

Wall Street-West Avenue Neighborhood Plan

February 2019

Submitted to Norwalk Redevelopment Agency
by Regional Plan Association



MARC WOUTERS | STUDIOS
Urban Planning + Architecture + Film

NORWALK  DEVELOPMENT AGENCY

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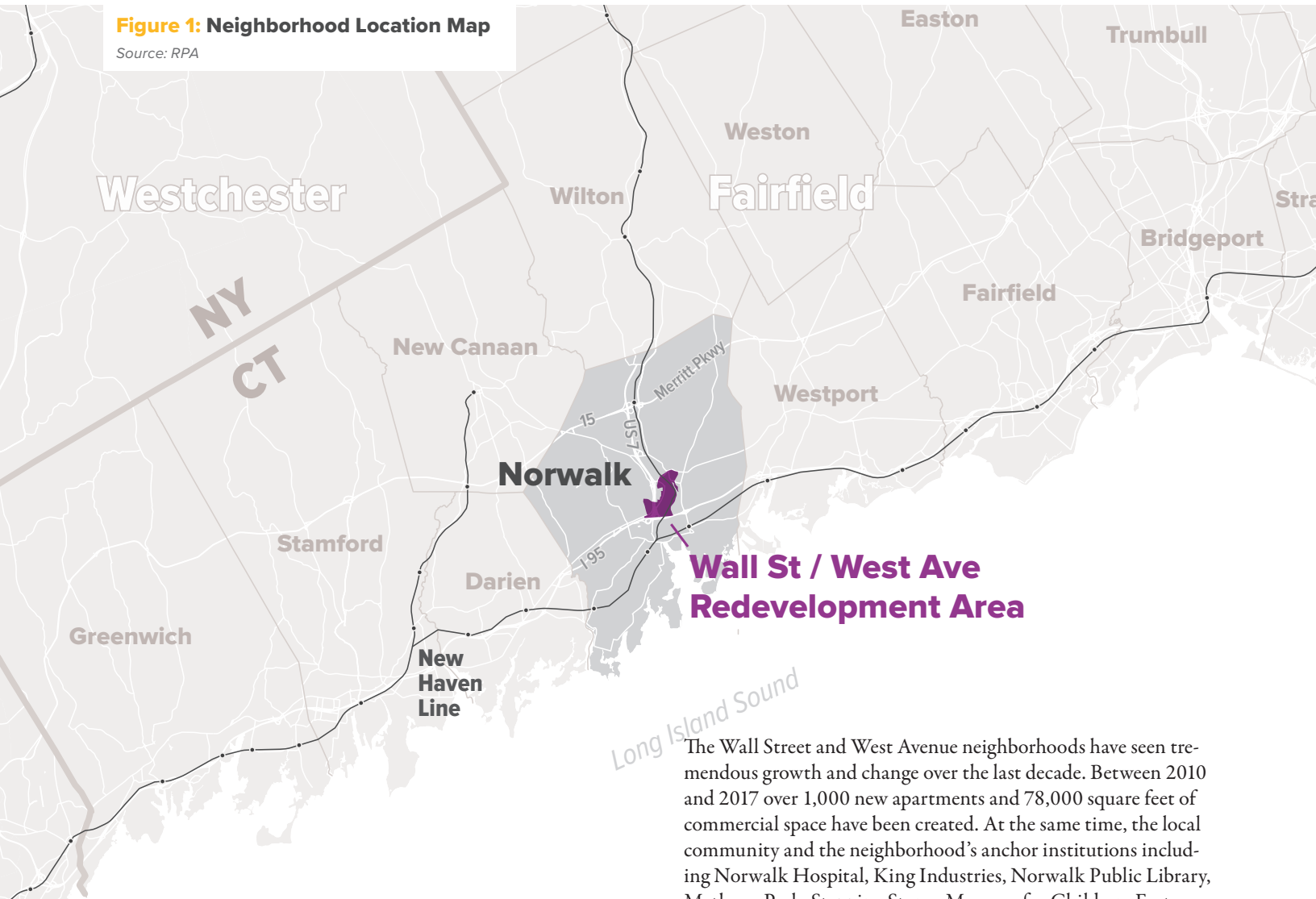
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Executive Summary

