



4ward Planning

Thompsonville / Enfield, CT Market Assessment Study

greatblue

Report of Findings

25 October 2017

Confidential & Proprietary

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Evidence-based research across diverse industries

Our experience in instrument design affords our clients actionable analytics to help them identify, address, and improve offerings to, and the way they communicate with, their key constituents.

With more than 38 years of experience in diverse markets, our consultative approach ensures our data can be the basis to make important business decisions.

Our clients most commonly fall under markets such as government and municipalities, public and private utility companies, healthcare administration, and education.

Cross-functional engagement teams ensure a complete view of the issues and solutions.



Expertise in a diverse set of research methodologies

Having conducted millions of surveys and thousands of focus groups over the past 38+ years, our experience in instrument design, data collection and the presentation of those findings in manageable, actionable ways allows us to serve our clients across the spectrum of research studies.



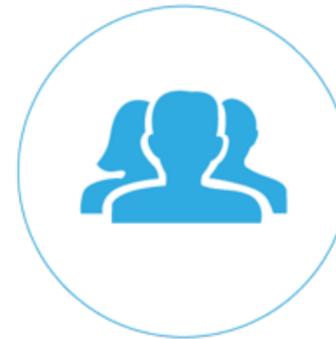
Telephone Interviews

In-house, multi-lingual interviewing capabilities



Digital Surveys

Web + mobile-based survey programs



Focus Groups

State-of-the-Art facility in CT



In-Depth Interviews

Trained researchers allow us to dive deep in a 1:1 setting



Solutions that focus on strategic and operational needs of clients

Whether direct to clients or through their agencies, we apply our core research methodologies, often applying a mixed methodology to ensure a study that captures both quantitative and qualitative information, to ensure our solutions exceed client expectations.

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Project Overview

- GreatBlue was commissioned by 4ward Planning to conduct comprehensive research among residents of Enfield, CT and surrounding towns to gain a deeper understanding into the potential utilization of a Thompsonville section of Enfield high-speed commuter rail train station, and gaining insights from the opinions regarding surrounding businesses and services in the community.
- The primary goal of this research study was to assess current awareness of the potential Thompsonville Station, likelihood of using the train and patronizing businesses near the station, and familiarity with and perceptions of the Thompsonville area.
- In order to service this research goal, GreatBlue conducted 500 telephone interviews among randomly selected residents of Enfield and surrounding towns. Call-backs were set up for respondents who could not complete the survey at the time of the call.
- The outcome of this research will enable 4ward Planning to a) gauge the demand for utilization of the Thompsonville Station, b) help prioritize which types of business development to promote in the area, c) understand the housing needs of those in the area, d) gauge the demand for employment opportunities and retail space near the station, and e) better understand the general perceptions of the Thompsonville area.

Areas of Investigation

The 4ward Planning Thompsonville / Enfield Market Assessment Study leveraged a quantitative research methodology to address the following areas of investigation:

- Awareness of the potential Thompsonville Station
- Likelihood to utilize the high-speed commuter train, to which locations, and for what purposes
- Businesses and services residents would like to have located near the Thompsonville Station
- Likelihood of moving in general, and more specifically, into an industrial-style apartment or condominium
- Familiarity with and perceptions of the Thompsonville area
- Issues currently facing Thompsonville
- Likelihood of business owners establishing a business near the Thompsonville Station
- Demographic profiles of respondents

Research Methodology Snapshot

Methodology Telephone	No. of Completes 500	No. of Questions 22*	Incentive None	Sample Procured by GreatBlue Research
Target Residential	Quality Assurance Dual-level**	Margin of Error +/- 4.3%	Confidence Level 95%	Research Dates September 29 - October 17

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel in addition to computer-aided interviewing platform ensure the integrity of the data is accurate.

Respondent Snapshot

This slide quantifies select data points to provide context for this research study. The data is not meant to be statistically significant, rather to provide an empirical view into the demographic profile of the participants.

