

Final Report

Downtown Gateway Study Middletown, Connecticut



**PREPARED FOR:
CITY OF MIDDLETOWN**

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IN ASSOCIATION WITH
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SEPTEMBER 2011

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

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APPENDICES

APPENDIX A – Market Feasibility Assessment

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Introduction

Summary of Scope of Work

As part of its Brownfield Assessment Grant Project, the City of Middletown was interested in determining the most appropriate and economically sustainable uses for identified or suspected brownfield properties. In addition, the Redevelopment Agency was particularly concerned with addressing the brownfield properties clustered in close proximity to Downtown Middletown. These properties are located in two areas that, while each different and unique in their land use patterns, character and development history, are important gateways into Downtown Middletown. Throughout this report, these areas will be identified as the North End Gateway and South End Gateway areas.

In completing the Market Feasibility Assessment to identify market-supported uses, Milone and MacBroom defined primary and secondary market areas for analysis. Within these areas, data on general demographics, spending patterns, employment, economics and housing were analyzed to identify important trends. Based upon this data collection effort and the subsequent analysis, Milone and MacBroom prepared a market feasibility assessment that identified the suitability of and market support for several different land use types in the Downtown Gateway areas. These uses included retail, general office, medical office, services, residential and light industrial.

After determining the level of market support for each type of land use, Milone and MacBroom developed preliminary concept plans for each area that identified and recommended opportunities for the redevelopment of individual sites or assemblages of sites, including recommendations on streetscaping and transportation issues. These preliminary concept plans were presented and discussed with City officials, Downtown stakeholders and the general public at a charrette-style workshop. Based upon feedback from this workshop and data analysis from the market feasibility assessment, final detailed concept plans were produced. These detailed concept plans consisted of an illustrative plan produced at a 1 inch: 100 feet scale accompanied by a set of 1 inch: 40 feet scale plans for selected areas identified as potential redevelopment sites.

Milone and MacBroom also incorporated a pedestrian access and streetscape plan into the North End Gateway and South End Gateway redevelopment plans. The pedestrian access and streetscape plan focused on filling in the real and perceived gaps in the pedestrian environment, improving and encouraging walking and bicycling options, and creating a seamless link between the gateway areas and the Downtown core.

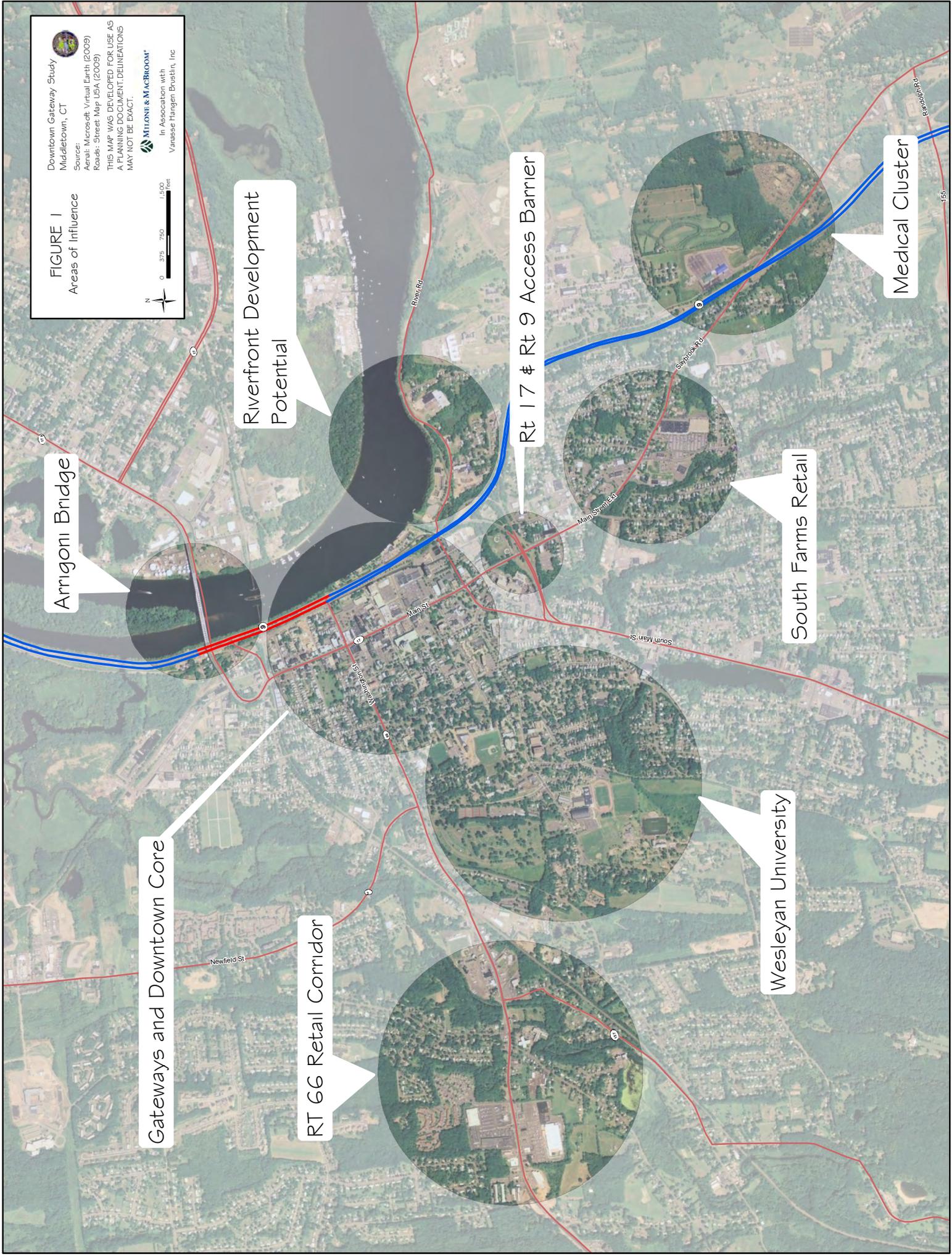
Figure 1, which follows this page, illustrates the existing areas of Middletown at the broad scale that have either a direct or indirect impact on the function, form and future development potential of the two gateway areas. Understanding these areas and their influences on the gateway areas was critical for the process of creating the redevelopment plans.

FIGURE 1
Areas of Influence

Downtown Gateway Study
Middletown, CT

Source: Microsat: Virtual Earth (2009)
Aerial: Street Map USA (2009)
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Arrigoni Bridge

Riverfront Development Potential

Rt 17 & Rt 9 Access Barrier

Medical Cluster

South Farms Retail

Wesleyan University

RT 66 Retail Corridor

Gateways and Downtown Core

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Purpose of this Report within the Context of the Brownfields Assessment Grant Project

This report and its associated tasks represents the planning component of the Brownfield Assessment Grant Study. The work completed was intended to examine the potential re-use of brownfields in the Downtown Gateway areas that have been identified by the City's environmental consultant – VHB. Ultimately, the goal of the brownfields project is to clean up and reinvest in these properties, which in turn will increase the local tax base; facilitate job growth; utilize existing infrastructure; take development pressures off of undeveloped open land; and improve and protect the environment.

The purpose of this planning work was to focus on identified brownfield properties within the North End Gateway and South End Gateway areas and development revitalization concepts for the brownfield properties specifically and for each entire gateway area generally. This effort was not intended to be a complete market study and development plan for all of Downtown Middletown. While the concepts and ideas for the gateway areas presented in this report are intended to dovetail with both past and potential future planning studies within the Downtown core, it is not intended to substitute for them.

Report Content and Organization

This report is divided into two main sections based upon geography, with one section discussing the North End Gateway area and the other discussing the South End Gateway area. The report was organized in this manner so that the reader could follow the development of each Redevelopment Plan individually from start to finish, rather than using an organizational structure based upon topics where the reader would have had to change focus from one gateway area to the other.

Both of the main sections are subdivided and organized in a similar manner, with individual subsections dedicated to market support and potential; the identification of individual brownfields; pedestrian infrastructure and streetscape conditions; preliminary concept plans; summary of applicable workshop feedback; and final concept plans. These subsections, in total, represent the Redevelopment Plan for each of the gateway areas. A final concluding section provides a synopsis of actions and future conditions needed to implement the Redevelopment Plans.

The report is supplemented with seventeen (17) maps, graphics and renderings to help illustrate key concepts and ideas, to identify the boundaries and salient features of the gateway areas, and to clearly illustrate the concept vision for each gateway area.

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Market Feasibility Assessment

The purpose of the market study and analysis was to assess the potential for development within the North End Gateway and South End Gateway areas of Downtown Middletown. The City's overall goal is to plan for and promote intelligent economic investment in brownfield properties as well as in the North End Gateway and South End Gateway areas in general.

The Market Assessment examines regional and area demographic trends, consumer spending patterns, land and building supply, and the Downtown Housing Market Analysis to develop a market assessment for the regional and downtown market area. The assessment specifically looks at each gateway and its potential uses based upon the results of the analysis.

Regional Market and Downtown Market Areas

Two market areas were identified in the market analysis. A Regional Market Area (RMA) was established as the market area within which the vast majority of competition for general office space, industrial space and some residential uses would occur, as well as to provide a broad demographic and economic picture of the larger region from which patrons might be drawn and its impacts on the North End and South End Gateway areas. The RMA encompasses the greater Middletown region and the southern end of the Route 9 corridor, including the City of Middletown, the City of Meriden and the towns of Cromwell, Rocky Hill, Portland, Haddam, Durham, Middlefield, Chester, Deep River, Essex and Old Saybrook. In addition, a smaller Downtown Market Area (DMA) was established as the geographic area from which much of the competition and demand for small retail uses, personal services, medical office space and some residential uses would occur. The DMA encompasses the four central Census Tracts in Middletown: Tracts 5411, 5415, 5416 and 5417. These Census Tracts include both the North End Gateway and South End Gateway areas, as well as the central core of Downtown Middletown and the area around Wesleyan University. The boundaries of these market areas are shown on Figure 2.

Demographic and Economic Trends:

Economic and demographic estimates for 2010 and 2015 for the identified Regional Market Area (RMA) and Downtown Market Area (DMA) were gathered from Claritas, Inc., a leading national demographic and research data provider.

The RMA has had, and is projected to continue to have, modest growth in both population and number of households. Between 2000 and 2010, the population in the RMA grew by 9,290 people or approximately 5.0%. Perhaps more importantly, the number of households in the RMA increased by 6.6% between 2000 and 2010. Based upon the projections for population and households in 2015, the RMA will likely continue in a modest growth mode for the next few years. In the DMA, the population grew by only 1.3% between 2000 and 2010. However, the number of households in the DMA increased by 3.5% over the same time period, clearly indicating a shift

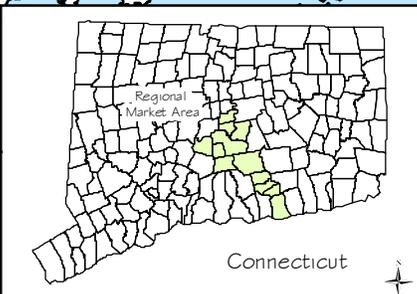
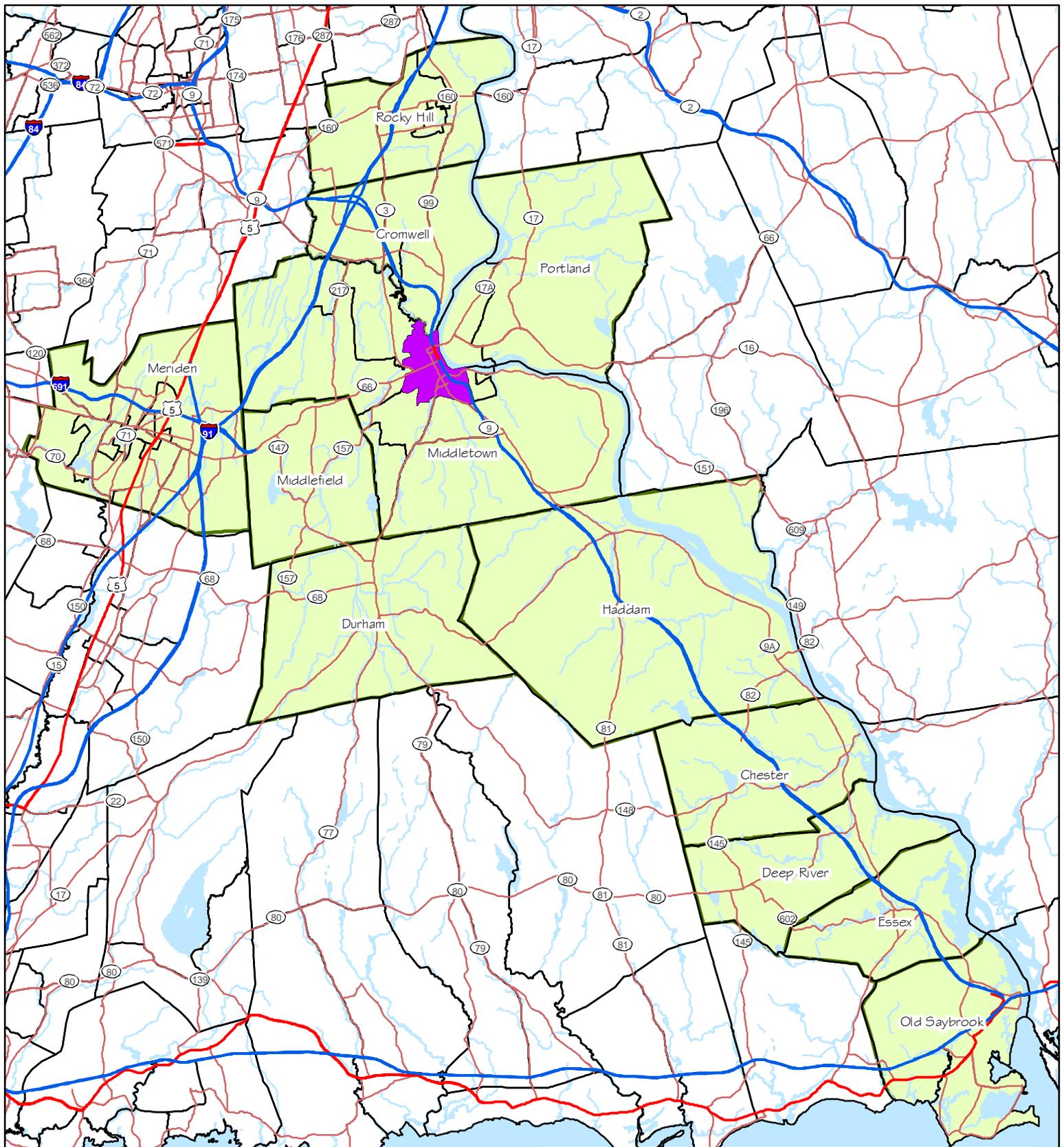


FIGURE 2
Downtown Gateway Study
Middletown, CT
Designated Market Areas

Source: Basemap: CT DEP
 Geographic Information Center
 Census Tracts: US Census 2000
 Roads: Street Map USA (2009)

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Regional Market Area (RMA)
 Downtown Market Area (DMA)

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toward smaller households. Based upon the projections for population and households in 2015, the DMA is expected to experience a small decline in both population and the number of households. The assessment also looked at other economic benchmarks in order to understand the potential market for development and redevelopment of the North and South Gateway areas in order to understand the existing local economic base. Middletown's economy relies primarily on the educational services, health care and social assistance, and manufacturing sectors for employment and earnings. Wesleyan University and Middlesex Hospital are major employers in the community and generate significant spin-off economic activity. The manufacturing sector, while declining, is still an important component of Middletown's overall economy.

According to the American Community Survey five-year (2005-09) data (ACS 05-09), approximately 30% of Middletown's civilian labor force is employed in the educational services, health care and social assistance fields. Thirteen percent is employed in manufacturing, while 10% work in retail and an additional 10% are employed in the finance, insurance and real estate industry. According to the *2007 Economic Census*, the healthcare and social assistance industry accounted for 7,535 jobs in Middletown; whereas the manufacturing sector had 3,390 jobs, down from 4,670 in 2002. The Census reported manufacturing sector receipts of approximately \$1.67 billion in 2007. While the 2007 Economic Census doesn't report total employment figures for educational services, it is reasonable to assume that Middletown serves as a regional job center in the educational services and healthcare fields. Finally, the retail and arts and entertainment sectors combine to account for approximately 18% of Middletown resident jobs, according to the ACS 05-09.

According to the ACS 05-09, the median household income in Middletown is \$59,677, which is lower than the corresponding figure for the RMA but substantially higher than that of the DMA. However, approximately 30% of households had incomes of less than \$35,000. Approximately 12% of all Middletown residents had incomes below the poverty level. These figures indicate a level of economic need that must be considered when evaluating market opportunities and potential.

Consumer Spending

Data on the amount of consumer spending by residents of the RMA and the DMA, and for what product and service categories such spending was allocated to, was obtained from Claritas, Inc. This 2010 data indicates that RMA residents had total specified annual consumer expenditures of approximately \$4.24 billion, while DMA residents had total specified annual consumer expenditures of approximately \$142.1 million. However, many of these expenses are outside the realm of retail sales, such as expenditures for transportation, housing, education, child care, restaurants, personal services, charitable contributions, travel expenses and medical services. Total existing consumer expenditures of a generally retail nature for RMA residents were approximately \$1.85 billion in 2010, and are projected to increase to roughly \$2.1 billion in 2015. This represents an increase of roughly \$243.6 million or 13.1%.

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The Claritas data indicated that of the \$243.6 million increase in selected consumer spending in the RMA by 2015, approximately \$178.3 million or 73.2% of the new spending will be in the categories of food at home (groceries); prescription drugs; apparel; TV/radio/sound equipment; computers/software/accessories; and sports and recreation.

The report found that the total existing consumer expenditures of a generally retail nature for DMA residents were approximately \$65.4 million in 2010, and are projected to increase to roughly \$71.6 million in 2015. This represents an increase of roughly \$6.2 million or 9.6%. Similarly, the data in Table 8 shows that of the \$6.2 million increase in selected consumer spending in the DMA by 2015, approximately \$4.7 million or 74.5% of the new spending will be in the categories of food at home (groceries); prescription drugs; apparel; TV, radio, sound equipment; computers, software, accessories; and sports and recreation.

Downtown Housing Market Study:

A Downtown Housing Market Study for Middletown was completed in September 2010 by RKG Associates, Inc. The purpose of this study was to analyze the downtown housing market and determine the potential demand for various housing types. The study was also intended to serve as the statistical and analytical underpinning for an analysis of the feasibility of creating an Incentive Housing Zone (IHZ) in the Downtown area. More specifically, the City was interested in the following questions:

- What type of housing units would be “in demand”?
- How many units could be supported and over what time period?
- At what price levels could newly developed units be sold or rented?
- Are current incentives or infrastructure improvements in Middletown adequate to encourage investment?
- What role would parking play in the development of future housing?

The primary conclusion of the study is that due to a decline in employment, the Downtown housing market will not see any major increases over the next few years. Five-year household forecasts for Middletown indicate a projected decline of -750 households for the City and -190 households in the Downtown. The Downtown has a small concentration of condominiums, and there is a forecasted demand for approximately 20 condominiums in the downtown annually, with much if not most of this demand captured by ownership turnover in existing condominium units.

The projected growth sector for the homeownership market was projected to be households at the upper income level of \$100,000, while a decline was projected for the rental housing market. Also, the age groups of those purchasing condominium units were projected to be households between 25-34 years of age and 45-74 years of age. The study recommended creating a strategy for the conversion of multi-unit rental buildings into condominiums or upper floor residential conversions

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in commercial/mixed use buildings. The study also assumed that a potential price range of \$110,000 to \$150,000 would be more attainable in the Downtown based upon an evaluation of various case studies. The study also suggested that upscale housing is not likely to be supportable in the Downtown housing market.

As part of the case study analysis of other communities similar to Middletown, the study found that public partner relationships are possible and tend to mitigate developer-borne risk levels. In addition, a commitment by the City to make improvements such as infrastructure upgrades would also engender greater confidence in developers to move potential projects forward. The study also recommended that any residential development would need to be safe and provide off-street parking in the more densely developed parts of Downtown Middletown.

Business Inventory

To assess the current status of the Downtown Middletown market, a business inventory and field reconnaissance were conducted on January 4, 2010. The business inventory included all businesses with frontage along Main Street from St. John's Church at the intersection of Main Street and North Main Street to the intersection of Main Street Extension and Ridge Road. Within this 1.2 mile-long section of Middletown, 206 individual business establishments were identified. Each business was subsequently assigned an appropriate land use category based upon the North American Industry Classification System (NAICS) code. In addition, the total number of businesses by land use code was calculated for the subareas of Downtown Middletown, the North End Gateway area and the South End Gateway area. Appendix B contains a detailed summary of this inventory.

Through the completion of the business inventory and the subsequent analysis, several land use clusters were identified. These included the following:

North End

- Food and Beverage Stores
- Food Services and Drinking Places
- Ambulatory Health Care Services
- Performing Arts
- Religious, Grantmaking, Civic, Professional, and Similar Organizations

South End

- Motor Vehicle and Parts Dealers

Downtown

- Food and Beverage Stores
- Food Services and Drinking Places

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- Clothing and Clothing Accessories Stores
- Banks
- Professional, Scientific and Technical Services
- Personal Services

Gateway Characteristics

When one looks at the North End Gateway and the South End Gateway, there are clearly differences in terms of existing uses and the relationship to Main Street. The North End Gateway is an extension of the Downtown in terms of uses and urban fabric. To the contrary, the South End Gateway area is physically separated from the Downtown by Route 17 and has a much different urban fabric. The North End Gateway area contains a variety of destination uses including O'Rourke's Diner, Eli Cannons, Green Street Art Center, The Buttonwood Tree and the Community Health Center. It is interesting to note that on a percentage basis, there are similarities between the North End and the Downtown within certain use categories. For example, the percentage of establishments in the food and drink category is 18.8% in the Downtown and 13.5% in the North End. The percentage of retail trade establishments is 34.4% in the Downtown and 30.6% in the North End.

By contrast, the South End contains no eating and drinking establishments. While retail trade establishments comprise 50% of the total establishments, for the most part, these fall into the heavy commercial uses such as the plumbing supply and motor vehicle parts categories. These are not uses found in the Downtown. The primary uses are within the healthcare and social assistance categories. These are the destination uses in the South End.

Considering the existing uses, urban fabric and physical relationship to the Downtown of each of the gateway areas, a development focus emerges. The North End contains an evolving arts and culture base with a health care and social assistance sector represented by the Community Health Center. The new Community Health Center facility will make a strong physical statement on Main Street. These sectors have the potential to strengthen the surrounding neighborhood by increasing the demand for housing. The arts and culture sector known collectively as the "creative industries" will support the demand for work/live housing as well as the potential for additional galleries and performing arts venues. A concept similar to ArtSpace, which sponsors live/work developments, might be appropriate for the area. The former Trolley Barn building might be a good location for such a use.

The South End Gateway area's future will be grounded in the healthcare sector. There may be direct impacts in the area from the expansion of Middlesex Hospital facilities. A second market opportunity is the expansion of the housing supply marketed to Middlesex Hospital employees. This housing can be provided through new development as well as renovation and marketing of existing housing in the surrounding neighborhood. At the same time, connectivity with the

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Downtown should be strengthened through better pedestrian connections.

Major Findings and Conclusions

Below are the major findings and conclusions of the Market Assessment. Further information and explanations can be found in the Market Feasibility Assessment Report included as Appendix A.

- Many market segments currently have limited potential for near-term growth
- Particular niche uses such as arts, medical office space, selected retail and small-scale residential in a mixed use development format provide potential opportunities
- Retail market in general is relatively weak, but select retail opportunities do exist
- +/- 40,000 s.f. of retail space demand; could be absorbed substantially by existing vacant space
- Smaller retail spaces, preferably in a mixed use format, likely to have greatest chance for success
- Potential demand for 1,000 to 12,000 s.f. of new office space over next 5 years
- Potential for solid demand for medical office space in gateway areas, equivalent to 116,400 to 135,800 s.f. of medical office space
- Residential tied to Middlesex Hospital; arts w/residential in the North End
- Downtown market is heavily dependent upon regional economy
- Importance of civic, educational and medical uses in bringing people into Downtown

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North End Gateway

1. Current Conditions

The North End Gateway area is located along the northern end of Main Street where Route 17 and Route 66 interchange with the Arrigoni Bridge and Route 9. This interchange is a major gateway into the community and is a primary access point for visitors coming from points north of Middletown. This gateway area includes the Rapallo Avenue-Green Street-Ferry Street neighborhood along the east side of Main Street and the Spring Street-Grand Street-Liberty Street neighborhood on the west side of Main Street.

The North End has been home to many small neighborhoods and ethnicities for well over a century. The North End has also struggled with crime and poverty for years. However, within the last decade the North End has been evolving with some new development, and the redevelopment and improvement of the area has become a priority for the City of Middletown. The North End is home to a number of notable uses and buildings, including St. John's Church, Eli Cannon's Pub, the former Trolley Barn building, and the newly-constructed Liberty Square building. Currently, construction has begun on a new Community Health Center on Main Street. The residents within the North End are very active in the community and have created a grass roots organization called the North End Action Team (NEAT). The North End's component neighborhoods have experienced successful rehabilitation efforts with the construction of the Wharfside Commons 96 unit apartment complex that includes affordable housing, and the on-going rehabilitation efforts for 15 single family homes by the Nehemiah Housing Corporation. Figure 3 identifies the North End Gateway study area and the potential brownfields identified by VHB and the Redevelopment Agency in the Community-Wide Brownfield Assessment Study.

An examination of average daily traffic (ADT) counts in the North End Gateway area reveals that there is significantly more traffic at peak hours in the North End than there is in the South End. In the North End, the traffic volumes suggest that the area services a more regional market. The traffic volumes support the conclusion that the North End Gateway area is a primary access point into Downtown Middletown and that it is also a major connection to the eastern side of the Connecticut River by way of the Arrigoni Bridge. During the 7:00 am peak time there were roughly 6,000 cars traveling through the area and the majority of them either originated from east side of the Arrigoni Bridge or were heading toward Route 9. During the 4:00 pm peak time, roughly 6,500 cars were either traveling toward Portland over the bridge or into Downtown Middletown. Due to the consistently high traffic volumes in the morning and evening peak hours, the North End Gateway area has greater potential for development at a regional level. Table 1 provides 2010 traffic counts for various counting stations in the North End Gateway area.



FIGURE 3
North End Gateway Area
Brownfield Sites

★ Identified Brownfield Sites
 Study Area Boundary

0 50 100 200 Feet
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Downtown Gateway Study
 Middletown, CT
 Source: City of Middletown (2009)
 Aerial: Microsoft Virtual Earth (2009)
 Roads: Street Map USA (2009)
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TABLE 1						
2010 Traffic Counts: North End Gateway						
Middletown, CT						
Location	Direction	Station	ADT	Peak Hour	Peak Count	24 Hour
Portland Town Line (Arrigoni Bridge) RT 66	East	49	16,700	5:00 PM	2,048	17,731
Portland Town Line (Arrigoni Bridge) RT 66	West	49	18,000	7:00 AM	2,172	19,150
South of Kings Avenue RT 66	North	52	11,400	4:00 PM	1,184	12,126
South of Kings Avenue RT 66	South	52	8,800	8:00 AM	842	9,381
East of Saint Johns Street RT 17	East	68	14,200	7:00 AM	1,374	15,085
East of Saint Johns Street RT 17	West	68	10,000	4:00 PM	1,044	10,671
Rapallo Ave - East of RT 66	Both	242	4,400	2:00 PM	456	4,635

Source: State of Connecticut Traffic Count Locator Program TMSADT.

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2. Market-Based Development Potential

From the Market Feasibility Assessment a number of potential uses for redeveloped properties in the North End Gateway were explored to determine quantitative market support, proximity to similar uses or clusters of similar uses, and locational appropriateness for each potential land use. Based upon the quantitative and qualitative data collected and analyzed, each potential land use was assigned a rating from “Excellent” to “Poor” to summarize the findings regarding each element of the identified land uses. Table 2 presents the market assessment for potential land uses in the North End Gateway area.

TABLE 2				
North End Gateway Area - Market-Based Development Potential				
USE	Market Support	Use Cluster Support	Locational Appropriateness	OVERALL ASSESSMENT
<i>Retail</i>				
Motor Vehicle and Parts Dealers	Excellent	Poor	Poor	Fair
Furniture and Home Furnishings Stores	Poor	Good	Good	Fair
Electronics and Appliance Stores	Fair	Poor	Good	Fair
Building Material and Garden Equipment and Supplies Dealers	Poor	Fair	Fair	Fair
Food and Beverage Stores	Good	Excellent	Good	Good
Health and Personal Care Stores	Good	Good	Good	Good
Gasoline Stores	Excellent	Good	Poor	Fair
Clothing and Clothing Accessories Stores	Poor	Fair	Good	Fair
Sporting Goods, Hobby, Book, and Music Stores	Fair	Poor	Good	Fair
General Merchandise Stores	Excellent	Poor	Good	Good
Hardware Stores	Fair	Poor	Good	Fair
Jewelry Stores	Fair	Fair	Good	Fair
Department Stores	Good	Poor	Fair	Fair
Gifts/Novelty/Souvenir Stores	Fair	Fair	Good	Fair
Luggage/Leather Goods	Poor	Poor	Good	Fair
Office Supplies	Fair	Fair	Good	Fair
Convenience Stores	Fair	Excellent	Fair	Fair
<i>Personal Services</i>				
	Fair	Fair	Good	Fair
<i>Arts/Culture/Recreation</i>				
	Good	Excellent	Excellent	Excellent
<i>Health Care & Medical Office Space</i>				
	Fair	Excellent	Good	Good
<i>General Office Space</i>				
	Poor	Fair	Fair	Fair
<i>Industrial/Warehouse Space</i>				
	Poor	Fair	Poor	Poor
<i>Residential</i>				
Condominiums	Fair	Fair	Good	Fair
Apartments	Fair	Good	Good	Good

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As Table 2 identifies, the land uses best suited for the North End market fall within the following categories:

- Food and Beverage Stores
- Health and Personal Care Stores
- General Merchandise Stores
- Arts/Culture/Recreation Uses
- Health Care & Medical Office Space
- Residential apartments

Overall, the Market Assessment suggests that with the combined market trends in the RMA and DMA areas, as described in detail in the Market Assessment, the North End Gateway area would thrive with a “niche food store” and a mix of uses including residential apartments and arts-oriented uses.

More specifically, a particular food-oriented retail use that could fit into the North End market is an ethnic food market. Middletown has a number of general regional or national grocery stores such as Stop & Shop, Aldi’s and Price Chopper along its major roads, and several small mini-marts and natural food stores along Main Street. However, the surrounding region is generally lacking a significant market for purchasing ethnic foods and groceries. This type of food retail is heavily concentrated further north in the Hartford area, particularly in the Town of West Hartford. Numerous ethnic food stores also can be found further south in and around the City of New Haven. There is little regional competition for this use in the RMA; however, according to data from Claritas, there are over 35,400 people within the RMA who are of Hispanic, Asian, Indian, Middle Eastern or Sub-Saharan African descent. In addition, a comparison of recently released 2010 Census data with 2000 Census data indicates that since the last census the Hispanic population in the RMA has increased by 8,360 people or +50.8%, and the Asian population has increased by 3,494 people or +107.9%. Population increases of this size are clearly indicative of growing market support for an ethnic food market use. A potentially underserved market for ethnic food may exist in the RMA, and a store of this type would be an excellent fit in the North End gateway area, given the close proximity to existing restaurants and food stores, as well as Downtown Middletown’s state-wide reputation for food and restaurants.

The Market Assessment also suggests that combining any new residential development with niche uses or clusters of similar uses will be especially critical for market success in the North End. The area already has a significant number of residential units, both old and new, as well as a significant number of units in foreclosure. Stand-alone residential developments are unlikely to garner enough market support due to the relatively high residential vacancy rate in the adjacent Downtown core and the issues of foreclosure and blight on some of the nearby streets.

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One possible residential/mixed use form of development that could be supportable by the market is a development that combines a small number of studio or loft apartments with artist work space and gallery display space. Similar type developments have been completed in the cities of Hartford, Norwich and Willimantic by the organization ArtSpace Connecticut, LLC. The similarly named and national-level organization Artspace has completed a similar project at the former's Read's Department Store in Bridgeport. Perhaps 12 to 15 apartment units, ranging from studio units to two-bedroom units, could be supportable when combined with work and display space for artists. Such a development would provide a unique residential product that ties into the growing arts and culture cluster in the North End.

Lastly, the Market Feasibility Assessment identified the North End Gateway as a regional transportation center due to the close proximity and interchange of Route 66 and the Arrigoni Bridge, Route 17, and the State Route 9 Highway. Because of this factor, the North End has the potential to directly capture those consumers in the regional market area.

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3. North End Gateway Brownfield Properties

Table 3 lists the properties have been identified by VHB, Inc. and the Middletown Redevelopment Agency as the known or perceived brownfields that are within the North End Gateway. The locations of these properties are shown on Figure 3.

TABLE 3	
Brownfield Properties	
North End Gateway Area	
Address	
	0 Kings Avenue
	3 Kings Avenue
	12 Liberty Street
	515 Main Street
	639 Main Street
	645 Main Street
	711 Main Street
	725 Main Street

Source: VHB, Inc.; Middletown Redevelopment Agency.

The following summary descriptions provide basic information about each site.



ADDRESS: 0 Kings Avenue
 MBL: 22 17-28 13
 USE: Mid-State Auto-Body
 BUILDING
 SQFT: 4,192 sq. ft.
 YEAR
 BUILT: 1940
 ACRES: 0.08 acres
 ZONE: Central Business Zone (B-1)
 CURRENT
 OWNER: Theodore & Diana Tine
 MMI Land
 Use: Surface Parking, Accessory

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

SITE CHARACTERISTICS:

This property is currently being used as an auto body shop behind Bob's auto repair shop. This property is very small, and the combination of the structure and parked vehicles make the site appear cramped. There are no wetlands on the property and it does not fall within a flood plain. The land is relatively flat with Wethersfield – urban land complex soils. It is within the Historic Main Street District and is considered an historic building.