Figure 1: Neighborhood Location Map

Source: RPA



Wall St / West Ave Redevelopment Area

The Wall Street and West Avenue neighborhoods have seen tremendous growth and change over the last decade. Between 2010 and 2017 over 1,000 new apartments and 78,000 square feet of commercial space have been created. At the same time, the local community and the neighborhood's anchor institutions including Norwalk Hospital, King Industries, Norwalk Public Library, Mathews Park, Stepping Stones Museum for Children, Factory Underground and the Wall Street Theater, have been leveraging human capital to foster an identity around art, science, technology, culture and health and wellness in the neighborhood. Building upon the value of its physical assets- including historic structures, urban form and waterfront- the vision for the future of the neighborhood expressed in this plan recognizes the tremendous opportunity that exists within the community to leverage the power of institutions, businesses and residents to reimagine, reinvent and renew the neighborhood into an innovative urban environment.

This opportunity to reframe redevelopment through the lens of peoples' connections with spaces revealed itself through the planning process through which this plan was developed. Over the course of 2018 and 2019 the Norwalk Redevelopment Agency, in collaboration with Regional Plan Association, undertook an extensive stakeholder engagement effort to understand area opportunities and challenges and develop a vision for the future of the neighborhood. This engagement process was closely coordinated with the City Planning Department's update of its Plan of Conservation and Development and a city-wide parking study undertaken by the Norwalk Parking Authority. Together, these parallel, coordinated processes allowed the city to look closely at specific needs and opportunities in and around Wall Street and West Avenue within a broader, citywide conversation about the future of Norwalk.

Building on the momentum of private development along with the renewal of community engagement throughout the neighborhood among its residents, artists, business community and anchor institutions, this plan is an update and expansion of the existing Wall Street and West Avenue Corridor Redevelopment Area plans. Through the plan development process it was determined that the plans for these areas should be combined as these neighborhoods have become increasingly economically and physically connected over the past decade. Further, the industrial waterfront to the east of the original plan boundaries and Norwalk Hospital to the west have also been included in order to create a holistic neighborhood plan. This expansion recognizes these key contributors to Norwalk's economy and ensures that planning for the area accounts for the unique challenges associated with supporting such uses as redevelopment occurs within the broader neighborhood.

As shown on Figure 2, the Wall Street-West Avenue neighborhood plan area is bounded by Cross Street and North Avenue to the north (inclusive of parcels on both sides of the street), the Norwalk River to the east, Route 1-95 to the south and Woodbury Avenue and Maple Street to the west. It covers 0.36 square miles and includes 230 acres of land area. In order to be designated as a redevelopment area, properties within this designated boundary must meet a set of criteria, as defined by Connecticut General Statute Chapter 130, §8-125(7). The Wall Street-West Avenue neighborhood was analyzed for consistency with these criteria and the plan area was determined to be eligible for designation as a redevelopment area, as described in the analysis of deteriorating or deteriorated conditions provided in Appendix A.

This plan describes a vision for the future of the Wall Street-West Avenue neighborhood as-

A healthy and vibrant Urban Core Neighborhood with a strong economy driven by innovation and collaboration that is accessible, authentic, lively and affordable for residents and businesses.


This vision, which emerged through the plan development process, is described in this document along with the public policy framework necessary to achieve it and the actions that should be undertaken to implement the plan's stated policies. The recommended actions discussed in this plan focus on four key areas:

- ▶ Collaborative planning and investment
- ▶ Development of opportunity sites
- ▶ Connectivity and mobility improvements
- ▶ Design guidelines

The plan also provides guidance on next steps with regard to implementation of zoning changes and economic development strategies that will be necessary to achieve the vision for the future described herein.

Realizing the vision described in this plan and implementing its recommended actions will require a range of partnerships and substantial collaboration across agencies, departments, institutions, the private sector and the local community. The ability to exercise acquisition of property by use of eminent domain rests with the Common Council of the City of Norwalk. The Norwalk Redevelopment Agency must follow the procedures for acquiring real property by eminent domain under a redevelopment plan as set forth in Chapter 130 Section 8-127a of the Connecticut State Statutes. The Norwalk Redevelopment Agency does not intend to use eminent domain for acquisitions under this Redevelopment Plan, and could not use eminent domain without the approval of the City Council.