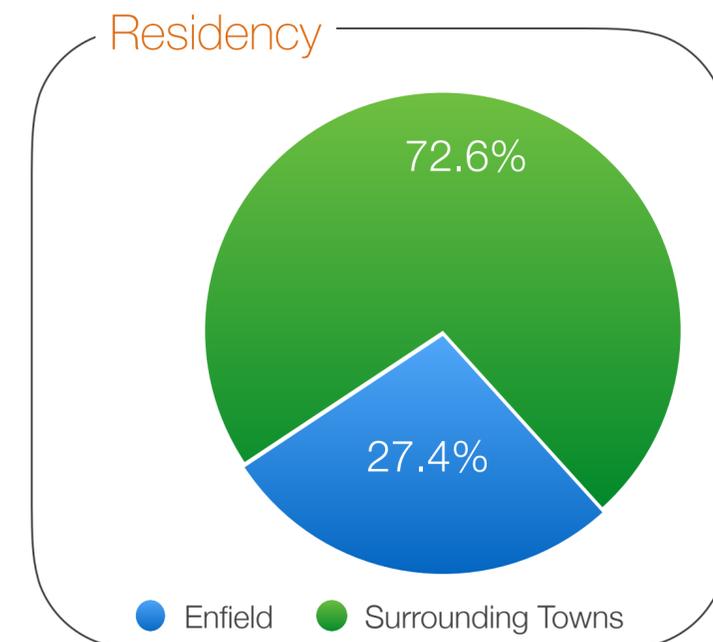
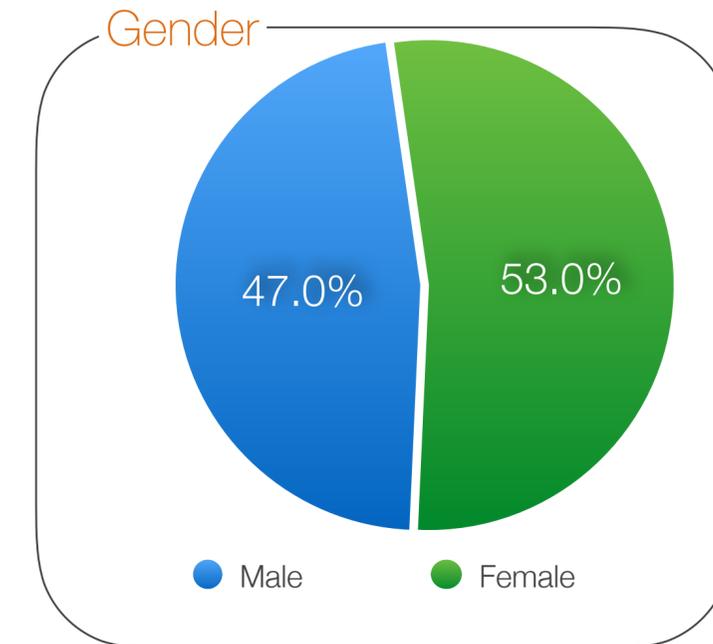