HISTORY:

- Sanborn Map
 - 1924 – Auto Body Works



ADDRESS: 3 Kings Avenue
MBL: 22 17-28 12
USE: Residential/Vacant
BUILDING
SQFT: 1,848 sq. ft
YEAR
BUILT: 1839
ACRES: 0.09 acres
ZONE: Central Business Zone (B-1)
CURRENT
OWNER: Theodore & Diana Tine
MMI Land
Use: Surface Parking, Accessory

SITE CHARACTERISTICS:

This is a multi-family residential property. It was built in 1839 and is one of the older extant residential structures in Middletown. Due to its age, it is considered an historic property and does fall within the Main Street Historic District. The structure is in a state of minor disrepair and appears to be vacant. The property does not have wetlands and does not fall within a flood plain. The property is relatively flat with Wethersfield-urban land complex soils. The property is located between two auto repair businesses and the Trolley Barn property.

HISTORY: None on Record

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**



ADDRESS: 12 Liberty Street
MBL: 22 17-35 47
USE: Motorcycle Shop
BUILDING
SQFT: 5,178 sq. ft.
YEAR
BUILT: 1789
ACRES: 0.12 acres
ZONE: Central Business Zone (B-1)
CURRENT
OWNER: Franklyn & Margaret
Rusconi
MMI Land
Use: Surface Parking

SITE CHARACTERISTICS:

This property is one of the oldest existing properties in Middletown, is considered historic and is located within the Main Street Historic District. The property contains two buildings. The front building is residential in character, while the rear building is currently used as a motorcycle shop. The property does not have any wetlands and it does not fall within a flood plain. The property is relatively flat on Urban land soils.

HISTORY:

- Sanborn Map
1924 – Auto Repairing

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**



ADDRESS: 515 Main Street
MBL: 22 17-46 5
USE: Salvation Army
BUILDING
SQFT: 11,200 sq. ft.
YEAR
BUILT: 1950
ACRES: 0.67 acres
ZONE: Central Business Zone (B-1)
CURRENT
OWNER: Salvation Army, Inc
MMI Land
Use: Salvation Army

SITE CHARACTERISTICS:

This property contains a single-story building with frontage on Main Street owned by the Salvation Army. It has no wetlands and does not fall within a flood plain. The property is relatively flat on Urban land soils. The property does fall within the Main Street Historic District but is not considered an historic building.

HISTORY: None on Record

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**



ADDRESS: 639 Main Street
MBL: 22 17-35 4-5
USE: Deliverance Church
BUILDING
SQFT: 6,863 sq. ft.
YEAR
BUILT: 1940
ACRES: 0.18 acres
ZONE: Central Business Zone (B-1)
CURRENT
OWNER: Deliverance Haven Inc.
MMI Land
Use: Mixed Use

SITE CHARACTERISTICS:

This property contains a single-story building with frontage on Main Street that is currently being used as a church. It is a plain white building with little architectural character and appears vacant from the street. The property does not have wetlands and does not fall within a flood plain. The property is relatively flat with Urban land soils. The property also falls within the Main Street Historic District but is not considered an historic building.

HISTORY:

- Sanborn Map
 - 1913 – Paints
 - 1924 – Auto Sales & Service

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**



ADDRESS: 645 Main Street
MBL: 22 17-35 6+7
USE: Steve's Repairs Unlimited, LLC
BUILDING SQFT: 1,880 sq. ft.
YEAR BUILT: 1930
ACRES: 0.14 acres
ZONE: Central Business Zone (B-1)
CURRENT OWNER: Coladonato Realty LLC
MMI Land Use: Mixed Use

SITE CHARACTERISTICS:

This property contains an auto sales repair shop and gas station, and is situated at the southwest corner of the Grand Street and Main Street intersection. The property appears underutilized and out of character with the surrounding built form. The property does not have any wetlands and it does not fall within a flood plain, and is relatively flat on Urban land soils. It is part of the Main Street Historic District but the building is not considered an historic structure.

HISTORY:

- Sanborn Map
 - 1924 – Filling Station
- Prior Ownership
 - John Jarzabek

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**



ADDRESS: 711 Main Street
MBL: 22 17-28 4
USE: Bob's Amoco Gas Station
BUILDING
SQFT: 2,116 sq. ft.
YEAR
BUILT: 1940
ACRES: 0.14 acres
ZONE: Central Business Zone (B-1)
CURRENT
OWNER: George Kalber
MMI Land
Use: Surface Parking, Accessory

SITE CHARACTERISTICS:

This property currently contains an active auto repair shop on Main Street. The structure is not considered an historic building, and the property does not fall within the Main Street Historic District. It does not have any wetlands and does not fall within a flood plain. The property is relatively flat on Urban land soils. This property is very small, and the combination of the structure and parked vehicles make the site appear cramped.

HISTORY:

- Sanborn Map
 - 1924 – Filling Station

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**



ADDRESS: 725 Main Street
MBL: 22 17-28 6
USE: Royal Display Corporation
BUILDING
SQFT: 46,325 sq. ft.
YEAR
BUILT: 1920
ACRES: 1.57 acres
ZONE: Central Business Zone (B-1)
CURRENT
OWNER: Keith & Marilyn Emery
MMI Land
Use: Mixed Use

SITE CHARACTERISTICS:

This property contains the structure known as the former Trolley Barn. It is located on Main Street and is currently home to the Royal Display Corporation. The Trolley Barn structure is an historic building and falls within the Main Street Historic District. The property does not have any wetlands and does not fall within a flood plain. The property is also relatively flat on Urban land soils. The former Trolley Barn structure is underutilized and has been subject to vandalism and graffiti. The property does have a parking lot located to the rear that provides some off-street parking, and it borders a rail line spur.

HISTORY:

- Sanborn Map
 - 1913 – Connecticut Company. Car Barn & Repair Shop
 - 1924 – Connecticut Company. Car Barn & Repair Shop
- Prior Ownership
 - Zenak Realty LLC

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

4. Pedestrian Infrastructure and Streetscape Conditions

A survey of the pedestrian and streetscape environment in the North End Gateway was conducted to assess existing pedestrian, bike and transit network conditions and opportunities to implement the “Complete Streets” concept. Complete Streets is a policy program that encourages communities to incorporate standards for design and improvements of roadways that take into account all users, not just the automobile. A “Complete Street” is one that provides access and circulation for cars, pedestrians and bicyclists. Policies range from design guidelines to signage programs.

Overall, the North End Gateway has a well-established sidewalk network. There are some safety concerns for pedestrians due to the high volume of traffic, gaps in the timing of certain traffic signals, and a couple of missing handicapped ramps. However, the North End Gateway has a robust network infrastructure already in place, whereas the South End Gateway does not. Because Main Street is a State owned road, opportunities for the City to make physical improvements to enhance the bike and pedestrian environment are somewhat limited. The existing pedestrian infrastructure is shown on Figure 4.



Decorative, stamped brick sidewalk treatment

The following discussion highlights the conditions of the pedestrian and streetscape infrastructure in the North End Gateway:

- From Liberty Street north to Spring Street, there are sidewalks on both sides of Main Street. On the easterly side, stamped brick, decorative streetscape improvements run all the way to St. John’s Square. On the westerly side, decorative streetscape improvements end just north of Eli Cannon’s. There is angled, metered parking throughout this section of Main Street.
- Handicapped-accessible ramps are on every corner except one, and all intersecting side streets have striped



Wide crossing, crossing signal blocked by signage

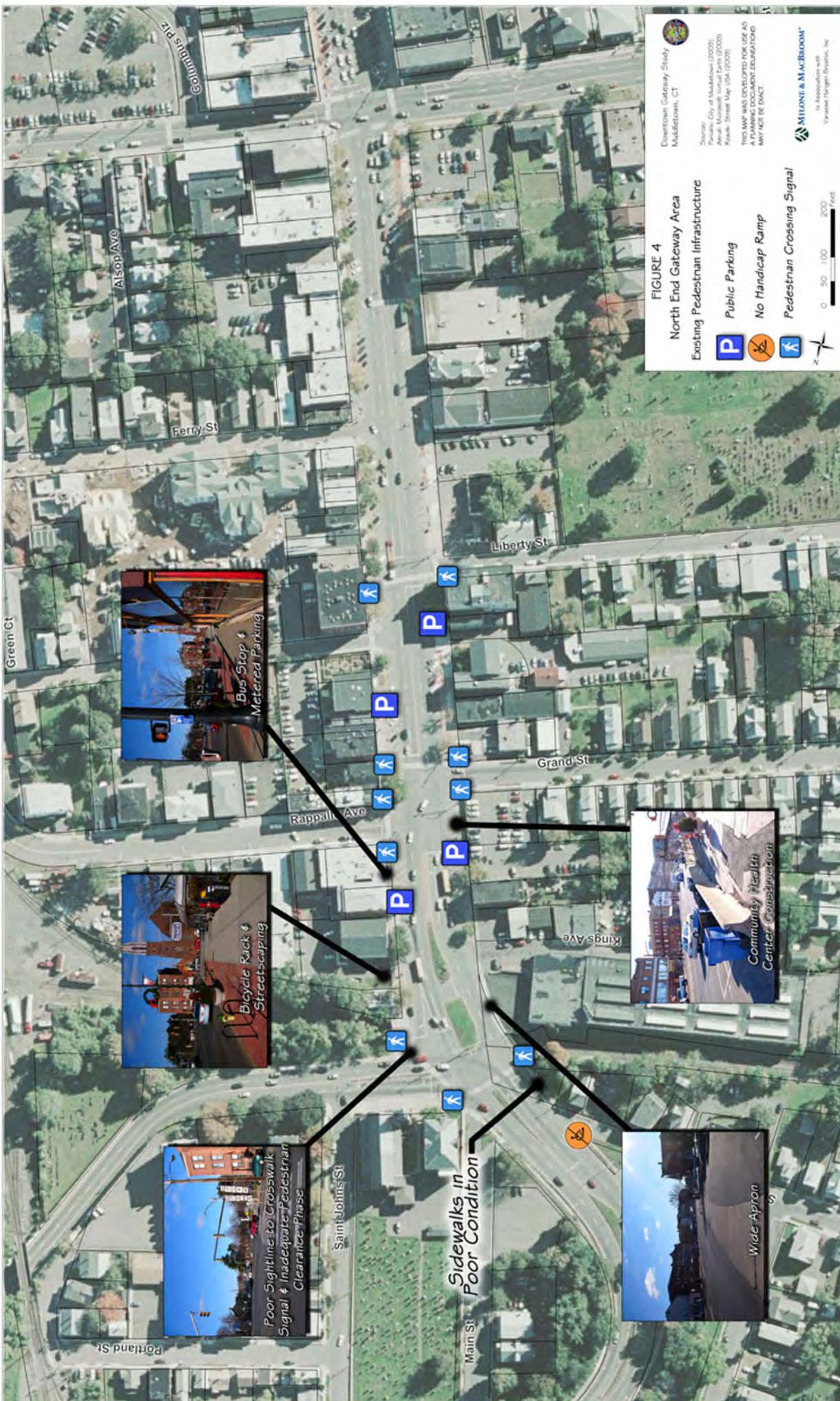


FIGURE 4
North End Gateway Area
Existing Pedestrian Infrastructure

P Public Parking
No Handicap Ramp
Pedestrian Crossing Signal

0 50 100 200 Feet

Downtown Gateway Study
 Middletown, CT

Source:
 People: City of Middletown (2020)
 Aerial: Microsoft Virtual Earth (2020)
 Kansas Street Map (2020)

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Bus Stop & Metered Parking



Bicycle Rack & Streetscaping



Poor Sightline to Crosswalk Signal & Inadequate Pedestrian Clearance Phase



Community Health Center Construction



Wide Apron

Sidewalks in Poor Condition

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
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crosswalks. Crosswalk signals exist at Liberty Street, Grand Street and St. John’s Street. The crossing signals at St. John’s Street are difficult to see from the sidewalk. In addition, the crossing is extremely wide and intimidating to the pedestrian, especially with what feels like a short crossing signal.

- The only marked and signalized crossings of Main Street are at Liberty Street, Grand Street and the north side of St. John’s Square. The crossing of Main Street north of St. John’s Square is extremely wide and intimidating to the pedestrian with no refuges. In addition, the crossing signal timing seems inadequate for certain users at this northern crossing.



Wide driveway apron in front of Trolley Barn

- There is a large apron on the westerly side of Main Street at the vacant Trolley Barn building across from O’Rourke’s Diner. The sidewalk is in poor condition for a 10 to 20 foot portion just south of the Spring Street intersection, and there is no handicapped-accessible ramp at the south side of the Spring Street crosswalk.

Crosswalk distances and crossing signal timing were reviewed through additional field work. The distance of each street crossing was measured while the pedestrian clearance phase, or the period when a crossing signal allows pedestrians to cross, was timed. Table 4 shows the results of this survey.

TABLE 4 Pedestrian Clearance Phase Measurements North End Gateway				
Crossing Location	Length (Ft)	Walk Time (Seconds)	Flashing Don’t Walk Time (Seconds)	Walk Speed (Ft/Sec)
Hartford Avenue @ Main Street	102	27	10	2.76
Main Street @ Bridge	87.1	28	10	2.29
Rapallo Avenue @ Main Street	38.4	12	8	1.92
Main Street @ Grand Street	76.9	25	10	2.2
Grand Street @ Main Street	30	15	7	1.36
Main Street @ Liberty Street	82.6	28	10	2.17
Liberty Street @ Main Street	21.6	83	6	0.24

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DOWNTOWN GATEWAY STUDY
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The Federal Highway Administration's *Manual on Uniform Traffic Control Devices (MUTCD)* recommends using a walking speed of 3.5 feet per second when calculating pedestrian clearances, except in the case of very wide streets (90+ feet wide), where 3.0 feet per second is recommended to ensure slower pedestrians, who are delayed in starting to cross have adequate time to complete the crossing. All of the signalized crossings in the North End Gateway meet the MUTCD recommendations.

Lastly, the Middletown Police Department Traffic Division provided data on traffic accidents involving bicyclists and pedestrians for review. There have been five (5) accidents involving bicyclists in the North End Gateway since June 2009, and six (6) accidents involving pedestrians since August 2009.

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

5. Preliminary Concept Plan

A preliminary concept plan for the North End Gateway area was designed based upon the Market Feasibility Assessment, discussions with VHB staff and City officials regarding the identified potential brownfield properties, an analysis of existing conditions and the pedestrian infrastructure and streetscape conditions.

Figure 5 illustrates the strengths and weaknesses identified within the North End Gateway, along with potential redevelopment areas. Strengths identified included excellent regional connections, few building vacancies, a very active neighborhood grassroots organization, developer interest, quality of building form, and the direct connection to the downtown core and association with the Downtown Business District. Economic generators and attractions such as Eli Cannon's, O'Rourke's Diner, the new Community Health Center, the new Liberty Square/It's Only Natural store, the Green Street Arts Center and the Buttonwood Tree were also identified as businesses and organizations that support the Gateway.

Weaknesses identified included negative perceptions and stigmatism of the North End, regional traffic impacts from the Arrigoni Bridge, spillover congestion from the Route 9 and Route 66 interchange, and the possible closing of the Little Tibet Store.

From this analysis two general areas were identified within the North End Gateway as possible investment areas: the Trolley Barn Brownfield Investment Area and the Grand St. & Main St. Brownfield Investment Area. These areas were chosen based upon the clusters of brownfield properties, along with the increased potential for redevelopment at these sites. The Downtown Housing Revitalization Area was highlighted because of the significant support from and investment by the City of Middletown to enhance the particular area through development of improved housing opportunities.

Figure 6 provides a more detailed conceptual drawing that provides connections between brownfields, greenways and potential streetscape design.

North End Gateway Area

Strengths & Weaknesses

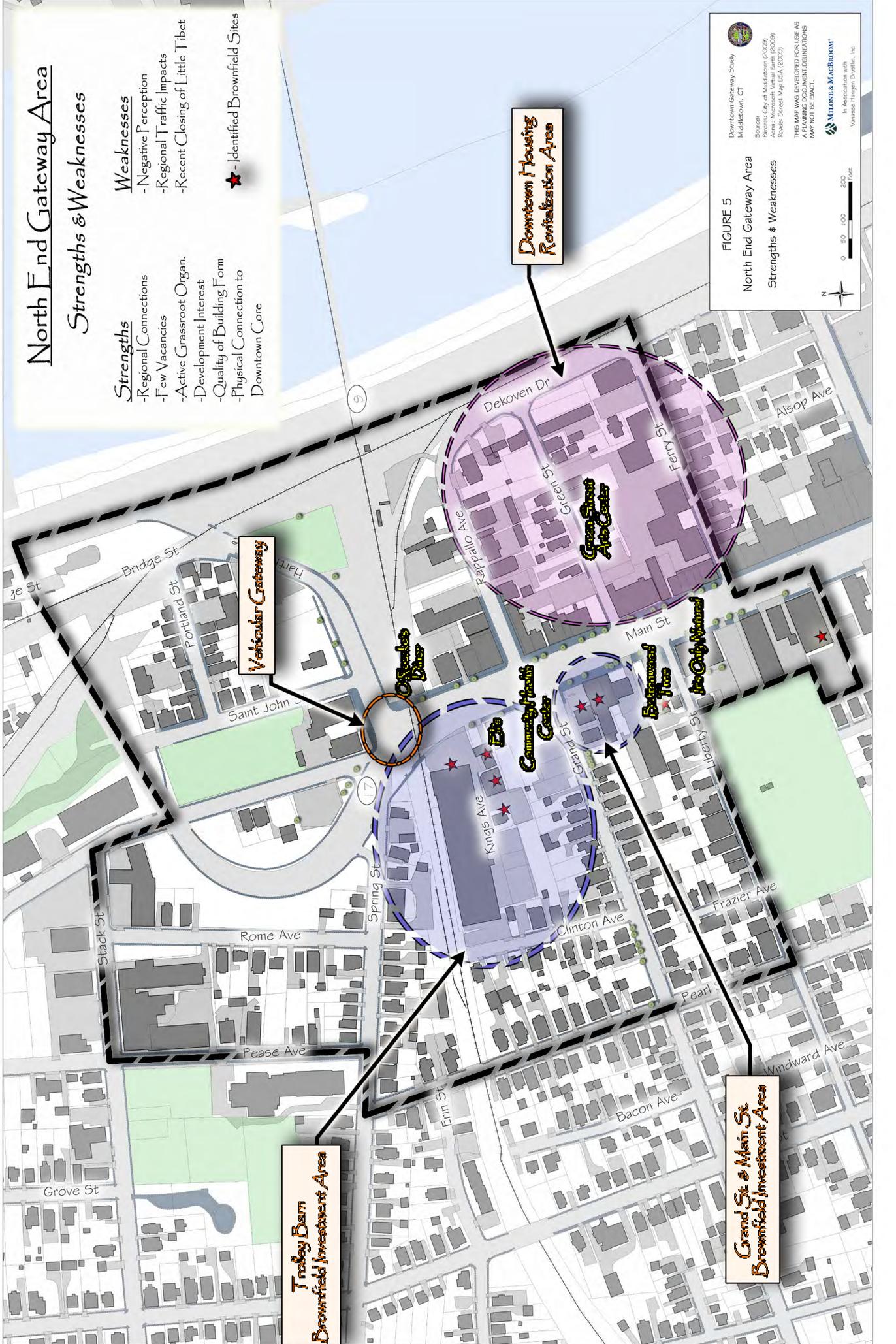
Strengths

- Regional Connections
- Few Vacancies
- Active Grassroot Organ.
- Development Interest
- Quality of Building Form
- Physical Connection to Downtown Core

Weaknesses

- Negative Perception
- Regional Traffic Impacts
- Recent Closing of Little Tibet

★ - Identified Brownfield Sites



Downtown Gateway Study
Middletown, CT
Sources:
Parcels: City of Middletown (2009)
Aerial: Microsoft Virtual Earth (2009)
Roads: Street Map USA (2009)
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A PLANNING DOCUMENT DELINEATIONS
MAY NOT BE DRAFT.
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Vernace Margen Dapkin, Inc.

FIGURE 5
North End Gateway Area
Strengths & Weaknesses





FIGURE 6
Original Concept Sketch
for North End Gateway

0 50 100 200 Feet

North Arrow

Downtown Gateway Study
Middletown, CT

Prepared by:
Milner & MacBrook
100 Main Street, Suite 200
Middletown, CT 06457
Tel: 860.346.1234
www.milnermacbrook.com

MILNER & MACBROOK
An Association with
Cannover Through Streets, Inc.

Stack St
Grove St
Pease Ave
Rome Ave
Spring St
Saint John St
Bridge St
Hartford Ave
Dekoven Dr
Liberty St
Frazier Ave
Pearl St
Windward Ave
Bacon Ave
High St
Alsop Ave

17
9

CONSIDER MODIFYING TRAFFIC ISLAND LAYOUT & GRAPHIC SIGNAGE IN THIS AREA

PARK TREE BOSQUE (POSSIBLY WITH SOME PARKING)

ACCESS TO PARKING LOT

PEDESTRIAN CONNECTION

NEW COMMUNITY HEALTH CENTER

TREE BOSQUE COULD PROVIDE OUTSIDE EATING AREA

GRAND ST. & MAIN ST. BROWNFIELD AREA (REHAB / REPLACE EX. BLDGS OR INFILL)

INFILL EXISTING LOT

FUTURE PARKING AREA

PEDESTRIAN LINKS

CONNECT PARKING AREAS

LANDSCAPE BUFFER WITH RENOV. CONNECT PARKING AREAS

EMERGENCY ACCESS

TROLLEY BARN (REHABILITATE)

TROLLEY BARN INVESTMENT AREA (REHAB / REPLACE EX. BLDGS)

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DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

6. Public Participation/Workshop Review

On April 26, 2011, the findings of the Market Feasibility Assessment, the pedestrian infrastructure and streetscape conditions, and the preliminary concept drawings were presented to local merchants and organizations, city officials, brownfield property owners and other key stakeholders. The goal of the charrette-style workshop was to garner input and recommendations from the community in order to develop more detailed redevelopment plans.

The participants were asked to explain their perception of the strengths and weaknesses of the North End Gateway. The North End Gateway was positively characterized as very lively with nightlife, a younger population and consumers, and a growing ethnic food cluster. On the other hand, participants explained that cut-through traffic using Liberty Street was dangerous because of parking on both sides of the street; the Main Street/Grand Street intersection was poorly designed and was considered a bottleneck in the area; state control of Route 9, Route 17 and Route 66 make it difficult to make any improvements and therefore hindered development; traffic signals along Route 9 create daily traffic congestion and issues in the area that also deter development; and the lack of parking for customers negatively impacts the various businesses in the North End.

The following comments were offered by the workshop participants:

- Note specific recent investments in the surrounding areas on all maps.
- Incorporate electric car charging stations.
- Note upcoming retail/office space vacancies such as the former Community Health Center office spaces as a possible positive for new investments and developments.
- Encourage three-story buildings to remain consistent with the overall character of downtown. One example of this suggested building vertically along the front portion of the Trolley Barn site and keeping the existing structure for adaptive reuse.
- Possibly incorporate an indoor farmers market at the Trolley Barn site.
- Consider traffic light improvements at the intersection of Main Street and Grand Street and improve the sight lines at this intersection.
- Provide more streetlights around Eli Cannon's and other locations where streetlights are missing, as well as provide better lighting in parking areas for improved visibility.

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7. Detailed Final Concept Plan

The following section outlines the proposed redevelopment concepts for the North End Gateway area. These concepts are discussed below in detail and then illustrated at appropriate scales on attached figures.

TROLLEY BARN SITE

The Trolley Barn Site, comprising the 725 Main Street, 711 Main Street, 0 Kings Avenue and 3 Kings Avenue properties, is envisioned as a mixed use development combining adaptive reuse, additional new building space and selective demolition. Grocery retail, artist studio work and display space, and upper story residential apartments would provide an appropriate mix of uses and activities for this site.

The existing single-story Trolley Barn structure would be renovated and fit out to accommodate an ethnic/specialty grocery store, artist studios and art display space. A new three-story addition to the front of the Trolley Barn would bring the façade wall up to the sidewalk line while also creating space for a public art plaza. The second floor of the new addition would also extend over a portion of the existing Trolley Barn structure. The ground floor of the new addition would have retail and general office space, while the second and third floor would contain 16 apartments. The existing structures on the 711 Main Street, 0 Kings Avenue and 3 Kings Avenue properties would be demolished to develop approximately 125 surface parking spaces and additional landscaping. A connection to the proposed bikeway/greenway adjacent to the site would be integrated into the redevelopment design.

Existing Structure

- Ethnic/Specialty Grocery Store: 15,000 to 20,000 s.f.
- Artist studios/work space and gallery space: 15,000 to 20,000 s.f.

New Addition – First Floor

- Retail: 1,100 s.f., Office: 1,100 s.f.

New Addition – Second Floor

- 10 studio and 1BR units, averaging 625 s.f. each

New Addition – Third Floor

- 4 1BR units, averaging 550 s.f. each

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MIDDLETOWN, CONNECTICUT**

Site Amenities

- 711 Main St., 0 Kings Ave. and 3 Kings Ave. demolished to clear area for parking, circulation and landscaping
- +/- 125 parking spaces
- Linkage to new bike trail on north side of property utilizing the rail spur to connect to DeKoven Drive and the Connecticut River waterfront
- 2,500 s.f. plaza with public art along Main Street at northeast corner of property
- Improved lighting and pedestrian connections with adjacent CHC building and parking

GRAND AND MAIN SITE (639 & 645 Main Street)

The Grand and Main Site, comprising the 639 Main Street, 645 Main Street and 9 Grand Street properties, is envisioned as a three-story mixed use structure combining retail, general office, medical office and residential uses. The existing structures on all three properties would be demolished and would be replaced with a new 22,000 square foot building. The ground floor of the new building would have retail and general office space, while the second floor would have medical office space. The third floor would house six two-bedroom apartments. The rear area of the site would be used for approximately 19 surface parking spaces.

First Floor – New Structure

- Office: 2,900 s.f., Retail: 2,900 s.f.

Second Floor – New Structure

- Medical Office: 5,800 s.f.

Third Floor – New Structure

- 6 2BR units, averaging 965 s.f. each

Site Amenities

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
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- 639 Main St. and 645 Main St. demolished to clear area for new three-story structure
- 9 Grand St. also acquired and demolished to clear area for additional parking
- +/- 19 parking spaces
- Improved lighting and streetscaping along Main St. and Grand St.

SALVATION ARMY SITE (515 Main Street)

The existing 11,200 square foot Salvation Army use at 515 Main Street would be retained.

MOTORCYCLE SHOP SITE (12 Liberty Street)

The existing structure at 12 Liberty Street would be demolished to create an approximately 18 short-term public parking spaces for Downtown businesses.

Pedestrian Generation Impacts

The redevelopment activities proposed will not only generate new jobs, property taxes and vehicular traffic, but also increased pedestrian activity along Main Street and its nearby side streets. In order to estimate the potential increase in pedestrian volumes resulting from new development, the proposed building and land use square footages for proposed North End developments were categorized and appropriate pedestrian average daily traffic (ADT) values assigned on a square footage basis for each use by structure/redevelopment site. These ADT values were drawn from “A Pedestrian Planning Procedures Manual” published by the Federal Highway Authority (FHWA), and applied to the applicable square footages of proposed new development in the North End Gateway area.

Table 5 illustrates the pedestrian generation calculations for the North End Gateway area for proposed redevelopment activities and land uses.

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TABLE 5 Pedestrian Generation Rates and Calculations for Redevelopment Concepts North End Gateway Area					
TROLLEY BARN SITE					
Use	Net Square Footage - Low Estimate	Net Square Footage - High Estimate	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians - Low Estimate	Pedestrians - High Estimate
Grocery	15,000	20,000	29	435	580
Art Space	15,000	20,000	5	75	100
General Office	1,100	1,100	6	7	7
General Retail	1,100	1,100	12	13	13
Res. - studio	3,125	3,125	7	22	22
Res. - 1BR	7,825	7,825	7	55	55
TOTAL	43,150	53,150		606	776
GRAND & MAIN SITE					
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians		
General Office	2,900	6	17		
Medical Office	5,800	6	35		
General Retail	2,900	12	35		
Res. - 2BR	5,800	7	41		
TOTAL	17,400		128		
GRAND TOTAL	60,550 to 70,550		734 to 904		

Recommendations for Pedestrian Circulation System

As Table 5 indicates, redevelopment of the Trolley Barn property could potentially result in an additional 600 to 775 pedestrians per day circulating through the North End Gateway area. Even the modest scale of redevelopment at the Grand Street/Main Street intersection could create almost 130 pedestrian trips per day. These new daily pedestrian trips, especially when combined with substantial pedestrian trips generated by the new CHC facility, will have significant impacts on the existing pedestrian circulation system in the North End Gateway area. As a result, upgrades to pedestrian circulation elements, streetscape and roadway improvements will likely be necessary.

Recommended improvements, based upon field reconnaissance, planning analysis and comments received from the public workshop/charrette, include the following:

- Conduct a traffic study for the intersection of Main Street and Grand Street and improve the sight lines at this intersection.
- Conduct a traffic and parking study of Liberty Street between Main Street and High Street to properly address conflicts between on-street parking and cut-through traffic issues.

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DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

- Provide more streetlights around Eli Cannon's and other locations where streetlights are missing, as well as provide better lighting in parking areas for improved visibility.
- Development and maintain a unified streetscape and lighting scheme along Main Street from the Downtown core up to St. John's Church.
- Pursue the development of a bikeway/greenway along the rail spur north of the Trolley Barn property to offer residents and visitors an alternative transportation option for accessing the North End Gateway area. This bikeway/greenway could continue along DeKoven Drive southward to the South End Gateway area, where it would continue along Sumner Brook.
- Conduct a traffic and landscape design study for the intersection of Main Street and the accessway to the Arrigoni Bridge and Route 9. Emphasis should be placed on elements that enhance pedestrian safety, including textured/slightly raised crosswalks, improved pedestrian crossing and traffic signal timing, aesthetic and landscape improvements and improved wayfinding signage.

Detailed Concept Plans

Figure 7, Figure 8 and Figure 9 present detailed final concept plans for the North End Gateway area. Figure 7 is a 100 scale illustrative concept plan that builds upon the draft concept plan developed previously and presented as Figure 6, combined with additional planning analysis and feedback from stakeholders and the general public at the community workshop/charrette in April 2011. This illustrative concept plan retains many of the elements of the original draft concept plan shown in Figure 6. However, notable additional elements include proposed future pedestrian connections to the riverfront, specific streetscape improvements, and the new redevelopment components shown in greater detail in Figure 8 and Figure 9 (discussed below).

Figure 8 presents a 40 scale detailed concept plan focused on the Trolley Barn property and its immediately surrounding environs. As shown on this detailed concept plan, the existing Trolley Barn building would be retained, renovated and adaptively reused for an ethnic food center/grocery store and artist work/gallery space, along with a possible option for a seasonal indoor farmers market. To better connect the property with Main Street and improve continuity with neighboring building facades, a new two-part building would be constructed attached to the front of the existing Trolley Barn structure. The portion closest to Main Street would consist of three stories, and the portion of the new structure that is attached to the Trolley Barn would consist of two stories. Several brownfield properties to the south of the Trolley Barn would be demolished and cleared to create supportive surface parking. This parking would be integrated with surface parking developed behind the new CHC building at the northwest corner of the Main Street/Grand Street intersection.

