 Whalley	Baltimore	3,860	0.09	2,200	2 stores
146 Hobart		2,184	0.05	2,000	single family
Total		33,939	0.78	37,399	

Using the guideline of one acre of land to support 10,000 square feet of building and parking, this would support 7,500 square feet of retail, possibly with 7,500 square feet of office above. The cost of acquisition, demolition and construction would not in all likelihood justify the creation of such a small development.

Southside Whalley Block Between Hobart & Brownell
(Within the Whalley Ave. West Subsection)



This block of Whalley is mixed commercial and residential, with the most prominent feature being the Marrakech building at 524-526, formerly Howard Printing. This 16,000 square foot building, extensively renovated, is used primarily for human resources program services run by Marrakech, a non-profit employment training and placement organization. Marrakech also owns the abutting 9,000 square foot mixed use building on the corner of Brownell which contains three

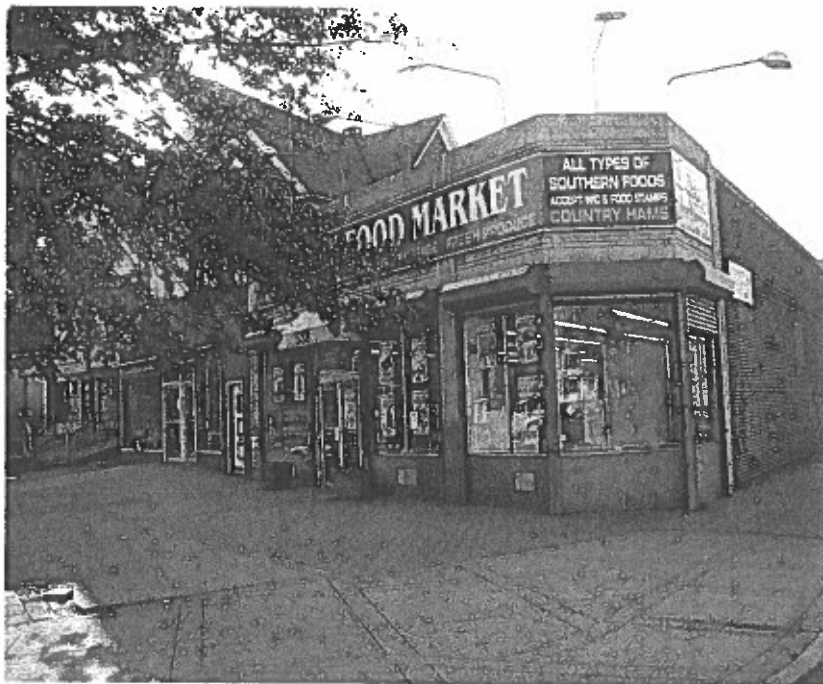
residential units above first floor space being used for program services and a bar, the Village Pub Café.



A prominent building on block is the
Marrakesh Building, formerly Howard Printing
- 524-526 Whalley Avenue

To the west of the Marrakech complex are three structures which complete the block. At 530-532 Whalley is a mixed use three family with commercial space on the first floor, currently occupied by Glamour-Rama, a personal services provider. Continuing west, at 534-536 Whalley is a mixed use two family with a vacant store front and the offices of Dr. Rohinsky, a dentist.

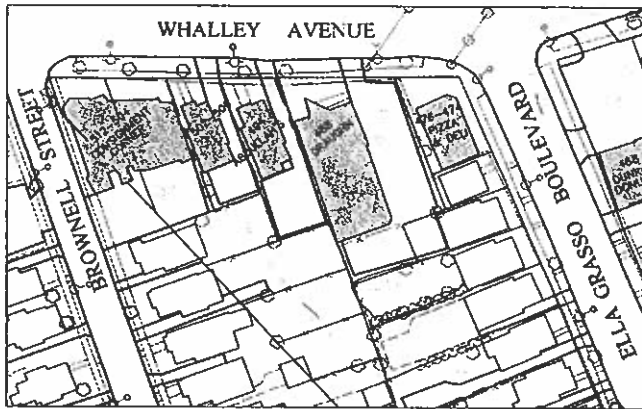
At the western corner of the block is a commercial building with a new tenant in 2001, a small grocery store. New owners acquired this 2,900 square foot building in December 2000 for \$138,500 or \$47 per square foot. Behind these three properties is a limited amount of parking which is accessed by Hobart from Whalley.



New Tenant at 538-540 Whalley Avenue

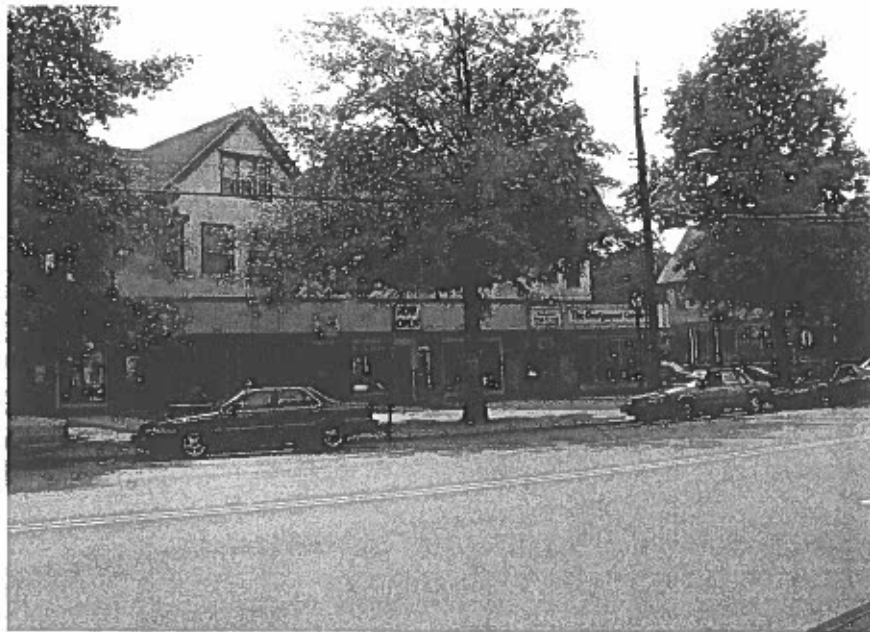
This block has already witnessed upgrading through the substantial renovation of the Marrakech complex, solidifying this as the block's anchor. The wooden mixed use structure on the corner, however, needs painting. Reportedly funds are now in place to substantially rehabilitate this building.

Southside Whalley Block Between Brownell-Boulevard (Within Whalley Ave. West Subsection)



This block forms the southwest corner of the important Whalley Avenue-Boulevard intersection. It is dominated by two structures, one mixed use and one commercial. The first, at 504-512 Whalley, is a combination of two multi-families at the Brownell Street corner with unified, built out commercial space at street level. In all, six businesses operate from these premises, anchored by the double store

Consignment Corner. This enterprise creates good visual impact for the block with small sidewalk displays of interesting furniture. More successful than many storefront conversions seen in cities such as New Haven, this little strip center needs help with signage but otherwise functions well. Access to a limited amount of parking in the rear is via Brownell Street, which is a two-way street.



Functioning Retail/Commercial Block - 500-512 Whalley

A two family at 500-502 Whalley is currently the office of a property management company. In mid-block, a mixed use storefront and residential building at 494 Whalley houses Abdullah's, a clothing store that often also makes use of the sidewalk for display. Its signage is however in need of upgrade.

Southside Whalley/ Brownell to Boulevard (cont'd)

The second dominant building of this block is 488 Whalley Avenue, home of Draugn Conclusions, a computer training and consulting business. Architecturally unique and professional looking, it unfortunately does not blend well with adjacent uses. The planted area in front, a nice oasis of green, is also in need of more consistent maintenance. Parking is available on the eastern side of the building and the rear. The lot would benefit from some landscaping to soften the impact of the expanse of asphalt between this building and the one on the corner of Boulevard and Whalley.



Computer Training & Consulting Business- 488 Whalley Avenue

The bench in front of 488 Whalley is evidence of an earlier streetscape program directed at the blocks close to the Whalley-Boulevard intersection, which also included street lights and trash barrels as well as decorative paving.

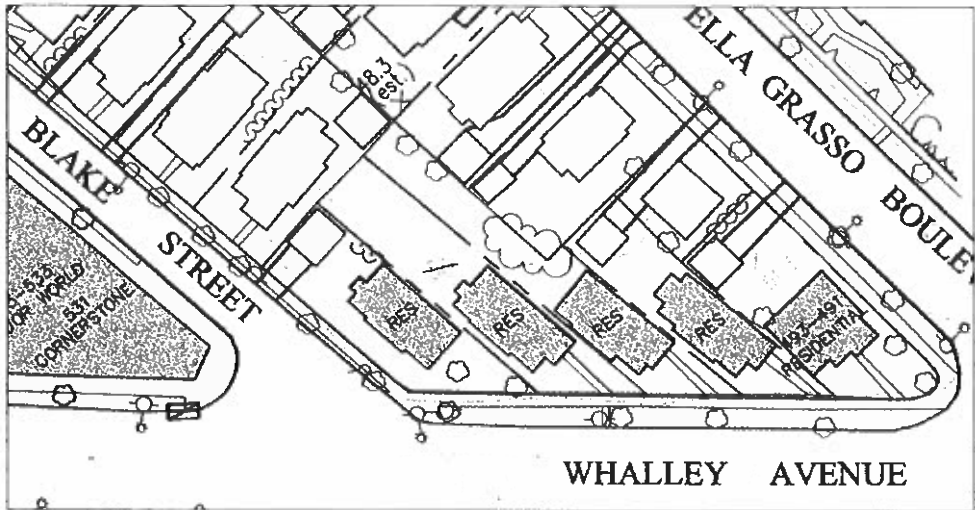


The small, one story building at the southwestern corner of Whalley and the Boulevard houses a pizza and deli takeout operation, a pager service and a billboard. It is not the ideal use for such a visible location from the commercial community's standpoint. The very small size of the lot (4,500 square feet) and building (1,912 square feet) limit the choices for improvement. Adjacent to the south is an even smaller building of 972 square feet at 1462 Boulevard that

houses two office tenants. The buildings have common ownership, having been purchased in 2000 for \$185,000, an impressive \$64 per square foot, which no doubt attests to the value of the billboard rather than to the value of the retail rents. Neither building has off street parking. This key property should be redeveloped.

Northside Whalley Block Between Boulevard-Blake
(Within the Whalley Ave. West Subsection)

This block is entirely residential, improved along the Whalley frontage with five multifamily homes ranging in size from three to five units. One



investor, Mitchell Maidman (New Haven Projects LLC), owns all of these, along with six others farther north in the block accessed via either Blake Street or Boulevard. The eleven parcel assemblage was originally undertaken in the late 80's to produce a site for a high rise residential development. When the market turned, plans for such a development were abandoned. At present, very few of the units are rented and most are damaged, vacant, boarded up and in serious disrepair, a very detrimental situation for a key block at such a major gateway intersection. The five which front Whalley are largely vacant and 503 is boarded up with serious fire damage. Most of these structures are architecturally rich in detail.



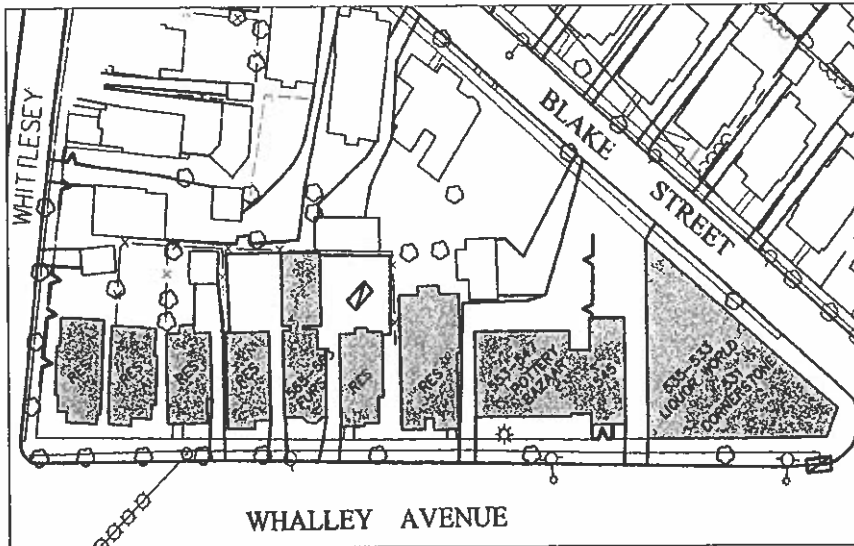
These blighted residential properties are candidates for rehab

Northside Whalley/ Boulevard - Blake (cont'd)

The unit density is on the high side, with approximately 33 units in eleven buildings sited on 1.5 acres. However, this assemblage, if rehabilitated and sold off in the original pieces, represents an excellent opportunity to increase owner-occupancy in an area critical to neighborhood and commercial revitalization. Only one building, the five family at 507-509 Whalley, is too large to qualify for owner-occupier financing, but it might conceivably be modified to four units. All eleven parcels have some off street parking and garages, lessening the impact of the unit density. Back taxes and penalties total \$452,000 on seven of the properties while the other four are current.

Timely intervention on this block is essential, as some blight and abandonment is evident farther north on Blake, which runs one way in that direction. Crime is increasingly an issue in this area as well. The two blocks of Blake Street between Whalley and Osborne Street also have some fine, unusual examples of Victorian architecture, many of which are beautifully maintained. The Boulevard, as a gateway to the Beaver Hills neighborhood, also has many fine homes from the turn of the last century, where homeownership and homeownership opportunities must be preserved as well.

Northside Whalley Block Between Blake & Whittlesey
(Within the Whalley Ave. West Subsection)



This northwestern-most, triangular block of the Whalley Avenue District is commercial on its eastern end and residential on its western end. The first picture below shows the angled intersection of Blake and Whalley, as well as the eastern end of the

commercial structure on the end of the block, currently the location of Diversified Employment Services at 531 Whalley. This building lacks parking and was just sold to a non-profit, Also/Cornerstone, which formerly rented offices in the Jacobson building. Criminal activities and vandalism occurring behind this property on this block of Blake Street are of concern to many residents and businesses in the area.



Intersection of Blake Street and Whalley Avenue

Two tenants occupy 533-535 Whalley, a liquor store and a pizza restaurant. The building footprint occupies the entire site, requiring on street parking. Reportedly the liquor store causes problems with loitering and the clutter of advertising in the front window is unattractive.



543 Whalley Avenue

Just west of the liquor store is a mixed use building housing one business and the mixed use Pottery Bazaar building, both pictured below. The Pottery Bazaar is a long term anchor for this end of Whalley, selling medium to high end house wares and china. Evidence of the most recent streetscape program can be seen in the sidewalk pavers and lighting, unfortunately broken.



Pottery Bazaar 547-553 Whalley Avenue



McClenning Furs - 565 Whalley Avenue

563-565 Whalley Avenue is the long time home of R.C. McClenning Furs. This business is one survivor of many in New Haven selling and maintaining fur coats and like the Pottery Bazaar represents a destination shopping venue. It has off street parking in the rear.

On either side of 565 Whalley, the block is entirely residential, with some of the homes well maintained and others in disrepair. Owners who are not maintaining properties detract from the transition area to the district. One weedy example from this block is shown below.