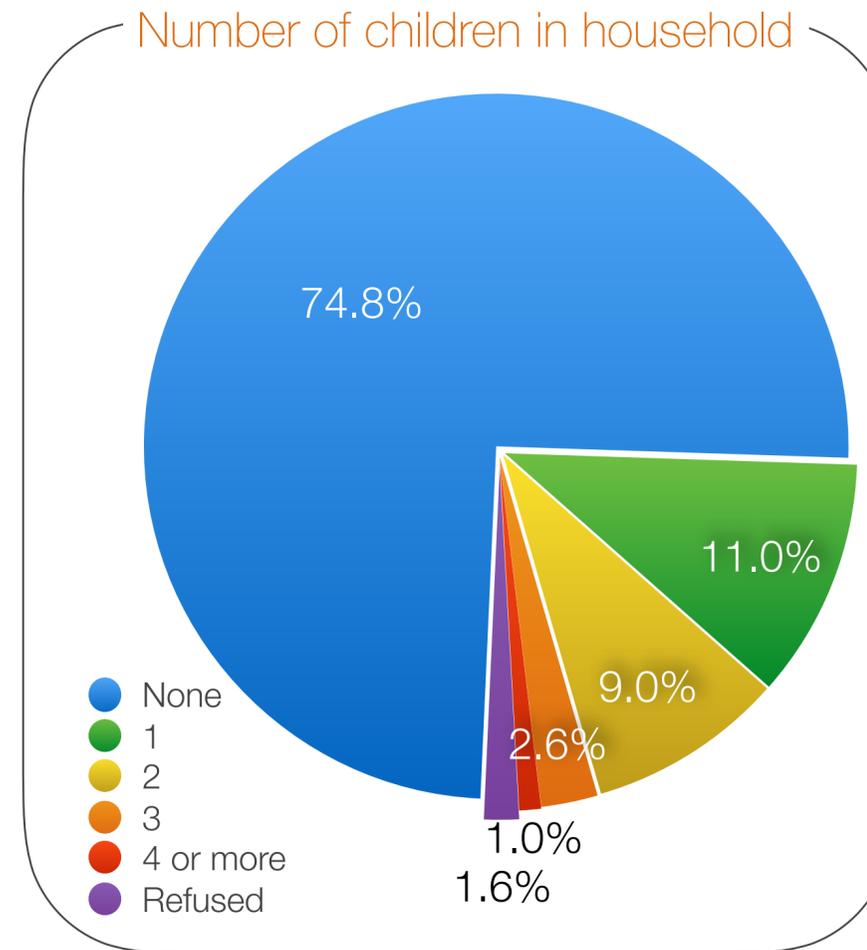
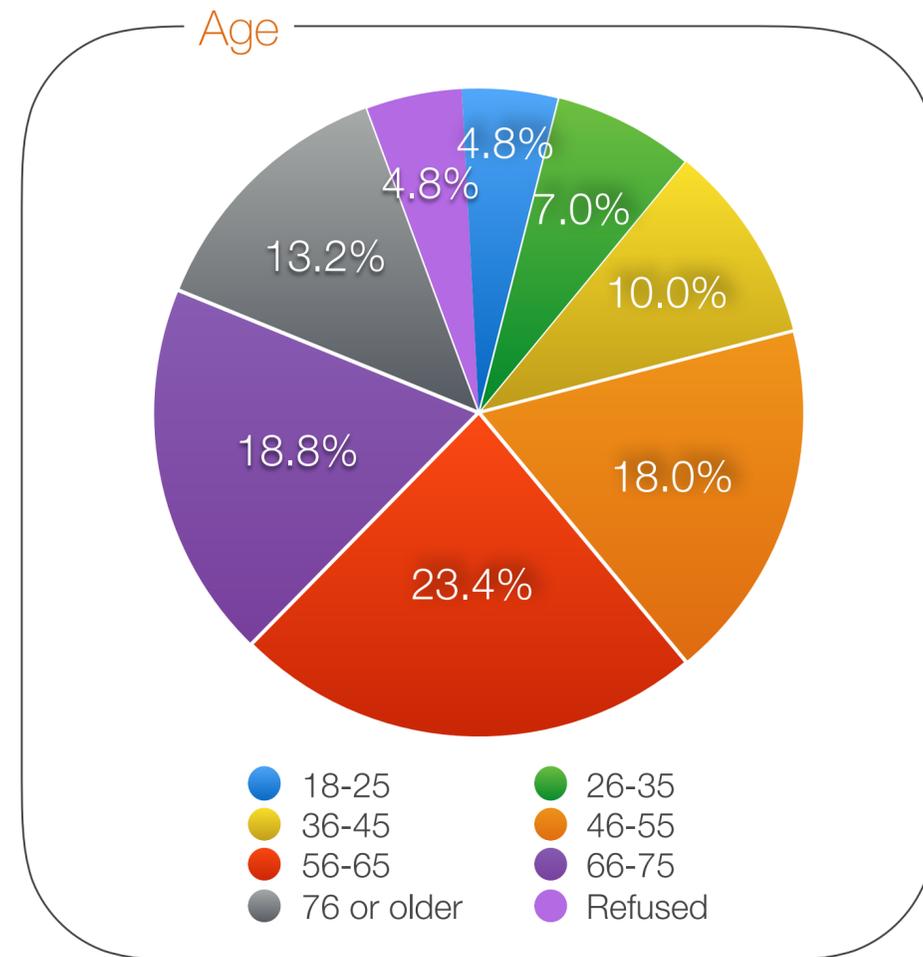