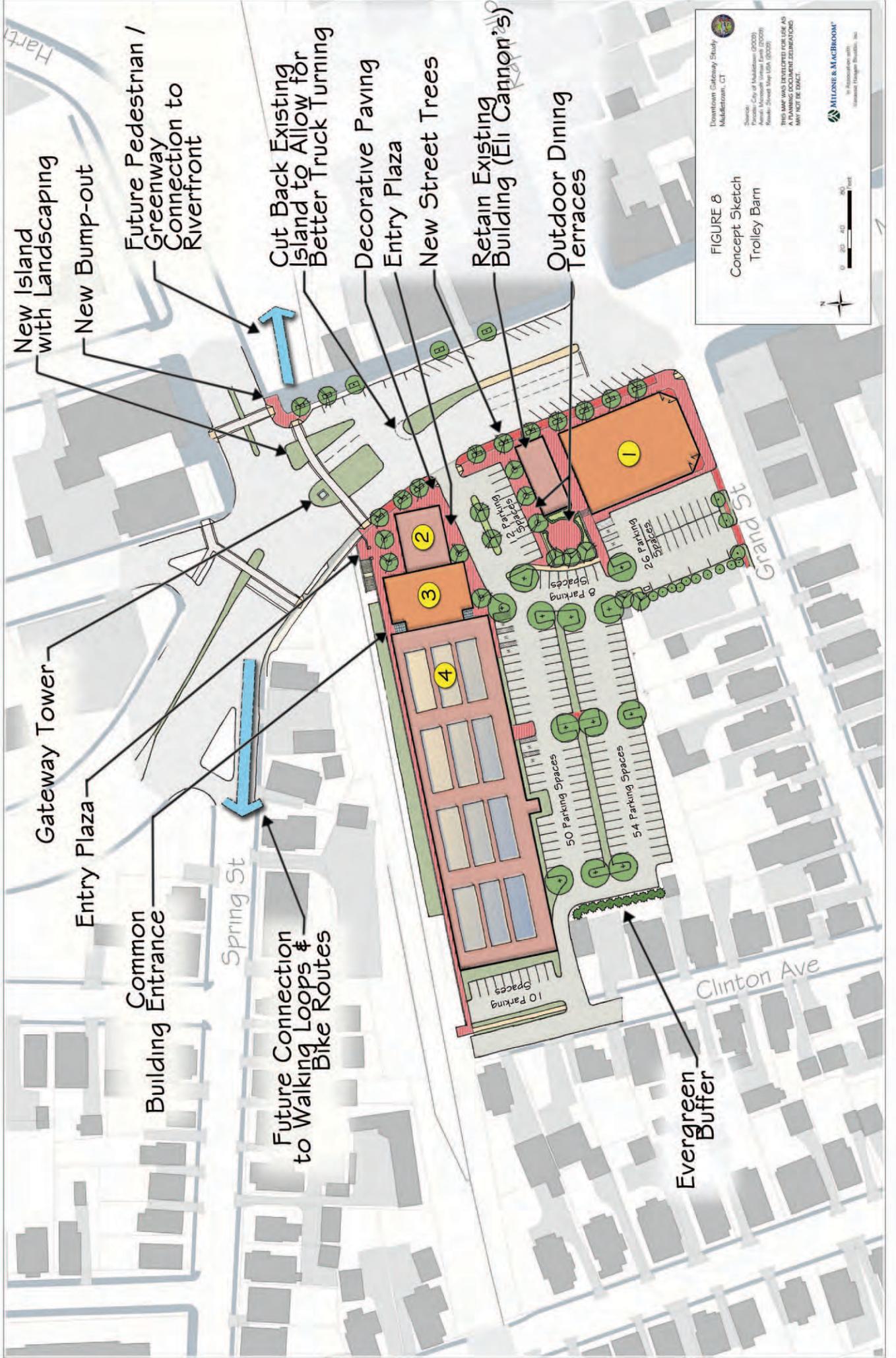


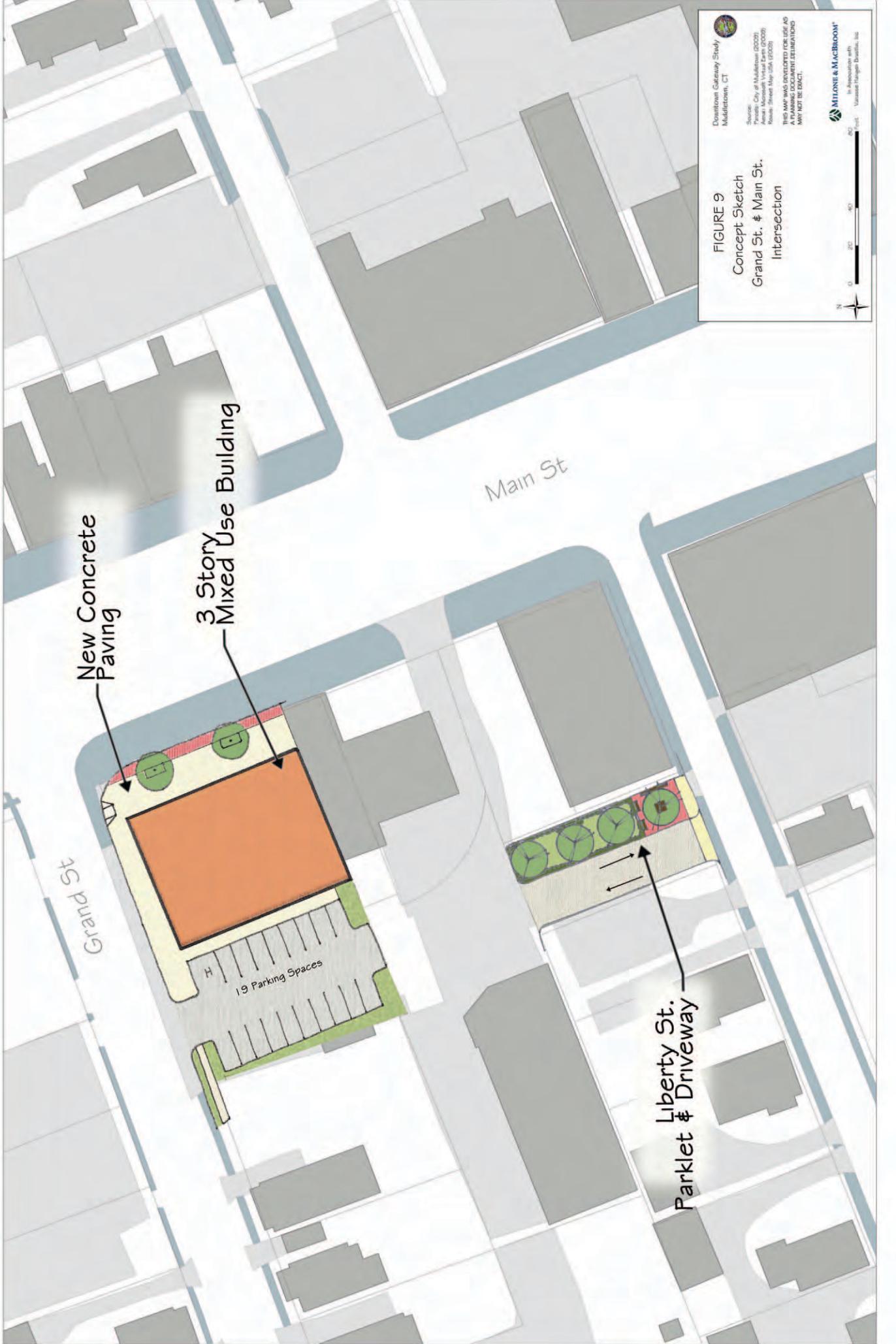
FIGURE 8
 Concept Sketch
 Trolley Barn

Downtown Gateway Study
 Middletown, CT

Client: City of Middletown (2020)
 Architect: Milone & MacBroom (2020)
 Address: Spring Loop (06257)

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MILONE & MACBROOM
 An Association with
 Common Design Studio, Inc.



New Concrete Paving

3 Story Mixed Use Building

Main St

Grand St

19 Parking Spaces

Liberty St. Parklet & Driveway

FIGURE 9
Concept Sketch
Grand St. & Main St.
Intersection

Downtown Gateway Study
Middletown, CT

Source:
Project: City of Middletown (2007)
Area: Main Street Urban Core (2009)
Scale: Street Map (2011)

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Figure 9 presents a 40 scale detailed concept plan focused on the intersection of Main Street and Grand Street. As shown on this detailed concept plan, the existing structures at 639 Main Street, 645 Main Street and 9 Grand Street, located generally at the southwest corner of the Main Street/Grand Street intersection, would be demolished and cleared to create a unified development site for a new three-story mixed use structure with a small number of associated surface parking spaces. This new development is intended to mesh from an urban design perspective with the new CHC building directly opposite of it at the northwest corner of the Main Street/Grand Street intersection.

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**FINAL REPORT
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MIDDLETOWN, CONNECTICUT**

South End Gateway

1. Current Conditions

The South End Gateway area is centered around Main Street Extension between the Route 17 interchange with Route 9 and the intersection of Ridge Road and Main Street Extension. The area includes the Cooley Avenue and West Silver Street neighborhoods. The former Formatron property at 134 Main Street Extension sits prominently at the gateway area's center. The U.S. Postal Service operates a facility at 11 Silver Street along the eastern boundary of the gateway area. The State of Connecticut Department of Social Services occupies two office buildings on Main Street Extension near the northern edge of the area. Middlesex Hospital, which employs over 1,500 people, is located at the northwest corner of the gateway area, separated from the other uses and properties in the South End by the elevated Route 17. Regional and national retailers, including CVS, Walgreens, Stop & Shop, Marshalls and Dollar Tree are located to the southwest of the gateway area within the South Farms section of Middletown.

Main Street Extension was constructed during the growth of Main Street. While the road was built to accommodate spillover development from the central part of Downtown Middletown, this growth never materialized. Therefore, the South End Gateway area has failed to develop a sense of identity and has become a disconnected piece of the City lying between Downtown Middletown and the suburban South Farms area of the City. The South End Gateway area does not have a strong built form or neighborhood character, and while Main Street Extension is an important access route for local residents, it is not a primary access route for visitors or regional residents. However, due to its location, the South End is still a major gateway into Downtown Middletown, albeit one that is highly underutilized and physically disconnected.

An examination of average daily traffic (ADT) counts in the South End Gateway area indicates that the traffic volumes are significantly lower than those in the North End. Traffic volumes peak in the afternoon between 3:00 pm and 4:00 pm. The traffic volumes suggest that the market potential for uses such as medium to large retail space is likely limited. To spur development of a regional scale, traffic volumes would need to increase or a “destination” use would need to be developed along Main Street Extension. Alternatively, these traffic volumes indicate that a potentially more successful approach to development would be to focus on building forms and uses that relate to the critical mass of activity present at the Middlesex Hospital campus. Table 6 provides 2010 traffic counts for various counting stations in the South End Gateway area.

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TABLE 6 2010 Traffic Counts: South End Gateway Middletown, CT						
Location	Direction	Station	ADT	Peak Hour	Peak Count	24 Hour
Main Street Extension- NW of RT 17 SB on Ramp	North	2221	5,600	4:00 PM	473	6,001
Main Street Extension- NW of RT 17 SB on Ramp	South	2221	4,900	3:00 PM	418	5,162
Main Street Extension- N of RT 17 NB off Ramp	North	2368	7,500	4:00 PM	646	8,029
Main Street Extension- N of RT 17 NB off Ramp	South	2368	6,200	3:00 PM	509	6,564
Main Street Extension- S of RT 17 NB off Ramp	Both	363	16,600	3:00 PM	1,400	17,636
Main Street Extension- SE of Ridge Road	Both	223	13,300	3:00 PM	1,137	14,174

Source: State of Connecticut Traffic Count Locator Program TMSADT.

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2. Market-Based Development Potential

A number of potential uses for redeveloped properties in the South End Gateway were explored in the Market Feasibility Assessment to determine quantitative market support, proximity to similar uses or clusters of similar uses, and locational appropriateness for each potential land use. Based upon the quantitative and qualitative data collected and analyzed, each potential land use was assigned a rating from “Excellent” to “Poor” to summarize the findings regarding each element of the identified land uses. Tables 6 present the market assessment for potential land uses in the South End Gateway area.

TABLE 7				
South End Gateway Area - Market-Based Development Potential				
USE	Market Support	Use Cluster Support	Locational Appropriateness	OVERALL ASSESSMENT
<i>Retail</i>				
Motor Vehicle and Parts Dealers	Excellent	Excellent	Poor	Fair
Furniture and Home Furnishings Stores	Fair	Fair	Good	Fair
Electronics and Appliance Stores	Fair	Poor	Fair	Fair
Building Material and Garden Equipment and Supplies Dealers	Fair	Fair	Excellent	Fair
Food and Beverage Stores	Good	Poor	Good	Fair
Health and Personal Care Stores	Good	Poor	Good	Fair
Gasoline Stores	Good	Fair	Poor	Fair
Clothing and Clothing Accessories Stores	Poor	Poor	Fair	Poor
Sporting Goods, Hobby, Book, and Music Stores	Fair	Poor	Good	Fair
General Merchandise Stores	Excellent	Poor	Good	Good
Hardware Stores	Fair	Poor	Good	Fair
Jewelry Stores	Fair	Poor	Poor	Poor
Department Stores	Good	Poor	Poor	Poor
Gifts/Novelty/Souvenir Stores	Fair	Poor	Fair	Fair
Luggage/Leather Goods	Poor	Poor	Fair	Poor
Office Supplies	Fair	Poor	Good	Fair
Convenience Stores	Fair	Fair	Fair	Fair
<i>Personal Services</i>				
	Fair	Fair	Good	Fair
<i>Arts/Culture/Recreation</i>				
	Good	Poor	Fair	Fair
<i>Health Care & Medical Office Space</i>				
	Fair	Excellent	Good	Good
<i>General Office Space</i>				
	Poor	Poor	Good	Fair
<i>Industrial/Warehouse Space</i>				
	Poor	Fair	Excellent	Fair
<i>Residential</i>				
Condominiums	Fair	Poor	Good	Fair
Apartments	Fair	Fair	Good	Fair

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As Table 7 identifies, the land uses best suited for the South End market fall within the following categories:

- Health Care & Medical Office Space
- General Merchandise Stores

Overall, the Market Assessment suggests that with the combined market trends in the RMA and DMA areas, as described in detail in the Market Feasibility Assessment, the South End Gateway area would thrive with more medical office space with a mix of uses including residential condominiums, as well some convenience retail and services uses.

The South End Gateway area benefits from the presence of existing medical uses that could potentially serve as anchor points for development. Middlesex Hospital, located at the northwestern edge of the South End Gateway area, employs over 1,500 people and is the primary medical care facility for the lower Connecticut River Valley area. Middlesex Hospital also manages a number of satellite facilities around the region from the towns of Madison, Westbrook and Old Saybrook along the Connecticut shoreline to the towns of Cromwell, Portland, East Hampton and Marlborough to the north and east. Satellite facilities in Middletown itself outside of the main hospital campus include the following:

- Middlesex Hospital Primary Care
520 Saybrook Road
- Middlesex Hospital Outpatient Services
534 Saybrook Road
- Middlesex Hospital Cancer Center
536 Saybrook Road
- Middlesex Hospital Homecare – Visiting Nurses
770 Saybrook Road

All four of these facilities are located along Saybrook Road approximately 1.2 miles southeast of the South End Gateway area and 1.75 miles southeast of the Middlesex Hospital main campus. Saybrook Road connects directly with Main Street Extension, providing a strong linkage between Middlesex Hospital and its satellite facilities. The South End Gateway area straddles this transportation linkage, and office space for medical or related fields would be a logical form of development along Main Street Extension.

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With over 1,500 employees, Middlesex Hospital provides an ample market base from which a small-scale residential development could potentially draw either condominium owners or apartment renters. This market would be comprised of employees looking for reasonably-priced housing options in a location that would allow them to walk or bike to work. Using a conservative combined annual housing turnover rate and capture rate of 3%, approximately 40 employees of Middlesex Hospital could be interested in such housing. Some of these potential residents would seek housing in the existing apartments and condominium units within Downtown itself. However, there is currently no housing located within the South End Gateway area that is likely to appeal to this market. A small condominium development, potentially interspersed with several apartment units could draw its market from the younger medical professionals working at Middlesex Hospital. As a result, this form of housing would draw in higher income levels and provide housing and parking for hospital staff within walking distance of the hospital. This could also become a benefit for Middlesex Hospital by potentially decreasing demand for hospital staff parking. Residential development in the South End Gateway area would be most likely to succeed if combined in a mixed use format with perhaps ground floor medical offices or small-scale retail/service uses.

Based upon the analysis contained in the Market Feasibility Assessment, data and analysis from the Downtown Housing Market Study, and an analysis of employment at Middlesex Hospital and average occupational salaries in the medical field, it is estimated that either a single condominium development or multiple small-scale condominium developments with a total of 12 to 15 units could be supported by the Middlesex Hospital market.

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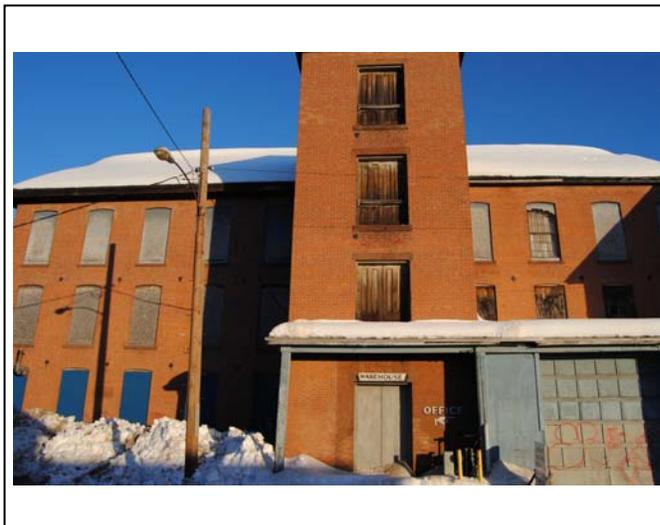
3. South End Gateway Brownfield Properties

The following properties in Table 8 have been identified by VHB, Inc. and the Middletown Redevelopment Agency as the known or perceived brownfields that are within the South End Gateway. The locations of these properties are shown on Figure 10.

TABLE 8 Brownfield Properties South End Gateway Area
Address
0 Cooley Avenue
117 East Main Street
134 Main Street Extension
159 Main Street Extension
169 Main Street Extension

Source: VHB, Inc.; Middletown Redevelopment Agency.

The following summary descriptions provide basic information about each site.



ADDRESS: 0 Cooley Avenue
 MBL: 34 24-11 20
 USE: Former Formatron
 BUILDING SQFT: 28,552 sq. ft.
 YEAR BUILT: 1900
 ACRES: 0.50 acres
 ZONE: Transitional Development (TD)
 CURRENT OWNER: Middletown Holdings LLC
 MMI Land Use: Mixed Use

SITE CHARACTERISTICS:

This property contains a portion of the former Formatron manufacturing complex and is associated with the 134 Main Street Extension property to the north. It has a history as a manufacturing site

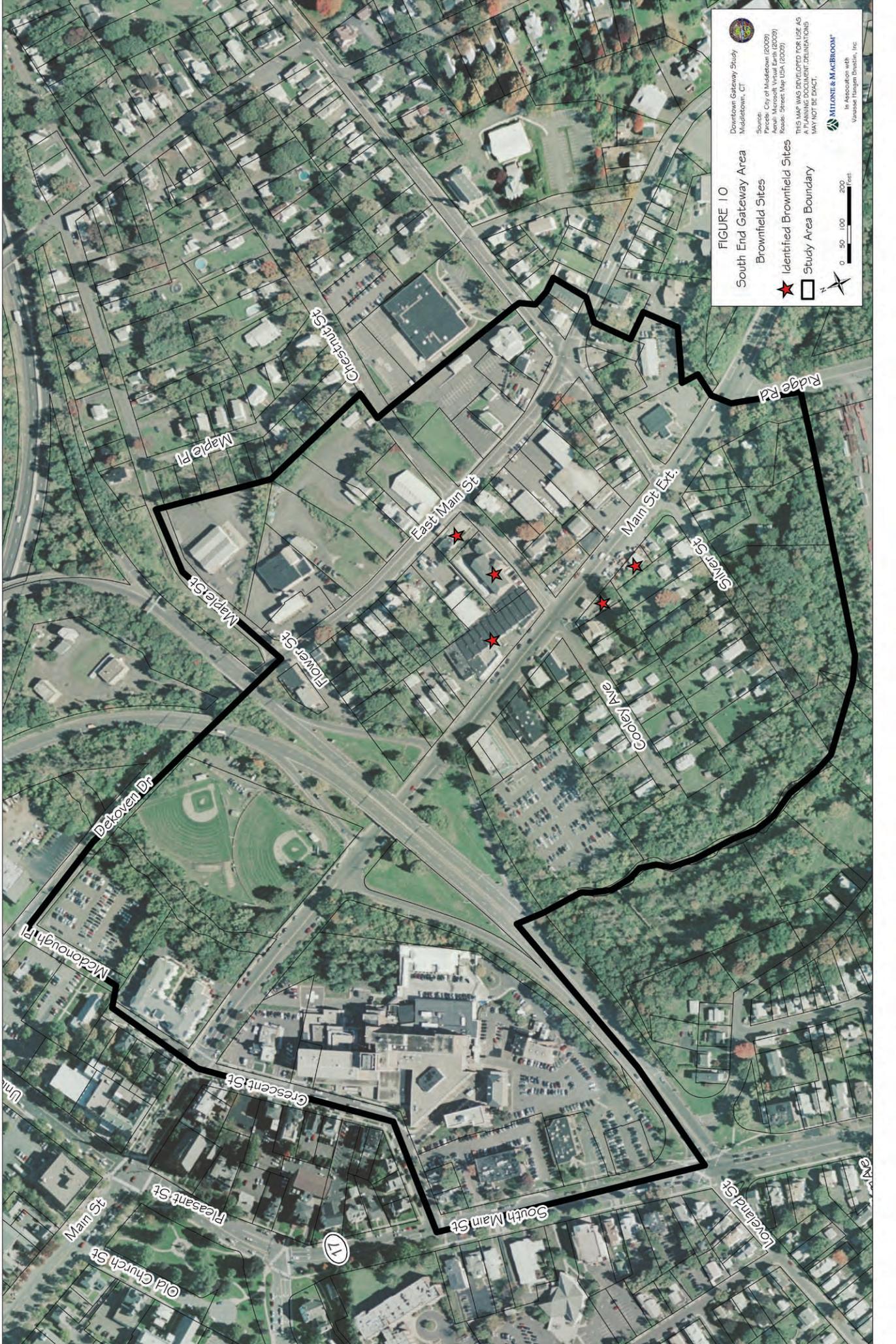


FIGURE 10
South End Gateway Area
 Brownfield Sites

★ Identified Brownfield Sites
 Study Area Boundary

Downtown Gateway Study
 Middletown, CT
 Source:
 Parcel: City of Middletown (2009)
 Aerial: Microsoft Virtual Earth (2009)
 Roads: Street Map USA (2009)

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 MAY NOT BE EXACT.

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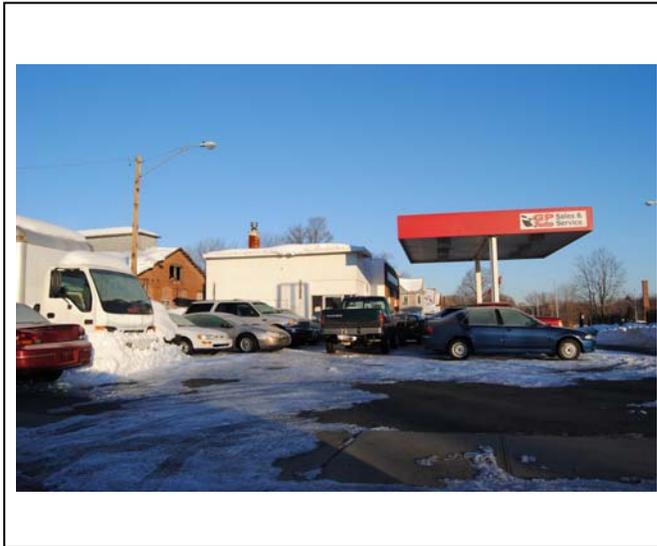
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for the production of silk and silk products. The building is vacant and in a state of disrepair. A Phase 1 Environmental Site Assessment was conducted and found potential for environmental concerns. The property does not have any wetlands and it does not fall within a flood plain. The property is relatively flat on Udorthents-urban land complex soils. The structure is considered an historic building but does not fall within an historic district.

HISTORY:

- Sanborn Map
 - 1895 – The L.D. Brown & Sons Company, Manufacturing of Silks
 - 1901 - The L.D. Brown & Sons Company, Manufacturing of Silks
 - 1907 – The Merchants Silk Company, Manufacturing of Silks
 - 1913 – The Poidebard Silk Company, Manufacturing of Silks
 - 1924 – The Middlesex Bag & Paper Company
- Prior Ownership
 - Miller Associates



ADDRESS: 117 East Main Street
MBL: 34 24-11 1
USE: GP Auto Sales and Service
BUILDING SQFT: 1,243 sq. ft.
YEAR BUILT: 1948
ACRES: 0.16 acres
ZONE: Transitional Development (TD)
CURRENT OWNER: GP Auto Sales and Service LLC
MMI Land Use: Mixed Use

SITE CHARACTERISTICS:

This property is located at the northwest corner of the Cooley Avenue and East Main Street intersection, behind the former Formatron manufacturing complex. The property was once part of

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the silk manufacturing complex, but was converted to a gas station sometime between 1913 and 1924. It does not have any wetlands and it does not fall within any flood plain. The property is relatively flat on Wethersfield-urban land complex soils. While the property was once part of the manufacturing history of Middletown, the property today is not considered an historic property and it is not located within an historic district.

HISTORY:

- Sanborn Map
 - 1895 – The L.D. Brown & Sons Company, Manufacturing of Silks
 - 1901 - The L.D. Brown & Sons Company, Manufacturing of Silks
 - 1913 – The Poidebard Silk Company, Manufacturing of Silks
 - 1924 – Filling Station
- Prior Ownership
 - Salvatore G Fazzino



ADDRESS: 134 Main Street Extension

MBL: 34 24-11 19 19A

USE: Former Formatron

BUILDING
SQFT: 33,050 sq. ft.

YEAR
BUILT: 1900

ACRES: 1.32 acres

ZONE: Transitional Development
(ID)

CURRENT
OWNER: NJ Holdings LLC

MMI Land
Use: Mixed Use, Two Buildings

SITE CHARACTERISTICS:

This property is the site of the former Formatron manufacturing complex, and is associated with the adjacent 0 Cooley Avenue property. A Phase 1 Environmental Site Assessment was conducted and that there are potential environmental concerns on the property. The large industrial building originally on the property was recently demolished. Numerous reuse options have been proposed for this property, but to date none have been formerly endorsed. The property does not have any

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wetlands and does not fall within a flood plain. The property is relatively flat on a mix of Urban land soils and Urdorthents-urban land complex soils. The original structure was an historic building, but the property itself does not fall within an historic district.

HISTORY:

- Sanborn Map
 - 1901 - The L.D. Brown & Sons Company, Manufacturing of Silks
 - 1907 – The Merchants Silk Company, Manufacturing of Silks
 - 1913 – The Poidebard Silk Company, Manufacturing of Silks
 - 1924 – The Wilcox Lace Corporation
- Prior Ownership
 - Detoro Floremond & Etals



ADDRESS: 159 Main Street Extension

MBL: 34 24-10 15

USE: Frank's Auto Service

BUILDING
SQFT: 1,134 sq. ft.

YEAR
BUILT: 1958

ACRES: 0.14 acres

ZONE: Transitional Development
(TD)

CURRENT
OWNER: Franklin N. Johnson

MMI Land
Use: Park, Open Space Plaza

SITE CHARACTERISTICS:

This property is currently being used as an auto repair shop. The property was once an operational Sunoco gas station, but the retail sale of gas is no longer occurring on the site. The property is underutilized, and much of its limited area is devoted to parked vehicles. There are wetlands and the flood plain to the west of the property, but not on the property itself. The land slopes slightly downward to the west, with Wethersfield urban land complex soils underlying the property. The structure on the property is not an historic building and the property does not fall within an historic district.

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HISTORY: None on Record



ADDRESS: 169 Main Street Extension

MBL: 34 24-10 16

USE: D & M Auto

BUILDING
SQFT: 936 sq. ft.

YEAR
BUILT: 1934

ACRES: 0.10 acres

ZONE: Transitional Development
(TD)

CURRENT
OWNER: D & M Recovery and
Towing LLC

MMI Land
Use: Park, Open Space Plaza

SITE CHARACTERISTICS:

This property is located on Main Street Extension and contains the D&M Auto repair shop. Parked trucks and used vehicles are scattered around the entirety of the property. A number of vehicles on the property are parked adjacent to the street right-of-way, resulting in poor sight lines for traffic. There are wetlands and the flood plain to the west of the property, but not on the property itself. The property slopes slightly downward to the west, with Wethersfield urban land complex soils underlying the property. The structure is not an historic building and the property does not fall within an historic district.

HISTORY:

- Prior Ownership
 - Mary Landeen

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4. Pedestrian Infrastructure and Streetscape Conditions

The same survey of pedestrian and streetscape infrastructure that was conducted in the North End Gateway area was also conducted in the South End Gateway area.

The South End Gateway area has few pedestrian amenities and is dominated by the motor vehicle network with Main Street Extension's extremely wide travel lanes, and the amount of informal on-street parking in the area. However, there is evidence that significant foot and/or bicycle traffic traverses the area. Given that Main Street Extension is a City-owned road, and there is significant pedestrian activity when conditions are intimidating to the pedestrian, there are significant opportunities in the South End Gateway area to implement complete street standards and enhance the safety and quality of the pedestrian network. The existing pedestrian infrastructure is shown on Figure 11.



Following are the general findings of the survey in the South End Gateway area.

- Main Street Extension has informal parallel parking on both sides of the street from just south of Middlesex Hospital south to the Route 17 off- and on-ramps. There are no pavement markings, parking meters or signs to organize this parking, most of which appears to be associated with the hospital. There are no sidewalks on the west side of Main Street Extension in this section, though pedestrian activity on this side of the street is evident from the number of cars parked on the street, existing worn footpaths and the striped crosswalk on the hospital's southernmost driveway that leads from a sidewalk to the street.



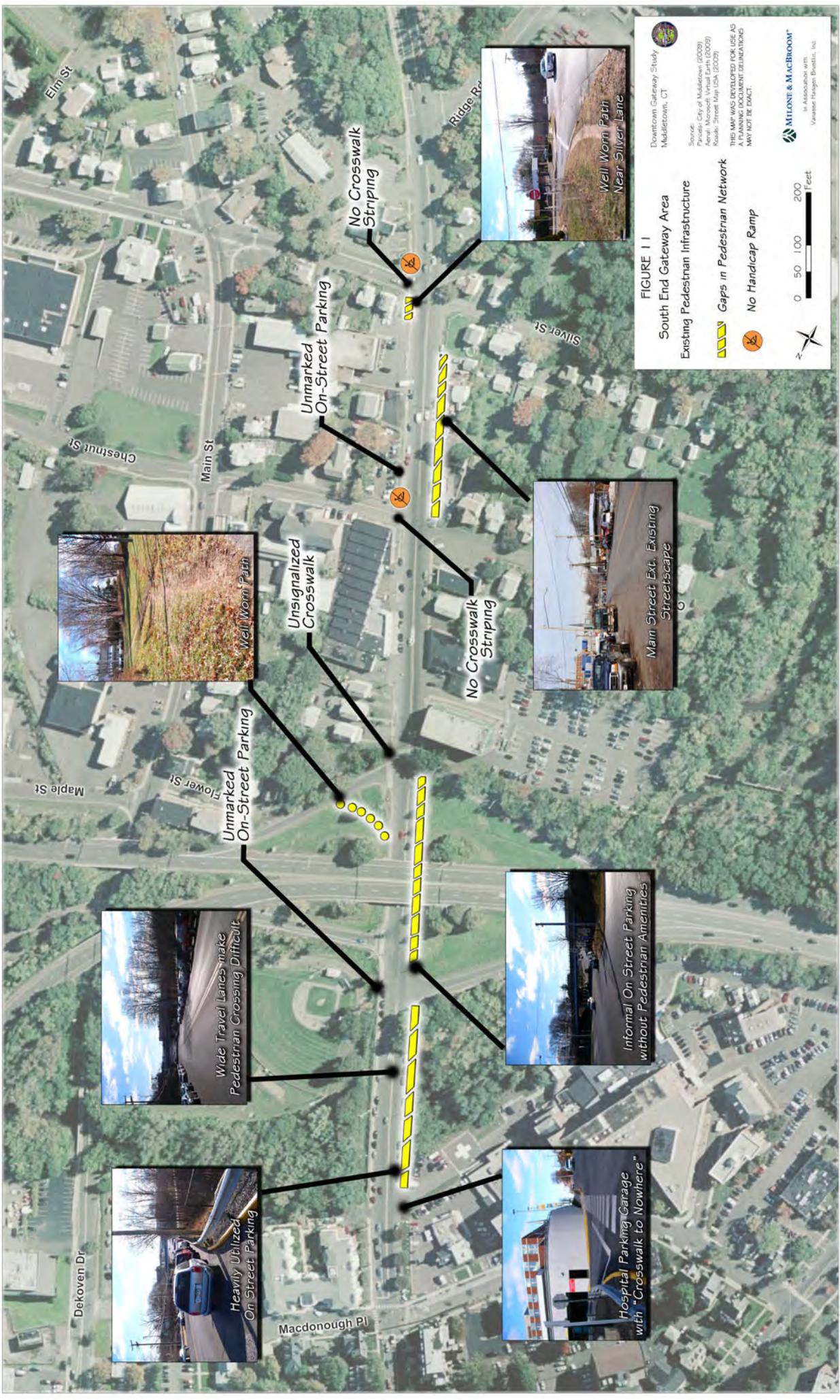


FIGURE 1.1
South End Gateway Area
Existing Pedestrian Infrastructure

Source:
 Downtown Gateway Study
 Middletown, CT

Source:
 Parcel: City of Middletown (2009)
 Aerial: Microsoft Virtual Earth (2009)
 Mobile: Street View (2009)

THIS MAP WAS DEVELOPED FOR USE AS A PLANNING DOCUMENT DELINEATING WHAT MAY BE EXPECTED.

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- On the eastern side of Main Street Extension a bituminous concrete sidewalk runs from the hospital south through the South End Gateway area. The sidewalk is generally in good condition, and has several new handicapped-accessible ramps; however, there are some obvious improvements needed. The Route 17 off- and on-ramps have striped crosswalks, but no crossing signals. The off-ramp has a stop sign and blinking red light only. There are clear footpaths that cross the Route 17 northbound on-ramp and the grassy median between the ramp, Main Street Extension and the Route 17 bridge. The footpaths appear to connect with Flower Street and East Main Street. The alignment of the sidewalk just north of the Route 17 northbound on-ramp, where the sidewalk swings away from the road, seems unnecessary and contrary to pedestrians' use as indicated by footpaths.



Worn pedestrian path

- There is a striped crosswalk across Main Street Extension that angles from the Route 17 northbound on-ramp on the west side of the street to the corner of the State of Connecticut property, where the sidewalk begins on the east side of the street. This is the only crossing of Main Street Extension in the South End Gateway area south of Middlesex Hospital. There are no full traffic signals or signs, only a blinking yellow light beyond the crosswalk at the on- and off-ramps.
- Sidewalk conditions on the east side of Main Street Extension south of the Route 17 bridge are passable. There are a couple of large apron areas that could be tightened up, and there is no crosswalk striping at the intersections with side streets. There is a gap in the sidewalk network just north of the West Silver Street intersection with Main Street Extension, though the



Gap in sidewalk at Silver St.

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south side of this intersection has a handicapped-accessible ramp.

- Sidewalks on West Silver Street and Cooley Avenue are located on the south sides of their respective streets.
- On the west side of Main Street Extension south of Route 17, the sidewalks extend from only as far as the D&M Towing property. There is no striping or signals for a crosswalk across Cooley Avenue.