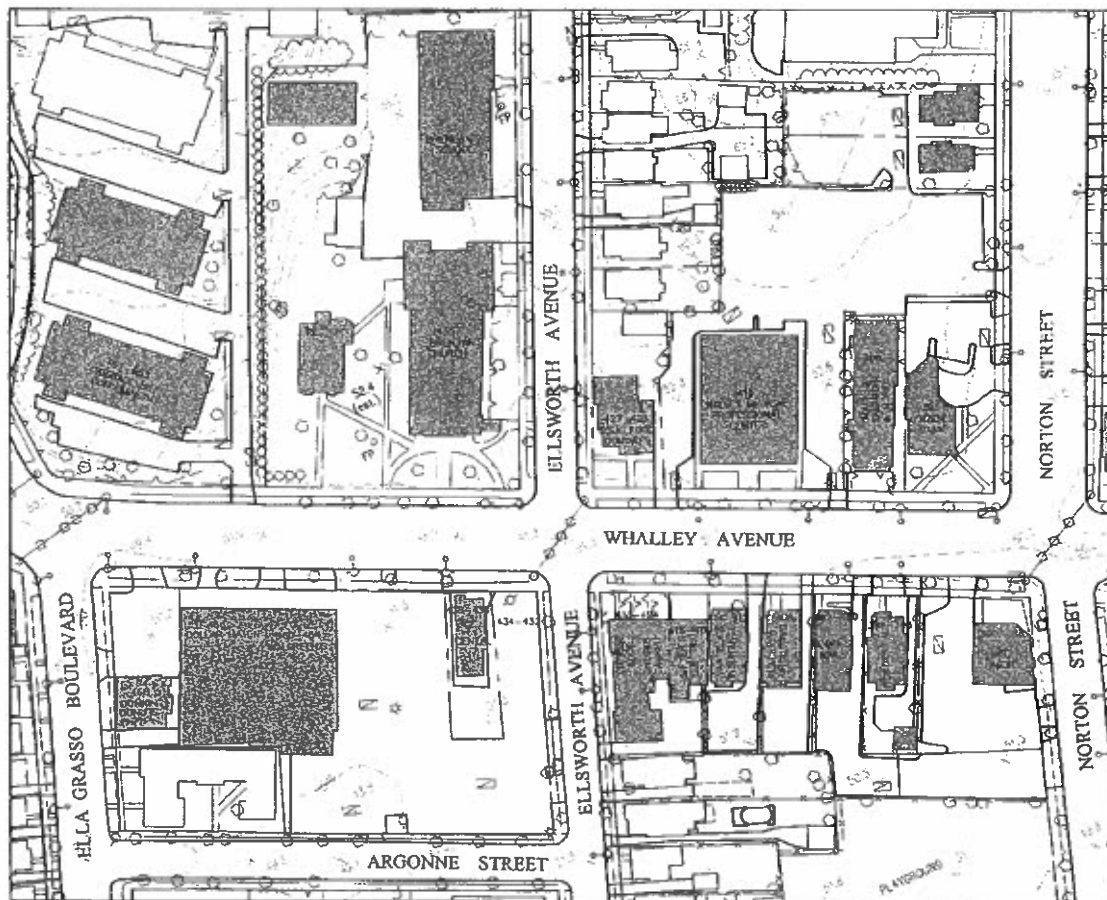
Building in Disrepair - 555-557 Whalley Avenue

WHALLEY AVENUE MIDDLE: Ella T. Grasso Boulevard to Norton Street

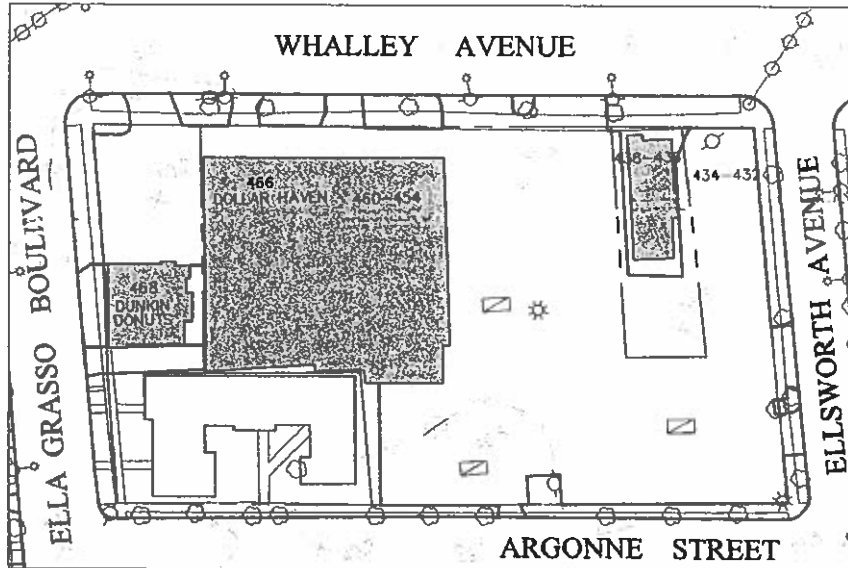
Overview

This subsection includes four blocks in a grid, two north and two south of Whalley Avenue. The north side is largely residential and institutional, anchored by St. Brendan's Church, the Rectory and parochial school. The district's largest office building complex, the Whalley Medical and Professional Center, is also located on the north side of this section. The south side is characterized by commercial and mixed use residential and commercial, with one large anchor, the Walgreen's drug and convenience store located near the Boulevard intersection.

There are no blighted properties in this section, although there are façade, landscaping and streetscape needs on the south side. The north side is one of the strongest areas of the entire corridor. Of the three Whalley subsections, this one is the most functional at present and represents a solid anchoring base for redevelopment occurring to the east or west.



Southside Whalley Block Between Boulevard & Ellsworth Avenue
(Whalley Ave. Middle Subsection)

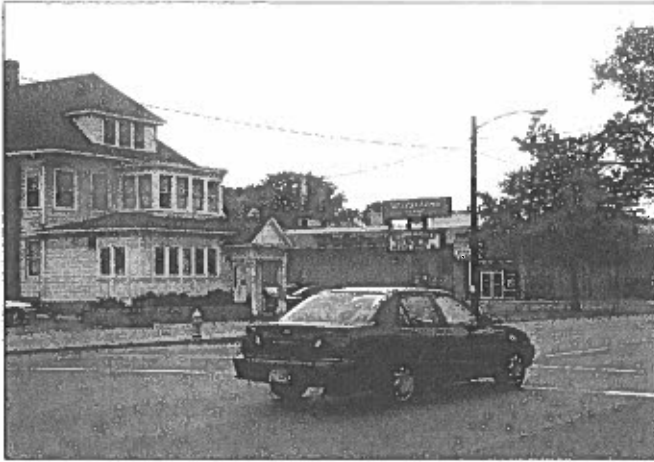


The block is shorter at just 230 feet deep due to Argonne Street which parallels Whalley between Boulevard and Ellsworth. Dunkin Donuts occupies the high traffic southeast Boulevard corner parcel in a recently remodeled building with generous parking. It is shown below.

As previously indicated, Walgreen's and its parking lot dominate this block, totaling 1.5 acres of the total 2 acres. The building, which also houses an independent dollar store, occupies 14,300 square feet while the asphalt parking area is 50,000 square feet. Previously the entire building was used for a small chain supermarket, for which the parking was assembled.



Walgreens & Dunkin Donut – 454-468 Whalley Avenue

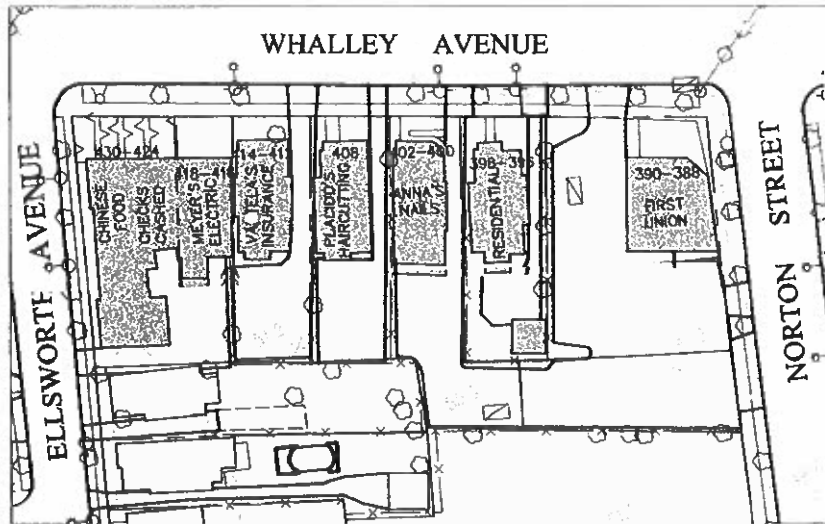


The only other commercial structure on the block is a mixed use residence partially converted to a pediatric dental practice, shown in the picture here. This use compliments the Whalley Medical Professional Center across the street. One other structure, a 16 unit apartment building immediately to the rear of Walgreen's and Dunkin Donuts, completes the block.

**454-460 Whalley Ave.(Walgreens);
436-438 Whalley Ave. (dental offices)**

Altogether this small block totals 2.12 acres with just four building improvements and one owner controlling three quarters of it. Walgreen's is known to be looking for a location which would permit a larger store similar to new ones recently completed on York Street in New Haven and on Dixwell and Putnam Avenues in Hamden. However, Walgreen's does not own the real estate in this case and the assemblage of a larger site in their current location would be difficult in view of the recent refurbishment of the Dunkin Donuts and apparent functionality of the dental offices. The apartment property on the corner of Argonne and Boulevard would permit direct access to and from the big parcel from Boulevard, but would only add 12,000 square feet to the total site. If however, Walgreen's leaves this site, it will represent a good opportunity to attract a new retail anchor for this section of the district. Landscaping of the parking area would in any case be a welcome change.

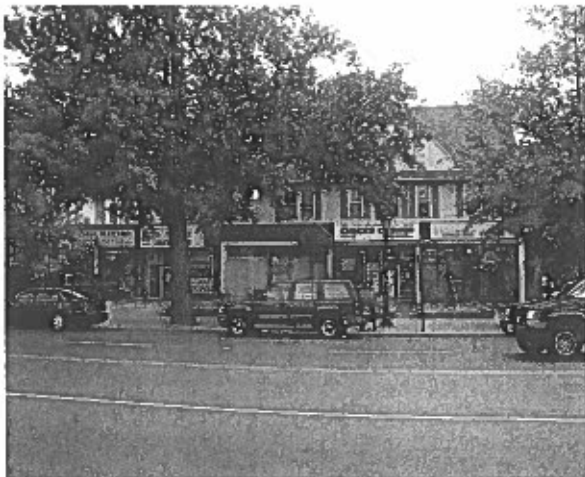
Southside Whalley Block Between Ellsworth & Norton Street
 (Within the Whalley Ave. Middle Subsection)



This block is anchored at the eastern end by a First Union bank branch on a third of an acre site, with a drive through teller window, offices above the branch and ample parking. Like Citizen's, its competitor across the street, this branch is well sited to take advantage of commercial accounts

along the 1.2 mile district as well as residential business with good access via Norton Street, which runs both north and south.

On the western corner of this block is a large mixed use residential and commercial building with three storefronts and twelve apartments, which are generally well maintained with landscaped areas in front. A smaller one story building abuts to the east with two stores. Both of these properties, essentially a five store strip, would benefit from unified signage, complimenting a block which has already had streetscape and lighting upgrades in recent years.



**424-430 Whalley Avenue &
 416-418 Whalley Avenue**



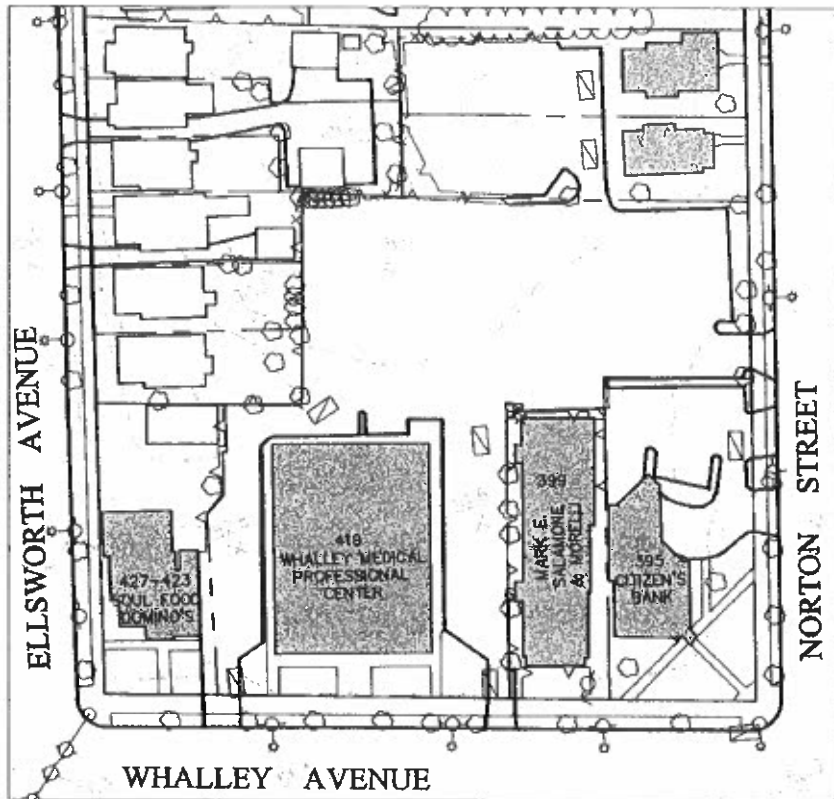
**First Union Bank – One of Two
 Banks in District**

Sandwiched between the bank branch to the east and the commercial strip on the western end of the block are four multifamily houses all but one of which have been converted to accommodate some commercial use. The one remaining residential structure is well-maintained at 396 Whalley, a four family with garage. The most prominent commercial uses are Placido's Salon at 408 Whalley and Anna's Nails next door at 400 Whalley. Placido's is pictured below.



Placido's Salon - 408 Whalley Avenue

Northside Whalley Block Between Norton & Ellsworth
 (Within Whalley Ave. Middle Subsection)

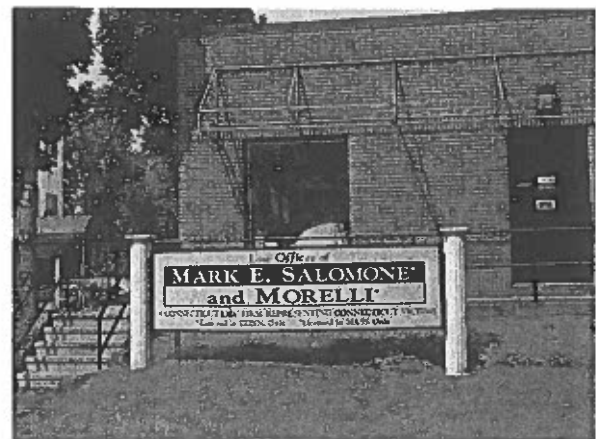


Three large commercial properties dominate this block that constitutes one of the main "destination" locations of the Whalley Avenue district. Two of the buildings are under common ownership, on over an acre of land. They constitute the Whalley Medical and Professional Center, pictures below. The four story building at 419 Whalley is roughly 57,000 square feet and reportedly enjoys high occupancy by dentists, doctors and lawyers. Next door at 399 Whalley the major

tenant is a regional law firm in the building which totals roughly 7,000 square feet. Parking to serve both is accessible from both Whalley and Norton Street.

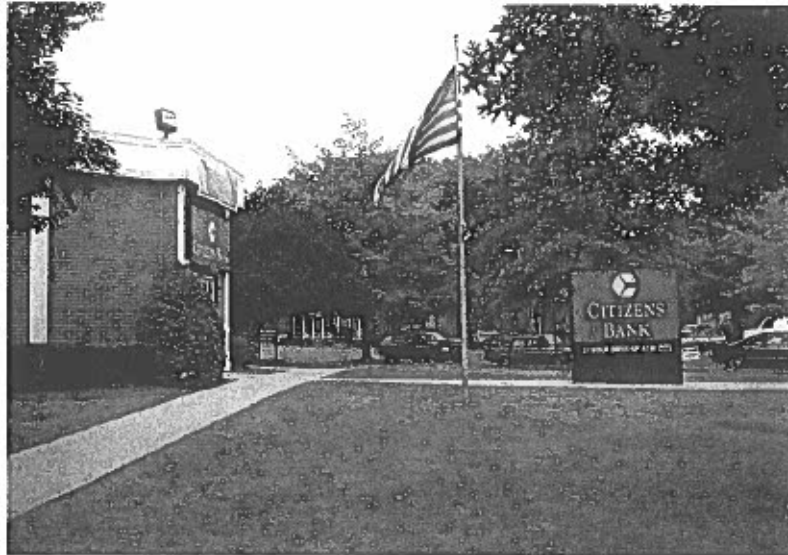


419 Whalley Avenue; the Whalley Medical & Professional Center



399 Whalley Avenue

On the eastern end of the block is Citizen's Bank, an upgraded branch with drive through and off street parking in the rear via Norton Street. The lawn and landscaping in front along Whalley is a welcome feature of the block. Citizen's is directly across from First Union, as mentioned previously. The district also has a third bank located in the Shaw's supermarket.



Citizen's Bank is one of two banks in Study Area -395 Whalley Avenue

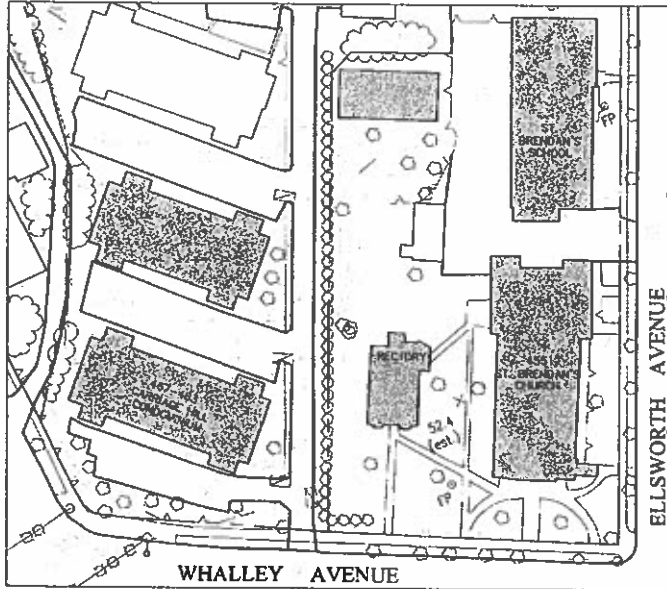
Occupying the western corner of the block is a mixed use four family with two restaurants on the first floor, one of which is a chain location. The other is one of the few independent, non-fast food restaurants in the district. There is parking in the rear accessible via Ellsworth Avenue, which runs both north and south. This property is more typical of others on Whalley in scale and configuration and could use help with signage but otherwise compliments this quite viable block.