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71.5%

would still purchase
at an increased
price point

8.9%

5.4%

2.8%

0.0%

Negative Impact

Boomers

No Impact

Positive Impact

Key Study Findings

- Awareness of the Connecticut Department of Transportation's proposed train station in Thompsonville is low, with only 36.0% of residents being either "very" or "somewhat aware," compared to nearly three out of five residents (58.6%) being "not at all aware."
- However, nearly half of residents (47.0%) reported being likely (either "very" or "somewhat") to utilize this commuter rail station when it becomes operational, as opposed to 38.8% that reported being "not at all likely."
 - If they were to utilize the train, residents would be more likely to travel in the direction of Hartford (56.4%) versus Springfield (21.0%); a small number of residents (14.6%) would utilize the high-speed rail to commute to work.
- Restaurants/dining, small & medium size retail stores, and arts & entertainment are the types of services and amenities residents desire to see located around the proposed Thompsonville station.
- Less than one out of four residents (23.8%) reported being likely ("very" or "somewhat") to move or change their residence in the next 5 years; among those residents likely to move, a similar frequency (23.5%) reported being likely to consider moving into an industrial style building with apartments and/or condominiums located near the Thompsonville Station.

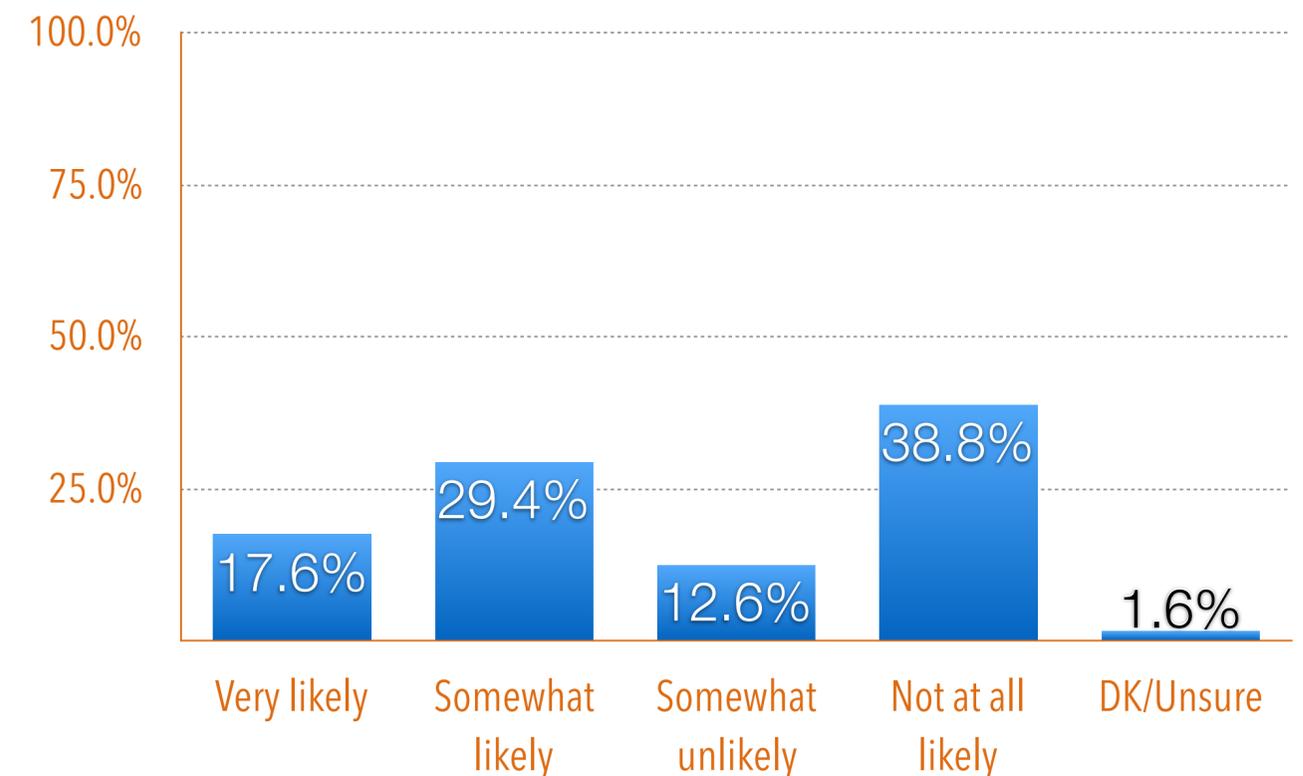
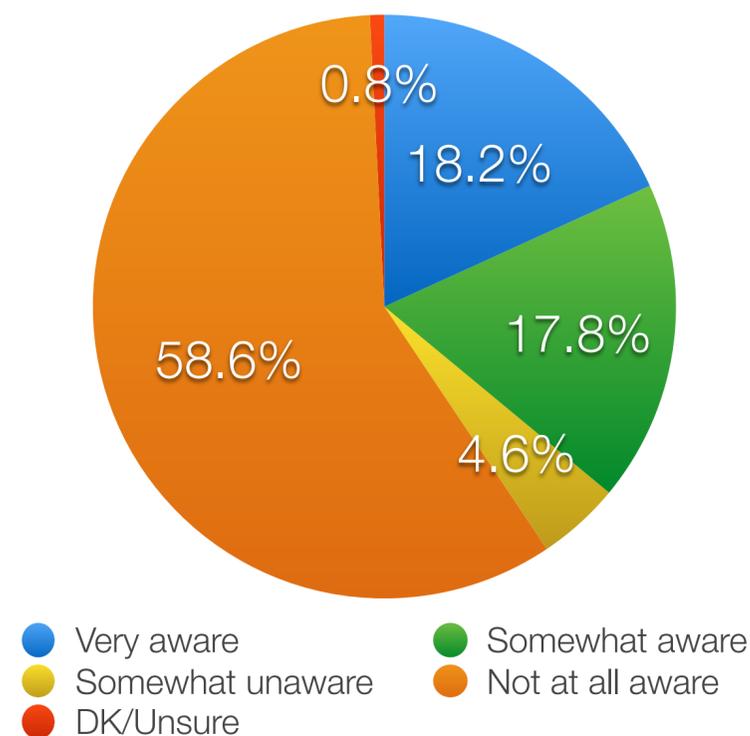
Key Study Findings

- Generally, residents would want to see more upscale apartments or condominiums, single-family detached homes, and townhouses located near the Thompsonville Station.
- More than two out of three residents (70.4%) reported being familiar (“very” or “somewhat”) with Thompsonville, and the perception of the area is mixed; while one out of five residents perceive Thompsonville to be a “nice / small / quiet town” (21.8%), one-third of residents (34.3%) noted the area is either “run down” (14.4%), “in need of revitalization” (10.3%) or expressed concerns over “crime / dangerous” (9.6%).
- The biggest issues facing Thompsonville are a “poor reputation / perception” (24.5%), “crime (perceived or real)” (16.5%) and “dilapidated housing” (16.1%).
- One out of ten residents surveyed (10.8%) is either a business owner or is considering starting a business. Among business owners and those considering business ownership, one out of five (20.0%) reported being likely (“very” or “somewhat”) to establish a business near the Thompsonville station, and would most likely consider opening a restaurant, boutique clothing store, or a professional practice (e.g. medical, legal, financial).