On a second occasion, the South End Gateway area was observed again to ascertain pedestrian traffic patterns. The existing well-worn paths indicate a high level of pedestrian and bicycle traffic coming out of the Flower Street/East Main Street neighborhood. Most of the informal parking along Main Street Extension is associated with the hospital, based on observation of foot traffic. The area was also observed on a weekend, when there were few vehicles parked, suggesting that the majority of pedestrian movement occurs on weekdays when Middlesex Hospital is fully staffed. No crosswalks were measured in the South End Gateway area due to the lack of signalized crosswalks.

Lastly, accident data involving pedestrians and bicyclists in the South End Gateway area indicated that there were two (2) accidents involving bicyclists since June 2009 and no accidents involving pedestrians since August 2009.

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5. Preliminary Concept Plan

A preliminary concept plan for the South End Gateway area was designed based upon the Market Feasibility Assessment, discussions with VHB staff and City officials regarding the identified potential brownfield properties, an analysis of existing conditions and the pedestrian infrastructure and streetscape conditions.

Figure 12 illustrates the strengths and weaknesses identified within the South End Gateway. Strengths identified included the potential for housing for hospital staff, the potential for improved streetscape design, the significant employee base present within walking distance of the area and the potential to connect to the waterfront in the future. The major economic generator in the area is Middlesex Hospital, an institution that has expanded significantly in the recent past, and will likely continue to grow in the near future. Middlesex Hospital's outpatient facility is further south along Main Street Extension on Saybrook Road. With a dentist's office proposed for the former bank site at the southeast corner of Silver Street and Main Street Extension, the Main Street Extension/Saybrook Road corridor currently possesses a medical presence that could support and complement additional medical uses in the area.

Weaknesses identified included the Route 9 and Route 17 interchange, a lack of identity for the area, physical disconnection from the downtown core and minimal architectural character. The gateway area also lacks a clear pedestrian network and also lacks connections with other areas of the City such as the South Farms neighborhood and the Connecticut River waterfront. Lastly, the majority of the parcels in this area are relatively small and many are irregularly shaped, which limits the potential for substantial development without considerable site assemblage.

From this analysis, one specific area was identified within the South End Gateway as a possible investment area: the former Formatron site. The Formatron site had been home to a silk manufacturing facility beginning in the early 1900s, and the three brownfield properties identified as part of this site were at one point part of the silk manufacturing business. A Phase 1 site assessment was conducted which identified this location as an environmental concern. Due to the size, location and known/perceived environmental issues, this site was identified as a potential redevelopment area. The Cooley Avenue and Silver Street residential neighborhood along the southwest side of Main Street Extension was identified as a stable neighborhood that could serve as a pivot point for future redevelopment efforts. Recently a new condominium complex was successfully developed at the southwest corner of Silver Street and Main Street Extension, suggesting the potential for a small residential market.

Figure 13 provides a more detailed conceptual drawing that provides connections between brownfields, greenways and potential streetscape design, in addition to proposed redevelopment activities.

South End Gateway Area

Strengths & Weaknesses

Strengths

- Potential Housing for Hospital Staff
- Potential for Streetscape Design
- Significant Number of Employees within Walking Distance
- Potential Connection to Waterfront

Weaknesses

- RT 9 & RT 17 Interchange
- No Identity
- No Relationship to Downtown
- No Architectural Character
- Not Pedestrian Friendly
- Lack of Connectivity
- No Destination Uses
- Limited Potential for Site Assembly

★ - Identified Brownfield Sites

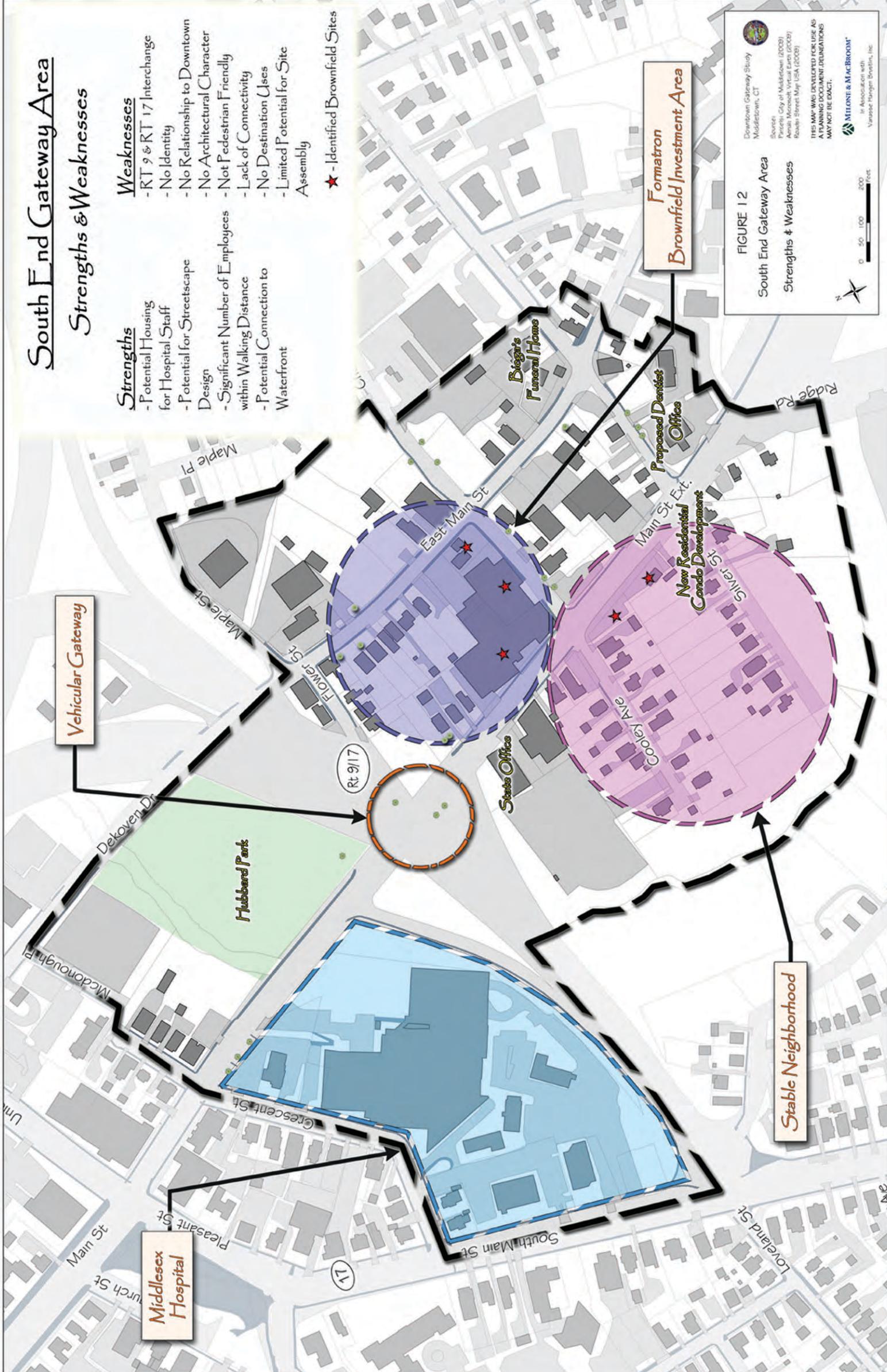


FIGURE 12

South End Gateway Area
Strengths & Weaknesses

Downtown Gateway Study
Middletown, CT
Sources:
Peters: City of Middletown (2009)
Aerial: Microsoft Virtual Earth (2009)
Roads: Street Map USA (2009)
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A PLANNING DOCUMENT. DELINEATIONS
MAY NOT BE EXACT.
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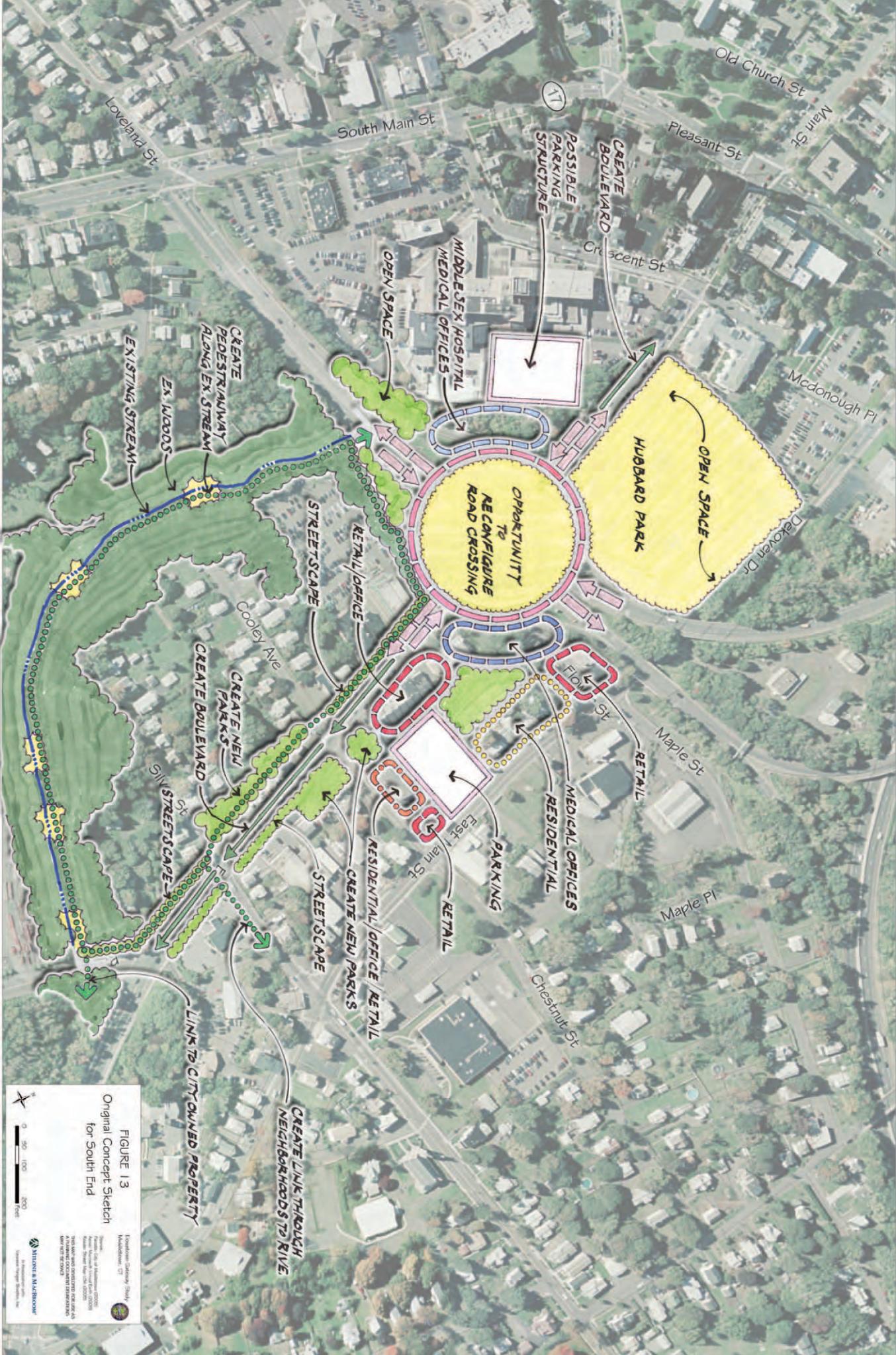


FIGURE 1.3
Original Concept Sketch
for South End



Executive Director's Study
Haverhill, CT
Prepared by: City of Haverhill (2008)
Project: Haverhill South End Urban
Planning Study
This map was developed for use as a
planning document only and is not
intended to be used for any other
purpose.
MILITONE & MACKBROW
Urban Planning & Architecture
Haverhill, MA

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6. Public Participation/Workshop Review

On April 26, 2011, the findings of the Market Feasibility Assessment, the pedestrian infrastructure and streetscape conditions analysis, and preliminary concept plans were presented to local merchants and organizations, city officials, brownfield property owners and other key stakeholders. The goal of the charrette-style workshop was to garner input and recommendations from the community in order to develop more detailed redevelopment plans.

The participants were asked to explain their perception of the strengths and weaknesses of the South End Gateway. The South End Gateway was negatively characterized as a place with no identity and little meaningful function. Participants agreed with the strengths and weaknesses as presented. Participants also added the traffic issues in front of Middlesex Hospital associated with the Route 9 interchange, the presence of the access ramps for Route 17 and the lack of sidewalks as other weaknesses in the gateway area.

The following are comments offered by the workshop participants:

- Relocate the baseball fields at Hubbard Park and develop the east side of Main Street Extension.
- Create better linkages to existing bus service, particularly the express bus service to Hartford.
- Incorporate “Dark Skies” policies when adding street lights.
- The main role and purpose of the South End Gateway area should be to support the Downtown Core rather than to compete with it.
- Develop a theme for the area focused on mix of residential and office uses.
- Create design guidelines for building form, facades and setbacks, and promote the three or four-story building heights similar to Main Street.
- Some participants were supportive of the greenway design, while others suggested orienting it toward the Downtown area instead of looping south of Middlesex Hospital.

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7. Detailed Final Concept Plans

The following section outlines the proposed redevelopment concepts under Concept “A” and Concept “B” scenarios for the South End Gateway area. These concepts are discussed below in detail and then illustrated at appropriate scales on attached figures.

CONCEPT “A”

FORMATRON SITE

The Formatron Site, comprising the 134 Main Street Extension and 0 Cooley Avenue properties, is envisioned as a multi-structure mixed use development combining retail, general office and medical office space with upper story condominium units.

Building #1 would be new construction and comprise the majority of the 134 Main Street Extension property with a building footprint of approximately 13,000 square feet. The building would form a continuous façade along Main Street Extension with a two-story frontage. The third and fourth stories would be subsequently set back from the building frontage to achieve a tiered effect that permits ample square footage while still presenting a pedestrian-scale street wall. The ground floor would be split into retail and general office space, while the upper stories would contain approximately 24,000 square feet of medical office space. Along the north side of the building, roughly 25 surface parking spaces could be developed.

134 Main Street Extension – Building #1

- Ground Floor: 6,500 s.f. of retail space, 3,900 s.f. of office space
- Second Floor: 10,400 s.f. of medical office space
- Third Floor: 8,000 s.f. of medical office space
- Fourth Floor: 5,600 s.f. of medical office space
- +/- 25 parking spaces at north side of property
- **TOTAL SPACE: 34,400 s.f. commercial space**

Building #2 would be new construction situated at the corner of Main Street Extension and Cooley Avenue. The three-story structure would have a footprint of approximately 6,400 square feet. The ground floor would have space for retail or personal service uses, while the second and third floors would contain two-bedroom condominium units.

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134 Main Street Extension – Building #2

- Ground Floor: 5,120 s.f. of retail/personal services space
- Second Floor: 5 2BR condominium units averaging 1,025 s.f. each
- Third Floor: 5 2BR condominium units averaging 1,025 s.f. each
- **TOTAL SPACE: 5,120 s.f. commercial space, 10 housing units**

Building #3 would consist of the adaptive reuse of the existing 0 Cooley Avenue building. A portion of the existing single-story façade along Cooley Avenue would be demolished along with rear portions of the building, with a retained building footprint of approximately 5,400 square feet. The brick tower component of the building facing Cooley Avenue would also be retained. The ground floor would be redeveloped as additional medical office space, and the upper two stories would contain a total of eight two-bedroom condominium units.

It should be noted that the redevelopment of this property is highly dependent on any environmental issues found on the site. If significant environment issues are ultimately discovered, these issues may be prohibitive for residential development. If this were the case, alternative redevelopment scenarios for this specific property would need to be examined.

0 Cooley Avenue – Building #3

- Ground Floor: 4,300 s.f. of medical office space
- Second Floor: 4 2BR condominium units averaging 1,075 s.f. each
- Third Floor: 4 2BR condominium units averaging 1,075 s.f. each
- **TOTAL SPACE: 4,300 s.f. commercial space, 8 housing units**

TOTAL SITE DEVELOPMENT

- Retail/Services: 11,620 s.f.

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- Office: 3,900 s.f.
- Medical Office: 24,000 s.f.
- Residential: 18 2BR condo units

105 EAST MAIN STREET

The existing vacant lot at 105 East Main Street would be reconfigured as a surface parking lot to support the commercial and residential space in Building #1, #2 and #3.

- Clear existing site for surface parking to support redevelopment
- +/- 83 parking spaces

117 EAST MAIN STREET

The existing auto sales and service structures would be demolished and the property redeveloped as a three-story mixed use building. The building would have a footprint of approximately 3,500 square feet and would be built at the front lot lines along both Cooley Avenue and East Main Street. The ground floor would have retail space, and the two upper stories would contain a total of eight one-bedroom rental units. Approximately 17 surface parking spaces could also be provided on-site.

- Demolish existing structure
- New three-story mixed use structure
- Ground Floor: 2,800 s.f of retail space
- Second Floor/Third Floor: 8 1BR apartment units averaging 700 s.f. each
- +/- 12 parking spaces

MAIN STREET EXTENSION PLAZA (159 & 169 Main Street Extension)

The existing auto service, sales and gas station structures on the 159 and 169 Main Street Extension properties would be demolished. The two properties would be combined and developed into a public plaza that incorporates landscape and hardscape elements, lighting, public seating and public art elements. The plaza would be integrated with streetscape improvements along Main Street Extension and would connect to the proposed bikeway/greenway.

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- Demolish existing structure on 169 Main St. Ext. site and combined property with 159 Main St. Ext.
- Develop an approximately 0.25 acre plaza consisting of landscape and hardscape elements
- Lighting, public seating area, improved streetscape elements

CONCEPT “B”

FORMATRON SITE

Similar to the proposed redevelopment under Concept “A”, the Formatron Site is envisioned as a multi-structure mixed use development combining retail, general office and medical office space with upper story condominium units.

Building #1 would be new construction and comprise the majority of the 134 Main Street Extension property with a building footprint of approximately 15,840 square feet. The building would form a continuous façade along Main Street Extension with a two-story frontage. The third and fourth stories would be subsequently set back from the building frontage to achieve a tiered effect that permits ample square footage while still presenting a pedestrian-scale street wall. The ground floor would be split into retail and general office space, while the upper stories would contain approximately 29,230 square feet of medical office space. Along the north side of the building, roughly 23 surface parking spaces could be developed.

134 Main Street Extension – Building #1

- Ground Floor: 8,450 s.f. of retail space, 4,225 s.f. of office space
- Second Floor: 12,675 s.f. of medical office space
- Third Floor: 9,790 s.f. of medical office space
- Fourth Floor: 6,770 s.f. of medical office space
- +/- 23 parking spaces at north side of property
- **TOTAL SPACE: 41,910 s.f. commercial space**

Building #2 would consist of the adaptive reuse of the existing 0 Cooley Avenue building. A portion of the existing single-story façade along Cooley Avenue would be demolished along with

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rear portions of the building, with a retained building footprint of approximately 5,400 square feet. The brick tower component of the building facing Cooley Avenue would also be retained. The ground floor would be redeveloped as additional medical office space, and the upper two stories would contain a total of eight two-bedroom condominium units.

It should be noted that the redevelopment of this property is highly dependent on any environmental issues found on the site. If significant environment issues are ultimately discovered, these issues may be prohibitive for residential development. If this were the case, alternative redevelopment scenarios for this specific property would need to be examined.

0 Cooley Avenue – Building #2

- Ground Floor: 4,300 s.f. of medical office space
- Second Floor: 4 2BR condominium units averaging 1,075 s.f. each
- Third Floor: 4 2BR condominium units averaging 1,075 s.f. each
- **TOTAL SPACE: 4,300 s.f. commercial space, 8 housing units**

Building #3 would be a new three-story mixed use building. The building would have a footprint of approximately 3,300 square feet and would abut an additional new mixed use structure on the 117 East Main Street property. The ground floor would have retail/service use space, and the two upper stories would contain a total of six two-bedroom condominium units.

0 Cooley Avenue – Building #3

- Ground Floor: 2,640 s.f. of retail/service use space
- Second Floor: 3 2BR condominium units averaging 880 s.f. each
- Third Floor: 3 2BR condominium units averaging 880 s.f. each

TOTAL SPACE: 2,640 s.f. commercial space, 6 housing units

TOTAL SITE DEVELOPMENT

- Retail/Services: 11,090 s.f.

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- Office: 4,225 s.f.
- Medical Office: 33,535 s.f.
- Residential: 14 2BR condo units

95-105 EAST MAIN STREET

The existing residential property at 95 East Main Street would be demolished and the lot combined with the vacant lots at 99 East Main Street and 105 East Main Street to create a surface parking lot to support the commercial and residential space developed on the Formatron site and 117 East Main Street.

- Clear existing site for surface parking to support redevelopment
- +/- 138 parking spaces

117 EAST MAIN STREET

The existing auto sales and service structures would be demolished and the property redeveloped as a three-story mixed use building. The building would have a footprint of approximately 4,180 square feet and would be built at the front lot lines along both Cooley Avenue and East Main Street. The ground floor would have retail space, and the two upper stories would contain a total of 12 one-bedroom rental units.

- Demolish existing structure
- New three-story mixed use structure
- Ground Floor: 3,350 s.f of retail space
- Second Floor/Third Floor: 12 1BR apartment units averaging 560 s.f. each

11 COOLEY AVENUE

The existing used auto sales operation would be cleared and the property redeveloped with four two-story townhouse residential units and associated parking and landscaping. The four townhouse units would have two bedrooms each and would have an average floor area of approximately 1,000 square feet.

- Demolish existing use on site

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- New two-story townhouse units
- 2BR units averaging 1,000 s.f. each
- 8 parking space for residents

MAIN STREET EXTENSION PLAZA (159 & 169 Main Street Extension)

As under the Concept “A” redevelopment scenario, the existing auto service, sales and gas station structures on the 159 and 169 Main Street Extension properties would be demolished. The two properties would be combined and developed into a public plaza that incorporates landscape and hardscape elements, lighting, public seating and public art elements. The plaza would be integrated with streetscape improvements along Main Street Extension and would connect to the proposed bikeway/greenway.

- Demolish existing structure on 169 Main St. Ext. site and combined property with 159 Main St. Ext.
- Develop an approximately 0.25 acre plaza consisting of landscape and hardscape elements
- Lighting, public seating area, improved streetscape elements

Pedestrian Generation Impacts

The redevelopment activities proposed will not only generate new jobs, property taxes and vehicular traffic, but also increased pedestrian activity along Main Street Extensions and its nearby side streets. In order to estimate the potential increase in pedestrian volumes resulting from new development, the proposed building and land use square footages for proposed South End developments were categorized and appropriate pedestrian average daily traffic (ADT) values assigned on a square footage basis for each use by structure/redevelopment site. These ADT values were drawn from “A Pedestrian Planning Procedures Manual” published by the Federal Highway Authority (FHWA), and applied to the applicable square footages of proposed new development in the South End Gateway area.

Table 9 and Table 10 illustrate the pedestrian generation calculations for the North End Gateway area for the two proposed redevelopment scenarios.

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TABLE 9 Pedestrian Generation Rates and Calculations for Redevelopment Concepts South End Gateway Area - Concept "A"			
FORMATRON - BUILDING #1			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
General Office	3,900	6	23
Medical Office	24,000	6	144
General Retail	6,500	12	78
TOTAL	34,400		245
FORMATRON - BUILDING #2			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
General Retail	5,120	12	61
Res. - 2BR	10,240	7	72
TOTAL	15,360		133
FORMATRON - BUILDING #3			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
Medical Office	4,300	6	26
Res. - 2BR	8,600	7	60
TOTAL	12,900		86
117 EAST MAIN STREET SITE			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
General Retail	2,800	12	34
Res. - 1BR	5,600	7	39
TOTAL	8,400		73
GRAND TOTAL	71,060		537

TABLE 10 Pedestrian Generation Rates and Calculations for Redevelopment Concepts South End Gateway Area - Concept "B"			
FORMATRON - BUILDING #1			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
General Office	4,225	6	25
Medical Office	29,235	6	175
General Retail	8,450	12	101
TOTAL	41,910		302
FORMATRON - BUILDING #2			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
Medical Office	4,300	6	26
Res. - 2BR	8,600	7	60
TOTAL	12,900		86
FORMATRON - BUILDING #3			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
General Retail	2,640	12	32
Res. - 2BR	5,280	7	37
TOTAL	7,920		69
117 EAST MAIN STREET SITE			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
General Retail	3,350	12	40
Res. - 1BR	6,720	7	47
TOTAL	10,070		87
11 COOLEY AVENUE SITE			
Use	Net Square Footage	Pedestrian Generation Rate (per 1,000 s.f.)	Pedestrians
Res. - 2BR	4,000	7	28
TOTAL	4,000		28
GRAND TOTAL	76,800		572

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Recommendations for Pedestrian Circulation System

As Table 9 and Table 10 indicate, redevelopment of the former Formatron complex and adjacent properties could potentially result in 500 to 600 additional pedestrians per day circulating through the South End Gateway area. These new daily pedestrian trips could have a significant impact on the existing pedestrian circulation system in the South End Gateway area, which is minimal in nature at best. As a result, upgrades to pedestrian circulation elements, streetscape and roadway improvements will likely be necessary. One of the key physical features of Main Street Extension is its very wide right-of-way. This extensive width provides a unique opportunity for the City to develop an attractive and robust pedestrian and non-motorized vehicular network throughout the South End Gateway area. Of the two gateway areas, the South End has the greatest potential for establishing and implementing a highly effective set of “Complete Streets” policies and design elements, as previously discussed and defined. These policies, standards and design elements would benefit the entire City and would make the South End Gateway area a more welcoming entrance into Downtown Middletown.

Recommended improvements, based upon field reconnaissance, planning analysis and comments received from the public workshop/charrette, include the following:

- Develop and maintain a unified sidewalk, streetscape and lighting scheme along Main Street Extension from Middlesex Hospital and Hubbard Park south to Ridge Road, as well as along Cooley Avenue, East Main Street and Silver Street. Bike racks should be provided in appropriate quantities and appropriate locations, and curbs should have ADA-compliant ramps at all intersections. Curb cuts for vehicular traffic should be kept to a minimum to avoid pedestrian/motor vehicle conflicts.
- Pursue the development of a bikeway/greenway along Sumner Brook, connecting the Land Trust property near Ridge Road with Middlesex Hospital, continuing on through Hubbard Park, and linking up with DeKoven Drive to eventually run northward to the rail spur in the North End Gateway area. Additional bike lanes should be oriented east along Silver Street to facilitate future connections to the Connecticut River waterfront.
- Develop a definitive and clear transportation mode hierarchy along Main Street Extension. This should include improved road striping, new crosswalks near pedestrian-generating uses and development such as the redeveloped Formatron site, dedicated bike lanes or “sharrows” (a lane shared by both motor vehicles and bicycles, designated with special arrow markings), and clearly marked (and possibly metered) on-street parking spaces.
- Create design guidelines for the South End Gateway area that encourages “Complete Streets” and establishes streetscape standards such as lighting, sidewalk, bike lanes and signage to promote a friendlier and safer atmosphere for all transportation users.

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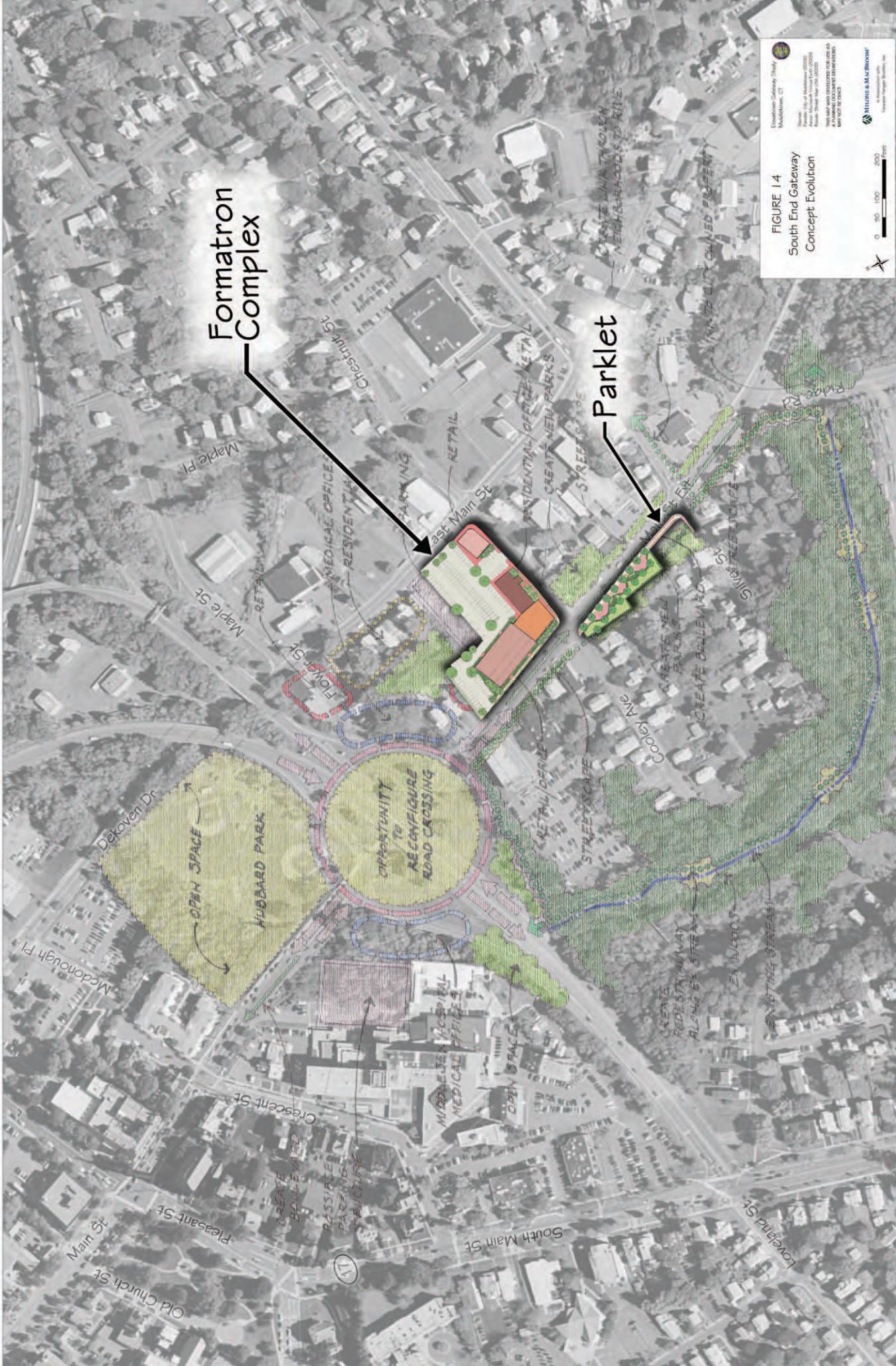
- Invest in DeKoven Drive as the connection between the North End Gateway and South End Gateway areas for bicyclists due to the limited potential for dedicated accommodations for bicyclists on Main Street.
- The intersections of Main Street Extension/Cooley Avenue and Main Street Extension/Silver Street should be studied to identify potential improvements. Emphasis should be placed on elements that enhance pedestrian safety, including textured/slightly raised crosswalks, improved pedestrian crossing and traffic signal timing (if necessary), aesthetic and landscape improvements and improved wayfinding signage.

Detailed Concept Plans

Figure 14, Figure 15, Figure 16 and Figure 17 present detailed final concept plans for the South End Gateway area. Figure 14 is a 100 scale illustrative concept plan that builds upon the draft concept plan developed previously and presented as Figure 13, combined with additional planning analysis and feedback from stakeholders and the general public at the community workshop/charrette in April 2011. This illustrative concept plan retains many of the elements of the original draft concept plan shown in Figure 13. However, notable additions include the extension of the proposed bikeway/greenway along Sumner Brook northeastward to DeKoven Drive, specific streetscape improvements, and the new redevelopment components shown in greater detail in Figure 15, Figure 16 and Figure 17 (discussed below).

Figure 15 presents a 40 scale detailed plan under the Concept “A” redevelopment scenario, focused on the former Formatron manufacturing complex and adjacent properties. As shown on this detailed concept plan, the site’s frontage along the east side of Main Street Extension would be redeveloped with two new structures. The northernmost structure would be a four-story building with approximately 43,000 square feet of gross floor space. The third and fourth floors would be “stepped back” from the façade line to maintain a pedestrian scale along Main Street Extension and to provide space for potential roof gardens or other “green roof” elements. The building would consist of ground floor retail and general office space, with medical office space on the upper floors. The southernmost building would be situated at the corner of Main Street Extension and Cooley Avenue, and would be a three-story building with approximately 19,200 square feet of gross floor space. The building would have ground floor retail or service establishment space and residential condominium units on the upper two stories.

Along the Cooley Avenue side of the former Formatron site, the existing brick structure at 0 Cooley Avenue would be retained for adaptive reuse, with some elements of the structure being selectively demolished. The portion of the building retained, approximately 16,100 square feet of gross floor area spread over three floors, would be used for ground floor medical office space and upper story residential condominium units. At the corner of Cooley Avenue and East Main Street, the existing



Formatron
Complex

Parklet


 Downtown Gateway Study
 Middletown, CT
 Prepared for: City of Middletown (2020)
 Project: South End Gateway
 Author: Milone & MacBroom
 THIS MAP WAS DEVELOPED FOR THE IAS
 A PLANNING DOCUMENT DEVELOPMENT
 BY THE CITY OF MIDDLETOWN

FIGURE 1.4
 South End Gateway
 Concept Evolution

0 50 100 200
 Feet



Downtown Gateway Study
 Middletown, CT

Source:
 City of Middletown (2009)
 Aerial: Microsoft Virtual Earth (2009)
 Roads: Street Map USA (2009)

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FIGURE 15
 Concept Sketch
 Former Formatron Complex
 Concept A



Downtown Gateway Study
 Middletown, CT

Source:
 City of Middletown (2009)
 Aerial: Microsoft Virtual Earth (2009)
 Roads: Street Map USA (2009)

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FIGURE 16
 Concept Sketch
 Former Formatron Complex
 Concept B

Main St Ext.