Two Restaurants - 423-425 Whalley Avenue

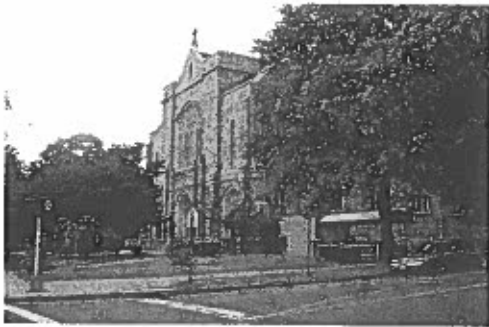
Northside Whalley Block Between Ellsworth & Boulevard (Within Whalley Middle Subsection)

The St. Brendan's Church complex and Carriage Hill Condominiums share this block, which forms a visual oasis along Whalley Avenue by virtue of the lawns and landscaping of the church and low profile aspect of the condominium association. The gracious



architecture of the church is repeated in the rectory just west of the church. Behind the church on Ellsworth Avenue is the parish school which offers Kindergarten through grade 8, a winner of academic awards for excellence. St. Brendan's School continues to be a key resource for the western end of the city and stabilizing force in the neighborhood. It serves a school population much wider than the church congregation.

On the western corner of this block are the Carriage Hill condominiums, a community of 106 one bedroom condominiums in three buildings, only one of which is fully visible from Whalley Avenue. This community was developed in the mid 1980's and suffered a loss in value along with the rest of the real estate market which resulted in investors buying up units in bulk as rentals. The complex continues to operate mainly as a rental community, but could revert to owner occupancy if area housing conditions improve. Right across Boulevard from Carriage Hill are the eleven Maidman multi-families discussed earlier, which are blighted and largely vacant, a de-stabilizing influence.



St. Brendan's Church - 435 Whalley Avenue

Not visible from Whalley Avenue but nonetheless a part of this block is Brendan Towers, an approximately 50 unit apartment complex at 461 Whalley, constructed to the rear of the church complex on a slight rise. It is accessed via a long driveway between the Rectory and Carriage Hill.

Between the condominiums and Brendan Towers, this corner of Whalley is intensively residential with more than 150 units. However, due to the layout of both complexes, far less density is apparent from the street. These households represent a good potential source of walk-in traffic for businesses at the Whalley-Boulevard intersection and the Walgreen's location, which might serve as a good location for a new restaurant.

WHALLEY AVENUE EAST: Norton Street to Sherman Avenue

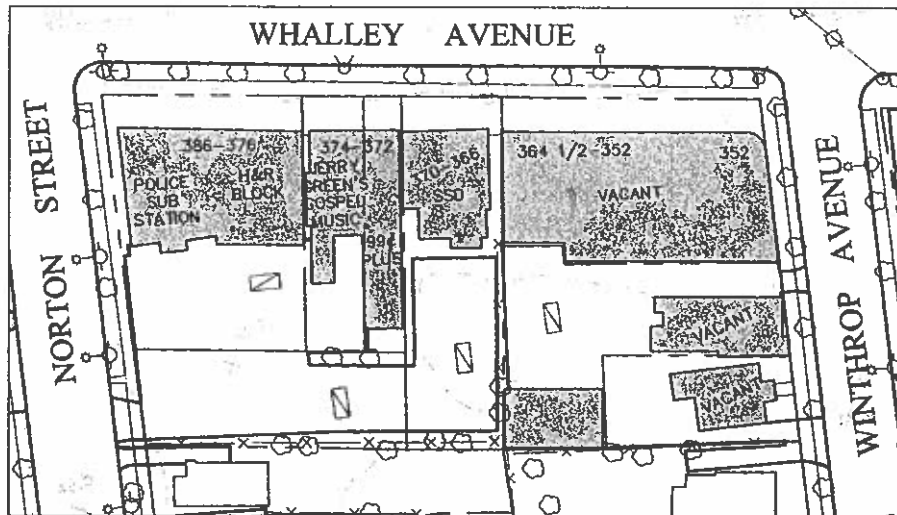
Overview

This is the block group that requires the most attention from a strategic and redevelopment standpoint. It encompasses two blocks on the south side and three blocks on the north side of Whalley Avenue. The blight and vacancy predominating in the southern Norton – Winthrop block colors perceptions of the district as a whole, encouraging the impression that blight and vacancy on Whalley Avenue are more widespread than is actually the case. This block group also has the largest potential redevelopment site, the only location that is both large enough to accommodate some form of big box retailer and would not require painstaking site assemblage.

There is also much already in place to build on in this subsection, including the successful and wide-drawing Edge of the Woods Supermarket and prepared foods location on the north side of the street. The market, with its healthy diet and natural foods orientation, can be a catalyst for attracting complementary businesses and services to the district.

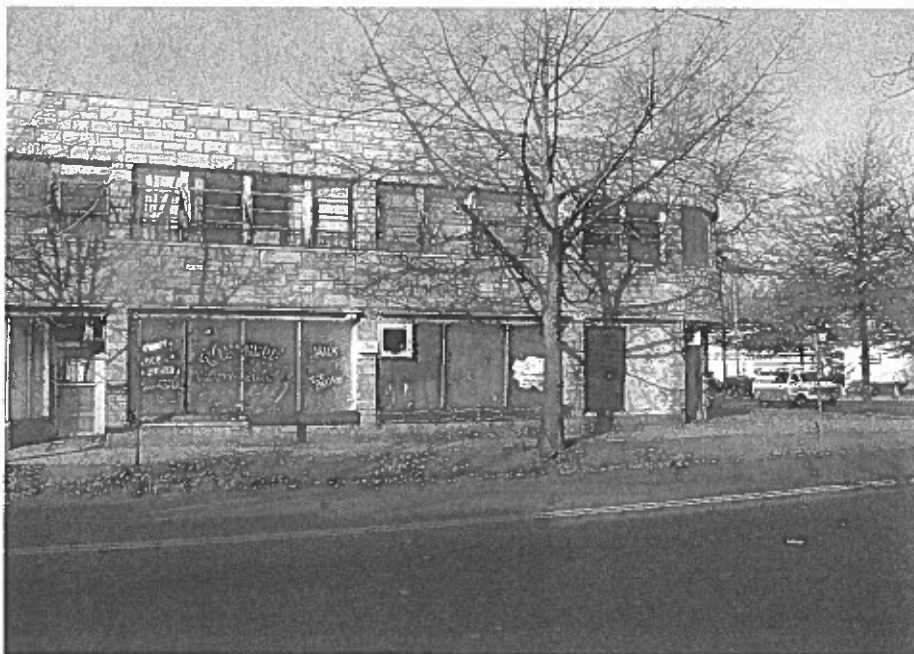


**Southside Whalley Block Between Norton & Winthrop
(Within Whalley Ave. East Subsection)**



This is the most distressed block in the district, with roughly half the block taken up by 352-364 Whalley, a vacant and blighted commercial strip property running from the corner of Winthrop west to midblock. The owner, Mast

Equities, also owns 420 and 422 Winthrop, which abut around the corner and are also blighted and vacant. The main building is shown below, with office space above store level. Altogether the three buildings total 22,450 square feet on two thirds of an acre.



Vacancies and Blight -- 352-364 Whalley Avenue, from Winthrop Street

The main building, built in 1920, has a total of 13,683 square feet. Of the total, 10,288 is street level retail, with multiple entrances. A partial second story of 3,395 square feet at the street corner was used as office space. Because 352 Whalley has no off street parking, two adjacent properties on Winthrop Avenue were purchased at some point in the past to address this need. They are shown below, with the entrance to parking closed.



Off street parking provided at 420 & 422 Winthrop Avenue

The building to the south at 422 Winthrop Avenue was built about 1900, originally as apartments. It is three stories, encompasses 4,950 square feet, most recently used as a combination of residential and office space. The building's lot aggregates almost a quarter of an acre, providing off street parking for both the Whalley building and 422 Winthrop.

The third property at 420 Winthrop Avenue was built as a six unit apartment building about 1900, with the most recent use being residential. It is also three stories with a total of 3,816 square feet. The building's lot is small at 5,400 square feet but when added to the other two parcels the total aggregates to 28,700 square feet or roughly two thirds of an acre.

The current owner, Mihos Karaelas Papagianopo (dba Mast Equities LLC) of Long Island City, N.Y., gained title to the three properties in April and May of 2000. The retail/office complex sold for \$199,109, a distress price of \$14.55 per square foot. The two Winthrop parcels were sold together by a bank for \$60,000 or \$6.84 per square foot, also a distress sale. Since investing the initial \$259,000, no redevelopment has taken place. Asbestos remediation was halted because it was being improperly carried out. Despite having only owned the properties for a year and a half, a delinquency of \$16,568 has already accumulated and another \$14,817 will be due for current taxes in January 2002. Efforts to contact the owner for an outline of his intentions regarding the property have not been successful.

To the west of the Mast Equities property are three smaller buildings that have changed hands in recent years. The first, at 366-370 Whalley Avenue, is a three story mixed use brick apartment building with retail stores on the first level. In 1998 the property was purchased for \$100,000 by TMG LLC, a significant increase over the prior selling price of \$55,000 in 1994. The building is 6,100 square feet, with 2,578 square feet devoted to retail. Two stores and one small restaurant occupy the shop space with apartments above. The lot is 9,945 square feet but there is currently no access to the rear of the building by car for parking. It is partially pictured below with two adjoining structures to the west, 372 and 374 Whalley Avenue.



Western end of 366 Whalley Avenue, 372 Whalley (1 story)
and 374 Whalley (3 story mixed use) – home of WSSD

The one story retail building at 372 is an infill development, constructed in 1946 on what was probably the original driveway for 374 Whalley Avenue. It totals 2,280 square feet, being quite narrow at 21 feet in front and 111 feet deep, not an ideal retail configuration. It also lacks off street parking. However, as a testament to the strength of the retail market for moderately priced goods along Whalley Avenue, a new independent discount tenant has opened in the space. The building sold for \$75,000 in 1998 to the current owner, Kathy Faught, who has also owned 374 Whalley Avenue next door since the mid 1980's.

The mixed use building at 374 Whalley, shown in the photo above, is 4,365 square feet, of which 2,000 is retail space devoted to two store fronts with three apartments above. One of the storefronts is the home of the Whalley Avenue Special Services District office. Altogether, the land area of 372 and 374 Whalley totals 7,975 square feet, or just under a fifth of an acre. A few spaces of off street parking is accessed via Norton Street via an easement over the back lot of the corner property at 376 Whalley.

On the western corner of this block, at Norton Street, is the other major land use after Mast Equities, a three story office building at 376 Whalley Avenue. Total square footage is 18,500, with 4,622 on the street level appropriate for office or retail. The building is at present only occupied by two tenants, the City of New Haven Police Department substation for the area and a tax preparation firm, both on the first floor.

According to a representative of the owner Edgewood Corners, a religious non-profit real estate group, the upper stories will require total gutting and refurbishment before they can be rented. This is unfortunate in view of the fact that the building, dating from 1900, was remodeled in 1987 and used briefly for law and other professional offices. The owner is also not actively marketing the street level space, despite having excellent off street parking in the rear of the building, accessible from Norton Street. However, there is interest in attracting retail of the sort which would compliment the Edge of the Woods market across the street.



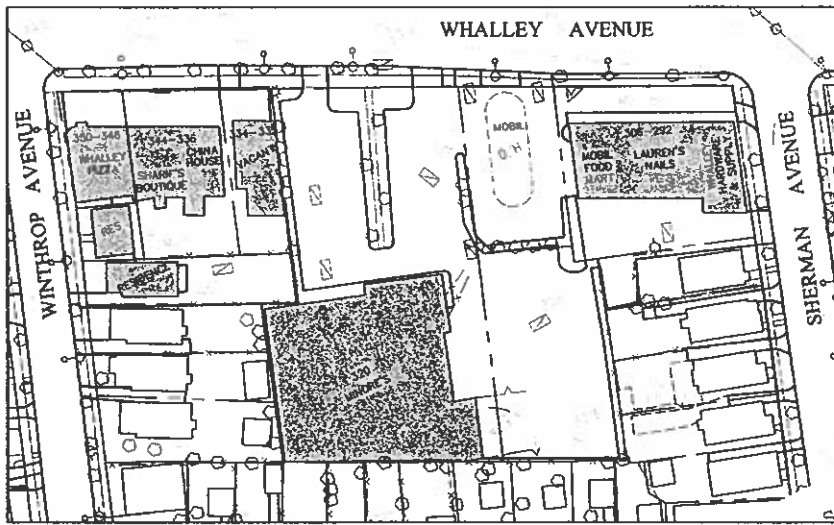
Largely Vacant Office Building - 376 Whalley Avenue

The building occupies a lot totaling 14,700 square feet, or one third of an acre, about half of which is improved parking at the rear of the building. Edgewood Corners also owns a contiguous 7,500 square foot vacant house lot at 229 Norton Street which has been paved and fenced as additional parking for the office building. Together the two properties aggregate half an acre.

Taxes are current for these two properties, which were purchased from the city in June of 1998. The office building is 25% tax exempt because of the police substation. However, the owner is appealing the taxes assessed and paid on both properties.

The owners of this property also own several residential rental structures throughout the neighborhood that show signs of substantial reinvestment and careful property management.

**Southside Whalley Block Between Winthrop & Sherman
(Within Whalley Ave. East Subsection)**



The Minore's Poultry and Foods wholesale distribution facility at 320 Whalley Avenue dominates this block. Formerly a supermarket, the majority of the building is now devoted to servicing wholesale accounts throughout New England while a small portion of the building continues to offer

retail meats and convenience groceries. The front of the parcel is devoted to parking, with the store set back as shown in the photo below. In addition to the distribution facility, common family ownership interests on the block include a vacant commercial property at 332 Whalley and two multi-families on Winthrop Avenue. Altogether, the four parcels aggregate 67,000 square feet or roughly 1.6 acres.



**Minores Poultry's and Food Wholesale
- 320 Whalley Avenue**

As can be seen from the above, modest attention has been paid in recent years to the façade, signage and landscaping of the main property which totals roughly 1.2 acres. This is due in part to the advent of the Shaw's supermarket farther east on Whalley Avenue, which has become the main source of retail meats and groceries for

the market area. As the business has increasingly become more focused on the wholesale market, the building has become less oriented to the public. Truck traffic, including semi trailers, has become more prevalent as well. The current use of this property is increasingly incompatible with this important retail/commercial corridor although the business is certainly one that New Haven should be at pains to preserve within its

borders. Relocation of Minore's to a more appropriate wholesale-distribution location in New Haven would both retain an industry market leader and preserve the jobs base for city residents. The owner's willingness to relocate however has not been determined although efforts have been made to ascertain this.

The Minore's building is 23,145 square feet, of which 6,249 square feet or 27%, is retail space. Minore's is a substantial taxpayer and all taxes are current.

Three other properties are also owned by Minore family interests, including 332 Whalley Avenue which abuts the supermarket parking lot to the west, shown below. The building is vacant and blighted, having most recently been used as a nightclub (New World Café) on the first floor. The upper two floors were residential originally but have also been used as office space.

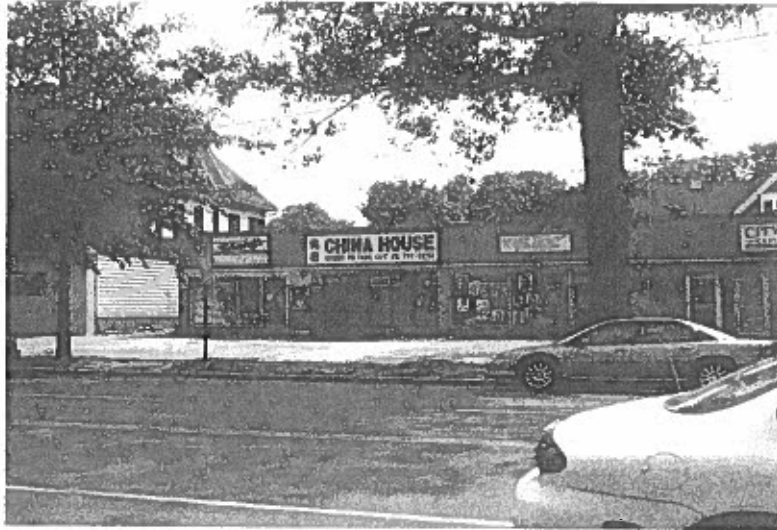
In 1986 this property sold for \$237,500, but by 1995, it resold for \$50,000, a victim of the real estate whipsaw of the late 80's and early 90's. It was purchased as a defensive move by the current owner, but has remained vacant for many years. The building totals 5,198 square feet and the lot, which is accessible from Whalley Avenue, totals 5,000 square feet.



Another Minore Property now vacant - 322 Whalley Avenue

Around the corner are two multi-families that were also bought as defensive measures, 421 and 425 Winthrop Avenue. These are both occupied and have benefited from some reinvestment. Together they aggregate 7,200 square feet of building space on 10,000 square feet of land.

On the southeastern corner of Whalley and Winthrop Avenues are two commercial properties which are surrounded by Minore holdings elsewhere in the block. The first, at 336 Whalley, is a four store strip building, fully leased, including one store which relocated to Whalley Avenue from Dixwell Avenue earlier this year.