Low Awareness of Station and Mixed Interest

Nearly three out of five residents surveyed (58.6%) reported being “not at all aware” the Connecticut Department of Transportation has proposed a station in Thompsonville, while a smaller number (36.0%) reported being either “very” or “somewhat aware.” However, nearly half of residents (47.0%) reported being likely (either “very” or “somewhat”) to utilize this commuter rail station when it becomes operational, while 38.8% reported being “not at all likely.”

Q Prior to today's survey, how aware you were that the Connecticut Department of Transportation has proposed a station in Thompsonville, on the Hartford Line. It is proposed by the Connecticut Department of Transportation as one of five new stations that would be built for the line (along with North Haven, Hamden, Newington, and West Hartford). Would you say you were...

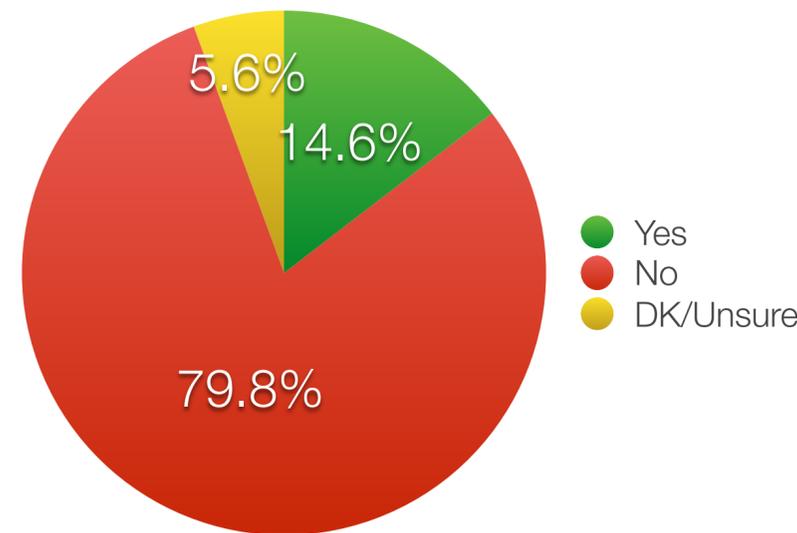
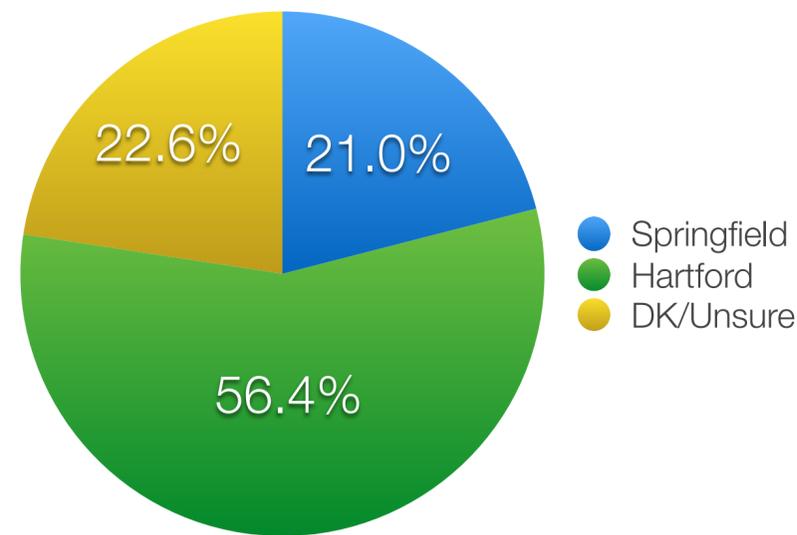


Q How likely would you be to use this commuter rail station when it becomes operational?

Not Likely to Utilize for Work Commute

More than half of residents (56.4%) reported being likely to take the train in the direction of Hartford, compared to 21.0% that would travel in the direction of Springfield. However, less than one out of five residents (14.6%) reported they would have the ability to use the high-speed rail in Thompsonville to commute to work. “Restaurants/dining” (56.2%), “small & medium retail stores” (23.8%) and “arts & entertainment” (20.4%) are the types of services and amenities respondents would want to see around the proposed Thompsonville station.

Services & Amenities	%
Restaurants / Dining	56.2
Retail - small / medium stores	23.8
Arts & entertainment	20.4
Don't know / unsure	17.8
Office space	10.4
Retail - big box stores	8.0
Grocery stores, super markets, etc.	7.8
Nightlife / leisure time locations	7.4
Apartments	5.2



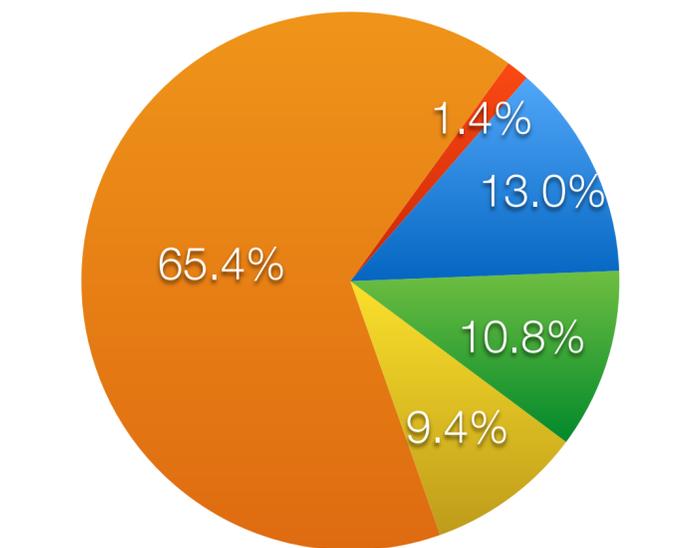
Would you be more likely to take the train in the direction of Springfield, MA or Hartford, CT?