Decorative Lamp Post

Benches

Plant Beds - shrubs, groundcover
& flowers

Ornamental Street Trees

Decorative Paving

New Sidewalk

FIGURE 17
Concept Sketch
Parklet at Silver St. &
Main St. Ext Intersection

Downtown Gateway Study
Middletown, CT

Sources:
Pavilion: City of Middletown (2009)
Lamp Post: City of Middletown (2009)
Benches: Street Map USA (2008)

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structure at 117 East Main Street would be demolished and replaced by a new three-story structure containing approximately 10,500 square feet of gross floor area. The ground floor would house retail or service establishment space, with one bedroom apartment units on the second and third floors. The 105 East Main Street property would be cleared and redeveloped as surface parking to support the new uses on the former Formatron complex site.

Figure 16 presents a 40 scale detailed plan under the Concept “B” redevelopment scenario, focused on the former Formatron manufacturing complex and adjacent properties. As shown on this detailed concept plan, the site’s frontage along the east side of Main Street Extension would be redeveloped with one new structure. This structure would be a four-story building with approximately 52,400 square feet of gross floor space. The third and fourth floors would be “stepped back” from the façade line to maintain a pedestrian scale along Main Street Extension and to provide space for potential roof gardens or other “green roof” elements. The building would consist of ground floor retail and general office space, with medical office space on the upper floors.

At the corner of Main Street Extension and Cooley Avenue, a roughly 5,400 square foot plaza would be constructed, offering from landscaping and hardscape elements and integrated into the surrounding streetscape design and pedestrian circulation functions.

Along the Cooley Avenue side of the former Formatron site, the existing brick structure at 0 Cooley Avenue would be retained for adaptive reuse, with some elements of the structure being selectively demolished. The portion of the building retained, approximately 16,100 square feet of gross floor area spread over three floors, would be used for ground floor medical office space and upper story residential condominium units. Immediately adjacent to the east of this building, a new three-story mixed use building with approximately 10,000 square feet of gross floor space would be constructed. The ground floor of this structure would have retail/service use space, and the two upper stories would contain condominium units.

At the corner of Cooley Avenue and East Main Street, the existing structure at 117 East Main Street would be demolished and replaced by a new three-story structure containing approximately 12,500 square feet of gross floor area. The ground floor would house retail or service establishment space, with one bedroom apartment units on the second and third floors. The 95 East Main Street, 99 East Main Street and 105 East Main Street properties would be cleared and redeveloped as surface parking to support the new uses on the former Formatron complex site.

Figure 17 presents a 20 scale detailed concept plan focused on the west side of the section of Main Street Extension between Cooley Avenue and Silver Street. As shown on this detailed concept plan, the existing structures at 159 Main Street Extension and 169 Main Street Extension would be demolished and the two properties would be combined. The unified site would be cleared redeveloped as a small park/plaza integrated with the new streetscape and pedestrian circulation

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improvements along Main Street Extension. This new open space asset is intended to support the redevelopment of the Main Street Extension/Cooley Avenue intersection as the focal point of the revitalized South End Gateway neighborhood, as well as provide an important activity node within the proposed network of pedestrian circulation and bikeway/greenway elements.

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Final Conclusions and Recommendations – A Vision for the Future

North End Gateway Area

Completing the linkage between the Downtown core and the North End via Main Street is not a particularly difficult task, and could be accomplished relatively quickly over a short-term or medium-term time frame. The City of Middletown, non-profit developers and a variety of local businesses and organizations are already mounting an impressive drive to knit the North End into the Downtown core and help the neighborhood develop its own success stories. Continuing this positive momentum simply requires continued dedication.

The North End Gateway area has potential as a regional draw. Building upon the existing arts, medical and food and food service clusters in the area offers a route for continuing the recent success experienced in revitalizing the North End neighborhood. However, continued vigilance will be required to avoid neighborhood deterioration, especially during difficult economic times. Business closings, housing foreclosures and changes in crime patterns could impact the North End Gateway area during the coming years. However, if the City, non-profits and commercial businesses can maintain the momentum from past successes, the possibility exists to fully establish the area as both an extension of the Downtown core, a regional destination, and maintain its identity as an historic and distinct neighborhood.

Critical components for future success of the North End Gateway area include the following:

- Continued presence of a strong, grass roots neighborhood organization
- Expansion of the Downtown business district association to include, at a minimum, the Main Street portion of the gateway area
- Continued active guidance and leadership from the City in pursuing development initiatives
- Proactive participation in the neighborhood by businesses and institutions
- A variety and balance of uses and activities that ensures that the North End Gateway reflects the needs and desires of both local residents and the wider regional market
- Creating alternative transportation linkages, such as tying together the City's established "walking loops" with a potential new bikeway/greenway along the rail spur adjacent to the Trolley Barn property would connect the North End with the Connecticut River waterfront and the South End Gateway area via DeKoven Drive, Hubbard Park and Sumner Brook.

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South End Gateway Area

The greatest barrier to the redevelopment of the South End Gateway area is its physical disconnection from the Downtown core. Given the complexity and scale of the Route 17 interchange, which blocks the South End Gateway from the balance of Downtown, remedying this disconnect must be viewed as a long-term objective. However, the presence of Middlesex Hospital at the northwest edge of the gateway area provides near-term opportunities that can begin the process of defining the neighborhood in preparation for its ultimate linkage with the Downtown core.

The first step in a short-term to medium-term strategy for revitalizing the South End Gateway area is to frame the neighborhood in terms of its key features: the Middlesex Hospital campus; the former Formatron site; the intersection of Cooley Avenue and Main Street Extension; and the intersection of Silver Street and Main Street Extension. “Framing” means creating a series of attractive focal points anchored to these key features. New open space elements, “Complete Streets” design, roadway improvements and streetscape improvements can form a comprehensive package of enhancements that immediately breathes new life into the area. Once the physical environment is improved, the process of developing modest amounts of medical office space, retail/service space and new residential units can occur. The final concept plans presented in this report are designed to illustrate one possible way in which these two steps can be realized. It is important to note that redevelopment efforts in the South End Gateway area should be modest in scale to start. As the gateway area begins to experience success in its revitalization efforts, larger and more ambitious undertakings may occur with a greater chance of success.

The South End Gateway area is a blank canvas. Without a distinct built character or development form that defines this area, the South End could be many things. Should the character of Downtown expand south, or should the development patterns of East Main Street and Saybrook Road expand north? What is the form that offers the greatest chances for long-term economic sustainability? What is the form that will help the South End Gateway area eventually mesh with the Downtown core? The market feasibility analysis indicated that at this point in time, medical office mixed with small-scale retail and service space and a modest number of new housing units would be achievable. The success of this relatively small development, but substantial when viewed in the context of the South End Gateway area, could set the stage for expanded development in future years that links the area to the Downtown core to the north and the existing retail and residential neighborhoods to the south and east. An eventual connection to the Connecticut River waterfront would complete the revitalization of this area.

Critical components for future success of the South End Gateway area include the following:

- Creation of a strong, grass roots neighborhood organization similar to NEAT in the North End

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- The reconfiguration of the Route 17 interchange and flyover will need to occur in order for the South End Gateway area to ever truly reconnect with the Downtown core.
- Middlesex Hospital's level of participation in the development of the South End Gateway area may be the single most important determinant
- Guidance and leadership from the City in driving development in this area will also be critical, as it has been in the North End
- Proactive participation in the neighborhood by new businesses and institutions will be needed to maintain the momentum of success
- Establishing an identity for the South End Gateway area, one that recognizes its connection to the Hospital and Downtown, but also allows for the development of the neighborhood as its own unique part of Middletown.

SUMMARY DATA – REDEVELOPMENT OPTIONS FOR DOWNTOWN GATEWAY AREAS

Table 11 and Table 12 on the following page summarize the proposed development space in terms of land use type and square footage for both gateway areas, broken down by individual building and site. In total, the proposed redevelopment plans would create an additional 33,000 to 38,000 square feet of retail space; 15,000 to 20,000 square feet of arts-related space; 8,000 square feet of general office space; 34,000 to 39,000 square feet of medical office space; 46 to 50 new apartments and condominium units; 13,000 square feet of open space; and 280 to 330 new parking spaces in the North End Gateway and South End Gateway areas.

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TABLE 11

Summary of Concept Plan Uses by Property

NORTH END	North End Gateway Area and South End Gateway Area - Concept "A"				Residential - Apts.	Open Space	Parking Spaces
	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office			
Trolley Barn	16,100 to 21,100	15,000 to 20,000	1,100	0	14 (5 studio, 9 1BR)	2,500	125
Grand & Main	2,900	0	2,900	5,800	6 (6 2BR)	0	19
12 Liberty St. Site	0	0	0	0	0	0	18
SUBTOTAL	19,000 to 24,000	15,000 to 20,000	4,000	5,800	20 (5 studio, 9 1BR, 6 2BR)	2,500	162
SOUTH END	General Office				Residential - Apts.	Open Space	Parking Spaces
	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office			
Formatron Site Building #1	6,500	0	3,900	24,000	0	0	25
Formatron Site Building #2	5,120	0	0	0	10 (10 2BR)	0	0
Formatron Site Building #3	0	0	0	4,300	8 (8 2BR)	0	0
105 East Main St. Site	0	0	0	0	0	0	83
117 East Main St. Site	2,800	0	0	0	8 (8 1BR)	0	12
Main Street Extension Plaza	0	0	0	0	0	10,500	0
SUBTOTAL	14,420	0	3,900	28,300	18 (18 2BR)	10,500	120
GRAND TOTAL	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Apts.	Open Space	Parking Spaces
	33,420 to 38,420	15,000 to 20,000	7,900	34,100	28 (5 studio, 17 1BR, 6 2BR)	13,000	282

TABLE 12

Summary of Concept Plan Uses by Property

NORTH END	North End Gateway Area and South End Gateway Area - Concept "b"				Residential - Apts.	Open Space	Parking Spaces
	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office			
Trolley Barn	16,100 to 21,100	15,000 to 20,000	1,100	0	14 (5 studio, 9 1BR)	2,500	125
Grand & Main	2,900	0	2,900	5,800	6 (6 2BR)	0	19
12 Liberty St. Site	0	0	0	0	0	0	18
SUBTOTAL	19,000 to 24,000	15,000 to 20,000	4,000	5,800	20 (5 studio, 9 1BR, 6 2BR)	2,500	162
SOUTH END	General Office				Residential - Apts.	Open Space	Parking Spaces
	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office			
Formatron Site Building #1	8,450	0	4,225	29,235	0	0	23
Formatron Site Building #2	0	0	0	4,300	8 (8 2BR)	0	0
Formatron Site Building #3	2,640	0	0	0	6 (6 2BR)	0	0
105 East Main St. Site	0	0	0	0	0	0	138
117 East Main St. Site	3,350	0	0	0	12 (12 1BR)	0	0
11 Cooley Avenue Site	0	0	0	0	4 (4 2BR)	0	8
Main Street Extension Plaza	0	0	0	0	0	10,500	0
SUBTOTAL	14,440	0	4,225	33,535	18 (18 2BR)	10,500	169
GRAND TOTAL	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Apts.	Open Space	Parking Spaces
	33,440 to 38,440	15,000 to 20,000	8,225	39,335	32 (5 studio, 21 1BR, 6 2BR)	13,000	331

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APPENDIX A

MARKET FEASIBILITY ASSESSMENT

**Downtown Gateway Study
Middletown, Connecticut**

**Prepared For:
City of Middletown Redevelopment Agency
Middletown, CT**

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I. Introduction

The purpose of this market study and analysis is to assess the potential for development within the North End and South End Gateway areas of Downtown Middletown. In 2009, the City of Middletown received a Brownfield Community Assessment Grant that has enabled the City to inventory and study brownfields throughout Middletown. The funding also will allow the City to invest in properties by conducting environmental assessments, identifying potential contaminants and planning for the possible remediation and redevelopment of these sites. Through the course of the brownfields assessment process, the City of Middletown's Redevelopment Agency has narrowed its area of focus to the North End and South End Gateway areas abutting Downtown Middletown. The City's overall goal is to plan for and promote intelligent economic investment in these brownfield properties as well as in the North End and South End Gateway areas in general.

II. Definition of Market Areas and Description of Market Analysis Methodology

Two market areas were identified for the purposes of conducting this market analysis. A Regional Market Area (RMA) was established as the market area within which the vast majority of competition for general office space, industrial space and some residential uses would occur, as well as to provide a broad demographic and economic picture of the larger region and its impacts on the North End and South End Gateway areas. The RMA encompasses the greater Middletown region and the southern end of the Route 9 corridor, including the City of Middletown, the City of Meriden and the towns of Cromwell, Rocky Hill, Portland, Haddam, Durham, Middlefield, Chester, Deep River, Essex and Old Saybrook. In addition, a smaller Downtown Market Area (DMA) was established as the geographic area from which much of the competition and demand for small retail uses, personal services, medical office space and some residential uses would occur. The DMA encompasses the four central Census Tracts in Middletown: Tracts 5411, 5415, 5416 and 5417. These Census Tracts include both the North End and South End Gateway areas, as well as the central core of Downtown Middletown and the area around Wesleyan University.

The RMA geography was defined based upon transportation linkages and regional development patterns. For example, the towns of Haddam and Cromwell were included in the RMA because of their strong transportation connection to Middletown via Route 9, while Rocky Hill was included because of its connection via Route 99. Portland, Meriden and Middlefield were included because of their connection to Downtown Middletown by way of Route 66, and the Town of Durham was incorporated into the RMA because of its linkage to Middletown along Route 17. In addition the towns in the lower Connecticut Valley were included due to market and anecdotal evidence that many residents from these communities traveled to Downtown Middletown for shopping and services. All of these transportation connections enable residents and visitors from each of these communities to reach Downtown Middletown in a reasonable amount of time. In contrast, the Town of East Hampton (which is technically adjacent to the City of Middletown, with the Connecticut River serving as their common border) was not included in the RMA since it is more difficult to reach Downtown Middletown from East Hampton in an acceptable amount of time. East Hampton has a much weaker transportation connection to Middletown because of the very limited number of places to cross the Connecticut River.

The DMA geography was defined based upon several factors, such as the inclusion of Census Tracts that encompass the three areas of particular interest for this market study (the North End, the South End and the Downtown core); a logical designation of an area within which the majority of the residents would be within walking distance of the businesses and institutions in Downtown Middletown; and to be generally consistent with the local market area established in the Downtown Housing Market Study completed in September 2010.

III. Description of Gateway Areas

The North End and South End Gateway areas form the north and south ends, respectively, of the central Downtown corridor of Middletown. Downtown Middletown is centrally located within the State of Connecticut along the Connecticut River and Route 9. The Downtown area encompasses the intersection of Route 9, Route 17 and Route 66, which is the major traffic interchange in the central Connecticut Valley region.

Both gateway areas have direct access to major transportation systems and routes, are within walking distance to the Downtown core and major shopping centers, and can be accessed by the Middletown Area Transit system.

North End Gateway:

The North End Gateway area is located along the northern end of Main Street where Route 17 and Route 66 interchange with the Arrigoni Bridge and Route 9. This interchange is a major gateway into the community and is a primary access point for visitors coming from points north of Middletown. This gateway area includes the Rapallo Avenue-Green Street-Ferry Street neighborhood along the east side of Main Street and the Spring Street-Grand Street-Liberty Street neighborhood on the west side of Main Street.

The North End has historically been home to many small neighborhoods and ethnicities for well over a century. The North End has also struggled with crime and poverty for years. However, within the last decade the North End has been evolving with some new development, and the redevelopment and improvement of the area has become a priority for the City of Middletown. The North End is home to a number of notable uses and buildings, including St. John's Church, Eli Cannon's Pub, the Old Trolley Barn, and the newly constructed Liberty Square building. Currently, construction has begun on a new Community Health Center on Main Street. The residents within the North End are very active in the community and have created a grass roots organization called the North End Action Team (NEAT). The North End's component neighborhoods have experienced successful rehabilitation efforts with the construction of the Wharfside Commons 96 unit apartment complex that includes affordable housing, and the on-going rehabilitation efforts for 15 single family homes by the Nehemiah Housing Corporation.

An examination of average daily traffic (ADT) counts in the North End Gateway area reveals that there is significantly more traffic at peak hours in the North End than there is in the South End. In the North End, the traffic volumes suggest that the area services a more regional market. The traffic volumes support the conclusion that the North End Gateway area is a primary access point into Downtown Middletown and that it is also a major connection to the eastern side of the Connecticut River by way of the Arrigoni Bridge. During the 7:00 am peak time there were roughly 6,000 cars traveling through the area and the majority of them either originated from east side of the Arrigoni Bridge or were heading toward Route 9. During the 4:00 pm peak time, roughly 6,500 cars were either traveling toward Portland over the bridge or into Downtown Middletown. Due to the



Downtown Gateway - North
 Downtown Gateway Study
 Middletown, CT

- Preliminary Gateway Boundary
- Brownfield Sites

Source: City of Middletown (2009)
 Parcels: City of Middletown (2009)
 Brownfields: As digitized by
 Vanasse Hangen Brustlin, Inc.
 Brownfield Assessment Grant (2010)
 Aerial: Microsoft Virtual Earth (2009)
 Roads: Street Map USA (2009)

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consistently high traffic volumes in the morning and evening peak hours, the North End Gateway area has greater potential for development at a regional level. Table 1 provides 2010 traffic counts for various counting stations in the North End Gateway area.

Location	Direction	Station	ADT	Peak Hour	Peak Count	24 Hour
Portland Town Line (Arrigoni Bridge) RT 66	East	49	16,700	5:00 PM	2,048	17,731
Portland Town Line (Arrigoni Bridge) RT 66	West	49	18,000	7:00 AM	2,172	19,150
South of Kings Avenue RT 66	North	52	11,400	4:00 PM	1,184	12,126
South of Kings Avenue RT 66	South	52	8,800	8:00 AM	842	9,381
East of Saint Johns Street RT 17	East	68	14,200	7:00 AM	1,374	15,085
East of Saint Johns Street RT 17	West	68	10,000	4:00 PM	1,044	10,671
Rapallo Ave - East of RT 66	Both	242	4,400	2:00 PM	456	4,635

Source: State of Connecticut Traffic Count Locator Program TMSADT.

South End Gateway:

The South End Gateway area is centered around Main Street Extension between the Route 17 interchange with Route 9 and the intersection of Ridge Road and Main Street Extension. The area includes the Cooley Avenue and West Silver Street neighborhoods. The former Formatron property at 134 Main Street Extension sits prominently at the gateway area's center. The U.S. Postal Service operates a facility at 11 Silver Street along the eastern boundary of the gateway area. The State of Connecticut Department of Social Services occupies two office buildings on Main Street Extension near the northern edge of the area. Middlesex Hospital, which employs over 1,500 people, is located at the northwest corner of the gateway area, separated from the other uses and properties in the South End by the elevated Route 17. Regional and national retailers, including CVS, Walgreens, Stop & Shop, Marshalls and Dollar Tree are located to the southwest of the gateway area within the South Farms section of Middletown.

Main Street Extension was constructed during the growth of Main Street. While the road was built to accommodate spillover development from the central part of Downtown Middletown, this growth never materialized. Therefore, the South End Gateway area has failed to develop a sense of identity and has become a disconnected piece of the City lying between the Downtown Middletown and the suburban South Farms area of the City. The South End Gateway area primarily functions as the connection between two more prominent sections of the City: Downtown Middletown and the residential South Farms section. The South End does not have a strong built form or neighborhood character, and while Main Street Extension is an important access route for local residents, it is not a primary access route for visitors or regional residents. However, due to its location, the South End is still a major gateway into Downtown Middletown, albeit one that is highly underutilized and physically disconnected.

An examination of ADT counts in the South End Gateway area indicates that the traffic volumes are significantly lower than those in the North End. Traffic volumes peaked in the afternoon

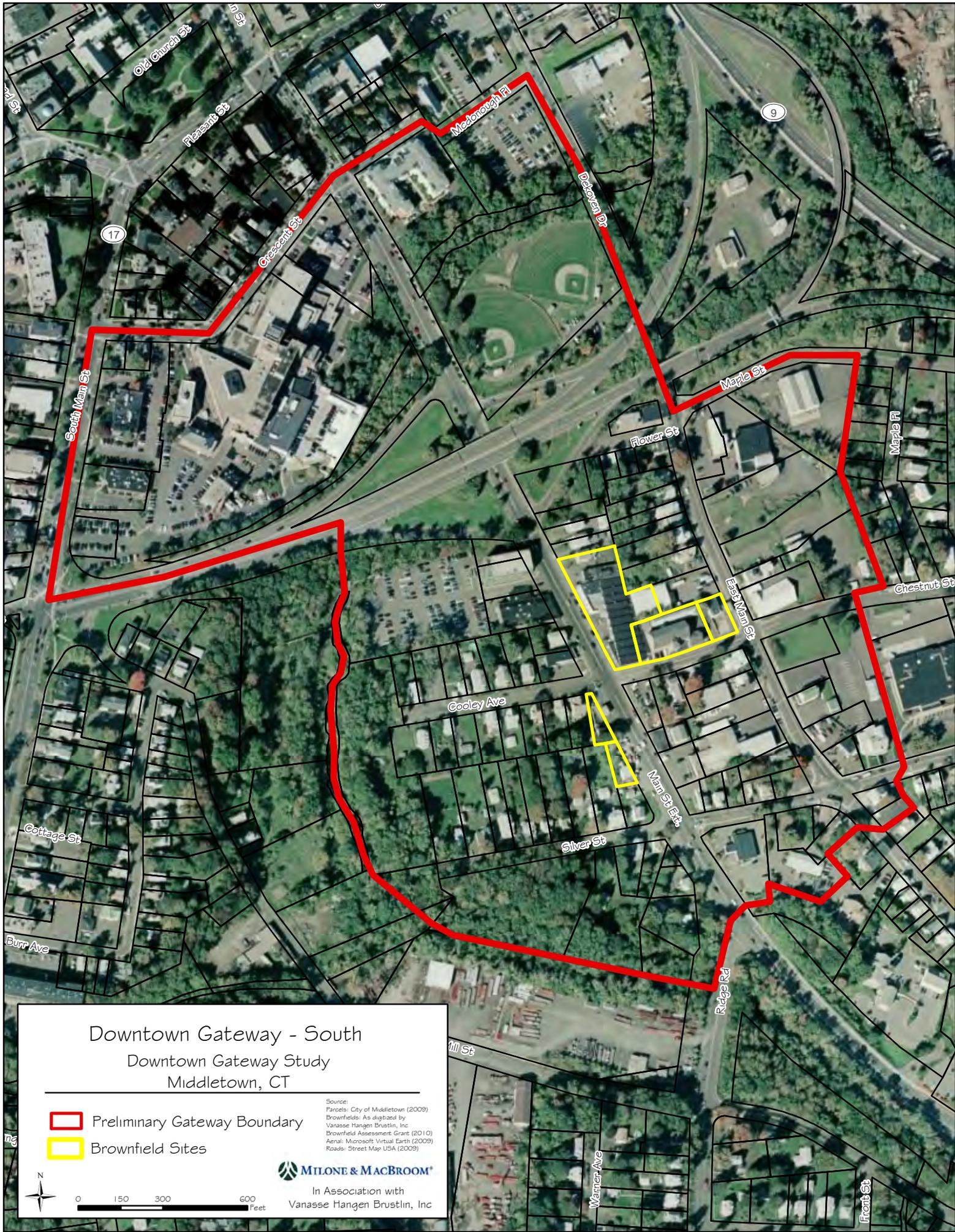
Downtown Gateway - South
Downtown Gateway Study
Middletown, CT

-  Preliminary Gateway Boundary
-  Brownfield Sites

Source:
Parcels: City of Middletown (2009)
Brownfields: As digitized by
Vanasse Hangen Brustlin, Inc
Brownfield Assessment Grant (2010)
Aerial: Microsoft Virtual Earth (2009)
Roads: Street Map USA (2009)



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between 3:00 pm and 4:00 pm. The traffic volumes suggest that the market potential for uses such as medium to large retail space is likely limited. To spur development of a regional scale, traffic volumes would need to increase or a “destination” use would need to be developed along Main Street Extension. Alternatively, these traffic volumes indicate that a potentially more successful approach to development would be to focus on smaller neighborhood-scale building forms and uses and tie into the customer base present at the Middlesex Hospital campus. Table 1 provides 2010 traffic counts for various counting stations in the South End Gateway area.

Location	Direction	Station	ADT	Peak Hour	Peak Count	24 Hour
Main Street Extension- NW of RT 17 SB on Ramp	North	2221	5,600	4:00 PM	473	6,001
Main Street Extension- NW of RT 17 SB on Ramp	South	2221	4,900	3:00 PM	418	5,162
Main Street Extension- N of RT 17 NB off Ramp	North	2368	7,500	4:00 PM	646	8,029
Main Street Extension- N of RT 17 NB off Ramp	South	2368	6,200	3:00 PM	509	6,564
Main Street Extension- S of RT 17 NB off Ramp	Both	363	16,600	3:00 PM	1,400	17,636
Main Street Extension- SE of Ridge Road	Both	223	13,300	3:00 PM	1,137	14,174

Source: State of Connecticut Traffic Count Locator Program TMSADT.

IV. 2010-2015 Demographic, Housing and Economic Data

Economic and demographic data estimates for 2010 and 2015 for the identified Regional Market Area (RMA) and Downtown Market Area (DMA) were gathered from Claritas, Inc., a leading national demographic and research data provider. Table 3 presents general data for population, households and income for these two areas.

	RMA	DMA
Population, 2000 Census	184,192	8,706
Estimated Population, 2010	193,482	8,816
Projected Population, 2015	195,699	8,799
Households, 2000 Census	74,614	3,907
Estimated Households, 2010	79,562	4,044
Projected Households, 2015	80,119	4,009
Average HH Income, 2000	\$64,428	\$39,883
Est. Average HH Income, 2010	\$80,277	\$44,713
Proj. Average HH Income, 2015	\$90,123	\$48,225
Median Household Income, 2000	\$53,503	\$29,814
Est. Median Household Income, 2010	\$64,899	\$32,905
Proj. Median Household Income, 2015	\$71,473	\$35,143
Per Capita Income, 2000	\$26,391	\$18,431
Est. Per Capita Income, 2010	\$33,325	\$20,975
Proj. Per Capita Income, 2015	\$37,216	\$22,447

Source: Claritas, Inc.; compiled by MMI.

As Table 3 illustrates, the identified RMA has had, and is projected to continue to have, modest growth in both population and number of households. Between 2000 and 2010, the population in the RMA grew by 9,290 people or approximately 5.0%. Perhaps more importantly, the number of households in the RMA increased by 6.6% between 2000 and 2010. Based upon the projections for population and households in 2015, the RMA will likely continue in a modest growth mode for the next few years. In the DMA, the population grew by only 1.3% between 2000 and 2010. However, the number of households in the DMA increased by 3.5% over the same time period, clearly indicating a shift toward smaller households. Based upon the projections for population and households in 2015, the DMA is expected to experience a small decline in both population and the number of households.

It is important to recognize that the population projections use mathematical formulas that trend forward earlier Census data. Substantial new data from the 2010 Census will be released over the next two years that will provide a more current picture of the demographic and economic conditions in both the RMA and the DMA. There is also new housing in the Downtown area that recently became occupied which is not recognized in the 2010 estimates.

Between 2000 and 2010, the RMA experienced increases in median household income and per capita income that far outpaced the growth rates for total population and the number of households. Median household income increased by 21.3% from 2000 to 2010, while per capita income increased by 26.3% over the same time period. Therefore, while the population and household statistics for the RMA indicate an area whose market base is growing modestly, the increase in income of existing residents compounds the growth of consumer spending resulting from population and household gains. However, the DMA did not experience a similar level of growth in income during the past decade. Between 2000 and 2010, the DMA's median household income increased by 10.4% while per capita income increased by only 13.8% over the same time period. The growth in the number of smaller households in the DMA with fewer children may explain this larger increase in per capita income.

Table 4 summarizes basic housing information for the RMA and the DMA.

TABLE 4				
Selected RMA & DMA Housing Data				
2010-2015				
	RMA		DMA	
	2010	2015	2010	2015
Total Occupied	79,562	80,119	4,044	4,009
Owner-Occupied	54,254	54,651	1,279	1,257
Renter Occupied	25,308	25,468	2,765	2,752
	2010	%	2010	%
One Family, Detached	50,488	59.1%	1,003	22.6%
One Family, Attached	4,868	5.7%	148	3.3%
Two Family	6,596	7.7%	925	20.9%
3 to 4 units	6,112	7.2%	822	18.5%
5 to 19 units	8,537	10.0%	665	15.0%
20 to 49 units	2,931	3.4%	370	8.3%
50+ units	5,636	6.6%	499	11.3%
Mobile homes	231	0.3%	0	0.0%
Other	8	0.0%	0	0.0%
TOTAL	85,407	100.0%	4,432	100.0%

Source: Claritas, Inc.; compiled by MMI.

Over 68% of the RMA's occupied housing stock is comprised of owner-occupied housing, and the majority of units in the housing stock itself (59.1%) are single family detached homes. Despite the strong presence of single family homes, however, the RMA has a considerably diverse stock of housing units; 14.9% of the housing stock is comprised of units in two- to four-family structures, and 20.0% of the housing stock is multifamily housing. Owner occupancy in the DMA is essentially the reverse of the RMA; only 31.6% of the occupied housing units in the DMA are owner-occupied. The DMA's housing stock is also much more concentrated in the multifamily categories, with over 77% of its housing units in structures with two or more total units. The difference between total housing units (85,407) and total *occupied* housing units (79,562) indicates that there are a substantial number of vacant residential structures in the RMA.

Table 5 provides general information of the racial and ethnic characteristics of the RMA and the DMA.

TABLE 5				
RMA & DMA Racial/Ethnic Characteristics				
2010-2015				
RMA	2010	%	2015	%
White, Non-Hispanic	148,732	76.9%	146,439	74.8%
Black, Non-Hispanic	11,948	6.2%	12,490	6.4%
Asian/Other, Non-Hispanic	9,040	4.7%	10,208	5.2%
Hispanic	23,762	12.3%	26,562	13.6%
TOTAL	193,482	100.0%	195,699	100.0%
DMA				
DMA	2010	%	2015	%
White, Non-Hispanic	5,212	59.1%	4,962	56.4%
Black, Non-Hispanic	1,697	19.2%	1,710	19.4%
Asian/Other, Non-Hispanic	687	7.8%	747	8.5%
Hispanic	1,220	13.8%	1,380	15.7%
TOTAL	8,816	100.0%	8,799	100.0%

Source: Claritas, Inc.; compiled by MMI.

Almost 77% of the RMA population is White Non-Hispanic, a percentage which is projected to continue to decrease slightly over the next five years. Black Non-Hispanic individuals constitute just over 6% of the population, while the Hispanic population represents 12.3% of the total population. Asian, Native American, Pacific Islander and multiracial individuals comprise 4.7% of the population. Over the next five years, continued population growth in the RMA among minority populations is projected to exceed numerical decreases in the White Non-Hispanic population. The DMA has a considerably larger percentage of Black Non-Hispanic residents than the RMA and a slightly greater percentage of Hispanic residents. While the Black Non-Hispanic population is expected to remain relatively flat over the next five years, continued growth in the Hispanic population and declines in the White Non-Hispanic population are projected for 2015.

Table 6 illustrates the age cohort breakdown of the RMA and DMA populations.

TABLE 6				
RMA & DMA Age Characteristics of Population				
2010-2015				
RMA	2010	%	2015	%
Age 0-4	11,056	5.7%	11,113	5.7%
Age 5-9	11,453	5.9%	11,050	5.6%
Age 10-14	12,305	6.4%	11,740	6.0%
Age 15-17	8,050	4.2%	8,230	4.2%
Age 18-20	5,773	3.0%	6,094	3.1%
Age 21-24	8,599	4.4%	9,261	4.7%
Age 25-34	22,417	11.6%	21,384	10.9%
Age 35-44	28,283	14.6%	25,592	13.1%
Age 45-54	31,172	16.1%	30,501	15.6%
Age 55-64	24,735	12.8%	27,793	14.2%
Age 65-74	14,972	7.7%	17,959	9.2%
Age 75-84	9,407	4.9%	9,411	4.8%
Age 85+	5,260	2.7%	5,571	2.8%
DMA	2010	%	2015	%
Age 0-4	487	5.5%	479	5.4%
Age 5-9	518	5.9%	482	5.5%
Age 10-14	540	6.1%	518	5.9%
Age 15-17	211	2.4%	266	3.0%
Age 18-20	311	3.5%	360	4.1%
Age 21-24	564	6.4%	474	5.4%
Age 25-34	1,343	15.2%	1,106	12.6%
Age 35-44	1,527	17.3%	1,549	17.6%
Age 45-54	1,177	13.4%	1,273	14.5%
Age 55-64	855	9.7%	923	10.5%
Age 65-74	580	6.6%	675	7.7%
Age 75-84	395	4.5%	377	4.3%
Age 85+	308	3.5%	317	3.6%

Source: Claritas, Inc.; compiled by HMA.

Almost 30% of the RMA population is under the age of 25, a statistic that is projected to decrease slightly over the next five years. The DMA's under age 25 population is slightly larger at 29.8% but is also projected to decrease slightly to 29.3% by 2015. Comparatively, the RMA's age 55+ population is projected to rise from 28.1% in 2010 to 31.0% in 2015 as the population begins to get somewhat older on average. The DMA's age 55+ population is also projected to increase noticeably, from 24.3% in 2010 to 26.0% in 2015.

Economic Benchmarks

To understand the potential market for development and redevelopment of the North and South Gateway areas, it is important to understand the existing local economic base. Middletown's economy relies primarily on the educational services, health care and social assistance, and manufacturing sectors for employment and earnings. Wesleyan University and Middlesex Hospital are major employers in the community and generate significant spin-off economic activity. The manufacturing sector, while declining, is still an important component of Middletown's overall economy.