Small Retail Center Next to Minores - 336-344 Whalley Avenue

Typical of the many mini-strip buildings along Whalley Avenue, there is inconsistent signage. Also, the sidewalk has been extended back to the storefronts and is in poor state of repair. Access to parking in the rear is via the cut on the eastern end of the building. Altogether, the one story structure totals 5,122 square feet on a lot of 8,800 square feet. Taxes are current.

On the corner parcel is 346 Whalley Avenue, owned and occupied by the proprietors of Whalley Pizza. This operation has taken over both storefronts and is one of Whalley's largest non-chain restaurants, despite having no off street parking.



Large non-chain restaurant - 350 Whalley Avenue

The building is one story, 3,125 square feet on a small lot of 4,600 square feet. As with the neighboring property, the sidewalk has been extended back to the front entrance, resulting in an unattractive expanse of poorly maintained concrete detracting from both properties. A billboard atop the building does not improve the appearance of this corner location either. Across Winthrop Street is the vacant and blighted Mast Equities complex, which, along with the vacant New World Café building, are deterrents to foot traffic.

Were the Minore's properties made available for redevelopment and combined with these two corner properties on the western edge of the block, a 2.3 acre site would result. This would be large enough to accommodate a stand alone or big box tenant of 20,000 to square feet with some ancillary small shop space as well. It is the largest site on the section of Whalley which is the focus of this study and could be the nucleus for transforming this block group into a coherent retail location.

One other large commercial structure encompasses the eastern end of the block at the corner of Sherman and Whalley Avenues. Located at 292 Whalley, the 23,600 square foot building has eight occupied stores at street level and two floors of offices. Built about 1900, the building was substantially rehabilitated in 1995 and is one of the few architecturally appealing structures along the corridor. Some parking is available in back and more spaces have been added in front, which are not permitted by zoning. More convenient than parking in the rear, the cars in front detract from the building's appearance. Office space on the upper floors is partially owner-occupied and oriented to professionals and small non-profits. The total site is 22,300 square feet, or about half an acre.



**23,600 square foot office/retail complex –
292 Whalley Avenue**

The one remaining commercial parcel on this block is adjacent to the above property and jointly owned. It is the service station at 312 Whalley Avenue, which has its office at the western end of 292 Whalley. It is purely a gas station, with no service bays and occupies a 12,320 square foot lot, which also provides parking for the commercial building.

Summary observations regarding Southside Whalley Blocks (Norton to Sherman Section)

- Four owners control Norton-Winthrop, about 1.6 acres, with the two largest owners, Mast Equities and Edgewood Corners controlling 1.2 acres together, both properties in need of substantial if not total rehabilitation. The Mast properties are the most blighted buildings on the Avenue and subject to tax arrearage. Nothing can happen on this block or area until this situation is addressed. It also devalues the properties across Whalley and Winthrop. The total assemblage of all four owner's interests would provide an entire block with 365 feet of frontage.
- The large Minore's holdings in the next block east constitute the largest single owner site assemblage in the study area with approximately 1.5 acres. Were this group of properties available for redevelopment, it would allow for 15,000 square feet of retail. Ideally, the two commercial properties on the corner of this block which are surrounded by Minore holdings would be added to the site, producing one entire site of approximately 2.3 acres with 330 feet of frontage on Whalley.
- The resulting assemblages across Norton Street would produce a total of 3.9 acres or roughly 40,000 square feet of developable space. Were one large user to take the biggest assemblage in the Winthrop-Sherman block, a cluster of smaller shops could be developed across Winthrop in the Norton-Winthrop block
- Redevelopment on the southern side of Whalley will spark upgrade of the three facing blocks on the northern side. It will serve to support the anchors on the north side, especially Edge of the Woods.

Block characteristics summary charts follow on the next page.

Southside Block/ Norton-Winthrop Characteristics (Norton-Sherman Section)

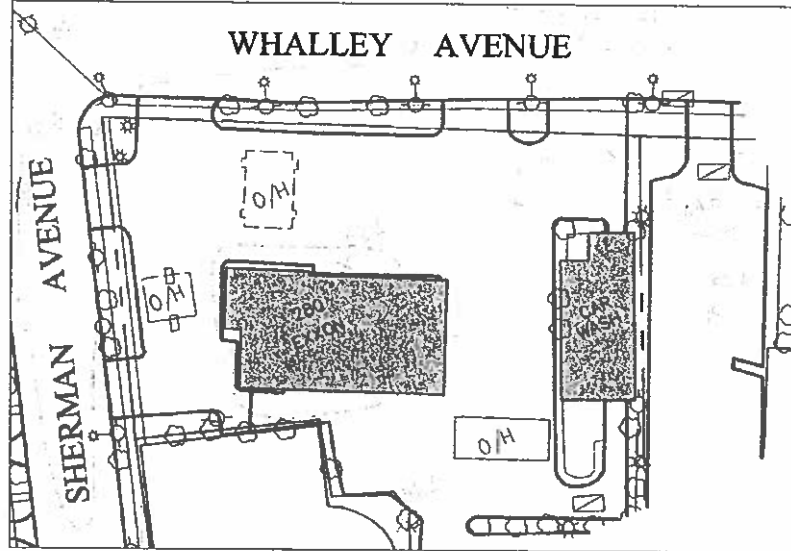
South Block Norton-Winthrop	Owner	Parcel SF	Parcel Acre	Bldg SF	Notes
376-386 Whalley	Edgewood Corners		0.00	18,500	substation
229 Norton			0.00	0	lot
total		23,450	0.54	18,500	
352-364.5 Whalley	Mast Equities LLC			13,683	vacant
422 Winthrop				4,950	vacant
Avenue				3,816	vacant
420 Winthrop				22,449	
Avenue		28,675	0.66		
total 3 parcels					
372 Whalley	Kathy Faught			2,280	WASSD ofc
374 Whalley				4365	
total parcel		7,975	0.18		
366-370 Whalley	TMG LLC	9,945	0.23	6100	
Total Norton-Winthrop		70,045	1.61	6100	

Southside Block/ Winthrop- Sherman Characteristics (Norton-Sherman Section)

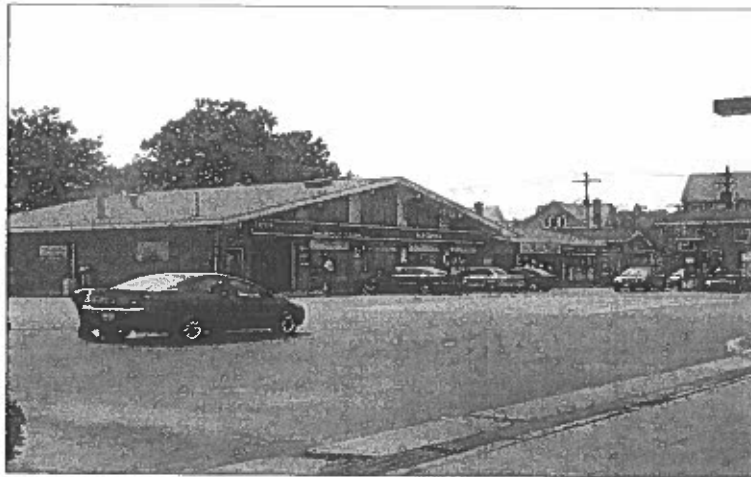
South Block Winthrop-Sherman	Owner	Parcel SF	Parcel Acre	Bldg SF	Notes
320 Whalley	Minore	51993	1.19	20145	market
332-334 Whalley		4950	0.11	5198	café,
421 Winthrop		7000	0.16	5011	offices
425 Winthrop		3000	0.07	2188	2 family
Total Minore		66943	1.54		2 family
346-350 Whalley	Ikonomou	4605	0.11	3125	Whalley Pizza
336-344 Whalley	Da Sing Corp	8800	0.27	5122	1 story retail
Parking area interior	Aldin Assoc	18000	0.41	0	
Total Winthrop-Sherman		98348	2.26		

Southside Whalley Block /the Eastern Transition to the Study Area
(Whalley Avenue East subsection)

Before leaving this side of Whalley Avenue, some observations regarding the land and buildings at the edge of the next block east are in order. The zoning changes east of Sherman from BA to BB which allows automotive uses. At 280-286 is the Whalley Exxon Service Center and Car Wash, a dynamic eight bay garage facility with 24 hour gas and mini-mart convenience service. This operation is one of

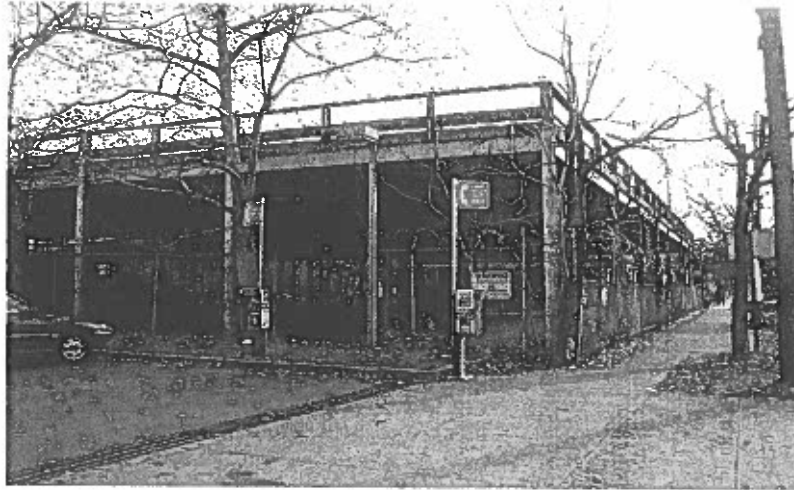


the anchors of the mid-Whalley district, employing many and serving the automotive and convenience needs of the neighborhood.



Exxon Service Center - 280-286 Whalley Avenue

The service complex was built on the site of a former new car dealership, of which one vestige, a decked garage, remains behind the gas pumps on the southwestern edge of the property. It is shown below.



Decked garage behind Exxon Station - 277-287 Sherman Avenue

This approximately 15,000 square foot structure, built in 1957 as two story car inventory parking, runs 150 feet down Sherman Avenue. It is in poor repair, economically obsolete and should be demolished. The land area at roughly a third of an acre might be redeployed for a more contemporary automotive use or possibly as a training center for auto service skills. Apparently St. Luke's Church is considering such a training facility for land and buildings it is under contract to purchase on the eastern end of Whalley Avenue, but this might be a more appropriate location. Alternatively, one of the garages located farther west in the BA zone might be relocated here. A third possibility would be additional parking for redevelopment in the blocks to the west. At a minimum, any redevelopment of the block to the west would be enhanced by an appropriate reuse of this site.



285 Whalley Avenue

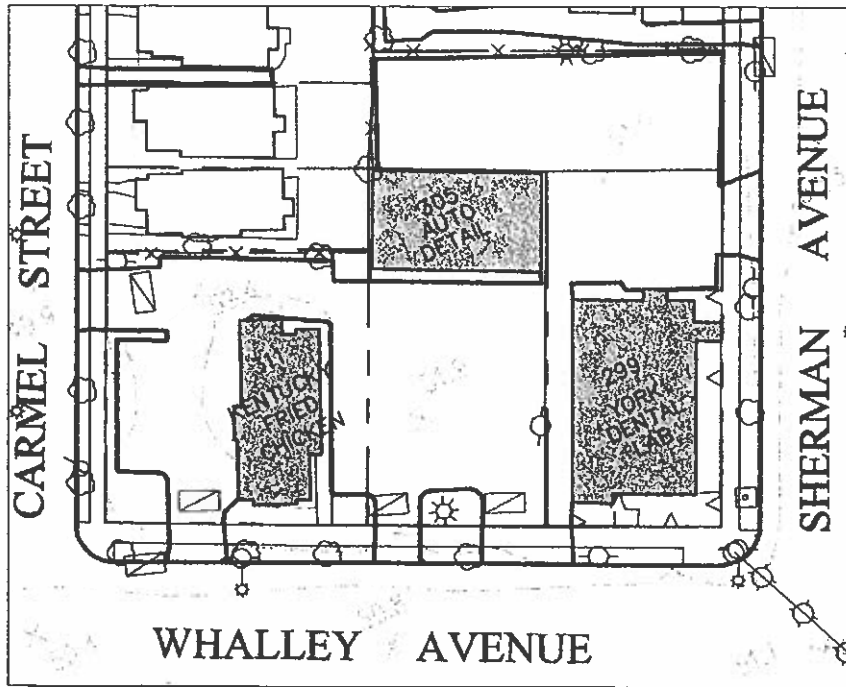
On the northeast side of Whalley and Sherman Avenues is a small convenience store which is functional and unremarkable.

However, down the block to the north is a restored Victorian house converted to offices which bears mention. This is the office of Neighborhood Housing Services, 333 Sherman Avenue, which promotes homeownership opportunities.



Home of NHS - 333 Sherman Avenue

Northside Whalley Block Between Sherman & Carmel
(Within Whalley Ave. East Subsection)



This block has narrower frontage on Whalley Avenue, as do the two to the west which complete this subsection. Between Sherman and Carmel there are three commercial structures with a total of 254 feet of frontage. An office building on the northwest corner of Whalley and Sherman Avenues is home to a dental laboratory, a business to business operation

which complements the large number of dental offices located a few blocks west on Whalley. It is a newer building, built in 1956 and remodeled in 1993, with two stories and a total of 8,180 square feet.

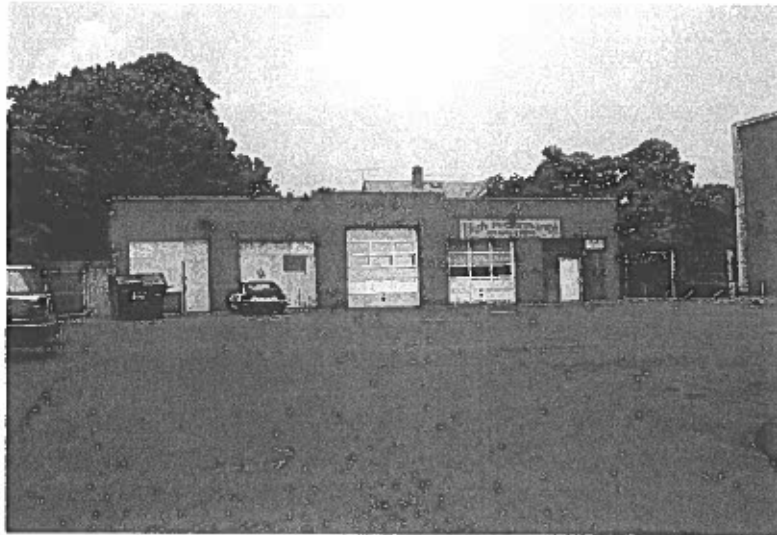


Parking is available around the corner behind the building. Security is obviously paramount over aesthetics with a high chain link fence in place topped with unsightly razor wire. The building footprint and parking lots aggregate 18,400 square feet.

8,180 sf Office Building - 299 Whalley Avenue

Northside Whalley/ Sherman to Carmel (cont'd)

Next door to the west is a building classified as light utility storage, built in 1942 and currently used by an auto detailing and service business. As the picture below shows, this building is set back about 110 feet, a considerable distance from the street with a vast expanse of asphalt in front. It totals 2,940 square feet with five vehicle bays.



Holdover from auto row heyday - 305 Whalley Avenue

A holdover from Whalley's "auto row" heyday, this business would ideally be resettled east of Sherman Avenue, where such uses are more in keeping with zoning designations. The lot is 11,100 square feet which alone would not prove useful except as parking or perhaps green space.

One scenario might be to demolish the current structure and rebuild a retail strip along the eastern lot line at 305 Whalley, using the Sherman Avenue lot as parking. This would provide 150 feet of store frontage, good for two to three small stores. The strip would face the KFC restaurant at 311 Whalley Avenue.

The third and last building in this block is a Kentucky Fried Chicken restaurant and drive through of approximately 2,100 square feet. It has recently been upgraded and occupies a 12,200 square foot lot with access from both Carmel and Whalley.

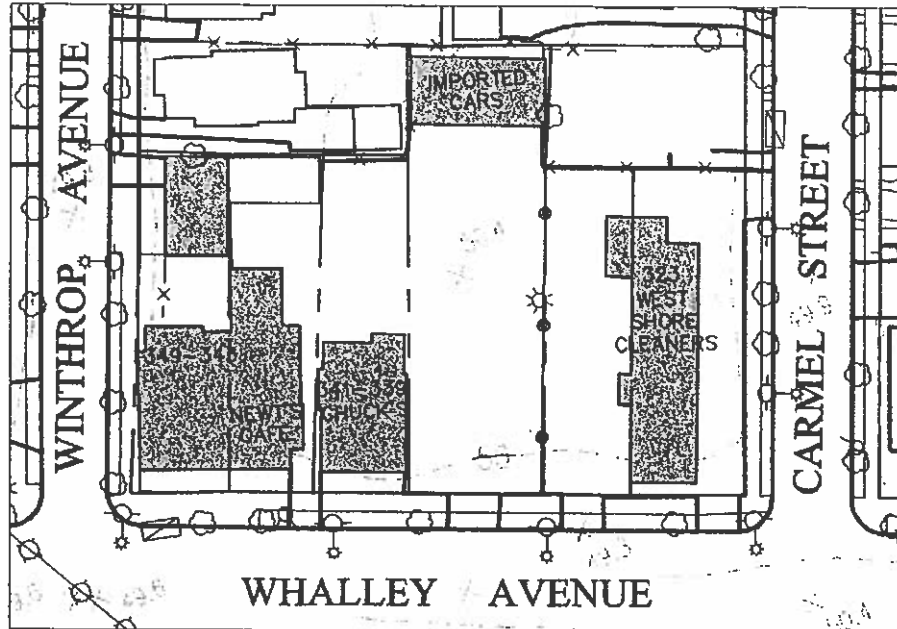


**Kentucky Fried Chicken - 311 Whalley Avenue,
between Sherman and Carmel Street**

Carmel Street runs one way south. In the early 1990's, this short, two block street developed a reputation for drug activity and crime which still resonates in local memory and contributes to fears about the corridor. This situation appears to have improved, with the housing along street showing signs of recent reinvestment thanks to Neighborhood Housing Services.