Would you have the ability to use the high-speed rail in Thompsonville to get to work?

What would you most likely want to see around the proposed station in Thompsonville?

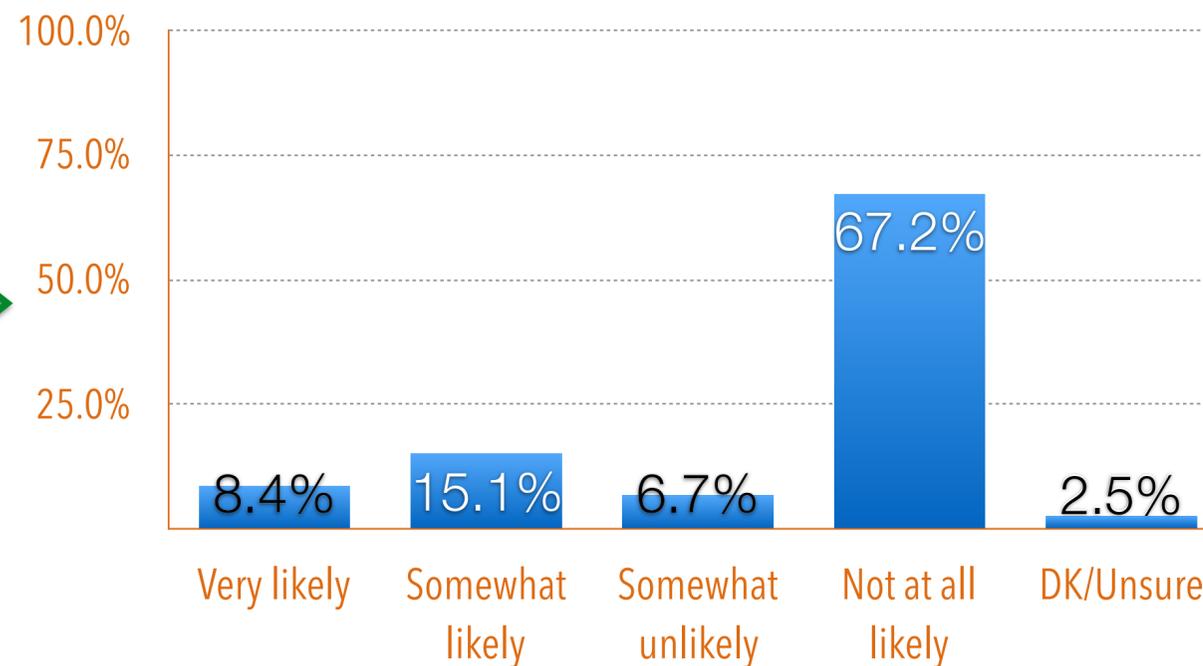
Residents Not Likely to Relocate

Two out of three residents (65.4%) reported being “not at all likely” to move or change their residence in the next five years; among the 23.8% or 119 respondents who reported being “likely” to move in the next 5 years, less than one-quarter (23.5%) reported being “very” or “somewhat likely” to consider moving into an industrial-style building with apartments and/or condominiums located near the Thompsonville Station. However, “upscale apartments or condominiums” are the types of housing residents would like to see more of in the area around Thompsonville Station.



● Very likely
● Somewhat unlikely
● DK/Unsure
● Somewhat likely
● Not at all likely

Among the 23.8% “likely”



Types of housing	%
Upscale apartments or condominiums	29.4
Single family detached homes	27.0
Don't know / unsure	23.0
Townhouses	20.6
Age restricted housing units	11.4
Other	3.2
Affordable housing	2.2