According to the American Community Survey five-year (2005-09) data (ACS 05-09), approximately 30% of Middletown's civilian labor force is employed in the educational services, health care and social assistance fields. Thirteen percent is employed in manufacturing, while 10% work in retail and an additional 10% are employed in the finance, insurance and real estate industry. According to the *2007 Economic Census*, the healthcare and social assistance industry accounted for 7,535 jobs in Middletown; whereas the manufacturing sector had 3,390 jobs, down from 4,670 in 2002. The Census reported manufacturing sector receipts of approximately \$1.67 billion in 2007. While the 2007 Economic Census doesn't report total employment figures for educational services, it is reasonable to assume that Middletown serves as a regional job center in the educational services and healthcare fields. Finally, the retail and arts and entertainment sectors combine to account for approximately 18% of Middletown resident jobs, according to the ACS 05-09.

According to the ACS 05-09, the median household income in Middletown is \$59,677, which is lower than the corresponding figure for the RMA but substantially higher than that of the DMA. However, approximately 30% of households had incomes of less than \$35,000. Approximately 12% of all Middletown residents had incomes below the poverty level. These figures indicate a level of economic need that must be considered when evaluating market opportunities and potential.

V. 2010-2015 Consumer Spending Patterns

Data on the amount of consumer spending by residents of the RMA and the DMA, and for what product and service categories such spending was allocated to, was obtained from Claritas, Inc. This 2010 data indicates that RMA residents had total specified consumer expenditures of approximately \$4.24 billion, while DMA residents had total specified consumer expenditures of approximately \$142.1 million. However, many of these expenses are outside the realm of retail sales, such as expenditures for transportation, housing, education, child care, restaurants, personal services, charitable contributions, travel expenses and medical services. As illustrated in Table 7, total existing consumer expenditures of a generally retail nature for RMA residents were approximately \$1.85 billion in 2010, and are projected to increase to roughly \$2.1 billion in 2015. This represents an increase of roughly \$243.6 million or 13.1%.

Expenditure Category	Amount (in 000's)	
	2010	2015
Apparel	339,492	386,998
Sports & Recreation	140,059	173,250
TV, Radio & Sound Equipment	59,867	88,406
Computers/Software/Accessories	49,778	75,587
Reading Materials	38,483	42,477
Photographic Equipment	9,271	12,054
Food at Home (groceries)	465,356	489,450
Prescription Drugs	169,481	188,660
Medical Supplies	16,059	17,953
Household Textiles	43,643	48,700
Furniture	64,978	73,437
Major Appliances	22,207	24,961
Small Appliances/Housewares	52,367	59,056
Misc. Household Equipment	42,019	46,751
Personal Care Products/Services	94,572	103,017
Smoking Products/Supplies	78,027	85,445
Pet Expenses	46,384	51,964
Housekeeping Supplies	29,201	32,101
Alcoholic Beverages at Home	91,799	96,373
TOTAL	1,853,043	2,096,640

Source: Claritas, Inc.; compiled by MMI.

The Claritas data in Table 7 indicates that of the \$243.6 million increase in selected consumer spending in the RMA by 2015, approximately \$178.3 million or 73.2% of the new spending will be

in the categories of food at home (groceries); prescription drugs; apparel; TV/radio/sound equipment; computers/software/accessories; and sports and recreation.

TABLE 8		
Annual Consumer Spending of DMA Residents		
Selected Expenditure Categories, 2010-2015		
	Amount (in 000's)	
Expenditure Category	2010	2015
Apparel	11,766	12,977
Sports & Recreation	4,168	4,839
TV, Radio & Sound Equipment	2,003	2,861
Computers/Software/Accessories	1,534	2,265
Reading Materials	1,120	1,204
Photographic Equipment	211	282
Food at Home (groceries)	18,838	19,456
Prescription Drugs	5,716	6,280
Medical Supplies	519	572
Household Textiles	1,337	1,442
Furniture	1,793	1,942
Major Appliances	617	675
Small Appliances/Housewares	1,493	1,631
Misc. Household Equipment	1,068	1,152
Personal Care Products/Services	3,286	3,489
Smoking Products/Supplies	3,871	4,221
Pet Expenses	1,476	1,628
Housekeeping Supplies	1,092	1,175
Alcoholic Beverages at Home	3,454	3,520
TOTAL	65,362	71,611

Source: Claritas, Inc.; compiled by MMI.

Table 8 shows that total existing consumer expenditures of a generally retail nature for DMA residents were approximately \$65.4 million in 2010, and are projected to increase to roughly \$71.6 million in 2015. This represents an increase of roughly \$6.2 million or 9.6%. Similarly, the data in Table 8 shows that of the \$6.2 million increase in selected consumer spending in the DMA by 2015, approximately \$4.7 million or 74.5% of the new spending will be in the categories of food at home (groceries); prescription drugs; apparel; TV, radio, sound equipment; computers, software, accessories; and sports and recreation.

A point of clarification should be made about the data in Tables 7 and 8. The sales data shown in this table refers to total spending by residents of both market areas in expenditure categories that are generally retail in their nature. It must be stressed that not all of this spending occurs within the boundaries of these market areas. Local residents may spend their retail dollars at shopping centers

and regional malls outside of the RMA and DMA, as well as on the internet and during destination shopping trips in places such as New York City or Boston. Also, certain retail categories that generally do not fit within the typical store setting, such as automobile sales, were not included as part of the selected retail sales.

VI. Competitive Commercial Market Supply – Land and Buildings

Land Available

A survey of land available for commercial and/or industrial development in the RMA gathered from the Connecticut Economic Resource Center (CERC) SiteFinder website indicated that 26 parcels comprising 379.07 acres of raw or vacant land were available for commercial and/or industrial development. Of these 379 acres, 164.5 acres are marketed for retail or office development, 136.5 acres for industrial development and 78 acres for mixed use development. The inventory consists of two parcels (14.94 acres) in Cromwell, five parcels (75.12 acres) in Meriden, four parcels (38.95 acres) in Middletown, three parcels (12.98 acres) in Portland, eight parcels (196.2 acres) in Rocky Hill, three parcels (23.62 acres) in Old Saybrook, one parcel (17.26 acres) in Chester, and no parcels in Deep River, Durham, Essex, Haddam or Middlefield. Parcels range in size from 0.44 acres to 83 acres. Over one-half of the total acreage available in the RMA is found in the Town of Rocky Hill.

Of the 26 parcels identified, asking prices ranged from as low as \$22,885 per acre to as high as \$897,727 per acre. Asking prices for land marketed for retail and/or office development averaged roughly \$393,000 per acre, while asking prices for industrial land averaged \$112,000 per acre. The only property specifically marketed for mixed use that had price information available had an asking price of approximately \$112,000 per acre.

Buildings Available

In addition to the supply of raw and vacant land, there is also an extensive supply of available commercial and industrial building space in the RMA. According to an analysis of property listings on CERC's SiteFinder website, approximately 1.35 million square feet of vacant retail/office building space is available for sale or lease in 122 buildings or units. Of this 1.35 million square feet of space, roughly 932,000 is for lease only; 192,000 is for sale only; and 225,000 is available for both sale or lease. Approximately 1.19 million square feet of vacant industrial building space is also available for sale or lease in 44 buildings or units. Of this 1.19 million square feet of space, roughly 678,000 is for lease only; 238,000 is for sale only; and 273,000 is available for both sale or lease.

The median asking sales price for building space for sale is approximately \$95 per square foot for retail space, \$106 per square foot for office space and \$63 per square foot for industrial space. The median asking rents for building space for lease are approximately \$14.75 per square foot for retail space, \$13 per square foot for office space and \$6 per square foot for industrial space. Both asking sales prices and asking rents vary substantially around the RMA. Retail space for sale and for lease is generally most expensive in Meriden, while Middletown on average has the least expensive retail space. Prices for office and industrial space vary on a site by site basis, with both expensive and modestly priced space available in many of the communities in the RMA.

VII. Housing Market Analysis

A Downtown Housing Market Study for Middletown was completed in September 2010 by RKG Associates, Inc. The purpose of this study was to analyze the downtown housing market and determine the potential demand for various housing types. The study was also intended to serve as the statistical and analytical underpinning for an analysis of the feasibility of creating an Incentive Housing Zone (IHZ) in the Downtown area. More specifically, the City was interested in the following questions:

- What type of housing units would be “in demand”?
- How many units could be supported and over what time period?
- At what price levels could newly developed units be sold or rented?
- Are current incentives or infrastructure improvements in Middletown adequate to encourage investment?
- What role would parking play in the development of future housing?

The primary conclusion of the study is that due to a decline in employment, the Downtown housing market will not see any major increases over the next few years. Five-year household forecasts for Middletown indicate a projected decline of -750 households for the City and -190 households in the Downtown. The Downtown has a small concentration of condominiums, and there is a forecasted demand for approximately 20 condominiums in the downtown annually, with much if not most of this demand captured by ownership turnover in existing condominium units.

The projected growth sector for the homeownership market was projected to be households at the upper income level of \$100,000, while a decline was projected for the rental housing market. Also, the age groups of those purchasing condominium units were projected to be households between 25-34 years of age and 45-74 years of age. The study recommended creating a strategy for the conversion of multi-unit rental buildings into condominiums or upper floor residential conversions in commercial/mixed use buildings. The study also assumed that a potential price range of \$110,000 to \$150,000 would be more attainable in the Downtown based upon an evaluation of various case studies. The study also suggested that upscale housing is not likely to be supportable in the Downtown housing market.

As part of the case study analysis of other communities similar to Middletown, the study found that public partner relationships are possible and tend to mitigate developer-borne risk levels. In addition, a commitment by the City to make improvements such as infrastructure upgrades would also engender greater confidence in developers to move potential projects forward. The study also recommended that any residential development would need to be safe and provide off-street parking in the more densely developed parts of Downtown Middletown.

VIII. Downtown Middletown – Market Assessment

Downtown Business District – Business Directory and Map

The Middletown Downtown Business District (DBD) is an organization comprised of downtown businesses and property owners that manage and oversee downtown Middletown, recruits businesses, and plans for future growth. The DBD has an extensive website that provides a directory of businesses, entertainment, and eating establishments and also provides a map of the downtown business community that highlights many of its businesses and attractions.

Milone and MacBroom conducted a land use survey of the downtown to identify all of the uses within the North End Gateway area, the Downtown core and the South End Gateway area. This inventory was necessary for identifying what land uses and businesses the Downtown area may be lacking and what uses could potentially thrive in the gateway areas. The DBD business directory and associated map was very useful for identifying the core businesses on Main Street. However, the directory and the map lacked the detail of all land uses, did not include the South End Gateway area and only included a small portion of the North End Gateway area. The MMI land use survey examined detailed land uses based upon sub-sectors identified by the North American Industry Classification System (NAICS). Once these detailed land uses in the surveyed area were inventoried, the number and geographic distribution of land uses was then compared to consumer spending patterns and estimated business sales for a much more specific market analysis.

Current Land Use Inventory

To assess the current status of the Downtown Middletown market, a business inventory and field reconnaissance were conducted on January 4, 2010. The business inventory included all businesses with frontage along Main Street from St. John's Church at the intersection of Main Street and North Main Street to the intersection of Main Street Extension and Ridge Road. Within this 1.2 mile-long section of Middletown, 206 individual business establishments were identified. Each business was subsequently assigned an appropriate land use category based upon the North American Industry Classification System (NAICS) code. In addition, the total number of businesses by land use code was calculated for the subareas of Downtown Middletown, the North End Gateway area and the South End Gateway area. The complete business inventory is attached as Appendix A.

An analysis of the overall business inventory indicates that the retail trade sector accounts for approximately 35% of all business establishments in the surveyed area. Other economic sectors with a substantial presence in this corridor include Accommodation and Food Services (17%) and Other Services (14.1%). Within the Accommodation and Food Services sector, however, the Food Services and Drinking Places or Restaurants and Bars subcategories account for the vast majority of the business establishments, and comprise 16.5% of the total 206 businesses in the corridor. Other subsectors that ranked highly were Food and Beverage Stores; Clothing and Clothing Accessories Stores; Personal and Laundry Services; and Religious, Grantmaking, Civic, Professional and Similar Organizations.

Of the 206 businesses in the surveyed area, only 36 or 17.5% are located within the North End Gateway area. The most heavily represented sector is retail trade with 11 businesses, followed by Other Services (8 businesses); Health Care and Social Assistance (5 businesses); Accommodation and Food Services (5 businesses); and Arts, Entertainment and Recreation (4 businesses). The most common subsectors are Food Services and Drinking Places; Food and Beverage Stores; Religious, Grantmaking, Civic, Professional, and Similar Organizations; Performing Arts, Spectator Sports and Related Industries; and Ambulatory Health Care Services. When looking more specifically at the North End and its land and building uses, the area tends to have a social service/arts and culture atmosphere within its business community.

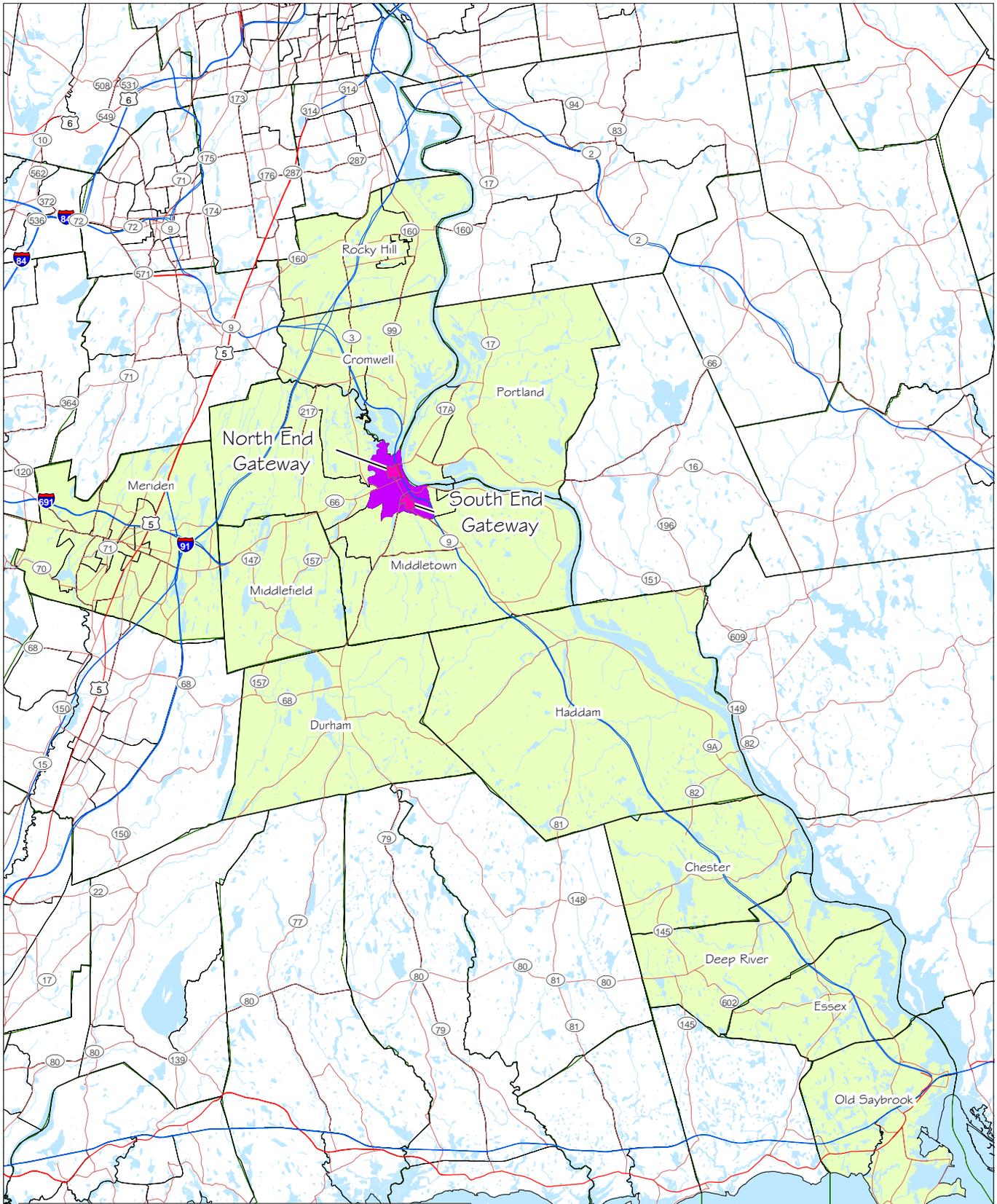
Compared to Main Street in Downtown Middletown and the North End, the South End Gateway area is relatively devoid of economic activity. There are only 16 businesses along the Main Street/Main Street Extension corridor that are located within this gateway area, or 7.8% of the total number of businesses in the entire corridor area. Of these 16 businesses, eight are retail businesses while Health Care and Social Assistance, Other Services and Public Administration sector business comprise the other eight businesses. The South End Gateway is bordered by Middlesex Hospital, and many of the health care and social assistance businesses in the Downtown area are located near the hospital.

The overwhelming majority of the businesses inventoried along the Main Street/Main Street Extension corridor are located outside of the North End and South End Gateway boundaries. Of the 206 businesses identified, 154 businesses or roughly 75% of the total are located in the central Downtown Middletown area. This area is generally defined as the Main Street corridor between Liberty Street to the north and Middlesex Hospital to the south. There are 53 different retail establishments in this area, along with 29 of the 34 Food Services and Drinking Places in the entire corridor, all of the 14 banks and credit institutions in the corridor, all but one of the nine Professional, Scientific, and Technical Services, and 12 of the 18 Personal and Laundry Services (hair salons, nail salons, etc.)

Consumer Spending – Downtown Middletown

In order to develop a more fine-grained analysis of the retail potential in the North End and South End Gateway areas of Downtown Middletown, consumer spending data was obtained from Claritas for the four Census Tracts that encompass the two gateway areas and the central portion of the Downtown: Tracts 5411, 5415, 5416 and 5417. This map that follows this page illustrates the DMA Census Tracts within the context of the larger RMA.

Table 9 presents selected retail store consumer spending data for the DMA for both the current year (2010) and projected for five years in the future (2015). Similar data is also provided for the RMA in Table 10. Residents of the Downtown Middletown area currently spend an estimated \$86.4 million per year at retail stores, an average of approximately \$9,805 per person. Total retail spending is



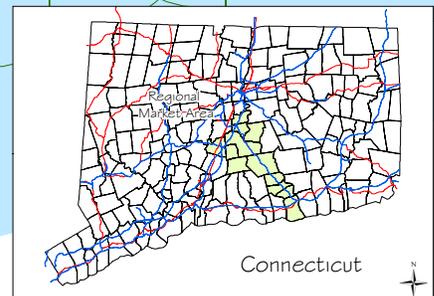
Designated Market Area
Downtown Gateway Study
Middletown, CT

- Preliminary Gateway Boundaries
- Downtown Middletown Census Tracts
- Census Tracts

Source:
Basemap: CT DEP
Geographic Information Center
Census Tracts: US Census 2000



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projected to increase by 6.7% over the next five years, rising to roughly \$92.3 million in 2015. The largest percentage increases in retail store sales are projected to occur in the following categories:

- Photographic Equipment and Supplies Stores
- Electronics/Computers/Appliance Stores
- Sporting Goods, Hobby, Book and Music Stores
- Office Supplies Stores
- Department Stores
- Clothing and Clothing Accessories Stores
- General Merchandise Stores

The greatest net changes in retail sales are projected in the following categories:

- General Merchandise Stores
- Department Stores
- Grocery Stores
- Computers/Electronics/Appliance Stores
- Clothing and Clothing Accessories Stores

Expenditure Category	Amount		% Change
	2010	2015	
Retail Stores	\$86,443,012	\$92,272,941	6.7%
Auto Dealers & Auto Parts	\$13,846,925	\$14,035,013	1.4%
Bldg. Materials/Garden Supplies & Equip.	\$1,862,402	\$2,000,274	7.4%
Photographic Equipment & Supplies	\$74,573	\$104,712	40.4%
Clothing & Clothing Accessories	\$6,041,932	\$6,665,494	10.3%
Electronics/Computers/Appliances	\$2,072,018	\$2,829,907	36.6%
Convenience Stores	\$1,019,423	\$1,072,485	5.2%
Department Stores	\$7,146,841	\$7,968,175	11.5%
Florists	\$677,376	\$719,723	6.3%
Grocery Stores	\$17,557,070	\$18,287,587	4.2%
Gifts/Novelty/Souvenir Stores	\$289,110	\$312,215	8.0%
General Merchandise Stores	\$14,703,359	\$16,149,712	9.8%
Gas Stations	\$10,267,370	\$10,174,985	-0.9%
Hardware Stores	\$229,135	\$247,436	8.0%
Health and Personal Care Products	\$5,573,966	\$6,076,635	9.0%
Jewelry Stores	\$1,169,932	\$1,246,044	6.5%
Furniture & Other Home Furnishings	\$2,267,671	\$2,459,611	8.5%
Luggage/Leather Goods	\$70,407	\$75,356	7.0%
Office Supplies	\$296,302	\$352,372	18.9%
Sporting Goods, Hobby, Books and Music Stores	\$2,165,558	\$2,587,859	19.5%
Personal Care Services	\$1,297,538	\$1,360,703	4.9%
TOTAL Specified Consumer Expenditures	\$142,113,512	\$150,750,936	6.1%

Source: Claritas, Inc.; compiled by MMI.

Expenditure Category	Amount		% Change
	2010	2015	
Retail Stores	\$2,530,380,658	\$2,787,968,499	10.2%
Auto Dealers & Auto Parts	\$487,188,088	\$516,382,955	6.0%
Bldg. Materials/Garden Supplies & Equip.	\$74,419,401	\$82,332,734	10.6%
Photographic Equipment & Supplies	\$3,150,177	\$4,266,841	35.4%
Clothing & Clothing Accessories	\$176,561,020	\$201,483,674	14.1%
Electronics/Computers/Appliances	\$65,701,005	\$92,528,164	40.8%
Convenience Stores	\$24,257,193	\$25,881,889	6.7%
Department Stores	\$213,625,492	\$245,995,662	15.2%
Florists	\$28,112,099	\$31,018,537	10.3%
Grocery Stores	\$441,004,218	\$468,131,828	6.2%
Gifts/Novelty/Souvenir Stores	\$8,931,415	\$9,976,430	11.7%
General Merchandise Stores	\$420,968,222	\$477,104,173	13.3%
Gas Stations	\$257,786,275	\$258,795,048	0.4%
Hardware Stores	\$9,022,292	\$10,029,599	11.2%
Health and Personal Care Products	\$161,642,738	\$179,301,980	10.9%
Jewelry Stores	\$41,733,105	\$46,659,867	11.8%
Furniture & Other Home Furnishings	\$82,000,683	\$92,479,043	12.8%
Luggage/Leather Goods	\$2,681,208	\$2,982,749	11.2%
Office Supplies	\$9,749,717	\$11,989,528	23.0%
Sporting Goods, Hobby, Books and Music Stores	\$67,714,415	\$84,875,830	25.3%
Personal Services	\$41,488,043	\$45,054,977	8.6%
TOTAL Specified Consumer Expenditures	\$4,329,080,115	\$4,638,342,002	7.1%

Source: Claritas, Inc.; compiled by MMI.

Use Clusters

Through the completion of the business inventory and the subsequent analysis, several land use clusters were identified. These included the following:

North End

- Food and Beverage Stores
- Food Services and Drinking Places
- Ambulatory Health Care Services
- Performing Arts
- Religious, Grantmaking, Civic, Professional, and Similar Organizations

South End

- Motor Vehicle and Parts Dealers

Downtown

- Food and Beverage Stores
- Food Services and Drinking Places
- Clothing and Clothing Accessories Stores

- Banks
- Professional, Scientific and Technical Services
- Personal Services

When one looks at the North End Gateway and the South End Gateway, there are clearly differences in terms of existing uses and the relationship to Main Street. The North End Gateway is an extension of the Downtown in terms of uses and urban fabric. To the contrary, the South End Gateway area is physically separated from the Downtown by Route 17 and has a much different urban fabric. The North End Gateway area contains a variety of destination uses including O'Rourke's Diner, Eli Cannons, Green Street Art Center, The Buttonwood Tree and the Community Health Center. It is interesting to note that on a percentage basis, there are similarities between the North End and the Downtown within certain use categories. For example, the percentage of establishments in the food and drink category is 18.8% in the Downtown and 13.5% in the North End. The percentage of retail trade establishments is 34.4% in the Downtown and 30.6% in the North End.

By contrast, the South End contains no eating and drinking establishments. While retail trade establishments comprise 50% of the total establishments, for the most part, these fall into the heavy commercial uses such as the plumbing supply and motor vehicle parts categories. These are not uses found in the Downtown. The primary uses are within the healthcare and social assistance categories. These are the destination uses in the South End.

Considering the existing uses, urban fabric and physical relationship to the Downtown of each of the gateway areas, a development focus emerges. The North End contains an evolving arts and culture base with a health care and social assistance sector represented by the Community Health Center. The new Community Health Center facility will make a strong physical statement on Main Street. These sectors have the potential to strengthen the surrounding neighborhood by increasing the demand for housing. The arts and culture sector known collectively as the "creative industries" will support the demand for work/live housing as well as the potential for additional galleries and performing arts venues. A concept similar to ArtSpace, which sponsors live/work developments, might be appropriate for the area. The former trolley barn might be a good location for such a use.

The South End Gateway area's future will be grounded in the healthcare sector. There may be direct impacts in the area from the expansion of Middlesex Hospital facilities. A second market opportunity is the expansion of the housing supply marketed to Middlesex Hospital employees. This housing can be provided through new development as well as renovation and marketing of existing housing in the surrounding neighborhood. At the same time, connectivity with the Downtown should be strengthened through better pedestrian connections.

IX. North End and South End Gateways – Market Potential Summary

As part of this analysis, a number of potential uses for redeveloped properties in both the North End and the South End Gateway areas were explored to determine quantitative market support, proximity to similar uses or clusters of similar uses, and locational appropriateness for each potential land use. Based upon the quantitative and qualitative data collected and analyzed, each potential land use was assigned a rating from “Excellent” to “Poor” to summarize the findings regarding each element of the identified land uses.

The three metrics selected for the matrices were chosen for a variety of reasons. First, quantitative market support, where discernible, is obviously a critical component of the potential for a particular land use. Second, the identification of existing uses or clusters of uses of a nature similar to the land use in question is also an important market consideration. Clustering of similar uses can be both positive and negative for uses of a similar nature. The presence of similar uses may help create a “district” that becomes known for particular types of uses, thereby allowing a single use to gain more market share than it normally would if it were alone. However, the presence of similar uses can also result in greater competition for a finite amount of consumer spending dollars, making it more difficult for a single use to survive in the market. Finding a balance between these two possible outcomes is an important consideration in determining the market feasibility of a particular land use. Finally, locational appropriateness encompasses the concept that certain land uses, for a number of possible reasons, are better “fits” in some areas than others. For example, even if there were market support for new industrial uses in Middletown, Main Street in Downtown would not be an appropriate location for such uses.

Tables 11 and 12 present the market potential for each potential land use in the North End and South End Gateway areas. The discussion following these two tables describes the rationale for each market potential designation by economic sector.

TABLE 11				
North End Gateway Area - Potential Land Use Assessment				
USE	Market Support	Use Cluster Support	Locational Appropriateness	OVERALL ASSESSMENT
<i>Retail</i>				
Motor Vehicle and Parts Dealers	Excellent	Poor	Poor	Fair
Furniture and Home Furnishings Stores	Poor	Good	Good	Fair
Electronics and Appliance Stores	Fair	Poor	Good	Fair
Building Material and Garden Equipment and Supplies Dealers	Poor	Fair	Fair	Fair
Food and Beverage Stores	Good	Excellent	Good	Good
Health and Personal Care Stores	Good	Good	Good	Good
Gasoline Stores	Excellent	Good	Poor	Fair
Clothing and Clothing Accessories Stores	Poor	Fair	Good	Fair
Sporting Goods, Hobby, Book, and Music Stores	Fair	Poor	Good	Fair
General Merchandise Stores	Excellent	Poor	Good	Good
Hardware Stores	Fair	Poor	Good	Fair
Jewelry Stores	Fair	Fair	Good	Fair
Department Stores	Good	Poor	Fair	Fair
Gifts/Novelty/Souvenir Stores	Fair	Fair	Good	Fair
Luggage/Leather Goods	Poor	Poor	Good	Fair
Office Supplies	Fair	Fair	Good	Fair
Convenience Stores	Fair	Excellent	Fair	Fair
<i>Personal Services</i>				
	Fair	Fair	Good	Fair
<i>Arts/Culture/Recreation</i>				
	Good	Excellent	Excellent	Excellent
<i>Health Care & Medical Office Space</i>				
	Fair	Excellent	Good	Good
<i>General Office Space</i>				
	Poor	Fair	Fair	Fair
<i>Industrial/Warehouse Space</i>				
	Poor	Fair	Poor	Poor
<i>Residential</i>				
Condominiums	Fair	Fair	Good	Fair
Apartments	Fair	Good	Good	Good

TABLE 12				
South End Gateway Area - Potential Land Use Assessment				
USE	Market Support	Use Cluster Support	Locational Appropriateness	OVERALL ASSESSMENT
<i>Retail</i>				
Motor Vehicle and Parts Dealers	Excellent	Excellent	Poor	Fair
Furniture and Home Furnishings Stores	Fair	Fair	Good	Fair
Electronics and Appliance Stores	Fair	Poor	Fair	Fair
Building Material and Garden Equipment and Supplies Dealers	Fair	Fair	Excellent	Fair
Food and Beverage Stores	Good	Poor	Good	Fair
Health and Personal Care Stores	Good	Poor	Good	Fair
Gasoline Stores	Good	Fair	Poor	Fair
Clothing and Clothing Accessories Stores	Poor	Poor	Fair	Poor
Sporting Goods, Hobby, Book, and Music Stores	Fair	Poor	Good	Fair
General Merchandise Stores	Excellent	Poor	Good	Good
Hardware Stores	Fair	Poor	Good	Fair
Jewelry Stores	Fair	Poor	Poor	Poor
Department Stores	Good	Poor	Poor	Poor
Gifts/Novelty/Souvenir Stores	Fair	Poor	Fair	Fair
Luggage/Leather Goods	Poor	Poor	Fair	Poor
Office Supplies	Fair	Poor	Good	Fair
Convenience Stores	Fair	Fair	Fair	Fair
<i>Personal Services</i>				
	Fair	Fair	Good	Fair
<i>Arts/Culture/Recreation</i>				
	Good	Poor	Fair	Fair
<i>Health Care & Medical Office Space</i>				
	Fair	Excellent	Good	Good
<i>General Office Space</i>				
	Poor	Poor	Good	Fair
<i>Industrial/Warehouse Space</i>				
	Poor	Fair	Excellent	Fair
<i>Residential</i>				
Condominiums	Fair	Poor	Good	Fair
Apartments	Fair	Fair	Good	Fair

Retail Potential

The market potential for retail space in Downtown Middletown area is quite varied. For many types of retail uses, the existing supply of similar retail uses already located in the Downtown area limits the potential for further growth. For others, the lower income levels within the DMA simply do not provide the necessary levels of consumer spending to support additional retail development. Finally, the Downtown Middletown retail market faces stiff competition from more regionally-oriented retail development areas located nearby, such as the Route 66 corridor.

According to data collected from Claritas and data presented in the recently completed Downtown Housing Market Study, Downtown Middletown’s population and household growth is projected to be either stagnant or actually contract over the next five years. While this is noteworthy from a market standpoint, what are more worrisome are the statistics and projections for income levels in the DMA. Based upon 2010 data estimates from Claritas, the per capita income of the DMA is only 62.9% of the RMA per capita income. As shown earlier in Table 3, the estimated 2010 per capita income for the DMA is \$20,975, and it is only projected to increase by 7.0% to \$22,447 in 2015. Assuming a rate of inflation of 1.5%, compounded annually, this 7.0% increase in income would not even cover the cost of inflation. While stagnant population and household growth is problematic for expanding the Downtown retail market, what is truly needed to expand this market is more income among DMA residents.

Despite these limitations, the DMA has very strong existing retail sales compared to the consumer spending levels of its residents. Table 13 illustrates the calculations completed to quantify the nature of this market relationship by calculating the DMA potential sales from residents and comparing this figure to estimated actual retail sales in the DMA.

TABLE 13 DMA Trade Area Capture and Sales Surplus Retail Uses	
Factor/Variable	
RMA Per Capita Expenditures	\$13,078.12
DMA Income Index	0.629
DMA Actual Sales	\$104,000,000
DMA Capture	\$12,634
Pull Factor	1.43
DMA Potential Sales	\$72,568,590
DMA SALES SURPLUS	\$31,431,410

As Table 13 shows, the DMA already captures significantly greater retail sales than its resident population could support on its own. It is estimated that DMA residents could support approximately \$72.6 million in annual retail sales. However, estimated existing annual retail sales in the DMA are \$104.0 million, resulting in a sales “surplus” of roughly \$31.4 million. Therefore, over 30% of the retail sales in the DMA are likely occurring as a result of customers from outside the DMA. This substantial regional draw is also reflected in the pull factor calculation. A pull factor greater than 1.00 is indicative of a trade area drawing in market support from surrounding trade

areas as well as its own residents. With a pull factor of 1.43, the DMA has a retail market that is clearly supported primarily by the larger region. These figures and calculations underscore other statistical and anecdotal evidence of Downtown Middletown being the central economic focal point for the region.

This analysis demonstrates the positive market element of Downtown Middletown being a regional retail draw. However, the analysis also points to a potentially negative aspect of Downtown Middletown's retail market. If Downtown Middletown already relies heavily upon the balance of the region to support its retail sector, and existing DMA residents lack the economic means to generate more market activity, how much additional growth can be expected in the Downtown retail market? From this analysis, potential growth would appear to be quite limited.