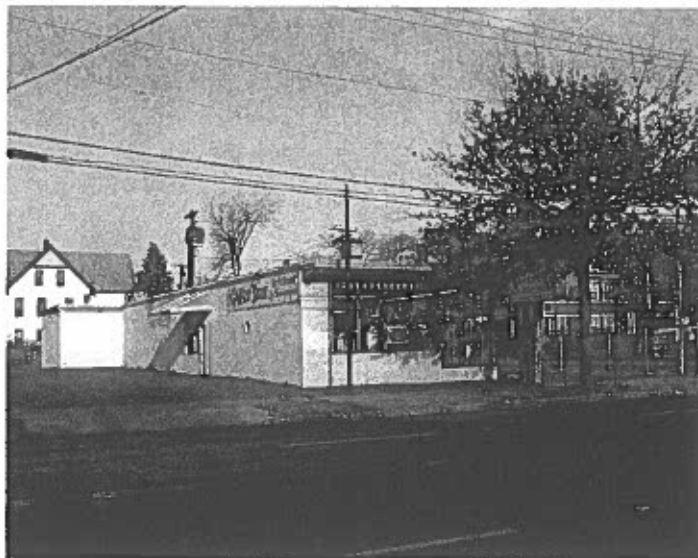
Northside Whalley Block Between Carmel & Winthrop
(Within Whalley Ave. East Subsection)

The second of the short blocks on the north side of Whalley, this block is in the hands of three owners, two of which control the entire frontage. The first controls 90 feet of frontage, improved with West Shore Cleaners, a dry cleaning operation that is



currently for sale. The building is 3,156 square feet with a drive through window and secondary access from the north only via Carmel.

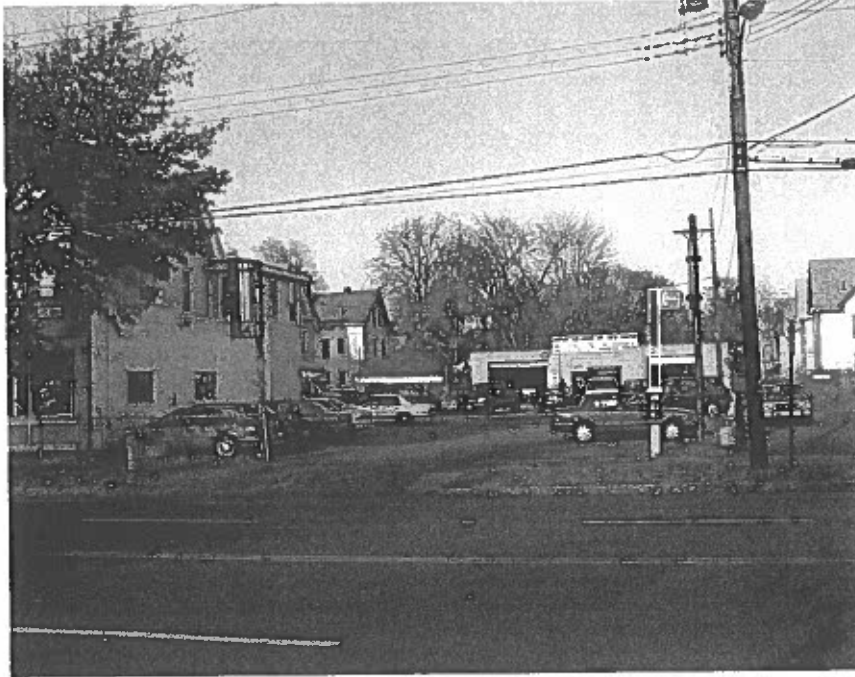
A contiguous paved lot formerly improved with a mixed use building at 323 Whalley was purchased for additional parking and to accommodate the drive through. The combined lots total 13,230 square feet or one third of an acre. The asking price for the property is \$325,000.



**Dry Cleaners For Sale - 323 Whalley Avenue,
Corner of Carmel and Whalley**

Northside Whalley/ Carmel to Winthrop (cont'd)

The second assemblage in this block belongs to the Vuoso family, who also have significant holdings on the eastern end of the corridor and who are engaged in the automotive service industry. The first of three parcels is similar to the Performance Auto location described in the Sherman – Carmel block: a garage set back from Whalley 200 feet with a 12,000 square foot expanse of asphalt in front. The three bay garage is 1,800 square feet. It is currently occupied by a foreign car service business.



**Foreign Car Service Business –
335 Whalley Avenue**

Contiguous to this on the eastern side with frontage at 20 Carmel Street is a 4,770 square foot lot now being used as a community garden, also owned by the Vuoso family. While this is zoned residential, it could provide buffering in a site assemblage scenario.

Northside Whalley/ Carmel to Winthrop (cont'd)

To the west of the foreign car garage is a mixed use property with a Whalley Avenue landmark business, Chuck's Luncheonette, on the first floor. Long a spot where politicians and other high profile New Haveners met to eat and talk, the original proprietor retired a few years ago. The second floor is residential, vacant and windows boarded. The building totals 3,253 square feet, with 2,072 on the first floor. Altogether the parcel is 4,800 square feet, with the rear used for parking.



**Well-known Whalley Diner
339 Whalley Avenue**

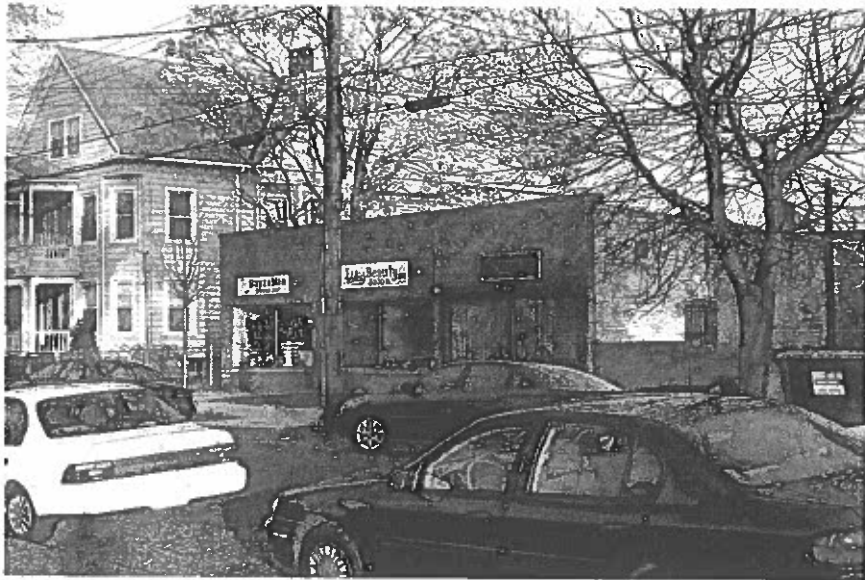
A mixed use property was created from two multi-families on the corner of Whalley and Winthrop, resulting in four stores below and residential above. The largest space is occupied by a bar and lounge which recently located from across the street. One of the other two stores is vacant and does not appear to be actively marketed. A package store occupies the corner store. The residential above is vacant with windows boarded, resulting in half the block having a boarded second story. The building totals approximately 5,800 square feet on a 12,000 square foot lot.



**Mixed-use on north corner of Whalley
and Winthrop - 343-351 Whalley
Avenue**

Northside Whalley/ Carmel to Winthrop (cont'd)

Around the corner are tucked one more storefront in the same building and three stores at 463 Winthrop Avenue, currently housing barber and beauty shops with one vacancy. This property is separately owned from other parcels in the block and does not have parking. The building, about 2,950 square feet, takes up most of the lot, which is roughly 3,560 square feet. The area between the corner building and this three store group, where the dumpster is shown in the picture below, is unfortunately a gathering place for persons who have recently made purchases at the package store in good weather.



463 Winthrop Avenue

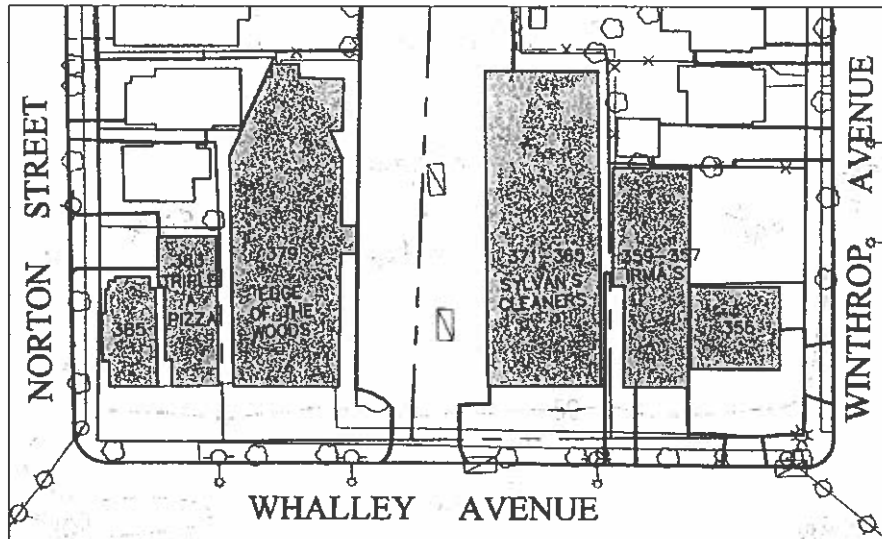
Northside Whalley/ Carmel to Winthrop (cont'd)

The land area of the Carmel to Winthrop block (north side) is not large but it is noteworthy that just two owners control the entire Whalley frontage and all but one of the commercial parcels. The Calechman property at the eastern corner is one-third acre. The Vuoso central and western part of the block is 0.84 acres for a total of 1.14. The small remaining interior piece adds 0.08 acre for a total of 1.22 as shown in the table below. Ownership of the largest parcel is on an investment basis and the Calechman parcel is for sale already, pointing to a reasonably receptive redevelopment scenario.

Characteristics of North Whalley block Carmel – Winthrop

Parcel	Owner	Parcel in SF	Parcel in Acres	Bldg SF	Notes
323 Whalley	Calechman	7,350		3,156	West Shore parking/drive through
327-9 Whalley		5,880		0	
subtotal		13,230	0.30		
335-7 Whalley	Vuoso	13,800		1,800	Garage, service garden Chuck's Diner Newt's
20 Carmel		4,770		0	
339-41 Whalley		6,000		3,253	
343-9 Whalley		12,000		5,800	
subtotal		36,570	0.84		
463 Winthrop	S & S Realty Co.	3,650	0.08	2,950	3 stores
Total Carmel - Winthrop		53,450	1.22		

Northside Whalley Block Between Winthrop & Norton (Whalley Ave. East Subsection)



This block is one of Whalley Avenue's most unusual, with a large central section of retail developed at a right angle to the street. The signature structure is a former movie theater converted to a vegetarian supermarket, Edge of the Woods. Opposite the supermarket is a

retail strip center with six storefronts, currently with one vacancy. Parking is available in front of the two buildings and farther back (north). Facing the street on either side of this core complex are smaller commercial buildings of a scale similar to the rest of Whalley Avenue.

Winthrop, on the eastern side of the block, runs north only. The corner of Whalley and Winthrop is improved with a laundromat, which is currently not in operation and for sale. The building and business were reported to be under contract last summer. The property is 4,800 square feet improved with a one story structure of 1,720 square feet with seven parking spaces around the perimeter of the building.



Building/business for sale - 355 Whalley Avenue

Also pictured to the west of the laundromat is a large mixed use three story property at 357 Whalley Avenue with 4,300 square feet devoted to commercial space on the first floor and 2,800 to apartments above. A total of 7,125 square feet, this building appears to be much smaller from the street due its narrow 40 foot frontage. The same owner holds 470 Winthrop Avenue which is used for parking and is located in back of the corner laundromat building. Altogether the two parcels total 11,200 square feet or a quarter of an acre.

The strip center configured at right angles to Whalley is shown below. It is anchored and was recently purchased by the dry cleaning establishment at the north end. The parking that is also used by Edge of the Woods customers runs with this parcel, which totals 25,820 square feet or 6/10ths of an acre.

While this center functions well and benefits from the traffic generated by the supermarket, it needs a facelift and better signage. While there is only one vacancy at present, turnover has been fairly regular among the smaller spaces. Upgrading the property would help to attract more complimentary businesses to the center. A fresh fish store would be a good addition, although one was there in the past and didn't survive. This would be the block and location to promote upscale food and beverage, especially convenience foods, taking advantage of the regional pull exerted by Edge. An Asian sushi or noodle restaurant would also do well here.



Strip Center at 365 Whalley Avenue, across from Edge of Woods

At the northern end of the parking area is a white building that has also had a commercial use in the past, most recently as a florist. It is currently vacant and blighted in appearance, as shown on the next page. Zoned residential, it is unclear what current use may be permitted. In any event, it detracts from this little center and should either be remediated or demolished.



Former florist shop – Needs upgrade

Edge of the Woods, pictured below, is a well integrated supermarket specializing in fresh produce and high end groceries popular with vegetarians and non-vegetarians alike. In addition to aisle space, the store also includes a vitamin and supplement area, bakery and vegetarian convenience food prepared for take-out or eating in a balcony seating area. The building encompasses 8,629 square feet on a 12,570 square foot lot.

The market's operator purchased the building in 2000, enabling renovation/expansion to proceed. Plans include a juice bar and sandwich station in the front of the store. Now both sides of this retail center are owned by their respective anchors.



**Major Whalley Landmark – Edge of the Woods
379 Whalley Avenue**

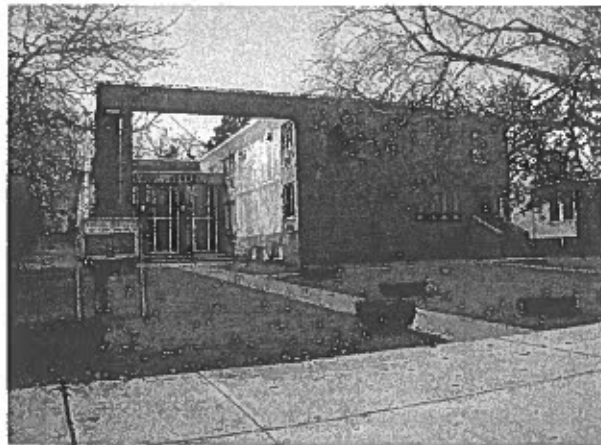
Egress from the parking lot is difficult at peak traffic times as traffic stopped at the Norton Street light backs up, blocking traffic exiting and well as east bound traffic trying to turn in.

On the western corner of this block are two multi-families at 383-385 Whalley Avenue which have been joined together by storefront expansion, creating the mixed use complex shown below. The current owner bought the property in January 1998 for \$150,000 as a distress sale. Since that time there has been substantial reinvestment, including the space occupied by the owner-operated restaurant and a storefront ministry on the corner. The building totals 8,242 square feet with four apartments above the retail space. A small amount of parking is available in the rear via Norton Street. The lot is small at 7,065 square feet.



Substantial reinvestment made at 383-385 Whalley Avenue

Norton Street is considerably wider than most of the other cross streets in the district and permits angled parking along much of the block running north of this intersection. This block is home to two institutional community anchors, the Rabbinical Institute of New England at 300 Norton and Young Israel of New Haven Synagogue at 292 Norton.



Young Israel of New Haven Synagogue -292 Norton Street

Orthodox practitioners must live within reasonable walking distance of services, which promotes residential demand and stability in the neighborhood as well. Retail directed at the Orthodox community represents another opportunity, as at present most of these goods are not available east of the Amity shopping area on the Woodbridge town line.

Summary Observations regarding Northside Whalley Blocks

(Within Whalley Ave. East Subsection)

- The automotive use set back in the middle of the Sherman-Carmel block should be reevaluated. While the rest of the block functions well, this use could be improved. Parking for retail redevelopment across the street or green space is an option. Alternatively a small strip center might also be developed along the eastern lot line.
- The Carmel-Winthrop block has a similar automotive use in midblock as well. Moreover, the commercial development in this block is in the hands of just three owners, two of which control 93% of the land and improvements. One of the two major owners is offering his property for sale at present and the second is an owner-investor rather than an owner-occupier. Site assemblage would total 1.22 acres, and might be redeveloped to compliment commercial activity in the Edge of the Woods block to the west.
- The Winthrop-Norton block is well established with Edge of the Woods and new ownership of the strip center which faces it midblock. Efforts should be directed to creating retail space which compliment these anchors, which could be accomplished across Whalley in the south block Winthrop-Norton or to the east in the Carmel-Winthrop block. Due to swift and heavy volume traffic conditions, the best synergy would be in redeveloping Carmel-Winthrop to compliment the Edge block. Target businesses would be higher end food and beverage, ethnic restaurants, bagel shop, specialty movie rental, etc.