Figure 2: Neighborhood Boundary

-  Complete Redevelopment Area
-  Wall St Area
-  West Ave Area
-  New Haven Line (Danbury Branch)

Source: RPA



Introduction

Planning Context

Since the distinct Redevelopment Area Plans for Wall Street and West Avenue were last updated in 2004 and 2006 respectively, these areas have seen significant redevelopment activity. In that time redevelopment projects have added over 1,000 new residential units and over 78,000 square feet of commercial space as well as cultural and recreational activity. As this redevelopment has occurred, these neighborhoods, which comprise the northern portion of the City of Norwalk's urban corridor, have become increasingly connected. And with an additional 780 residential units and 63,000 square feet of commercial development under construction or in the pipeline, the relationship between these areas continues to strengthen.

While new residential development is planned along the Norwalk River on the northeastern side of the neighborhood at East, Wall and High Streets, the western bank of the river has remained a working waterfront. Anchored by King Industries to the south and Devine Brothers to the north, these businesses are important to Norwalk's economy providing both jobs and tax revenues. Devine Brothers' use of the channel for commerce has provided the impetus for dredging over the past several decades, critical to maintaining navigability.

In addition to new development and long-standing industrial businesses, the neighborhood is also characterized by its civic institutions. Previous plans have noted this neighborhood's identity as a civic hub, primarily with respect to the presence of important civic structures, including the U.S. Post Office, Federal courthouse and Norwalk Public Library. What has been less often noted is the important role that these institutions play in supporting the fabric of community life. Over the past decade the neighborhood's anchor non-profit institutions including Norwalk Hospital, Stepping Stones Museum for Children, Lockwood Mathews Mansion Museum and Norwalk Public Library have substantially increased their presence in the neighborhood and their engagement with the community. Norwalk Hospital has acquired the former YMCA building, is making capital investments in the local neighborhood and is actively promoting programs targeted towards community health. Stepping Stones Museum has created an on-site early childhood education center and is working with the Norwalk Public Library and other partners to develop a Foodshed Initiative to address community access to healthy food and nutrition education. And the Norwalk Public Library has substantially

expanded its education, health and wellness programming and is currently developing a strategic plan to increase both its physical and programmatic footprint in the neighborhood. Working largely independently over the past decade, these institutions have recently begun important new conversations about collaboration that both furthers their individual missions and increases their collective impact on the local community.

Planning Process

In spring 2017 the Norwalk Redevelopment Agency, in consultation with Regional Plan Association (RPA), launched a planning process to update its Wall Street and West Avenue redevelopment area plans. To guide the plan development process, the Redevelopment Agency appointed a working group composed of representatives from City boards, commissions and agencies, neighborhood institutions, and business owners and residents who served as an advisory group to the Agency and RPA on plan research, stakeholder engagement, visioning, policy setting and plan recommendations. The Redevelopment Agency and RPA met with the working group monthly over the course of the summer and fall to share research, discuss ideas and develop the plan's vision and policies and worked closely together to refine the recommendations of the plan.

The first step in the planning process was an analysis of existing quantitative and qualitative neighborhood data. The quantitative analysis included a review of demographic and socioeconomic data, documented in Appendix C, as well as analysis of land use and neighborhood infrastructure to understand baseline conditions and trends, as discussed the body of this plan. The qualitative analysis was based on an extensive stakeholder engagement effort designed to solicit information on neighborhood conditions that are not readily accessible via traditional datasets, capturing information on preferences, needs and future plans of city agencies, local business owners, industrial operators, local real estate developers, anchor institutions, social service organizations and neighborhood residents (see Appendix B).

Between the spring and summer of 2017 the Redevelopment Agency and RPA conducted focus groups and one-on-one stakeholder conversations with these stakeholders to understand the multiple viewpoints on the current status and desired future of the Wall Street and West Avenue areas. The Agency and RPA