Despite the points of the previous discussion, several factors impact Downtown Middletown's retail market in a positive manner. First, the interchange of Routes 9, 66 and 17, as well as the presence of one of the few crossings over the Connecticut River via the Arrigoni Bridge, solidify Downtown Middletown as a regional transportation center. Thousands of vehicles pass through Downtown Middletown each day, providing a substantial and diverse potential customer base for Downtown businesses. Second, Downtown Middletown is home to several important civic and institutional uses that draw in visitors from around the region. Of these uses, Middlesex Hospital and the Middlesex Judicial District Courthouse perhaps have the greatest impact. Both of these uses draw in many potential customers for Downtown retail and personal services businesses on a daily basis. Finally, as a densely-developed urban environment and the historic center of the larger region, Downtown Middletown is an established retail market whose retail businesses have a long history of providing goods and services to the region's residents. The concentration of restaurants and arts-related uses has also made Downtown Middletown a "destination" location. As a result, Downtown retail and personal service businesses can build upon the success of each other and the success of other types of businesses to capture customers, rather than simply trying to capture "drive-through" traffic as their customer base.

Market support for additional retail space in the DMA will generally come from two sources: spending by DMA residents and spending by RMA residents. To calculate future demand from DMA residents, the estimated current retail store expenditures by DMA residents was compared to the estimated amount of current retail sales occurring within the DMA that were supportable by DMA residents. An estimated percentage of DMA residents' retail expenditures that actually occur within the DMA itself was calculated and then applied to the projected 2015 retail expenditures.

Initially, these calculations were completed for a more narrowly defined set of DMA and RMA geographies; the initial DMA geography did not include Census Tract 5415, which encompasses the Wesleyan University campus and surrounding area, and the initial RMA geography did not include the towns of Chester, Deep River, Essex and Old Saybrook. Based upon these initial calculations, it was estimated that approximately 57.5% of DMA resident retail spending and 4.1% of RMA

resident retail spending occurred within the designated DMA. For the purposes of analyzing the retail spending impacts of the expanded DMA and RMA residents, these calculated percentages were held constant and applied to the retail store expenditures for the expanded DMA and RMA geographies.

The respective figures for 2010 and 2015 were then compared to determine potential net growth in retail expenditures by DMA residents and RMA residents within the DMA. Applying a standard metric of \$350 of retail sales per square foot to the potential net growth in sales provided an estimated demand for 39,872 square feet of retail space. Table 14 illustrates these calculations.

TABLE 14	
Estimated Supportable Retail Square Footage	
Downtown Market Area, 2015	
DMA Residents	
2010 Est. Total Retail Exp. By DMA Residents	\$86,443,012
% Exp. Within DMA	57.5%
2015 Est. Total Retail Exp. By DMA Residents	\$92,272,941
2015 Est. Retail Exp. By DMA Residents within DMA	\$53,054,582
Net Gain, 2010-2015	\$3,352,060
\$/sq. ft.	\$350
Est. Supportable Sq. Ft.	9,577
RMA Residents	
2010 Est. Total Retail Exp. By RMA Residents	\$2,530,380,658
% Exp. Within DMA	4.1%
2015 Est. Total Retail Exp. By RMA Residents	\$2,787,968,499
2015 Est. Retail Exp. By RMA Residents within DMA	\$114,762,226
Net Gain, 2010-2015	\$10,603,188
\$/sq. ft.	\$350
Est. Supportable Sq. Ft.	30,295
TOTAL ESTIMATED SUPPORTABLE SQUARE FOOTAGE	39,872

While there appears to be market support for approximately 40,000 square feet of retail space in the DMA over the next five years, existing vacancies in the DMA will absorb much of this demand. According to property listings on CERC's SiteFinder website, approximately 21,965 square of

strictly retail space is available for sale or lease in the DMA. There is also an additional 40,000 square feet of available space that could be used for either office or retail. **Thus, the demand for newly constructed retail space in the DMA is likely less than 15,000 square feet.** In addition, new stores would likely need to be small in size (less than 2,000 square feet in size) to be successful in this market.

In order to help determine which specific retail uses could be most successful in the DMA, a comparison was made between the percentage of existing retail businesses in the Downtown business inventory for each retail category and the percentage of consumer spending by DMA residents at retail stores for each retail category. This methodology essentially compares and contrasts where the spending dollars of DMA residents go versus what types of retail uses they have closest to them. If a high percentage of retail spending goes toward a type of retail store of which there are few in the DMA, such a store could have a better chance of achieving market penetration in the DMA than other types of retail uses. Table 15 illustrates this comparison.

NAICS Retail Trade Subcode	Use Description/Category	% of Retail Businesses in Downtown	% 2010 DMA Resident Retail Exp.
441	Motor Vehicle and Parts Dealers	6.9%	16.0%
442	Furniture and Home Furnishings Stores	11.1%	2.6%
443	Electronics and Appliance Stores	5.6%	2.4%
444	Building Material and Garden Equipment and Supplies Dealers	4.2%	2.2%
445	Food and Beverage Stores	25.0%	21.5%
446	Health and Personal Care Stores	5.6%	6.4%
447	Gasoline Stores	4.2%	11.9%
448	Clothing and Clothing Accessories Stores	26.4%	7.0%
451	Sporting Goods, Hobby, Book, and Music Stores	5.6%	2.5%
452	General Merchandise Stores	1.4%	17.0%

Based upon this comparison of uses versus spending, and analysis of the general retail market in the RMA and DMA, the following retail uses are likely to achieve a level of market support that makes them viable uses in the DMA:

- General Merchandise stores
- Health and Personal Care Products stores
- Food stores

Some uses that had high percentages of retail spending by DMA residents were not included in this list for a number of reasons. Motor Vehicle and Parts Dealers were not included because the retail spending by DMA residents in this category is likely skewed higher because of purchases of

vehicles. Based upon land use and planning considerations, a new or used vehicle sales business was not deemed an appropriate use for either the North End or South End Gateway areas, and there are already well-established businesses of this type throughout the region that would offer stiff competition to any new vehicle sales business. Gasoline stations were also not included because of such a use was not deemed appropriate for either gateway area from a land use and planning perspective, and because there are already several gas stations located along Saybrook Road and Route 17. In addition, “food stores” was included as a supportable category even though 25% of the retail businesses in the Downtown inventory were in this category. This category was included because of the high percentage of DMA resident spending (21.5%) that went to this category, and because while food stores are well-represented in the Downtown, the existing businesses do not cover all elements of the food and beverage market that could appeal to DMA residents.

One identified potential niche retail use within the “food store” category that could fit well into the Downtown Middletown market is an ethnic food market. While Middletown has a number of general regional or national grocery stores such as Stop & Shop, Aldi’s and Price Chopper along its major roads, and several small mini-marts and natural food stores along Main Street, the surrounding region is generally lacking a significant market for purchasing ethnic foods and groceries. This type of food retail is heavily concentrated further north in the Hartford area, particularly in the Town of West Hartford. Numerous ethnic food stores also can be found further south in and around the City of New Haven. There is little regional competition for this use in the RMA; however, according to data from Claritas, there are over 35,400 people within the RMA who are of Hispanic, Asian, Indian, Middle Eastern or Sub-Saharan African descent. In addition, a comparison of recently released 2010 Census data with 2000 Census data indicates that since the last census the Hispanic population in the RMA has increased by 8,360 people or +50.8%, and the Asian population has increased by 3,494 people or +107.9%. Population increases of this size are clearly indicative of growing market support for an ethnic food market use. A potentially underserved market for ethnic food may exist in the RMA, and a store of this type would be an excellent fit in the North End gateway area, given the close proximity to existing restaurants and food stores, as well as Downtown Middletown’s state-wide reputation for food and restaurants.

Personal Services Potential

Table 16 illustrates the calculations completed to quantify the DMA potential sales from residents and comparing this figure to estimated actual personal service sales in the DMA.

TABLE 16	
DMA Trade Area Capture and Sales Leakage	
Personal Services Uses	
Factor/Variable	
RMA Per Capita Expenditures	\$979.67
DMA Income Index	0.629
DMA Actual Sales	\$7,000,000
DMA Capture	\$11,352
Pull Factor	1.29
DMA Potential Sales	\$5,436,036
DMA SALES SURPLUS	\$1,563,964

As Table 16 shows, the DMA currently captures significantly more personal services sales than its resident population could support on its own. It is estimated that DMA residents could support approximately \$5.44 million in annual personal services sales. However, estimated existing annual personal services sales in the DMA are \$7.0 million, resulting in a sales “surplus” of roughly \$1.56 million. Therefore, 22.3% of the personal services sales in the DMA are likely occurring as a result of customers from outside the DMA. As in the case of the retail market, this substantial regional draw is also reflected in the pull factor calculation. A pull factor greater than 1.00 is indicative of a trade area drawing in market support from surrounding trade areas as well as its own residents. With a pull factor of 1.29, the DMA has a personal services market that is clearly supported by the larger region.

Similar to the question raised by the retail market statistics for the DMA, Downtown Middletown’s ability to absorb additional personal services businesses may be quite limited if the DMA already relies heavily upon the balance of the region to support this sector.

General Office Potential

The market potential for general office space in the Downtown Middletown area is somewhat limited. One positive element of the Middletown office market is the relatively low vacancy rate, especially in the Downtown area itself. The most recent data available on Middletown's office space market indicates that the overall vacancy rate in the Downtown is approximately 9.1%; however, higher quality Class A and Class B office space have even lower rates of 7.1% and 7.7% respectively.¹ Only lower quality Class C office space has a relatively high vacancy rate of 17.1%.²

¹ “Middletown Commercial Real Estate Report – First Quarter 2009,” Trevor Davis Commercial Real Estate LLC,

As a point of comparison, Downtown New Haven has an office space vacancy rate of approximately 11.5%,³ and Downtown Hartford's office vacancy rate has been calculated at over 30%.⁴

However, there are several factors that are restraining the office space market in not only Middletown, but also in other parts of the central Connecticut region. As the data from CERC's SiteFinder clearly indicate, there is an excessive supply of general office space available for sale and/or lease in the area. Approximately 1.26 million square feet of office space is available within the RMA, with 53,000 square feet of this space available in the DMA. In addition, absorption rates for office space have been constrained by the difficulty potential tenants have had in securing financing. Over the past several years, lenders have become much more reluctant to finance space improvements for new tenants, and business financing in general has been languishing since the beginning of the current economic recession.

In order to estimate the potential demand for office space in the Downtown area, the two critical factors of existing office space supply and projected future employment for office-based industries over the next five years were isolated and analyzed. As noted above, at the time when office space market data was collected the DMA had 53,000 square feet of office space listed for either sale or lease. This figure is likely a conservative estimate for the DMA, as some vacant office space (particularly in the Class C category) may not be actively marketed. However, given that Downtown Middletown has over 600,000 square feet of total office space and a vacancy rate of 9.1%,⁵ the figure of 53,000 square feet of vacant office space appears quite reasonable.

To determine projected employment for office-based industries over the next five years, several steps were undertaken. First, particular industry categories were identified that could reasonably be considered as "office-based." These industry categories are:

- Utilities
- Information
- Finance and Insurance
- Real Estate and related fields
- Professional, Scientific and Technical Services
- Management of Companies

2009.

² Ibid.

³ Cara Baruzzi, "Office Vacancy Rate at 11.5%," *New Haven Register*, Nov. 16, 2010 (http://www.nhregister.com/articles/2010/11/16/business/bb1_office1110111610.txt).

⁴ Kenneth R. Gosselin, "Downtown Hartford Office Buildings Nearly One-Third Empty," *Hartford Courant*, Jan. 18, 2011 (http://articles.courant.com/2011-01-18/business/hc-office-market-hartford-0118-20110117_1_office-vacancies-connecticut-river-plaza-office-market)

⁵ "Middletown Commercial Real Estate Report – First Quarter 2009," Trevor Davis Commercial Real Estate LLC, 2009.

- Administration, Support and Waste Management Services
- Educational Services

Second, the most recent town-level data on employment by industry category available from the State of Connecticut Department of Labor was utilized to determine reasonably current baseline employment levels for each of the “office-based” industries in Middletown identified above. Third, projected growth rates for industry sector employment were obtained for each selected industry sector from the State of Connecticut Department of Labor’s data set entitled “State of Connecticut Employment Projections: 2008-2018.” These rates were divided in half to account for a five-year time horizon rather than the 10-year time horizon used in the data set, and then subsequently applied to the baseline employment levels for their respective industry categories. Table 17 below illustrates the results of these calculations.

TABLE 17 Projected Office-Based Employment Growth City of Middletown			
Industry Sector	Current Emp. ¹	Proj. 5-Year Change ²	Future Emp.
Utilities	142	-0.80%	141
Information	285	3.6%	295
Finance and Insurance	3,949	1.4%	4,004
Real Estate & Related Fields	201	2.8%	207
Professional, Scientific & Technical Services	1,037	5.95%	1,099
Management of Companies	287	2.7%	295
Administrative, Support and Waste Mgmt./Remediation Services	895	1.15%	905
Educational Services	1,100	6.0%	1,165
TOTAL	7,896		8,111
		Net Change	215

¹ CT DOL 2009 Annual Avg. Employment.

² CT DOL Employment Projections: 2008-2018.

To estimate the amount of office space square footage required to accommodate the growth in office-based employment over the next five years, a standard range of 250 to 300 square feet of office space per employee was assumed. **Applying this range to the estimated 215 new office-based jobs in Middletown results in a need for approximately 53,800 to 64,600 square feet of office space.** As noted previously, there is approximately 53,000 square feet of vacant office space in the DMA currently. Even if one were to use an aggressive approach and assume that all office-based employment in Middletown over the next five years would be captured within the DMA, **a net demand of only 800 to 11,600 square feet of office space would result.** In reality, based upon the City’s existing land use and zoning patterns, it is likely that a substantial portion of new office development in Middletown would occur in areas outside of the Downtown during the next five years.

CONCLUSION

At the present time, and likely for the next five years, the demand for new general office space in the Downtown area will be minimal. Any new general office space constructed likely will be built for specific tenants or owners with unique space needs.

Medical Office Space Potential

The market potential for medical and related fields office space is impacted by many of the same factors as those affecting the potential for general office space. However, both the North End and South End gateway areas benefit from the presence of existing medical uses that could potentially serve as anchor points for the development of additional related uses and space. The Community Health Center (CHC) in the North End is in the process of constructing a new three-story, 48,000 square foot facility at 675 Main Street that will allow for consolidation of their existing offices and facilities, which are currently distributed around the northern end of Downtown. Middlesex Hospital, located at the northwestern edge of the South End gateway area, employs over 1,500 people and is the primary medical care facility for the lower Connecticut River Valley area. Middlesex Hospital also manages a number of satellite facilities around the region from the towns of Madison, Westbrook and Old Saybrook along the Connecticut shoreline to the towns of Cromwell, Portland, East Hampton and Marlborough to the north and east. Satellite facilities in Middletown itself outside of the main hospital campus include the following:

- Middlesex Hospital Primary Care
520 Saybrook Road
- Middlesex Hospital Outpatient Services
534 Saybrook Road
- Middlesex Hospital Cancer Center
536 Saybrook Road
- Middlesex Hospital Homecare – Visiting Nurses
770 Saybrook Road

All four of these facilities are located along Saybrook Road approximately 1.2 miles southeast of the South End gateway area and 1.75 miles southeast of the Middlesex Hospital main campus. Saybrook Road connects directly with Main Street Extension, providing a strong linkage between Middlesex Hospital and its satellite facilities. The South End gateway area straddles this transportation linkage, and medical or related fields office space would be a logical form of development along Main Street Extension.

In addition to these locational factors, the health care and social assistance sector is projected to be one of the strongest economic sectors in terms of employment over the next decade. The State of Connecticut Department of Labor has estimated that employment in this sector will grow by 14.3% between 2008 and 2018. Jobs in this economic sector also tend to have significantly higher wages than other sectors such as retail and personal services.

To determine projected employment for office-based industries over the next five years, the most recent town-level data on employment in the health care and social assistance industry category available from the State of Connecticut Department of Labor was utilized to determine the current baseline employment level. The projected growth rate for health care and social assistance employment was obtained from the State of Connecticut Department of Labor’s “State of Connecticut Employment Projections: 2008-2018” data set. This rate was divided in half to account for a five-year time horizon rather than the 10-year time horizon used in the data set, and then subsequently applied to the baseline employment level. Table 18 below illustrates the result of these calculations.

TABLE 18			
Projected Medical Office-Based Employment Growth			
City of Middletown			
Industry Sector	Current Emp.¹	Proj. 5-Year Change²	Future Emp.
Health Care and Social Assistance	5,427	7.15%	5,815
		Net Change	388

¹ CT DOL 2009 Annual Avg. Employment.

² CT DOL Employment Projections: 2008-2018.

To estimate the amount of medical office space square footage required to accommodate the growth in office-based employment over the next five years, a standard range of 300 to 350 square feet of medical office space per employee was assumed. **Applying this range to the estimated 388 new medical office-based jobs in Middletown results in a need for approximately 116,400 to 135,800 square feet of office space.** As noted previously, there is approximately 53,000 square feet of vacant office space in the DMA currently, but also 1.26 million square feet of total vacant office space in the RMA. Although some of the demand for new medical office space would be absorbed through the lease or sale of existing vacant office space in Middletown, it is likely that some additional medical office space would need to be developed to meet the specific needs of unique health care field tenants. In addition, appropriately designed medical office space in close proximity to important health care facilities such as Middlesex Hospital and the new Community Health Center may not be as readily available as vacant office space in general. Given the fact that the two primary health care facilities in Middletown are located within the DMA, it is reasonable to assume that much of the future demand for medical office space would arise within the DMA. The presence of the State of Connecticut Department of Social Services’ offices and facility in the

South End gateway area is an additional anchor point in the DMA for similar type office and facility space.

CONCLUSION

Based upon the analysis above, there is potential demand in the Downtown area for a limited amount of medical office space. However, the demand for new space is unlikely to be as high as the 116,400 to 135,800 square feet estimated through projected employment increases in medical and related fields due to an expected absorption of some of the demand by existing vacant office space.

Industrial/Warehouse Use Potential

As in the case of general office space, the market potential for industrial/warehouse uses in the Downtown Middletown area are somewhat limited based upon a number of both positive and negative influences. The industrial vacancy rate in Middletown is approximately 8.5%, which compares favorably to New Haven (9%) and Hartford (13%). Middletown's industrial base also benefits from the presence of the Pratt & Whitney facility in the Maromas section of the City.

However, there are several factors that significantly limit the market potential for industrial/warehouse space in not only Middletown, but also in other parts of the central Connecticut region. As the data from CERC's SiteFinder clearly indicate, there is an excessive supply of industrial space available for sale and/or lease in the area. Approximately 985,000 square feet of industrial space is available within the RMA, with 108,900 square feet of this space available in the DMA. Both the State of Connecticut and the City of Middletown have experienced significant declines in manufacturing employment during recent years. Manufacturing employment in Connecticut declined by -42.6% between January 1991 and November 2010, dropping from 291,900 manufacturing jobs to only 167,500 manufacturing jobs currently. Between 2000 and 2009, the City of Middletown lost nearly 800 manufacturing jobs, a decrease of -16.6% in manufacturing employment. As global competition for industrial and manufacturing uses remains strong, and the cost of doing business in Connecticut remains high, this declining trend in industrial jobs is unlikely to change significantly during the foreseeable future.

As in the case of the office space market, the potential demand for industrial and warehouse space in the Downtown area was estimated by taking the two critical factors of existing industrial space supply and projected future employment for industries likely to need industrial, manufacturing or warehouse space over the next five years, and isolating and analyzing them. As noted above, at the time when office space market data was collected the DMA had 108,900 square feet of industrial space listed for either sale or lease. Similar to the office space market, this figure is likely a conservative estimate for the DMA, as some vacant industrial space may not be actively marketed.

To determine projected employment for industries likely to need industrial, manufacturing or warehouse space over the next five years, several steps were undertaken. First, particular industry

categories were identified that could reasonably be considered as “industrial” or “warehouse” type uses. These industry categories are:

- Construction
- Manufacturing
- Wholesale Trade
- Transportation and Warehousing

Second, the most recent town-level data on employment by industry category available from the State of Connecticut Department of Labor was utilized to determine reasonably current baseline employment levels for each of the industries in Middletown identified above. Third, projected growth rates for industry sector employment were obtained for each selected industry sector from the State of Connecticut Department of Labor’s data set entitled “State of Connecticut Employment Projections: 2008-2018.” These rates were divided in half to account for a five-year time horizon rather than the 10-year time horizon used in the data set, and then subsequently applied to the baseline employment levels for their respective industry categories. Table 19 below illustrates the results of these calculations.

Industry Sector	Current Emp. ¹	Proj. 5-Year Change ²	Future Emp.
Construction	591	1.4%	599
Manufacturing	3,958	-2.7%	3,851
Wholesale Trade	654	1.7%	665
Transportation & Warehousing	490	1.2%	496
TOTAL	5,693		5,611
		Net Change	-82

¹ CT DOL 2009 Annual Avg. Employment.

² CT DOL Employment Projections: 2008-2018.

The loss of additional industrial sector jobs will likely result in additional industrial/warehouse space becoming vacant. To estimate the amount of industrial/warehouse space square footage that could be added to the inventory of vacant space over the next five years, a standard range of 500 to 1,000 square feet of industrial/warehouse space per employee was assumed. **Applying this range to the estimated decline in employment of -82 industrial/warehouse jobs in Middletown results in an excess supply of approximately -41,000 to -82,000 square feet of industrial/warehouse space.** As noted previously, there is already approximately 109,000 square feet of vacant industrial/warehouse space in the DMA currently. Based upon the City’s existing land use and zoning patterns, it is likely that most of the industrial/warehousing employment decline in Middletown over the next five years will occur at businesses located outside of the DMA.

Nonetheless, there appears to be little market support to fill existing industrial space in the DMA, let alone generate demand for the development of new space.

CONCLUSION

At this point in time, there is little to no market-based demand for industrial or warehouse space in the DMA. It is also unlikely that additional demand for such space will occur during the next five years.

Residential Potential

The recently completed Downtown Housing Market Study for Downtown Middletown provides a wealth of market data and a number of conclusions on the Downtown residential market that are still applicable for this study. The data collected for this market area regarding residential development patterns, housing stock characteristics, sales and rent prices, and demographic factors are all comparable to the data collected for the Downtown Housing Market Study. While the projected declines in both population and the number of households in Downtown Middletown shown in the Downtown Housing Market Study were more severe than the projected numbers indicated by the sources for this market study, both data sets indicated a modestly shrinking DMA area with limited purchasing power. These factors, along with a lagging local and regional economy and an estimated Downtown residential vacancy rate of approximately 15%, combine to indicate limited residential development potential in Downtown Middletown. The Downtown Housing Market Study noted that “some major event would need to occur in downtown Middletown to stimulate demand over the near term, such as the landing of a major employer that builds a new office building or some other external event such as the advent of commuter rail service to Hartford and New Haven.”⁶ The analysis in this report also leads one to concur with the recommendations in the Downtown Housing Market Study to improve physical conditions in the Downtown area, promote homeownership where logical, and improve the housing stock and public amenities in the neighborhoods surrounding the Downtown core, including the North End and South End gateway areas.

Despite the sobering statistically-based conclusions reached in both of these studies, it is evident that because of Downtown Middletown’s unique character and locational advantages, there will always be some (however small) market potential for unique and appropriately designed housing products. One cannot expect, particularly at this time or over the next few years, that Downtown Middletown will be able to support the development of hundreds of new housing units. However, the success of small, well-planned and properly marketed residential developments in both Middletown and other downtown areas provides evidence that if a development is kept small and done well, it is possible to achieve market success. The North End and South End gateway areas each have a potential asset upon which support can be built for some limited residential development. In the North End, this asset is the presence of a growing arts and culture “cluster”,

⁶ RKG Associates, Inc., “Downtown Housing Market Study, Middletown, CT,” p. 46.

while in the South End, Middlesex Hospital serves as an anchor use that to a certain degree can generate its own small residential market. Residential uses in both of the gateways areas will have the greatest chance for success if linked to these “anchor” uses or are developed in conjunction with unique niche uses.

Residential – South End Gateway Area

With over 1,500 employees, Middlesex Hospital provides an ample market base from which a small-scale residential development could draw potential condominium owners or renters. This market would be comprised of employees looking for reasonably-priced housing options in a location that would allow them to walk or bike to work. Using a conservative combined annual housing turnover rate and capture rate of 3%, approximately 40 employees of Middlesex Hospital could be interested in such housing. Some of these potential residents would seek housing in the existing apartments and condominium units within Downtown itself. However, there is currently no housing located within the South End Gateway area that is likely to appeal to this market. A small condominium development, potentially interspersed with several apartment units could draw its market from the younger medical professionals working at Middlesex Hospital. As a result, this form of housing would draw in higher income levels and provide housing and parking for hospital staff within walking distance of the hospital. This could also become a benefit for Middlesex Hospital by potentially decreasing their demand for hospital staff parking.

Based upon the analysis contained in this study, data and analysis from the Downtown Housing Market Study, and an analysis of employment at Middlesex Hospital and average occupational salaries in the medical field, it is estimated that either a single condominium development or multiple small-scale condominium developments with a total of 12 to 15 units could be supported by the Middlesex Hospital market. In addition, a price range of \$175,000 to \$250,000 per unit is likely to be achievable. A few apartments may also be supportable by those who do not want to purchase a unit; however, the number of apartment units supportable at this time would be perhaps no more than 10 units. These units would be best suited as one bedroom or two bedroom units, with rents between \$700 and \$950 per month.

Once again, residential development in the South End would be most likely to succeed if combined in a mixed use format with perhaps ground floor medical offices or small-scale retail uses.

Residential – North End Gateway Area

Combining any new residential development with niche uses or clusters of similar uses will be especially critical for market success in the North End. The area already has a significant number of residential units, both old and new, as well as a significant number of units in foreclosure. Stand-alone residential developments are unlikely to garner enough market support due to the relatively high residential vacancy rate in the adjacent Downtown core and the issues of foreclosure and blight on some of the nearby streets.

One possible residential/mixed use form of development that could be supportable by the market is a development that combines a small number of studio or loft apartments with artist work space and gallery display space. Similar type developments have been completed in the cities of Hartford, Norwich and Willimantic by the organization ArtSpace Connecticut, LLC. The similarly named and national-level organization Artspace has completed a similar project at the former's Read's Department Store in Bridgeport. Perhaps 12 to 15 apartment units, ranging from studio units to two-bedroom units, could be supportable when combined with work and display space for artists. Supportable rents would likely be in the range of \$625 to \$650 per month for studio units, \$750 to \$800 per month for one-bedroom units, and \$850 to \$925 per month for two-bedroom units. Such a development would provide a unique residential product that ties into the growing arts and culture cluster in the North End.

Status of Phase I Assessments

At the current time, Phase I environmental assessments are underway for the identified brownfield properties in the North End and South End gateway areas. However, the Phase I work is not yet completed to the point where detailed assessments of specific reuse opportunities on a site-by-site basis can be made. Ultimately, the findings, conclusions and recommendations regarding the environmental issues and remediation measures for each property will be one of the key determinants in the future use of each property. When the Phase I work is completed to the necessary level, detailed recommendations regarding the future reuse of each identified brownfield property will be provided consistent with the market analysis provided in this study.

APPENDIX A

DOWNTOWN CORRIDOR BUSINESS INVENTORY							
Sector	Subsector	NAICS Code Description	Downtown	North End	South End	TOTAL	% of Total
31-33: Manufacturing							
	323	Printing and Related Support Activities	3	0	0	3	
	337	Furniture and Related Product Manufacturing	2	0	0	2	
		TOTAL	5	0	0	5	2.4%
44-45: Retail Trade							
	441	Motor Vehicle and Parts Dealers	2	0	3	5	
	442	Furniture and Home Furnishings Stores	5	2	1	8	
	443	Electronics and Appliance Stores	4	0	0	4	
	444	Building Material and Garden Equipment and Supplies Dealers	1	1	1	3	
	445	Food and Beverage Stores	13	4	1	18	
	446	Health and Personal Care Stores	3	1	0	4	
	447	Gasoline Stores	0	2	1	3	
	448	Clothing and Clothing Accessories Stores	18	1	0	19	
	451	Sporting Goods, Hobby, Book, and Music Stores	4	0	0	4	
	452	General Merchandise Stores	1	0	0	1	
	453	Miscellaneous Store Retailers	2	0	1	3	
		TOTAL	53	11	8	72	35.0%
48-49: Transportation and Warehousing							
	485	Transit and Ground Passenger Transportation	1	0	0	1	
		TOTAL	1	0	0	1	0.5%
51: Information							
	512	Motion Picture and Sound Recording Industries	1	0	0	1	
		TOTAL	1	0	0	1	0.5%
52: Finance and Insurance							
	522	Credit Intermediation and Related Activities (Banks)	10	0	0	10	
		TOTAL	10	0	0	10	4.9%
53: Real Estate							
	531	Real Estate	2	0	0	2	
	532	Rental and Leasing Services	1	0	0	1	
		TOTAL	3	0	0	3	1.5%
54: Professional, Scientific, and Technical Services							
	541	Professional, Scientific, and Technical Services	8	1	0	9	
		TOTAL	8	1	0	9	4.4%
56: Administrative, Support and Waste Management and Remediation Services							
	561	Administrative and Support Services	3	0	0	3	
		TOTAL	3	0	0	3	1.5%

DOWNTOWN CORRIDOR BUSINESS INVENTORY							
Sector	Subsector	NAICS Code Description	Downtown	North End	South End	TOTAL	% of Total
61: Educational Services							
	611	Educational Services	2	0	0	2	
		TOTAL	2	0	0	2	1.0%
62: Health Care and Social Assistance							
	621	Ambulatory Health Care Services	3	3	0	6	
	622	Hospitals	2		1	3	
	623	Nursing and Residential Care Facilities	0	0	1	1	
	624	Social Assistance	3	2	2	7	
		TOTAL	8	5	4	17	8.3%
71: Arts, Entertainment, and Recreation							
	711	Performing Arts, Spectator Sports, and Related Industries	2	3	0	5	
	712	Museums, Historical Sites, and Similar Institutions	2	0	0	2	
	713	Amusement, Gambling, and Recreation Industries	4	1	0	5	
		TOTAL	8	4	0	12	5.8%
72: Accommodation and Food Services							
	721	Accommodation	1	0	0	1	
	722	Food Services and Drinking Places	29	5	0	34	
		TOTAL	30	5	0	35	17.0%
81: Other Services (Except Public Administration)							
	811	Repair and Maintenance	0	2	0	2	
	812	Personal and Laundry Services	12	2	2	16	
	813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	6	4	1	11	
		TOTAL	18	8	3	29	14.1%
92: Public Administration							
	921	Executive, Legislative, and Other General Government Support	1	0	0	1	
	922	Justice, Public Order, and Safety Activities	2	1	1	4	
	923	Administration of Human Resource Programs	0	1	0	1	
	926	Administration of Economic Programs	1	0	0	1	
		TOTAL	4	2	1	7	3.4%
TOTAL BUSINESSES			154	36	16	206	100.0%

**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

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**FINAL REPORT
DOWNTOWN GATEWAY STUDY
MIDDLETOWN, CONNECTICUT**

APPENDIX B

MIDDLETOWN CONNECTICUT

DOWNTOWN GATEWAY STUDY

Prepared For:
Middletown Redevelopment Agency

Middletown, CT

November 23, 2010

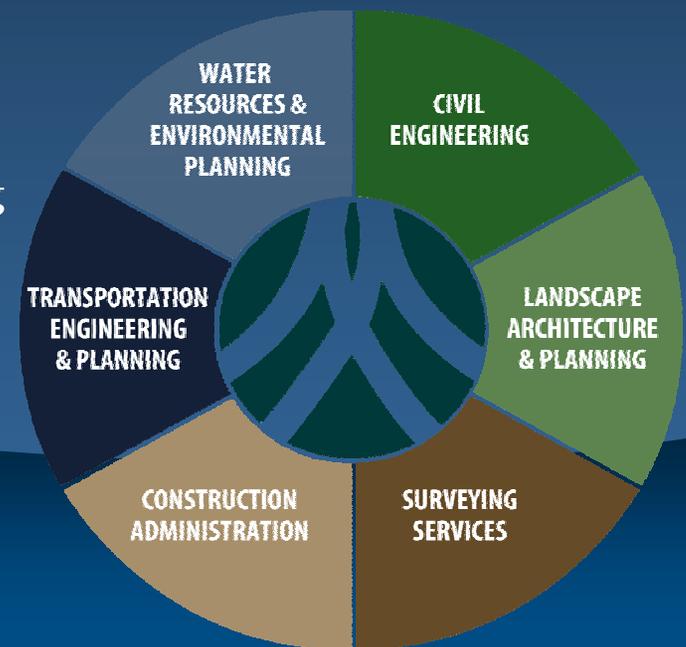


MILONE & MACBROOM®

Downtown Gateway Study – Middletown, CT

MILONE AND MACBROOM, INC.

- Multidisciplinary firm founded in 1984
- Employee-owned, Connecticut-based firm with offices in Cheshire, Branford and Stamford
- Extensive experience in:
 - Local land use planning and environmental planning
 - Urban and suburban redevelopment efforts
 - Economic and market analysis
 - Providing technical assistance to municipalities
- Strong participation by principals



Downtown Gateway Study – Middletown, CT

INTRODUCTION TO SCOPE OF WORK

Downtown Gateway Study:

- Component of the overall Brownfields Assessment Study being conducted by VHB

Role of Milone & MacBroom:

- Determine appropriate/supportable uses for identified brownfield properties
- Develop redevelopment plans for the North End and South End “Gateways” of Downtown Middletown

Goal:

- Develop plans that will guide prospective development within these two areas

Tasks:

- Market Feasibility Assessment
- Downtown Gateway Redevelopment Plans
- Pedestrian Access and Streetscape Plan
- Final Report



Downtown Gateway Study – Middletown, CT

A. MARKET ANALYSIS

- Goal: Determine how the redeveloped brownfield properties could function within both the economic context of the City of Middletown and the larger Central Connecticut Region
- Define Primary and Secondary Market Areas
- Analyze demographics, spending patterns, employment, economics and housing
- Assess the suitability of land uses, including retail, office, light industrial/warehouse, mixed use and residential
- Review environmental and structural assessments for each of the identified brownfield properties to determine site-specific suitability for each land use.