Evaluation of Existing and Competitive Retail Districts
– The New Haven Marketplace

Downtown

The demise of the proposed Long Wharf mall, improved economy and increased office occupancy has started to have a positive impact on what has been a moribund downtown retail district. Currently there is roughly 170,000 SF offered for rent in 62 buildings and complexes. This does not include the Macy's building. Recent absorption included 10,123 SF, a total of four stores.

- Chapel Square Mall, where there is significant vacancy (12,800 SF listed for rent on the first floor only, not including almost entirely vacant food court, vacant Yale Co-op space, and most of second floor which is not offered for rent)
- Ninth square retail, still largely vacant, advertising 22,700 square feet at \$12.50 plus utilities but generous \$30/SF upfit allowance, in 23 separate spaces averaging less than 1,000 SF each.
- Another 135,360 SF is advertised for rent throughout the CBD.

Despite significant retail vacancy downtown, the fact that it is being advertised and slowly absorbed is encouraging. A dramatic increase in resident population in the CBD census tract, which more than doubled from 908 in 1990 to 1919 in 2000, has also helped this trend.

Yet to be finalized is the decision regarding redevelopment of the downtown district which encompasses the site of the former Malley's, the vacant Macy's and the Chapel Square Mall/office complex. The eventual redevelopment will have implications for Whalley Avenue, both good and bad. Depending on the redevelopment proposal selected, Whalley could be in competition with downtown for new retailers. However, with the certain reconfiguration of Chapel Square Mall, some of the mall's current tenants might find a suitable new home on Whalley Avenue.

Although the stores have contracted in number, there are still about 30 businesses and many of the survivors are well established and have been in business for many years. Also, a few are chain operations that could serve as credit tenants in a new retail development. Chain stores currently operating in Chapel Square Mall include:

- The Athlete's Foot
- Radio Shack
- Ritz Camera
- Footlocker
- Lady Footlocker
- Rainbow Kids

Independent stores represent a cross section of shoppers goods, including men's clothing, jewelry, gifts, furniture, women's clothing, toys and children's clothing.

Broadway

The Broadway commercial district is the eastern “bookend” of the Whalley Avenue District. This past June, the Broadway Merchants Association and Yale, its major landlord, marketed the rejuvenation of the retail district with a reopening festival. In progress since 1994, with the reconfiguration of street patterns and streetscape as well as building façade and interior improvements, Yale has invested more than \$4 million in the district. New anchors include Barnes & Noble (1997), Urban Outfitters (2000) and J. Crew (2002) with the remaining retailers being a mix of well-established old businesses with new chains and independents. The J. Crew store is only the second location in Connecticut for that upscale retailer favored by collegians. Reportedly, Yale has made significant lease rate accommodations to secure this particular commitment, again underlying the institution’s resolve to serve its community and enhance its attractiveness.



Urban Outfitters on Broadway

Central to Yale’s strategy as a landlord has been the requirement that businesses remain open at night and through the weekend in order to sustain the sense of vitality that the foot traffic imparts to the campus as well as to better accommodate the needs of its community. This policy is also in effect with respect to its properties on Chapel and College Streets and has been successful in changing the perception that New Haven closes for business along with the office buildings downtown. It dovetails as well with the city’s efforts to sustain a viable entertainment district.

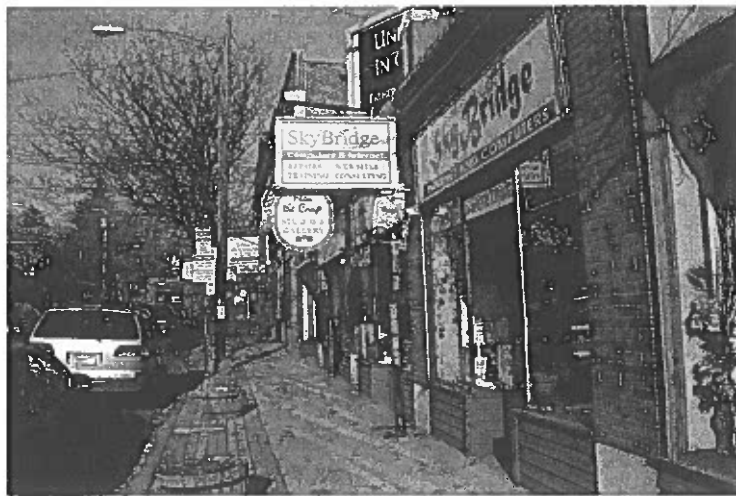
While the smaller stores among the Broadway Association may not rely as much on non-Yale patronage to prosper, the anchors will need wider market support to do really well. This is especially true when the seasonality of the Yale market is considered. As Whalley Avenue leads directly to the Broadway district, this represents an opportunity for Whalley redevelopment as well. The sort of traffic that is drawn to Barnes and Noble, Urban Outfitters and J Crew anchor destinations should also be considered in the redevelopment mix for some part of Whalley. With Edge of the Woods already on the Avenue, which is a “peer group” destination store as well, a limited amount of higher end retail may be expected to join this expanding group.



**Trailblazers
Store in the
Broadway
District**

Westville Village

The western “bookend” of the Whalley District is Westville Village, a comparatively small shopping area with some established and new anchors. Hallock’s, a regional furniture and appliance store, occupies a prominent position on Whalley Avenue. A major catering and dining destination, 500 Blake Street, has expanded its functions business in recent years. Two new restaurants have also been well-received and a cluster of personal services establishments also draw from a wide base. Office space has been redeveloped in a former manufacturing building, adding life to the area although lease up has been slow. Westville, formerly known mainly for its antiques shops, is becoming a better integrated commercial district.



Whalley Ave. in Westville

Also important long term for business development in this part of the city has been the establishment of a small artists enclave. Crafts fairs and art walks have brought in more traffic and raised the image of the Village. Recent additions to full service dining include Delaney’s Tap Room, pictured below.



Westville, Whalley Ave. south side

VII. Land use and Zoning Considerations

The analysis of the Whalley Avenue District marketplace would not be complete without consideration of land use and zoning matters. The following section adds land use and zoning context to our market and real estate findings and ultimately to the conclusions and recommendations which follow in Section VII.

Overview

Whalley Avenue is one of the oldest and best known thoroughfares in New Haven. Laid out in 1797 as the Litchfield Turnpike, it was not until the mid nineteenth century that it became a broad residential avenue and the main route to the residential areas establishing around it on the north and south. Its importance in the growth of the western part of the city is shown by the fact that it was the first (and for several years the only) paved street in the city.

Whalley Avenue still serves as a main artery connecting the downtown area of New Haven to its western-most neighborhoods, commercial areas and the Wilbur Cross Parkway. It also serves as a link with neighboring suburban communities whose residents are part of a significant commuter traffic flow in the corridor.

As the western suburbs grew, Whalley's transportation function increased and its residential desirability diminished. Mixed uses (and later first floor conversions) became more common on lower Whalley until it evolved into an intensely commercial area, first serving local shopping needs and then, with the construction of strictly commercial buildings, a broader range of goods, services and patrons. This commercial focus is particularly true in the lower part of Whalley Avenue where the Special Services District is located.

The surrounding neighborhood is an urban scale residential area of multi-family structures. For the most part these are 2 and 3 family frame dwellings of vertically stacked units. Triple decker structures of 3 to 6 units, apartment buildings and pockets of neighborhood level commercial uses are mixed in, the latter particularly along the heavily traveled east-west routes of Elm and Chapel Streets. A significant portion of the housing stock, especially in the area south of Whalley, requires property maintenance and rehabilitation attention. Areas north of Whalley and west of the Boulevard are more likely to have fewer units per structure (actually transitioning into single family dwellings) and to be owner-occupied. The immediate area maintains the original moderately priced residential character of a working class neighborhood.

Roadway and Streetscape Characteristics

The roadway itself consists of 4 twelve foot +/- travel lanes (two in each direction) and 2 eight foot +/- parking lanes (one in each direction). Along with this expansive travelway, the actual road right-of-way includes a 16 foot +/- sidewalk zone on each side (comprised of an 8 foot +/- planting strip area and an 8 foot +/- sidewalk area) for a total right-of-way width of approximately 100 feet. The right-of-way appears even more generous because buildings are consistently located some 20 feet back from the sidewalk limits of the public right-of-way. This pattern may be a remnant of the days when Whalley Avenue was a residential street with traditional “front yards”.

The Whalley corridor’s strengths form a suitable foundation upon which a renewed image and improved economic function can be built. Its 100 foot wide right of way places Whalley near the top of New Haven’s roadway hierarchy. As a major thoroughfare it carries high traffic volumes, including commuter traffic that could prove critical to sustaining revitalization. However, Whalley’s wide, straight configuration encourages speed, impedes safe pedestrian crossing and provides little visual interest to passing motorists.

There is a mixture of buildings—new and old, single and multi-story, on small and large lots—most conforming to a uniform setback to create a consistent street wall that anchors the linear form of the corridor, visually as well as physically. The age of much of the development, though providing many fine examples of period architecture, requires maintenance and investment to avoid blight, which often fuels negative perceptions and discourages business patronage.

Within a 16-foot band of the public right-of-way, a few elements of what is collectively referred to as the “streetscape” are in generally good condition. Healthy, mature trees fronting ample sidewalks and building “front yards” have now reached heights suitable for “limbing up” to ensure the much demanded viewshed from street to storefront. However, there is no unifying relationship between this public right-of-way and adjacent properties. Rather than being attractively maintained and used as an asset, these wide private front sidewalk areas are often littered and used informally or formally for off-street parking. This area is inconsistently treated so that the pavement, walls, and sparse plantings that do exist appear in hodge-podge fashion. These conditions broadcast disenfranchisement.

West of Norton Street unifying streetscape elements installed in conjunction with a state road project are evident. Future streetscape improvements should consider and be consistent with these improvements, which include scored concrete sidewalk/driveway aprons, accent pavers, Whalley logo signage, ornamental lights, trash receptacles and benches, to establish a unifying design theme for the corridor.

Zoning

From Sherman Avenue west the Special Services District is zoned Business A – General Business. This zone's predominant purpose is for retail trade of convenience goods and services for one or more neighborhoods. In addition, uses permitted by right or special exception in the RM-2 (High-Middle Density) Residence District are permitted by right in the BA District. In addition to residential use, this permits a range of uses including such things as governmental (police, fire, post office), public and non-profit recreation and cultural facilities, and several types of daycare.

There are some nonconforming uses as well as uses that, though permitted by zoning, are inappropriate to building the caliber of retail services in the corridor. Among the uses that do not support the creation of a strong neighborhood retail core are auto-related uses (more appropriate to the BB Automotive Sales zone east of Sherman Avenue) and the meat distribution operation at Minore's (more appropriate to a Business E Wholesale and Distribution District). Nonconformity will gradually be eliminated through reuse or redevelopment. The Special Services District should work with City Plan to review all of the zoning provisions that apply, with particular emphasis on uses permitted by right, to be sure that zoning provisions serve to improve the retail mix and contribute to an attractive, pedestrian-friendly shopping atmosphere. With this in mind it should be made clear that allowing parking on front yards (permitted by special exception) not only disrupts the streetscape but creates unsafe traffic and pedestrian interface at points of egress that, by necessity, must be located too close to the intersection. Better solutions must be found to meeting parking needs. Front yard parking must be discouraged and gradually eliminated.

VIII. Redevelopment & Marketing Options

The Whalley Avenue District must leverage the corridor's chief assets – substantial daily traffic volume and stable or stabilizing neighborhoods – into redevelopment that will complement and strengthen both. Without a large scale plan that takes into consideration the potential of each block within the district, redevelopment will continue to take place sporadically and opportunistically as individual land transactions permit, resulting in a corridor which serves mainly convenience needs. **For these reasons we recommend that the City of New Haven undertake a formal Renewal and Redevelopment Plan on behalf of the District and adjacent residential blocks.**

One major challenge is the sheer length of the avenue at 1.2 miles from Park Street to Pendleton and Whittlesey Streets. Most neighborhood retail corridors are considerably shorter and more easily unified and maintained for marketing to a relatively homogenous audience. In addition to the length of Whalley is the width of the avenue and pace of the traffic. This is not a situation where one theme, or look, will work. Whalley's length however does permit it to be different things to different constituencies, and much of what's there now will continue to serve a varied market.

An ongoing challenge will also be to address residential issues impinging on the corridor, strengthening the ranks of homeownership and demand for goods and services. In many cases, urban areas undergoing housing redevelopment find that existing neighborhood commercial areas need upgrading to meet the demand generated by new residents. The situation in this case is somewhat the reverse – a commercial district which has always functioned reasonably well seeks support for the neighborhoods that have always been its primary market.

The key is to pursue a strategy that selectively targets appropriate sites for redevelopment while simultaneously pulling together the blocks that currently function well. The task of assembling appropriate redevelopment sites will be difficult, time-consuming and costly. Care must be taken that any relocation of existing businesses be handled with minimum disruption. Care must also be taken that prospective tenants be tailored to the Whalley marketplace, especially for shoppers goods. The current state of the national retail landscape is discouraging but chances are, if the recession is short and shallow, retailers may be bouncing back when redevelopment is ready to start.

In the following discussion of recommended options for Whalley Avenue, the main concept is that of a Neighborhood Center in the north and south blocks between Sherman Avenue and Norton Street. In addition, several other buildings and blocks within the District also present opportunities for redevelopment or repositioning and they have been addressed as well. They include:

- The Jacobson commercial building at 566 Whalley
- The group of 11 commonly owned residential structures in the block between the Boulevard and Blake Street
- The Walgreen's block between the Boulevard and Ellsworth
- The billboard buildings at 474-476 Whalley and
- The decked garage at 277-287 Sherman Avenue

A. The Whalley Neighborhood Center: Norton Street to Sherman Avenue

The five blocks in this subsection of Whalley Avenue, aggregating 0.2 miles, represent both the greatest challenges and opportunities within the area we assessed (Sherman to Pendleton and Whittlesey). The main challenge is the vacant and blighted three building commercial/residential complex on the corner of Winthrop and Whalley owned by Mast Equities of New York. These three buildings constitute the greatest single source of blight on Whalley Avenue, contributing to negative perceptions of the entire corridor as well as negatively influencing other businesses in the core area.

The main opportunities are twofold. First is the large site currently occupied by Minore's Meats and two other commercial owners in the Winthrop-Sherman block, the only possible assemblage feasible for a store of up to 20,000-25,000 square feet in the area we assessed. The second is the north block running between Carmel and Winthrop, which is owned by just three entities, two of which control 93% of the commercial space and all of the Whalley frontage. This block is just east of the Edge of the Woods – Sylvan Cleaners block.

A third opportunity exists in this core block area as well, having to do with the existence of at least one well-established anchor business, Edge of the Woods. Edge serves an economically and ethnically diverse, widespread market, certainly stretching beyond the half mile to one mile radius associated with traditional urban supermarkets. It brings people to Whalley Avenue in search of a wide range of vegetarian foods, both basic and prepared in the kitchen and bakery. It could easily serve as a catalyst for either similar products or goods and services targeted to segments of that customer base.

Whalley Neighborhood Center Overview

As Whalley has evolved away from its automotive past, it has acquired redevelopment in patches, some large enough to sustain big box redevelopment such as those in the eastern end of the District, and some opportunistically located at good intersections such as the Whalley Exxon car care complex and the new CVS. While Whalley has traditionally supported pedestrian scale neighborhood retail and service establishments, the commercial buildings which house many of these smaller businesses have experienced less reinvestment due to a variety of factors: changing markets and demand, lack of parking and the spread out nature of the district.

The Dwight, Edgewood and Beaver Hills neighborhoods need and can support a visually distinct retail center both as a community resource, a source of identity and an economic shot in the arm for the area. While the big box and car-oriented developments on the eastern end of Whalley serve a vital economic purpose, they don't identify the area in any specific way. For these reasons we recommend a Neighborhood Center concept that will establish a sense of arrival with redevelopment on a scale both pedestrian-friendly and geared to provide goods, services and community resources.

As a retail development concept, this five block area has the potential to become what is commonly defined as a community center. Community centers offer convenience goods and personal services but also provide a wider range of soft lines (clothing) and hard lines (hardware and appliances). Many centers are built around a junior department store, variety store, super drugstore or discount department store in addition to a grocery store. It may have a strong specialty store or stores, for example shoes. Typical community centers are 100,000 to 250,000 square feet. As envisioned, the Whalley Neighborhood Center would have a total of 110,000 square feet, of which 65,000 square feet would be in existing buildings and 45,000 square feet would be in new construction.

Neighborhood Center South Blocks

Norton-Winthrop

The Norton-Winthrop block, which includes the blighted Mast Equities properties, has four other buildings that together aggregate roughly 70,000 square feet or 1.6 acres. Were all of the buildings razed, the resulting site would support 16,000 square feet of retail. Because this block is so intensively developed, with relatively little vacant or parking areas, the cost of razing and abating asbestos and lead would be high. The land cost would be a prohibitive \$94.00 per square foot of retail space generated. Our calculation of total square feet for all buildings is 54,700. Assuming the cost to demolish and abate would be \$6 per square foot, the total cost apart from acquisition would be \$328,200 or \$4.70 per square foot of the 1.6 acre parcel. The cost to acquire the buildings, at an average of \$21.60 per square foot, would be \$1,181,520.³ Added to the \$328,200, site assemblage would total \$1.5 million for 1.6 acres or \$943,600 per acre. The land cost would be a prohibitive \$94 per square foot of retail space generated.