Table 1: Stakeholder Engagement Summary Chart

Stakeholders	Meetings	Outreach Methods
Working group	9 Meetings (3/3/17, 5/12/17, 6/5/17, 9/15/17, 10/17/17, 12/7/17, 1/23/18, 5/22/18, 7/17/18)	Presentations and facilitated small group workshops
Residents	Waypointe (7/25/17) Neighborhood-wide (10/18/17)	Presentations and facilitated small group discussions
Developers & banks	Focus Group (6/7/17)	Focus group with key players in the study area and Norwalk
Government & institutions	Multiple one-on-ones (5/17-10/17)	Individual meetings with various city, agency & infrastructure staff regarding mobility, infrastructure, policy, zoning & investment
Retail & commercial businesses	Survey (7/17-8/17)	Business owner survey (English and Spanish) distributed to 44 study area businesses; 20 surveys completed & returned
Waterfront businesses	Focus group (8/8/17)	Focus group with waterfront business owners
Social service organizations	Focus Group (6/7/17)	Focus group with organizations in the study area
Planning Committee of the Common Council	5 Meetings (2/1/18, 6/7/18, 11/1/18, 12/6/18, 1/3/19)	Presented various components of the Plan
Redevelopment Agency	3 Meetings (1/16/18, 11/13/18, 1/8/19)	Presented various components of the Plan
Planning Commission	2 Meetings (1/16/18, 12/11/18)	Presented plan draft and determined consistency with the current and draft POCD
Zoning Commission	1 Meeting (1/3/19)	Presented plan draft and reviewed proposed zoning changes

Source: RPA

also designed and conducted a business owner survey in order to gain a deeper understanding of the needs and concerns of existing businesses in the areas' commercial corridors (see Appendix B).

Based on this analysis, the Redevelopment Agency and RPA developed a plan vision, plan policies and plan recommendations in consultation with the working group. The working group's input was instrumental in shaping these foundational elements of the plan.

The plan elements discussed in the following sections of this document provide a clear framework for addressing identified neighborhood challenges and achieving a shared vision for the future, for-

A healthy and vibrant Urban Core Neighborhood with a strong economy driven by innovation and collaboration that is accessible, authentic, lively and affordable¹ for residents and businesses.

This plan vision is an over arching goal statement supported by the policy objectives discussed in this report, which are intended to guide future decision-making by public, private and non-profit sector stakeholders. The plan's recommendations describe the actions necessary to implement these policies.

¹ Affordable, as referenced herein in relation to housing, is housing that costs not more than 30% of a household's income.

Figure 3: Getting from the Vision to Action Plan



Source: RPA

Consistency with the Plan of Conservation and Development

The POCD is a macro-level, citywide planning document that guides the overall vision, goals, and objectives of the City over the next 10 years. The POCD informs the needs of the overall City and advises for more detailed planning studies and implementation methods that should be completed within the City to lend guidance for the future. The Wall Street-West Avenue Neighborhood Plan, as well as any other redevelopment plan, is a micro-level study that explores and plans for specific improvements to a neighborhood. A Redevelopment Plan analyses specific land use issues that are constraining the revitalization of a neighborhood, and provides recommendations for addressing those constraints.

As required by State Statute Chapter 130, Section 8-127 the Norwalk Redevelopment Agency requested the written opinion of the Planning Commission, including a determination that the

Wall Street-West Avenue Redevelopment Plan is consistent with the adopted 2008 Plan of Conservation and Development and with the draft 2018 Plan of Conservation and Development. The resolution of the Planning Commission determining the Redevelopment Plan to be consistent with the adopted and draft POCD is dated 12/11/2018. Below are the goals in which the plans are consistent:

With the 2008 approved POCD:

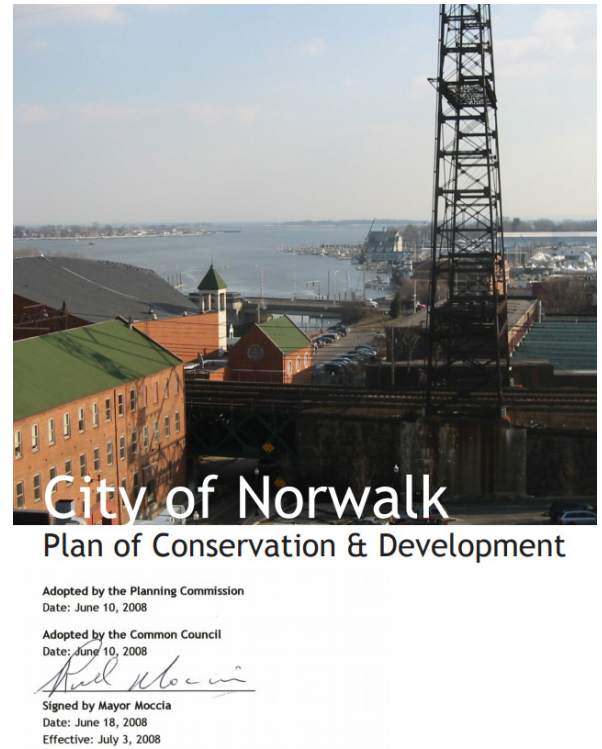
- 1) To implement the Plan of Conservation and Development to "Allow a wide range of housing opportunities to ensure that the housing needs of all segments of the labor force are met" (A.1.2.3, p. 10)
- 2) To implement the Plan of Conservation and Development to "Encourage quality housing for a variety of tenures, family sizes, incomes, the elderly, and persons with special needs" (A.2.1.1, p. 11)
- 3) To implement the Plan of Conservation and Development to "Strengthen the revitalization of the West Avenue area by encouraging mixed-use development....." (A.3.1.2, p.12)
- 4) To implement the Plan of Conservation and Development to "Enhance pedestrian experience to support related economic revitalization and encourage transit use" (F.4.2.1. p.42)
- 5) To implement the Plan of Conservation and Development to "Allow for the future needs of Norwalk to be met as identified in this Plan (i.e. housing, economic growth, community facilities, etc.)" (F.1.1.6, p. 40)

With the Draft 2019 POCD:

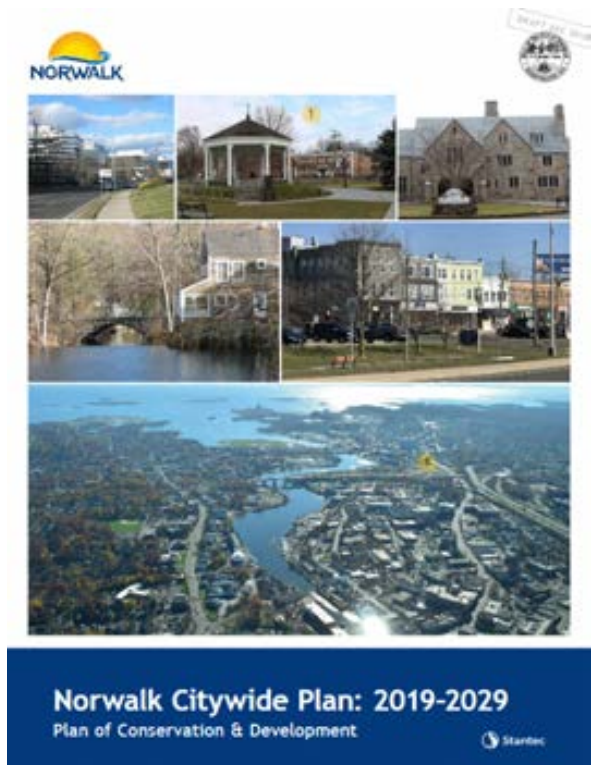
- 1) Chapter 3, Prosperity and Opportunity, Goal 3: Strengthen Norwalk's urban core with a mix of uses to attract residents, visitors and businesses.
- 2) Chapter 4, Housing Choice and Healthy Lifestyles, Goal 1: Norwalk has a neighborhood and housing strategy that maintains a variety of neighborhood types and housing choices through a variety of mechanisms.
- 3) Chapter 6, Preserving and Promoting our Historic Heritage, Arts and Culture, Goal 1: Norwalk protects its most important historic resources and encourages adaptive reuse of historic sites to maintain and enrich the City's character.
- 4) Chapter 7, Enhancing Open Space, Park, Trail and Recreation Systems, Goal 1: Norwalk has a connected green and blue network of parks, open space and trails.
- 5) Chapter 8, Coastal Resources and Resilience, Goal 1: Continue to support the implementation of Norwalk's Harbor Management Plan.
- 6) Chapters 10, Transportation and Mobility Networks, Goal 1: Norwalk has a comprehensive and balanced transportation system, with safety and multimodal accessibility the top priority of citywide transportation planning.
- 7) Chapter 11, Public Facilities, Services and Infrastructure, Goal 1: Norwalk's infrastructure and public facilities are resource-

efficient, well-maintained, cost-effective, sustainable and resilient.