DELIVERABLE: Market Feasibility Assessment for Identified Brownfield Properties



Downtown Gateway Study – Middletown, CT

B. DOWNTOWN GATEWAY REDEVELOPMENT PLANS

- Goal: Develop redevelopment plans for both the North End & South End Gateways using a two-step planning approach
- Develop a Framework for the Downtown Gateway Redevelopment Plans
 - Review of all data
 - Conduct assessments of local conditions
 - Outline major planning framework
 - Identify connections/linkages to key activity centers
 - Review potential synergies with development opportunities along the Main Street Corridor, including Middlesex Hospital and Wesleyan University
- Develop Conceptual Redevelopment Plans for the North & South End Gateways

DELIVERABLE: Conceptual Redevelopment Plans for both Gateway Areas, Including Supportive Narrative and Tabular Data



Downtown Gateway Study – Middletown, CT

C. PEDESTRIAN ACCESS AND STREETSCAPE PLAN

- Goal: Assess the real and perceived gaps in the pedestrian environment and identify improvements that will encourage walking and bicycling and will create a seamless link between the Gateways Areas and the Downtown
- Incorporate the elements of the Downtown Gateways Redevelopment Plans
- Identify key pedestrian trip generators such as community facilities, businesses, retail centers and residential neighborhoods located within the Downtown Gateway Areas
- Consider the need for pedestrian improvements in relation to existing or planned transit services and infrastructure to encourage transit use
- Incorporate “Complete Street” initiatives and policies

DELIVERABLE: Pedestrian Access and Streetscape Plan with Maps



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Downtown Gateway Study – Middletown, CT

D. FINAL REPORT

- Present the results and conclusions of the market analysis
- Identify the most appropriate development options based upon the findings of the market analysis
- Inclusion and discussion of the Conceptual Redevelopment Plans and pedestrian access/streetscape plans
- Report narrative will include discussion of information gathered through research, interviews and public workshops

DELIVERABLE: Final Report, Inclusive of All Work Products



Downtown Gateway Study – Middletown, CT

PUBLIC MEETINGS AND OUTREACH

- Four (4) public meetings will be held through the Redevelopment Agency at key project milestones
- An initial meeting will be held early in the study process to gather public comments on past visions for the Downtown Gateways, and identify new strengths, issues and opportunities
- The second and third meetings will be held at the mid-point of the assignment during the Conceptual Plan development to share alternatives under consideration with the community, and will be charette-style workshops
- The fourth public meeting will be held to present the Final Report.



MIDDLETOWN
CONNECTICUT

DOWNTOWN GATEWAY STUDY
Progress Report

Prepared For:
Middletown Redevelopment Agency

Middletown, CT

February 15, 2011



MILONE & MACBROOM®

Downtown Gateway Study – Middletown, CT

A. MARKET ANALYSIS

- Goal: Determine how the redeveloped brownfield properties could function within both the economic context of the City of Middletown and the larger Central Connecticut Region
- Define Primary and Secondary Market Areas
- Analyze demographics, spending patterns, employment, economics and housing
- Assess the suitability of land uses, including retail, office, light industrial/warehouse, mixed use and residential
- Review environmental and structural assessments for each of the identified brownfield properties to determine site-specific suitability for each land use.

DELIVERABLE: Market Feasibility Assessment for Identified Brownfield Properties



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – INTRODUCTION

- Regional Market Area (RMA)
 - Cromwell, Durham, Haddam, Meriden, Middlefield, Middletown, Portland, Rocky Hill
- Downtown Market Area (DMA)
 - Census Tracts 5411, 5416, 5417
- North End Gateway
 - Much better connection to Downtown core than South End
 - Greater “regional” potential
 - Higher ADTs, Route 9/17/66 interchange, linkages across the Connecticut River and the Greater Hartford area
 - Notable buildings and uses, active neighborhood organizations
- South End Gateway
 - Isolated between Downtown Core and South Farms
 - Lower ADTs
 - Lack of unique neighborhood character, cohesion of uses



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – DEMOGRAPHICS/ECONOMICS

TABLE 3
Selected RMA & DMA General Demographic and Economic Data
2010-2015

	RMA	DMA
Population, 2000 Census	158,967	6,990
Estimated Population, 2010	167,285	7,104
Projected Population, 2015	169,854	7,095
Households, 2000 Census	64,285	3,185
Estimated Households, 2010	68,159	3,334
Projected Households, 2015	69,359	3,319
Average HH Income, 2000	N/A	N/A
Est. Average HH Income, 2010	\$79,092	\$41,515
Proj. Average HH Income, 2015	\$86,667	\$44,899
Median Household Income, 2000	\$51,994	\$29,203
Est. Median Household Income, 2010	\$65,011	\$31,846
Proj. Median Household Income, 2015	\$69,782	\$33,899
Per Capita Income, 2000	\$25,121	\$16,606
Est. Per Capita Income, 2010	\$32,550	\$19,898
Proj. Per Capita Income, 2015	\$35,716	\$21,429
<i>Source: Claritas, Inc.; compiled by MMI.</i>		



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – DEMOGRAPHICS/ECONOMICS

	RMA		DMA	
	2010	2015	2010	2015
Total Occupied	68,159	69,359	3,334	3,319
Owner-Occupied	44,985	45,825	1,064	1,047
Renter Occupied	23,174	23,534	2,270	2,272
	2010	%	2010	%
One Family, Detached	39,443	54.6%	688	18.7%
One Family, Attached	4,588	6.3%	124	3.4%
Two Family	6,264	8.7%	818	22.2%
3 to 4 units	5,715	7.9%	749	20.4%
5 to 19 units	7,932	11.0%	590	16.0%
20 to 49 units	2,844	3.9%	271	7.4%
50+ units	5,288	7.3%	439	11.9%
Mobile homes	200	0.3%	0	0.0%
Other	5	0.0%	0	0.0%
TOTAL	72,279	100.0%	3,679	100.0%

Source: Claritas, Inc.; compiled by MMI.



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – DEMOGRAPHICS/ECONOMICS

TABLE 5				
RMA & DMA Racial/Ethnic Characteristics				
2010-2015				
RMA	2010	%	2015	%
White, Non-Hispanic	124,927	74.7%	122,424	72.1%
Black, Non-Hispanic	11,525	6.9%	12,282	7.2%
Asian/Other, Non-Hispanic	8,301	5.0%	9,458	5.6%
Hispanic	22,532	13.5%	25,690	15.1%
TOTAL	167,285	100.0%	169,854	100.0%
DMA	2010	%	2015	%
White, Non-Hispanic	3,931	55.3%	3,704	52.1%
Black, Non-Hispanic	1,580	22.2%	1,604	22.6%
Asian/Other, Non-Hispanic	492	6.9%	538	7.6%
Hispanic	1,101	15.5%	1,249	17.6%
TOTAL	7,104	100.0%	7,095	99.9%

Source: Claritas, Inc.; compiled by MMI.



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – DEMOGRAPHICS/ECONOMICS

TABLE 6				
RMA & DMA Age Characteristics of Population				
2010-2015				
RMA	2010	%	2015	%
Age 0-4	9,714	5.8%	9,744	5.7%
Age 5-9	10,076	6.0%	9,706	5.7%
Age 10-14	10,745	6.4%	10,261	6.0%
Age 15-17	6,932	4.1%	7,107	4.2%
Age 18-20	5,004	3.0%	5,332	3.1%
Age 21-24	7,474	4.5%	8,106	4.8%
Age 25-34	20,362	12.2%	19,032	11.2%
Age 35-44	25,447	15.2%	23,184	13.6%
Age 45-54	26,902	16.1%	26,588	15.7%
Age 55-64	20,501	12.3%	23,514	13.8%
Age 65-74	12,106	7.2%	14,973	8.8%
Age 75-84	7,743	4.6%	7,769	4.6%
Age 85+	4,279	2.6%	4,538	2.7%
DMA				
DMA	2010	%	2015	%
Age 0-4	417	5.9%	409	5.8%
Age 5-9	439	6.2%	408	5.8%
Age 10-14	457	6.4%	438	6.2%
Age 15-17	197	2.8%	243	3.4%
Age 18-20	214	3.0%	259	3.7%
Age 21-24	295	4.2%	275	3.9%
Age 25-34	1,038	14.6%	816	11.5%
Age 35-44	1,249	17.6%	1,253	17.7%
Age 45-54	1,002	14.1%	1,059	14.9%
Age 55-64	711	10.0%	783	11.0%
Age 65-74	488	6.9%	560	7.9%
Age 75-84	326	4.6%	310	4.4%
Age 85+	271	3.8%	282	4.0%

Source: Claritas, Inc.; compiled by HMA.



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – ECONOMICS/INCOME

- Middletown's economy relies primarily on the educational services, health care and social assistance, and manufacturing sectors for employment and earnings
- Wesleyan University and Middlesex Hospital are major employers in the community and generate significant spin-off economic activity
- The manufacturing sector, while declining, is still an important component of Middletown's overall economy.
- According to the American Community Survey five-year (2005-09) data (ACS 05-09), approximately 30% of Middletown's civilian labor force is employed in the educational services, health care and social assistance fields.
- Manufacturing: 13%; Retail: 10%; FIRE: 10%; Arts & Entertainment: 8%
- *2007 Economic Census*: Healthcare and social assistance industry accounted for 7,535 jobs in Middletown; manufacturing sector had 3,390 jobs, down from 4,670 in 2002.
- According to the ACS 05-09, the median household income in Middletown is \$59,677. However, approximately 30% of households had incomes of less than \$35,000. Approximately 12% of all Middletown residents had incomes below the poverty level.



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – SUPPLY SIDE

- Substantial amount of retail, office and industrial space available for sale and/or lease in the Regional Market Area
- In addition, 338 acres of land available for commercial/industrial development
- Retail and Office Space: Total of 1.19 million square feet available
 - Over 800,000 s.f. for lease; 165,000 s.f. for sale; and 220,000 s.f. for both sale and lease.
- Industrial Space: Total of 985,000 square feet available
 - Nearly 540,000 s.f. for lease; 203,000 s.f. for sale; and 243,000 s.f. for both sale and lease.
- However, Middletown vacancy rates for office and industrial space remain fair to good, particularly in the Downtown.
- Large amounts of available space in other RMA communities
- Impacts?



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – DOWNTOWN BUSINESS INVENTORY

- All businesses with frontage along Main Street from St. John's Church at the intersection of Main Street and North Main Street to the intersection of Main Street Extension and Ridge Road
- 206 individual business establishments were identified
 - 154 in Downtown Core, 36 in North End, only 16 in South End
- Each business was subsequently assigned a NAICS code
- Total number of businesses by NAICS code was calculated for the subareas of Downtown Middletown, the North End Gateway area and the South End Gateway area
- Retail trade sector accounts for approximately 35% of all business establishments in the surveyed area
- Accommodation and Food Services: 17%; Other Services: 14.1%
- Within the Accommodation and Food Services sector, however, the Food Services and Drinking Places or Restaurants and Bars subcategories account for 34 of the 35 businesses identified
- Other notable subsectors were Food and Beverage Stores; Clothing and Clothing Accessories Stores; Personal and Laundry Services; and Religious, Grantmaking, Civic, Professional and Similar Organizations.



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – RETAIL SPACE MARKET

- Population and housing growth projected to be stagnant
- Income index – DMA per capita income only 61% of RMA level
- DMA estimated retail sales – area already captures far more retail sales than resident population could support
- Supply of available space – over 200,000 s.f.
- Additional land available for retail development outside of Middletown
- Consumer Spending Patterns – Comparison with business inventory
 - Many of the businesses in the surveyed area are not within primary spending categories
 - Clothing/Clothing Accessory Stores: 26.4% of businesses but 7.1% of RMA consumer spending
 - General Merchandise Stores: 1.4% of businesses but 17.5% of RMA consumer spending



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – RETAIL SPACE MARKET

Use Clusters

Through the completion of the business inventory and the subsequent analysis, several land use clusters were identified:

North End

- Food and Beverage Stores; Food Services and Drinking Places
- Ambulatory Health Care Services
- Performing Arts
- Religious, Grantmaking, Civic, Professional, and Similar Organizations

South End

- Motor Vehicle and Parts Dealers

Downtown

- Food and Beverage Stores; Food Services and Drinking Places
- Clothing and Clothing Accessories Stores
- Banks
- Professional, Scientific and Technical Services
- Personal Services



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – RETAIL SPACE MARKET

CONCLUSIONS:

- Retail market in general is relatively weak, but select retail opportunities do exist
- Income levels and projected increases in consumer expenditures in the DMA likely not sufficient to support medium to large-scale freestanding retail uses
- Smaller retail spaces, preferably in a mixed use format, likely to have greatest chance for success
- Potential Opportunities:
 - General Merchandise stores
 - Health and Personal Care Products stores
 - Food stores



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – OFFICE SPACE MARKET

- Driven by supply of existing office space and projected changes in employment
- Supply of available space – over 1,000,000 s.f. in RMA, 53,000 s.f. in DMA
- Projected Change in Employment for Office-Based Industries
 - Next 5 years: +215 jobs
 - Equivalent to 53,800 to 64,600 s.f. of office space
 - Potential demand for 1,000 to 12,000 s.f. of new office space over next 5 years



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – MEDICAL OFFICE MARKET

- Driven by factors similar to those impacting general office space market
- Particular uses unique to an area can offer additional potential
- Both gateway areas benefit from presence of medical use “anchors”
 - North End – CHC
 - South – Middlesex Hospital
- Four Middlesex Hospital-affiliated facilities located along Saybrook Road
- Health care employment – projected growth of 14.3% over 10 years
 - Next 5 years: +388 jobs
 - Equivalent to 116,400 to 135,800 s.f. of medical office space
 - Potential for solid demand for medical office space in gateway areas
 - Potentially high wage jobs



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – INDUSTRIAL/WAREHOUSE MARKET

- Driven by supply of existing industrial space and projected changes in employment
- Supply of available space – over 985,000 s.f. in RMA, 53,000 s.f. in DMA
- Projected Change in Employment for Businesses Utilizing Industrial/Warehouse Space
 - Next 5 years: ~82 jobs
 - Equivalent to ~20,000 to ~41,000 s.f. of industrial space
- Question of “locational appropriateness”
- Additional industrial uses in the North End not compatible with existing neighborhood character; South End may present some opportunities
- Any new space developed should be for specifically recruited new businesses or expansion of existing businesses
- “Build on spec” approach not likely to be successful



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – RESIDENTIAL MARKET

- Downtown Housing Market Study for Middletown was completed in September 2010
- Primary conclusion of the study due to a decline in employment and existing housing supply characteristics, the housing market will not see any major increases over the next few years
- Current Downtown housing vacancy rate of around 15%
- Five-year household forecasts for Middletown and the region projected a decline of 750 households for the City and 190 in the Downtown
- Forecasted annual demand for approximately 20 condominiums in the Downtown, with most if not all of this demand absorbed by existing unit turnover
- However, projected growth for homeownership is for households with income of \$100,000, while renter households are projected to decline by 2,300
- Public/private partnerships – potential for future residential developments



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – RESIDENTIAL MARKET

- Research indicates that general findings regarding housing market and demographics are still true
- However, similar to the office market, particular uses unique to an area can offer additional residential potential
- Middlesex Hospital and its 1,000+ employee base could serve as a self-sustaining market for a modest number of new residential units in the South End
- Small-scale condominium development in the South End could be well suited for younger medical professionals working at Middlesex Hospital
- Would both draw in higher income population and provide housing and parking for hospital staff within walking distance of the hospital



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – NICHE USES

Residential tied to Middlesex Hospital

- Hospital workers – ample base for small residential market
- 12~15 condominium units geared toward young medical professionals

Arts w/residential in the North End

- Mixed use – apartments with studio/gallery space
- Small scale: 12~15 units
- ArtSpace developments

Ethnic/specialty food market

- Potential untapped regional demand, lack of competitive supply
- Concentrations in Hartford area (West Hartford) and New Haven area
- Nearly 31,000 residents in the RMA of Hispanic, Asian, Indian, Middle Eastern or Sub-Saharan African descent



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS – PRELIMINARY CONCLUSIONS

- Many market segments currently have limited potential for near-term growth
- Particular niche uses such as arts, medical office space, selected retail and small-scale residential in a mixed use development format provide potential opportunities
- Downtown market is heavily dependent upon regional economy
- Importance of civic, educational and medical uses in bringing people into Downtown



Downtown Gateway Study – Middletown, CT

C. PEDESTRIAN ACCESS AND STREETScape PLAN

- Goal: Assess the real and perceived gaps in the pedestrian environment and identify improvements that will encourage walking and bicycling and will create a seamless link between the Gateways Areas and the Downtown
- Incorporate the elements of the Downtown Gateways Redevelopment Plans
- Identify key pedestrian trip generators such as community facilities, businesses, retail centers and residential neighborhoods located within the Downtown Gateway Areas
- Consider the need for pedestrian improvements in relation to existing or planned transit services and infrastructure to encourage transit use
- Incorporate “Complete Street” initiatives and policies

DELIVERABLE: Pedestrian Access and Streetscape Plan with Maps



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Downtown Gateway Study – Middletown, CT

NEXT STEPS

- Complete draft of market assessment, circulate for comments and finalize
- Continue to refine the pedestrian access/streetscape plans
- Conduct public workshop to gather public comments on initial findings for the Downtown Gateways, and identify new strengths, issues and opportunities



Brownfields Redevelopment Public Meeting

What do you want the future of your city to look like?

At the North and South end of Middletown's robust downtown there are areas which have fallen to blight and contamination from past uses. The city's Redevelopment Agency is working to improve the look and feel of the city at these two gateways into the downtown to encourage economic growth.

Get Involved. Join Us!

We want to hear from the residents, store owners and shoppers. Your view is very important in making Middletown the best it can be.

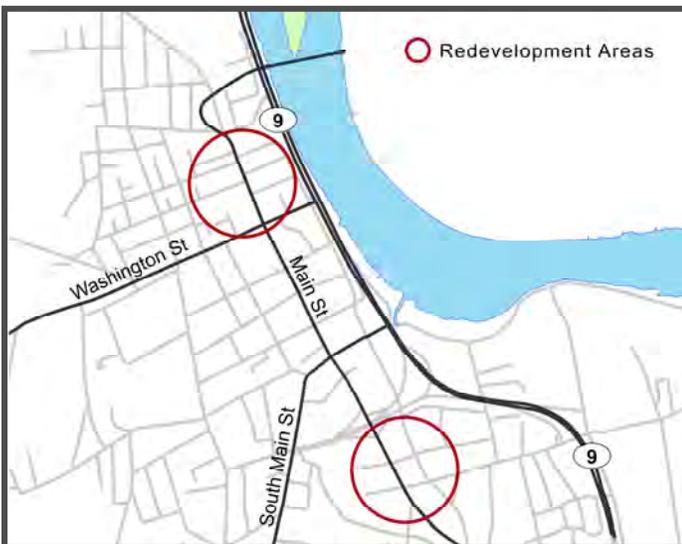
How do you feel about these Gateways?

What type of design do you feel is best?

What do you think the city is lacking?

What do you want more or less of?

What new amenities would you benefit from?



April 26th – 5:00pm
245 DeKoven Drive
Town hall - Room 208

What to expect:

- Presentations about contamination and historical uses from environmental specialists
- Presentation on the current status of Middletown and future trends
- Presentation of possible design scenarios
- Public discussions on future uses as well as the look and feel
- Questions and Answers

Department of Planning, Conservation and Development
Middletown, CT 06457.
245 DeKoven Drive
(860) 344 – 3425
www.Middletownplanning.com

Downtown Gateway Study – Middletown, CT

The Downtown Gateway Study is the planning component of the Brownfield Assessment Grant Study that examines the potential re-use of brownfields in the Downtown Gateway areas that have been identified by the City's environmental consultant – VHB.

Brownfields - Properties where expansion, reuse, or redevelopment is complicated by real or perceived environmental contamination. These can include former factories, gas stations, car dealerships, dry cleaners, warehouses, etc.

Goal - To clean up and reinvest in these properties which: increases local tax base, facilitates job growth, utilizes existing infrastructure, takes development pressures off of undeveloped, open land, which both improves and protects the environment.



- Identified Brownfield Sites from Brownfield Assessment Grant Study



Downtown Gateway Study – Middletown, CT

MARKET ANALYSIS –CONCLUSIONS

- Many market segments currently have limited potential for near-term growth
- Particular niche uses such as arts, medical office space, selected retail and small-scale residential in a mixed use development format provide potential opportunities
 - Retail market in general is relatively weak, but select retail opportunities do exist
 - +/- 40,000 s.f. of retail space demand; could be absorbed substantially by existing vacant space
 - Smaller retail spaces, preferably in a mixed use format, likely to have greatest chance for success
 - Potential demand for 1,000 to 12,000 s.f. of new office space over next 5 years
 - Potential for solid demand for medical office space in gateway areas, equivalent to 116,400 to 135,800 s.f. of medical office space
 - Residential tied to Middlesex Hospital; arts w/residential in the North End
- Downtown market is heavily dependent upon regional economy
- Importance of civic, educational and medical uses in bringing people into Downtown



Downtown Gateway Study – Middletown, CT

2000 – 2010 CENSUS TRENDS

Population:

City:	+10.4%
North End:	+8.2%
South End:	+13.2%

Housing Units:

City:	+7.7%
North End:	+1.5%
South End:	+9.5%

Children Under 18:

City:	-3%
North End:	+7.2%
South End:	-11.5%

Vacant Housing Units:

City:	+19%
North End:	+45.2%
South End:	-8.6%



MIDDLETOWN CONNECTICUT

DOWNTOWN GATEWAY STUDY Final Report

Prepared For:
Middletown Redevelopment Agency

Middletown, CT

September 20, 2011



MILONE & MACBROOM®

In Association with
Vanasse Hangen Brustlin, Inc.

Downtown Gateway Study – Middletown, CT

PURPOSE OF PROJECT

Downtown Gateway Study:

- Component of the overall Brownfields Assessment Study being conducted by VHB

Role of Milone & MacBroom:

- Determine appropriate/supportable uses for identified brownfield properties
- Develop redevelopment plans for the North End and South End “Gateways” of Downtown Middletown

Goal:

- Develop plans that will guide prospective development within these two areas

Tasks:

- Market Feasibility Assessment
- Downtown Gateway Redevelopment Plans
- Pedestrian Access and Streetscape Plan
- Final Report



Downtown Gateway Study – Middletown, CT

MARKET FEASIBILITY ASSESSMENT

Goal: Determine how the redeveloped brownfield properties could function within both the economic context of the City of Middletown and the larger Central Connecticut Region

CONCLUSIONS:

- Many market segments currently have limited potential for near-term growth
- Particular niche uses such as arts, medical office space, selected retail and small-scale residential in a mixed use development format provide potential opportunities
 - Retail market in general is relatively weak, but select retail opportunities do exist
 - +/- 40,000 s.f. of retail space demand; could be absorbed substantially by existing vacant space
 - Smaller retail spaces, preferably in a mixed use format, likely to have greatest chance for success
 - Potential demand for 1,000 to 12,000 s.f. of new office space over next 5 years
 - Potential for solid demand for medical office space in gateway areas, equivalent to 116,400 to 135,800 s.f. of medical office space
 - Residential tied to Middlesex Hospital; arts w/residential in the North End
- Downtown market is heavily dependent upon regional economy
- Importance of civic, educational and medical uses in bringing people into Downtown



Downtown Gateway Study – Middletown, CT

CONCEPT PLANNING

Goal: Transform market feasibility assessment findings into generalized redevelopment potential with an appropriate scale and composition, while achieving critical “gateway supportive objectives



FIGURE 1C
Original Concept Sketch
for North End Gateway

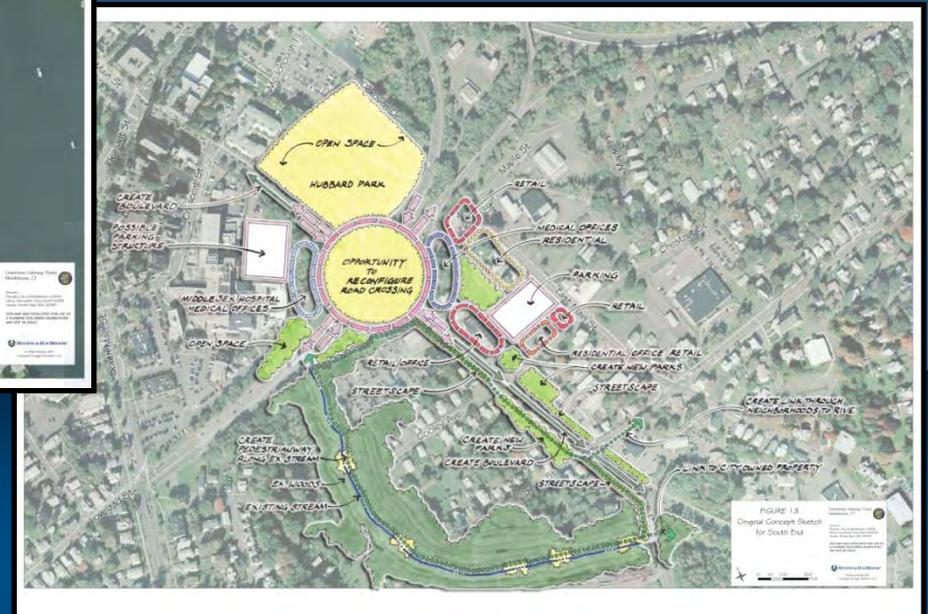
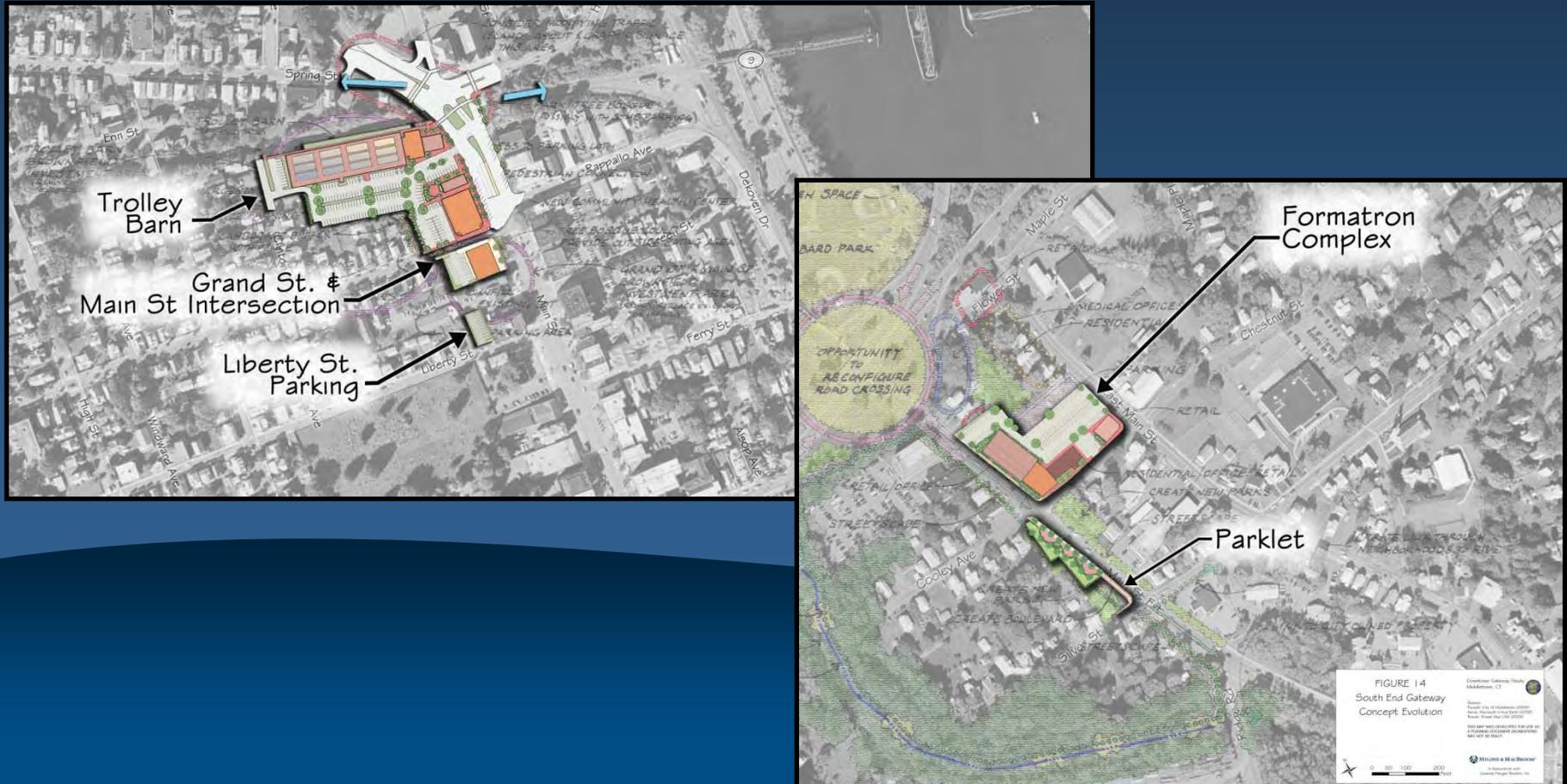


FIGURE 1B
Original Concept Sketch
for South End

Downtown Gateway Study – Middletown, CT

CHARRETTE /PUBLIC WORKSHOP

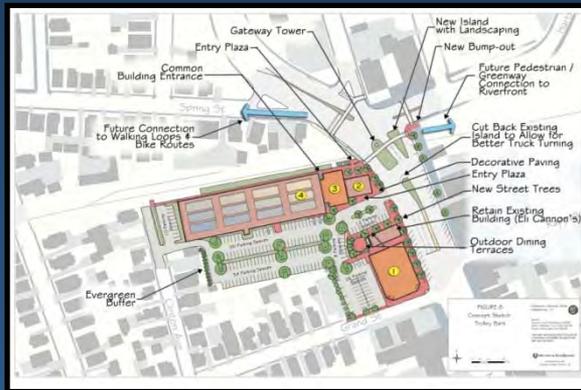
Goal: Bring initial concepts and ideas to Downtown stakeholders and the general public for discussion, feedback and further refinement.



Downtown Gateway Study – Middletown, CT

FINAL CONCEPT PLANS & REPORT

Goal: Take knowledge gained from charrette process and discussions with City staff and convert consensus visions into detailed, site-level redevelopment concept plans. Combine all elements into a unified report for use in leveraging “Next Steps.”



Downtown Gateway Study – Middletown, CT

FINAL CONCEPT PLANS & REPORT

TABLE 11
Summary of Concept Plan Uses by Property
North End Gateway Area and South End Gateway Area - Concept "A"

NORTH END	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Condo	Residential - Apts.	Open Space	Parking Spaces
Trolley Barn	16,100 to 21,100	15,000 to 20,000	1,100	0	0	14 (5 studio, 9 1BR)	2,500	125
Grand & Main	2,900	0	2,900	5,800	0	6 (6 2BR)	0	19
12 Liberty St. Site	0	0	0	0	0	0	0	18
SUBTOTAL	19,000 to 24,000	15,000 to 20,000	4,000	5,800	0	20 (5 studio, 9 1BR, 6 2BR)	2,500	162
SOUTH END	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Condo	Residential - Apts.	Open Space	Parking Spaces
Formatron Site Building #1	6,500	0	3,900	24,000	0	0	0	25
Formatron Site Building #2	5,120	0	0	0	10 (10 2BR)	0	0	0
Formatron Site Building #3	0	0	0	4,300	8 (8 2BR)	0	0	0
105 East Main St. Site	0	0	0	0	0	0	0	83
117 East Main St. Site	2,800	0	0	0	0	8 (8 1BR)	0	12
Main Street Extension Plaza	0	0	0	0	0	0	10,500	0
SUBTOTAL	14,420	0	3,900	28,300	18 (18 2BR)	8 (8 1BR)	10,500	120
GRAND TOTAL	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Condo	Residential - Apts.	Open Space	Parking Spaces
	33,420 to 38,420	15,000 to 20,000	7,900	34,100	18 (18 2BR)	28 (5 studio, 17 1BR, 6 2BR)	13,000	282

TABLE 12
Summary of Concept Plan Uses by Property
North End Gateway Area and South End Gateway Area - Concept "B"

NORTH END	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Condo	Residential - Apts.	Open Space	Parking Spaces
Trolley Barn	16,100 to 21,100	15,000 to 20,000	1,100	0	0	14 (5 studio, 9 1BR)	2,500	125
Grand & Main	2,900	0	2,900	5,800	0	6 (6 2BR)	0	19
12 Liberty St. Site	0	0	0	0	0	0	0	18
SUBTOTAL	19,000 to 24,000	15,000 to 20,000	4,000	5,800	0	20 (5 studio, 9 1BR, 6 2BR)	2,500	162
SOUTH END	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Condo	Residential - Apts.	Open Space	Parking Spaces
Formatron Site Building #1	8,450	0	4,225	29,235	0	0	0	23
Formatron Site Building #2	0	0	0	4,300	8 (8 2BR)	0	0	0
Formatron Site Building #3	2,640	0	0	0	6 (6 2BR)	0	0	0
105 East Main St. Site	0	0	0	0	0	0	0	138
117 East Main St. Site	3,350	0	0	0	0	12 (12 1BR)	0	0
11 Cooley Avenue Site	0	0	0	0	4 (4 2BR)	0	0	8
Main Street Extension Plaza	0	0	0	0	0	0	10,500	0
SUBTOTAL	14,440	0	4,225	33,535	18 (18 2BR)	12 (12 1BR)	10,500	169
GRAND TOTAL	Retail/Services	Arts/Culture/Entertainment	General Office	Medical Office	Residential - Condo	Residential - Apts.	Open Space	Parking Spaces
	33,440 to 38,440	15,000 to 20,000	8,225	39,335	18 (18 2BR)	32 (5 studio, 21 1BR, 6 2BR)	13,000	331



Downtown Gateway Study – Middletown, CT

NEXT STEPS

- Finalize and deliver/distribute work products
- Use of report and concept plans as the impetus and guiding tool for the on-going revitalization of the North End and South End Gateway Areas
- Use as leveraging tools for future funding requests and additional planning initiatives