A better approach would be to maintain the current structures on the block with the exception of the Mast Equities complex, which could be redeveloped in concert with the Minore's site, if it were to become available. The cost to raze and abate the Mast properties, with 22,450 square feet in total would be \$134,700 and the acquisition cost would be modest in view of condition and back taxes owed. The property was acquired by the current owner in 2000 for \$259,000. Even if the complex were acquired for the same price, \$259,000, the cost plus demolition would be \$393,700 or \$596,500 per acre. While this is still high, it is a necessary cost relative to the current blight and would be supported, ideally, by a large anchor retailer in the next block east.

Another scenario would include the taking of the three properties owned by Ms. Faught and TMG LLC in midblock, but again the cost to acquire and develop would be high relative to economic feasibility, as these are functioning, fully tenanted buildings. The fourth building at 346-350 Whalley (police substation), while largely vacant at present, is not blighted and its owner Edgewood Corners is already under obligation to rehabilitate and lease out space per an agreement with the city which previously owned it. It would be inadvisable to expend redevelopment resources on this building, which can be made functional and has excellent parking. This building already serves an important public service as the Police substation offices.

In fact, the repositioning of the Edgewood Corners building as a public/non-profit/professional services venue might serve as a catalyst for redevelopment of the Mast Equities complex into a complimentary community services building for day care, training, youth services, etc. This would be a second option to explore in any event if the Minore's site does not become available.

³ The \$21.60 per square foot was derived from the average of commercial sales transactions in the District 1998-5/50/01. See Buildings Transactions on page 31.

Sherman – Winthrop

The Minore's site, at 2 acres, is the largest assemblage owned by one entity in the area west of Sherman. We recommend adding to this to the two commercial properties at the corner of Whalley and Winthrop that house Whalley Pizza and three other retailers. These two properties aggregate 0.4 acres, which when added to the Minore holdings result in the one site which could sustain a 20,000 to 25,000 square foot box or in line strip center. Another advantage to this assemblage is that not as much demolition would have to be done relative to the parcel produced: the six buildings (three commercial, one mixed use and two residential) total 40,800 square feet which would be \$881,000 to acquire and \$244,700 to demolish, for a total of \$1,125,776 or \$498,130 per acre. Although this is still high relative to the cost of greenfields in the suburbs, the site could attract developer interest with some amount of subsidy.

In summary, we see this south side area of Whalley as the biggest piece of the puzzle if it can be acquired. If this is possible, the Mast Equities property will enjoy redevelopment synergy by virtue of its location across Winthrop Avenue. If the Minore site is unavailable, Mast Equities must nevertheless come down for redevelopment as neighborhood retail or community services.

Neighborhood Center North Blocks

The three blocks on the north side are almost completely unrelated to each other by use or scale at present. The most functional of the three blocks is Norton-Winthrop, home to the Edge of the Woods-Sylvan Cleaners retail complex, currently a destination shopping location for greater New Haven by virtue of the good choice of natural groceries and prepared foods. This center could serve as a catalyst for similar food oriented retail and restaurants, and an appropriate redevelopment opportunity exists in the Carmel-Winthrop block immediately east.

Carmel - Winthrop

The Carmel-Winthrop block is held by just three owners, two of whom control 93% of the commercial space and the entire Whalley frontage. This aggregates 17,000 of building space with an acquisition cost of \$366,314 plus demolition cost of \$101,750, or \$468,000 in total. This would produce 1.23 acres at \$380,500 per acre. Current businesses include West Shore Cleaners, Imported Cars of New Haven, Chuck's Luncheonette, Newt's Café, Ebony Paging and Paramount Liquor Store. None of these properties is owner-occupied, except for the drycleaners, which is for sale. The other owners, Mr. Vuoso and S&S realty, are investors. If this parcel is targeted, action should be taken soon to option these holdings so as to avoid any splitting off of interests.

The 1.23 site could support 13,000 square feet of retail which should contain a mix of small spaces appropriate for ethnic restaurants, food stores and one larger anchor. Restaurants could include Indian, Asian noodle, African American, a bagel shop and/or kosher foods, possibly a coffee shop. The market would be shop, office tenants and shoppers for lunch and homebound commuters seeking a higher end take-out alternative to fast food.

Summary information for the Whalley Neighborhood Center target blocks follows on the next page.

Development Summary
TARGETED REDEVELOPMENT SITES
Whalley Neighborhood Center

SOUTH BLOCK: NORTON-WINTHROP

- 1.61-acre parcel
- Maintain 18,500 sf/3-story office building (#376-386)
(Police Substation and H&R Block)
- New 11,000± sf/1-story retail building
- 75± shared spaces (68± required)
- Requires demolition of #352-364, #366-370, #372-374 Whalley, and #420 and #422 Winthrop

SOUTH BLOCK: WINTHROP-SHERMAN

- 2.26-acre parcel
- Maintain 8,247 sf/1-story building (#336-350)
(Whalley Pizza)
- New 18,000± sf/1-story retail building
- 105± shared spaces provided (105± required)
- Requires demolition of #320, #332-334 Whalley, #421 and #425 Winthrop
- Requires zone change at #425 Winthrop from RM2 to BA

NORTH BLOCK: WINTHROP-CARMEL

- 1.22-acre parcel
- One new 4,250± sf and one new 4,000 sf/1-story retail buildings
- 33± shared spaces proposed (33± required)
- Requires demolition of #323, #335-337, #339-341, #343-349 Whalley, and #463 Winthrop
- Requires zone change at #20 Carmel from RM2 to BA

- NOTES:
1. Parking requirements calculated from 80% of gross sf and 1 space/200 sf regardless of building size.
 2. City retail parking requirements: 600-5,000 sf of sales or service area: 1/200 sf.
Over 5,000 sf of sales or service area: 1/100 sf
 3. City office parking requirements: 1/600 sf

Neighborhood Center Transition Area at Sherman Avenue: The Decked Garage

The zoning changes east of Sherman from BA to BB which allows automotive uses. At 280-286 is the Whalley Exxon Service Center and Car Wash, an eight bay garage facility. This operation is one of the anchors of the mid-Whalley district. The service complex was built on the site of a former new car dealership, of which one vestige, a decked garage, remains behind the gas pumps on the southwestern edge of the property.

This approximately 15,000 square foot structure, built in 1957 as two story car inventory parking, runs 150 feet down Sherman Avenue. It is in poor repair, economically obsolete and should be demolished. The land area at roughly a third of an acre (15,000 square feet) might be redeployed for a more contemporary automotive use or possibly as a training center for auto service skills. Apparently St. Luke's Church is considering such a training facility for land and buildings it is under contract to purchase on the eastern end of Whalley Avenue, but this might be a more appropriate location. The Church's property on Whalley has a higher value by virtue of being directly on Whalley, while this Sherman location would be better for a less intensive use such as training.

Alternatively, one of the garage- based businesses located farther west in the BA zone/Neighborhood Center area might be relocated here, for example 305 or 335 Whalley. A third possibility would be additional parking for redevelopment in the Neighborhood Center blocks to the west. At a minimum, any redevelopment of the block to the west would be enhanced by an appropriate reuse of this site.

B. The Boulevard Gateway

The intersection of Whalley Avenue and the Ella T. Grasso Boulevard is the major gateway to the District but other than some streetscape improvements, has a discordant visual impact. The major challenge is that the intersection is neither completely commercial nor residential but an awkward mixture of the two. The Boulevard north/south access in both directions is residential and should remain so with its historic housing stock intact. Whalley Avenue at this juncture is both residential and commercial. Specific recommendations for each corner of the intersection are detailed below:

Northwest Corner: The Maidman Properties

The eleven Maidman residential properties comprise this corner, all but one of which are vacant and deteriorated. They affect not only the perception of the gateway but also redevelopment options for the District west of the intersection.

As these multi-families are architecturally rich and varied, even now painted to create visual interest, they represent a wonderful opportunity to upgrade the approach to the Whalley district. As occupied homes, the light generated at night will also be a welcome addition. They should be acquired, rehabilitated and sold off to homeowners. This should serve as a catalyst for the stabilization of the north side of Whalley, where crime and blight have been problems. Proceeds of sale should then be reinvested via a revolving loan fund to acquire other homes on Blake to continue the process of stabilization. If the area does become a redevelopment zone, funds can be used in other blocks within its boundaries.

Northeast Corner

This corner appears to function well, developed in the 1980's as the Carriage Hill Condominiums. While ownership is largely in the hands of investors now and the occupancy rental, the property is generally well-maintained. The St. Brendan's Church and Rectory also positively contribute to this gateway.

Southeast Corner

The southeast corner is home to the Dunkin Donuts shop and the back of the Walgreen's/Dollar Haven building. The Dunkin Donuts shop was recently upgraded along format lines typical of this ubiquitous franchise operator and is what it is. Attention to the tree belt along Boulevard and landscaping along the rear wall of Walgreen's would soften the impact of both the architecture and parking area as well as provide some shade for parked cars.

Southwest Corner: The Billboards

The major element detracting from the gateway at present is the two small buildings with billboard on top at the southwest corner. While the tenants should be relocated, the buildings should be acquired and demolished. They are owned by the same entity, purchased in 2000 for \$185,000. Demolition would cost \$17,304 at \$6/SF and a lot of about 5,000 square feet would be created. Public space or a small commercial building with parking shared with Draughn Conclusions next door are two redevelopment options to consider.

C. The Western End: Boulevard – Pendleton

The Jacobson Building

The south side of Whalley in the western end of the District functions well at present, although the fire at 560 Whalley, the Jacobson building, has taken a viable retail/office complex out of the commercial mix at present. In view of the transitional status of the Jacobson building we preliminarily assessed the redevelopment potential of the site and block it occupies to determine the cost of creating a development site. The block tip has two commercial properties, one mixed use and one residence at 146 Hobart Street totaling 37,400 square feet. There are four different owners. The buildings would cost approximately \$810,000 to acquire and \$225,000 to demolish for a total of \$1,035,000. This would produce a site of 0.78 acres at a cost of \$1,327,000 an acre. It is hard to imagine an economically viable use for such a site relative to the cost to deliver the land and the small size of the resulting parcel.

Our recommendation is to rehab the Jacobson building, which has shown to be popular with neighborhood retailers and non-profit office users, for similar uses in the future. Non-profits including those relocating from Science Park building 25 would be good tenants to target. With reconfiguration of the interior possible as a result of the fire, consideration should be given to adding additional plumbing for doctors and dentists offices on both floors as the Avenue has already been established as a viable location for such professional offices. The Jacobson building is the transition commercial building to the District on the south side of Whalley and has an important role in the initial perception of the Avenue.

In the next block west running between Blake and Whittlesey is a mixture of residential and commercial uses. The office building at the tip of Blake and Whalley has been purchased by a non-profit owner-occupier. The new owner is Also/Cornerstone, which was formerly a tenant in the Jacobson building across the street. This bodes well for stabilization of the Blake Street intersection and adds another non-profit owner to Marrakech in the immediate area.

D. The Midsection: Boulevard - Norton

Of the three Whalley subsections, this is the one most functional at present and represents a solid anchoring base for redevelopment occurring to the east and west. Our recommendations focus on façade rejuvenation and work on signage at 416-430 Whalley.

The Walgreen's Block

However, should Walgreen's and the dollar store move from their present location, the vacated site should be considered for redevelopment or major facelift. The building occupies 16,800 square feet on a lot of 1.5 acres, currently having very adequate parking. The site could be selectively developed or improved leaving other uses in place on the block. The exception to this might be the 16 unit apartment building on the corner of Argonne and Boulevard should it become blighted or abandoned. With a zoning change, the apartment parcel would permit access to the Walgreen's site from the Boulevard and provide visibility from that approach as well.

E. Land Use & Zoning Approach to Neighborhood Center Redevelopment

Land Use

The linear context of Whalley Avenue evolved and has been sustained for decades by its major functions as a roadway and commercial district. Over this same period of time, significant changes in markets, as well as merchandising and shifts in the demographics of the surrounding residential areas, dramatically affected the mix of businesses while the physical context for the most part remains unchanged. The revitalization of Whalley Avenue, in particular its economic recovery, should not emphasize this linear function by adopting the suburban-style, big box retail form of development that has replaced the car lots of the old “automobile row” on lower Whalley. This suburban-style development breaks down the neighborhood scale and does not encourage pedestrian activity.

The vision of the Avenue becoming a bustling corridor from end to end is attractive but probably not realistic although it is already bustling, with vehicles speeding by as fast as allowed to reach destinations other than those on Whalley. A more plausible and economically sustainable approach is to take advantage of existing critical mass and create an epicenter from which future improvements and further economic recovery would emanate. By targeting the reuse of specific parcels along Whalley within existing scale and context, there is an opportunity to attract new businesses in a manner physically and visually compatible with what will become “Whalley Neighborhood Center”.

The concept of creating a neighborhood center from Sherman Avenue to Norton Street takes advantage of a stretch of the corridor that has both economic stability and suitable reuse opportunities. Physical improvements within the right-of-way will play an integral part of overall revitalization. Through specific improvements, pedestrian nodes can be created to resolve vehicular conflicts. These nodes in turn tie into pedestrian corridors leading to and from the surrounding neighborhood.

Proposed streetscape improvements, colored/textured crosswalk treatments and bump-outs (portions of the sidewalk that jut out a bit farther into the roadway in areas designated for pedestrian crossing) will help to restore a human scale to the corridor and will provide visual clues to drivers that they are not only in a pedestrian zone and should adjust their speed accordingly, but that there are also viable businesses providing goods and services along the way.

On the following pages are presented a concept plan for Whalley Neighborhood Center, street sections with bump-outs, sidewalk-front yard section and plan, a summary of land use action areas and an initial cost estimate of Whalley Avenue right-of-way.

WHALLEY AVENUE SUMMARY OF LAND USE TARGETS

<u>TARGET</u>	<u>SOLUTION</u>
<ul style="list-style-type: none">● Excessive street widths, high traffic volumes – impede safe pedestrian crossings	<p>Bumpouts extending into the street will reduce the crossing widths. Areas will be planted. Colored textured pavement provides visual clues to on-coming vehicles and also provide aesthetic treatment.</p>
<ul style="list-style-type: none">● Lack of consistent streetscape (east of Norton) to unify corridor	<p>Proposed streetscape improvements include ornamental lights, benches, trash receptacles, signage, sidewalks, and accent pavement. These will complement the existing streetscape west of Norton, will visually unify, and will reduce the overall scale of the street.</p>
<ul style="list-style-type: none">● Negative perceptions and disinvestment”	<p>Continue public safety vigilance (including speed enforcement) accompanied by stricter code enforcement. Development of signage and façade guidelines that prohibit billboards and establish criteria for exterior treatments.</p>
<ul style="list-style-type: none">● Poorly maintained, wide private front yards have inconsistent aesthetic treatments and are sporadically used for parking.	<p>Working cooperatively with individual property owners during streetscape design, consistent treatments will be developed. Secure funding sources to offset costs or create a matching grant/loan fund</p>
<ul style="list-style-type: none">● Linear configuration and lack of visual interest encourages speeding traffic. Pockets of blight/no critical mass of and uses/lack of economic “magnets”	<p>Create a neighborhood center that functions as a visual focus. Target an area with blight <u>and</u> opportunities for redevelopment to re-establish a positive land use-roadway link. Apply a Neighborhood Center Overlay Zone to establish acceptable land uses, setbacks, building coverages and landscape/public space requirements.</p>

Public Right-Of-Way Improvements Cost Estimate

Whalley Neighborhood Center – Concept Plan
PUBLIC RIGHT-OF-WAY IMPROVEMENTS – INITIAL COST ESTIMATE

ITEM	QUANTITY	PER	PRICE	TOTAL
Demolition			allow	\$ 60,000
Maintenance and Protection of Traffic			allow	\$ 20,000
Granite Curb at Bump-outs	1,000	L.F.	@ \$ 35	= \$ 35,000
Concrete Sidewalk	32,000	S.F.	@ \$ 6	= \$192,000
Accented Sidewalk	5,000	S.F.	@ \$ 12	= \$ 60,000
Textured Crosswalks	6,000	S.F.	@ \$ 18	= \$108,000
Concrete Crosswalk Edging	1,450	L.F.	@ \$ 20	= \$ 29,000
Street Trees	12	Ea.	@ \$ 800	= \$ 9,600
Lawn Panel	23,000	S.F.	@ \$ 0.50	= \$ 11,500
Ornamental Lights	33	Ea.	@ \$5,000	= \$165,000
Benches	10	Ea.	@ \$2,000	= \$ 20,000
Trash Receptacles	10	Ea.	@ \$1,500	= \$ 15,000
Signage			allow	<u>\$ 10,000</u>
			Sub total	\$735,100
			<u>20% Contingency</u>	<u>\$147,020</u>
			Total Project Estimate	\$882,120
Bump-outs and Textured Crosswalks at Ellsworth, Ella Grasso, Brownell, Hobart and Pendleton intersections				\$450,000

Zoning

The established physical context considerations and revitalization objectives of the Whalley Avenue corridor are comparable to conditions and goals of other commercial corridors located in the City's neighborhoods. To varying degrees these corridor areas are struggling with similar reuse issues as they seek to provide business development opportunities. The current neighborhood planning activities of the City Plan Department and Empower New Haven are a good opportunity to explore zoning issues and to modify the regulations to better achieve revitalization goals and enhance design provisions.