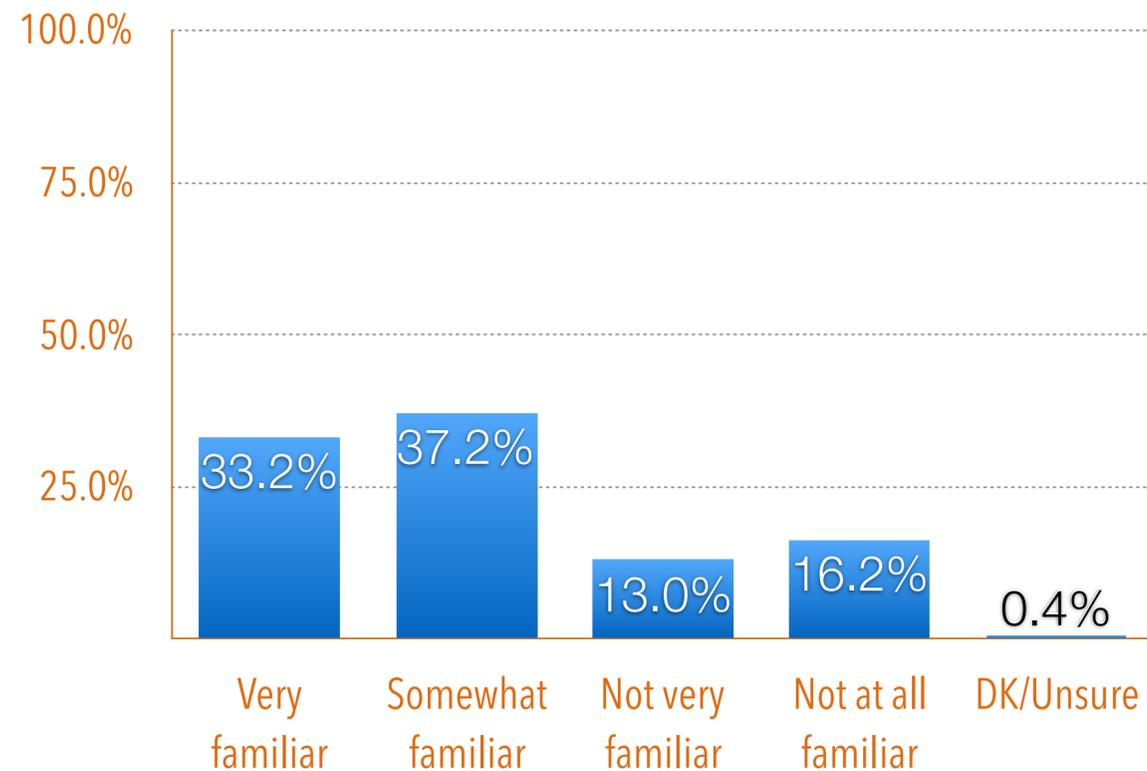
How likely are you to move or change your residence in the next 5 years?

If an industrial-style building with apartments and/or condominiums, similar in style to the Bigelow-Hartford Carpet Company building, was developed near the Thompsonville Station, how likely would you be to consider that building for your residence?

In general, what types of housing would you like to see more of near the Thompsonville station?

Strong Familiarity, but Many Concerns

More than two-third of residents (70.4%) reported being familiar with the Thompsonville area. However, the area raises many concerns, principal among them a “poor reputation / perception” (24.5%), “crime (perceived or real)” (16.5%) and “dilapidated housing” (16.1%). While one in five residents noted their perception of Thompsonville is that it is a “nice / small / quiet town” (21.8%), one out of three residents noted their perception is that the town is “run down” (14.4%), “in need of revitalization” (10.3%) or “crime / dangerous” (9.6%).



How familiar are you with the Thompsonville area?

Biggest Issue Facing Thompsonville	%
Poor reputation / perception	24.5
Don't know	19.4
Crime (perceived or real)	16.5
Dilapidated housing	16.1
Lack of retail or personal services	7.0
Other	6.0
Lack of living accommodation options	5.3
All of the above	2.9
Drug problems	1.2
Need jobs / businesses	1.2

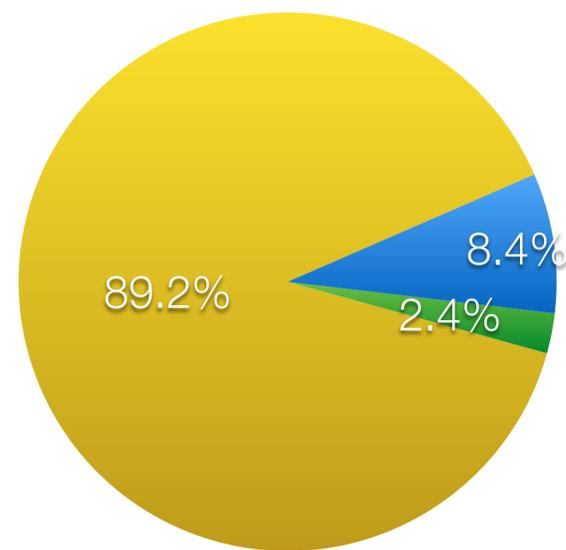
What do you feel is the single biggest issue facing Thompsonville?