Creation of a zone or overlay zone that encourages the construction and rehabilitation of buildings that conform to the size, scale and character (e.g. materials, color, etc.) of an individual neighborhood will not only result in an attractive commercial area but convey an overall and an individual image of success and vitality. This "Neighborhood Center" Zone should apply to new, enlarged or altered buildings, structures and uses in order to maintain a consistent physical revitalization effort. The mechanisms for creating such a zone would include:

- Identify planning objectives, e.g. consistency with the visual and physical qualities of the neighborhood, minimizing impact of commercial development on residential neighborhoods, safe and convenient pedestrian access and circulation, traffic calming, etc.
- Work with the City Plan Department to determine the specifics of the zone such as overlay versus modified existing zone, appropriate boundaries for applicability, basic provisions (e.g. uses, bulk requirements, parking), design standards to be required, advisory review opportunities for the neighborhood, etc.
- Consult with the neighborhoods and business community to build understanding of the objectives and anticipated outcome of a positive image and enhanced customer base.
- Coordinate with business development technical assistance providers and funding sources to reconcile any programmatic conflicts, gain their input on appropriate provisions, and enlist support for modifying zoning provisions as a catalyst for sustainable business development.
- Advocate for adoption of "Neighborhood Center" zoning provisions.

F. Summary of Redevelopment Recommendations

- **Prepare Redevelopment Plan for the area (with the city).**
- **Evaluate options for Neighborhood Center Overlay Zone (with the city).**
- **Prioritize & Pursue Redevelopment Options on Whalley Ave.**

South Block: Norton-Winthrop

South Block: Winthrop-Sherman

North Block: Winthrop-Carmel

Other: Jacobson Building, Maidman Properties, Walgreen site, Sherman Ave.
Garage

- **Undertake Public Right of Ways Improvements**

Sidewalk Bump-outs

Granite Curbing

Textured Sidewalks

Street Trees

Lighting

Furniture

Landscaping

Signage

- **Monitor City's progress on tax foreclosures of targeted properties**
- **Undertake Study for Design Standards (to be included in Overlay Zone)**

Signage

Facades

Private Frontage

- **Undertake Support Studies for Redevelopment & Site Improvements**
(See: General Recommendations - Parking and Traffic Studies)

IX. General Recommendations

Traffic Study

- As the most heavily trafficked central New Haven corridor, Whalley Avenue merits a comprehensive traffic study. Available data is not very current and contradictory. Traffic counts are the lifeblood of most retail concepts and Whalley cannot market itself effectively without a complete analysis of average daily traffic, peak hour flows, etc. Weekend data should be included as well.
- Undertake analysis of one-way streets (Pendleton, Hobart, Winthrop and Carmel) the possibility of making some of them two-way or at least permitting access to off street parking in the rear from Whalley Avenue.

Parking Utilization Study

- The need for parking expressed by merchants and real estate owners varies, with some in control of adequate off-street space to satisfy their needs and others relying on on-street parking. Needs will change as the Norton-Sherman core area is redeveloped and more intensively leased out, even though specific redevelopment sites will include parking for site-specific needs. A baseline survey, which would include surplus curb cuts and side street parking, will help quantify and anticipate the need and location for general parking. The western end of Whalley from the Boulevard on is of primary concern in this regard.

Parking

- When the need for general parking has been quantified, public off street parking as recommended should be developed. If possible, public parking should be at an intersection to better address traffic flow and access.
- General parking should have appropriate signage, security-proof landscaping buffers and lighting to aid with security and visual character of Whalley Avenue.

Pedestrian Safety

- While the lifeblood of Whalley is traffic, often swiftly moving traffic, pedestrian safety concerns must be addressed. One method of improving pedestrian safety is the bump-out curb design, in which the sidewalk bulges out slightly at an intersection on both sides of the corridor. The bumpout both creates a defined area to the on street parking and allows pedestrians to cross more easily. The use of bump-outs could help define the five block eastern core redevelopment area between Sherman and Winthrop Avenues.
- Another pedestrian friendly option would be the use of pedestrian nodes.

Chapel Square Mall Redevelopment

- The District should monitor the ongoing redevelopment of the Chapel Square Mall with respect to the reconfiguration of retail space and possible relocation of businesses. A recent count of businesses in the mall totaled 30 businesses. Many are well established and have been in business for years. Also, a few are chain operations that could serve as credit tenants in a new retail development. Independent stores represent a cross section of shoppers goods, including men's clothing, jewelry, gifts, furniture, women's clothing, toys and children's clothing.

Business to Business

- Whalley Avenue has potential as a central location for business to business development. Given the District's proximity to New Haven's biotechnology redevelopment sites, including 300 George Street and Science Park, Whalley Avenue will be a convenient location for supporting would be warehousing and distribution of laboratory equipment and materials. While most of New Haven's biotech space has yet to be converted and leased, planning for business to business functions on Whalley Avenue should be considered as a later phase.

Security

- Loitering has been identified as a problem in certain locations and times. The District, in addition to the police, should work with all merchants to enlist their support for no loitering in the immediate vicinity of their stores. As target sites are redeveloped, removing blight and vacancy, there will be more merchant voices with a greater stake in the image and viability of the Avenue.
- Lighting for those sections of the Avenue, which do not have a high concentration of 24 hour operations, should be analyzed. Whalley has a great deal of activity at night and all sections should be well lit.
- Specific trouble spots, including around the old New World Café at 332 Whalley and near the Blake Street intersection, must be aggressively dealt with until such time as any redevelopment takes place. These problem areas and others are detrimental and constitute destabilizing influences on neighboring businesses.
- Any new general parking lots which are created in the future should be subject to a joint District-City Police program to maintain their safety, security and upkeep.

Green Space

- Hand in hand with the anti-loitering initiative, the District should help identify a gathering space or spaces for the neighborhood where recreation and socializing is possible.

Strategic Housing Alliance

- In addition to the foregoing specific recommendations about blighted housing on Whalley which have a direct bearing on the viability of the corridor, the District should forge alliances with private and public housing development groups to address the issues of aging housing stock and homeownership. Neighborhood Housing Services, a significant factor in rejuvenating several market area blocks, is one such potential partner. Yale has recently renewed funding for its successful homeownership subsidy program, another resource which can be brought to bear. The market area's health and desirability is always reflected in the retail and service base it supports.

Retail Labor Market

- While Whalley Avenue based businesses have excellent access to a large pool of potential retail workers, several businesses noted skill levels and work readiness were issues needing attention. With the uptick in retail downtown, on Broadway and Whalley, some form of retail academy along the lines proposed in connection with the Long Wharf Mall would be desirable. A home for such a school could conceivably be found on Whalley itself and might be a good use of Enterprise Zone funds.

Visual Upgrade

- The merchant survey indicated a variety of physical appearance factors, which negatively influence Whalley's image, including trash, litter, unkempt tree belts, poorly maintained planters and bad sidewalks. Not all of this is within the control of the District, but higher standards of trash and litter control as well as improved tree belt and planter maintenance should be priorities. Planters in particular should be tended to or removed.
- The District should design and implement a façade improvement program similar to the one in place for the downtown Ninth Square – Chapel street district, but allowing for greater diversity of design, given the greater diversity of land uses present on Whalley.
- Extend Whalley District signage and create banners identifying the corridor, sponsored by District businesses.
- Upgrade Whalley intersections in addition to the Boulevard gateway, providing landscaping, lighting, and signage, fencing and street furniture as appropriate. Property owners located along these intersections should be encouraged to upgrade and improve their frontage.
- Support and monitor city program to undertake repairs and maintenance of previous streetscape improvements.

Marketing, Promotion and Image Building

- While the Whalley District has a logo, the design which incorporates the form of an automobile may no longer be appropriate. This issue should be reviewed when redevelopment plans are farther along and the evolution of Whalley is more of a known quantity. However, Whalley will need to develop a graphic identity that can be used in posters, banners, media alerts and letterhead.
- Continue with the newsletter, a particularly important resource for such a large district. Businesses and property owners will need to be informed on a timely basis during the phases of redevelopment.
- Identify and promote opportunities for positive media and communicate these opportunities through press releases or media alerts. For example, generate releases for grand openings, new improvement program and stories about unique or longstanding businesses on the corridor.

Business Recruitment

- Business recruitment efforts will be twofold; one oriented to potential developers and retailers for redevelopment sites and one for infill store vacancies. As redevelopment site control permits, a potential developer or developers will undertake the business recruitment function, on behalf of the District.
- Infill business recruitment strategies should include a periodic merchandising review to identify gaps in products and services which the market area wants and can support, tenant research as to market and real estate requirements, and maintenance of an available space database in conjunction with building owners.

X. Implementation

The following represents an implementation process for the recommendations in this report.

Secure & Broaden Community & Business Support

- Secure City support and cooperation on recommendations for Whalley Avenue. Immediate issues include: Redevelopment Plan, Overlay Zone, Public Right of Way Funding (CDBG?), and Tax foreclosure on targeted properties.
- Meet with Neighborhood Organizations active in immediate area (Dwight, Beaver Hills, Edgewood)
- Meet with Yale Representatives
- Set up individual Stakeholder meetings with Business and Community Leaders.
- Undertake presentations or announcements at other public venues: Chamber of Commerce, Area Churches, Synagogues, Non-profit organizations active in area
- Identify opportunities for media exposure on plan.

Define Roles & Responsibilities

- Prioritize the redevelopment objectives. It should be possible to organize this into Phases.
- Define the role of the Whalley Special Service District on recommended initiatives and redevelopment program.

Advocate
Facilitator
Partner/ Project Manager

- Define the role of the Whalley Special Service District on recommended initiatives and redevelopment program.
- Consider the option of forming separate non-profit or CDC. This potentially would open up funding opportunities, and minimize any conflicts in the Special Service District by-laws that might arise in undertaking redevelopment program.
- Identify other Partners, or Partnerships for undertaking specific projects and programs. Begin with determining interest among Whalley Avenue property owners.

Secure Funding for Public Right of Way Improvements

The following represent sources of funding primarily for public improvements. However in certain cases, these sources can also be approached for funding in the actual redevelopment of targeted properties specific to acquisition, demolition, and environmental remediation.

- State Department of Economic & Community Development
- State Bonding
- Federal Community & Development Block Grant Fund
- City of New Haven
- Empower New Haven
- State-wide Agencies and Organizations (CEDF)
- Private (Banks, Yale) and Foundation Sources
- For Housing: HUD, Connecticut Housing & Finance Authority, Fannie Mae, various city & state housing programs.

Secure Redevelopment Tools and Land Use Control

- Work with City in preparing a state-approved Urban Renewal Area for the neighborhood that would include Whalley Avenue. Establishing an Urban Renewal Area and redevelopment plan would provide the City's Redevelopment Agency (a quasi-city agency) powers of eminent domain to acquire and assemble property. It is also possible to include design standards as part of any redevelopment requiring Redevelopment Agency involvement.
- Work with City in determining options for a Neighborhood Center Overlay Zone. Issues covered under overlay zone include acceptable uses, setbacks, building coverages, signage, and landscape/public space requirements. It may be necessary to hire a consultant to prepare appropriate language for regulation for review by city.
- Establish Design Standards and Recommendations for Neighborhood Center and overall Special Service District. These recommendations would be incorporated into the Overlay Zone/Redevelopment Plan.
- Undertake Supporting Studies for Redevelopment: Parking and Traffic Analysis; Highest & Best Use Studies, Environmental Studies.

Pursue and Define Development Options

In many cases before actual development can occur, it will be necessary to have commitments from private developers or tenants supporting the reinvestment. Nevertheless, there are a number of actions that can be undertaken to move the process redevelopment process forward. These include:

- Neighborhood Center Sites: Establish partnerships with existing owners of targeted sites; complete foreclosure on blighted Mast Equities property
- Maidman Properties: Strict Tax Foreclosure; Partnerships for housing, RFP
- Walgreen Site: Discussion with owner and tenant
- Jacobson Building: Highest & Best Use, Training School option
- Sherman Avenue Parking Garage: Highest & Best Use for site, Determine parking options

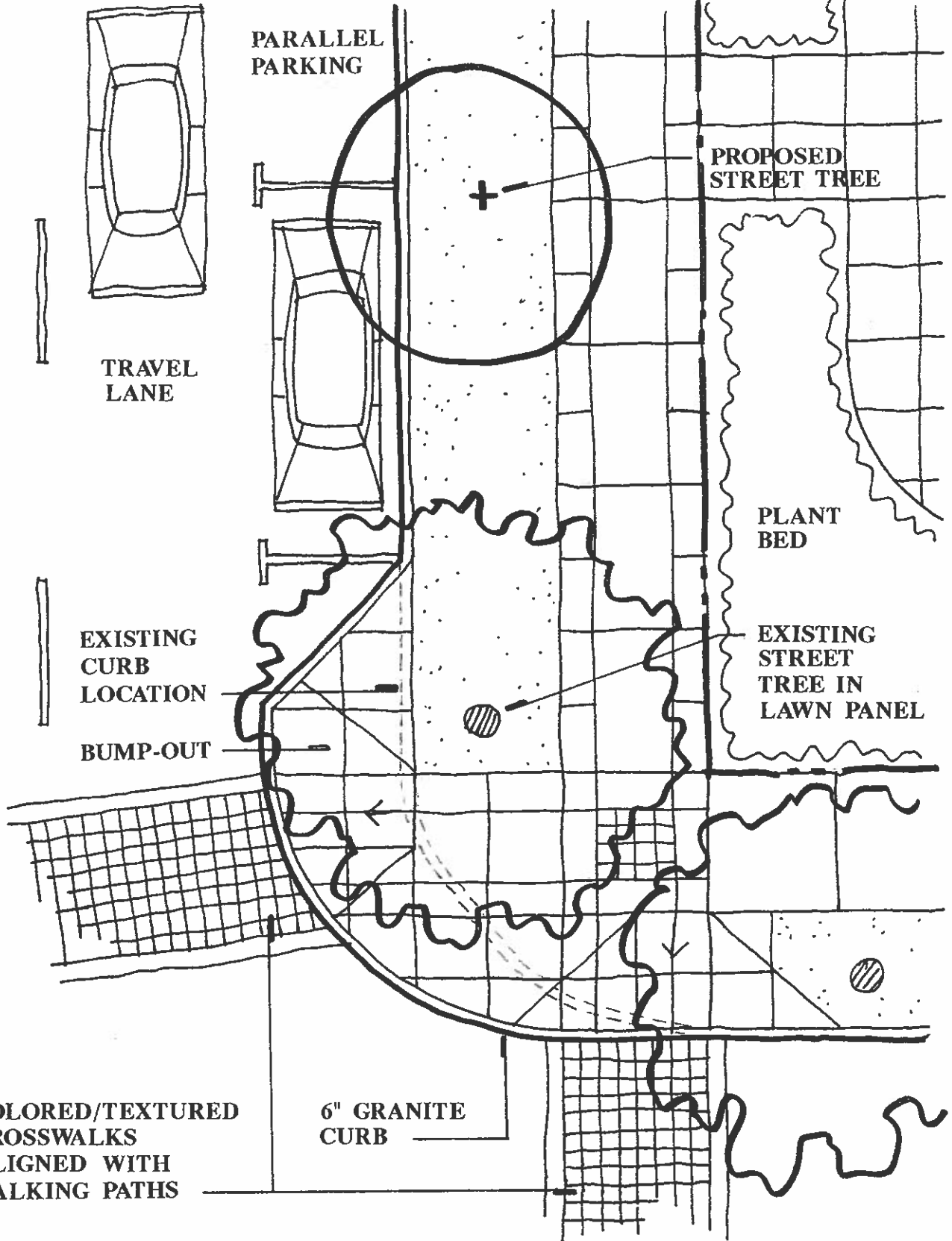
Engaging Developer & Tenant Interest

It will be necessary to market the redevelopment and infill retail opportunities to appropriate target audiences.

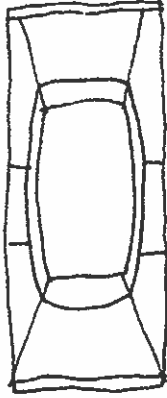
- Undertake local marketing of targeted sites and seek out desired retail mix from area businesses and developers (relocation of businesses from Chapel Square Mall?)
- Solicit interest in redevelopment options from retail chain development and broker community.
- Prepare Requests for Proposals for Targeted Sites.



WHALLEY AVENUE



PARALLEL PARKING



TRAVEL LANE

PROPOSED STREET TREE

PLANT BED

EXISTING CURB LOCATION

EXISTING STREET TREE IN LAWN PANEL

BUMP-OUT

COLORED/TEXTURED CROSSWALKS ALIGNED WITH WALKING PATHS

6" GRANITE CURB

JANUARY 2002

1/8" = 1'-0"

TPA
Design Group

SIDEWALK/BUMP-OUT PLAN
WHALLEY NEIGHBORHOOD CENTER