Perception of Thompsonville	%
Nice / small / quiet town	21.8
Run down	14.4
In need of revitalization	10.3
Crime / dangerous	9.6
Don't know	7.7
Old area / old town	5.5
Low income	4.3
Good area / like the area	4.3
No opinion	3.8
Mix of good and bad areas	2.9
Already improving / moving forward	2.6
Other	12.7

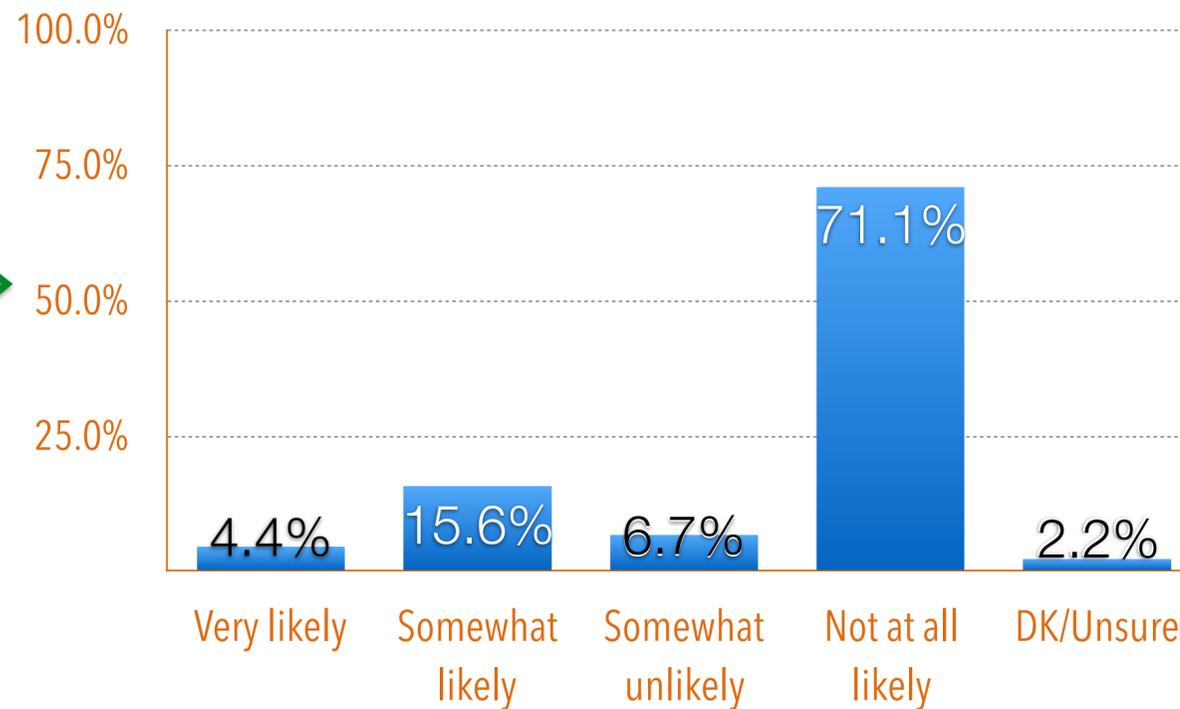
In your own words, what is your current perception of Thompsonville?

Train Station Not a Business Draw

One out of ten residents (10.8%) are either a business owner or are considering starting a business. Among the 10.8% or 45 residents that are business owners or interested in opening their own business, one out of five (20.0%) reported being either “very” or “somewhat likely” to establish a business near the Thompsonville Station, while the majority (71.1%) reported being “not at all likely.” Among the 9 respondents “likely” to establish a business near the Thompsonville Station, “restaurants,” “boutique clothing stores” and “professional practice” are the types of businesses that are most likely to be established.



- Business owner
- Considering starting a business
- Neither



Types of Businesses	%
Restaurant	22.2
Boutique clothing store	22.2
Professional practice	22.2
Salon or barber shop	11.1
Coffee shop	11.1
Convenience store	11.1

Are you a business owner or are you considering starting a business?

How likely would you be to establish a business near the Thompsonville station once high-speed rail service is operational?

What type of business would you establish?

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- **Grow awareness of the potential Thompsonville Station and High-Speed Commuter Rail.** Despite only 36.0% of respondents being “aware” of the proposed station in Thompsonville, 47.0% indicated a likelihood to utilize such a station when it becomes operational. There may be marketing opportunities to raise awareness and, thus, potential utilization of the station in the coming years. Potentially marketing to Hartford area businesses that this commuting option is soon to be available may commit additional individuals living around Enfield that may have not been captured in the survey.
- **Consider Restaurants, Small Retail Stores, Entertainment, and Upscale Apartments / Condominiums.** These are the predominate attractions respondents were interested in seeing around the Thompsonville Station once it becomes operational. All of these options may naturally cater to working professionals and/or younger individuals that would utilize the Thompsonville Station before or after work. Thus, ensuring businesses with hours conducive to being open around working hours should yield the highest likelihood of success (i.e. open before 9 am and after 7 pm).
- **Draft and Promote a Narrative of the “New Thompsonville.”** Perception is mixed, some say Thompsonville is a nice small quiet part of town, other note issues with crime and run-down infrastructure in need of revitalization. The train station, and surrounding businesses, would help with that revitalization, and create a new perception of Thompsonville. Certain elements of development such as a design review process, or facade programs may ensure all new businesses have a similar high quality look that is reflective of a up-and-coming community.

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