- 8) Chapter 12, Future Land Use, Zoning and Urban Design, Goal 2: Neighborhood and corridor activity enters have urban design standards that promote walkability.



Source: <https://norwalkct.org/DocumentCenter/View/389/Plan-of-Conservation-and-Development?bidl=>



Source: tomorrow.norwalkct.org

Existing Conditions

An analysis of existing demographic, socioeconomic and physical conditions in the Wall Street-West Avenue neighborhood is provided in Appendix C. As described in the Appendix, the major finding of this analysis is that the neighborhood has the physical character necessary for a dynamic urban area, but currently lacks residential and commercial density, transit connectivity and the cross sector collaboration necessary to unlock economic development opportunities consistent with an innovative urban environment.

Land use and Recent Development

Land Use

The Wall Street-West Avenue neighborhood has a mixed use urban fabric. As shown in Table 2 and Figure 4 commercial land uses comprise the largest share of acreage in the neighborhood (30%), followed by institutions (15%), and mixed use development (12%). Residential development accounts for 7% of the neighborhood's land area. Vacant land within the area has largely been accounted for in terms of future development planned or in the pipeline.

Table 2: Acreage of Existing Land Uses

Land Use Category	Parcels	Acres	Share of Acreage
Residential - 1 or 2 family	47	6.4	3%
Residential - 3 or more family	37	10.2	4%
Mixed Residential/Commercial	50	28.3	12%
Commercial	147	72.9	30%
Industrial	16	15.7	7%
Institutional/Government	20	36.9	15%
Open Space	4	11.5	5%
Cemetery	1	2.6	1%
Utility	3	8.1	3%
Surface Parking	3	1.0	>1%
Parking Structure	1	1.2	>1%
Vacant	46	13.7	6%
Other or No Land Use Defined	36	33.0	14%
Total	389	241.1	

Source: Norwalk Open Data, Norwalk CT GIS, 2017; RPA Classifications

Residential: There is very little purely residential development within the neighborhood; most new development has been mixed use commercial and residential, at moderately higher density. However, there are some smaller multifamily buildings and one- and two-family homes located throughout the neighborhood.

Commercial: The neighborhood has five main commercial corridors- Wall Street, West Avenue, Main Street, Cross Street and Belden Avenue. Much of the commercial development along these corridors is retail. With the changing nature of retail on a national scale, as well as the new mall under construction nearby, the future demand for retail remains to be seen. This changing landscape presents a significant opportunity to attract new, active commercial uses, including new retail that is more compatible with a walkable, urban environment.

Industrial: Industrial activities in the neighborhood are primarily located along the waterfront and include, but are not limited to, Devine Brothers, King Industries, O&G and Crystal Ice. The neighborhood's working waterfront, which necessitates periodic dredging, is critical to maintaining a navigable channel along the Norwalk River. The federal dredging programs require active industrial uses along a waterfront to maintain it as a federally navigable waterway. The industrial waterfront area is largely cut off from the balance of the neighborhood by the Metro North Danbury line. Roadway access to this portion of the neighborhood from I-95 and Route 7 is generally along Crescent Street and Harbor Avenue.

Institutional: There are numerous institutional uses throughout the neighborhood including a number of churches and non-profit community anchors. Norwalk Hospital is located on the western edge of the neighborhood; the Norwalk Public Library's main branch is located at the northern edge and Stepping Stones Museum for Children and Lockwood Mathews Mansion Museum are located at the southern edge.

Open Space: Just five percent of the neighborhood's land area is dedicated for open space. Mathews Park, located at the southern boundary of the neighborhood, is the largest open space in the neighborhood. Freese Park, located at the intersection of Main Street and Burnell Boulevard, is a smaller open space, but presents a unique opportunity to become a key community open space asset, as discussed in the City's recently adopted Freese Park Master Plan. The Norwalk River runs along the

Figure 4: Existing Land Use

- Residential: 1 to 2 family
- Residential: 3 or more family
- Mixed Residential/Commercial
- Commercial
- Industrial
- Institutional/Government
- Open Space
- Cemetery
- Historic Building
- Utility
- Surface Parking
- Paking Structure
- Vacant
- No Land Use Defined

Source: Norwalk Open Data, Norwalk CT GIS, 2017;
RPA Classifications

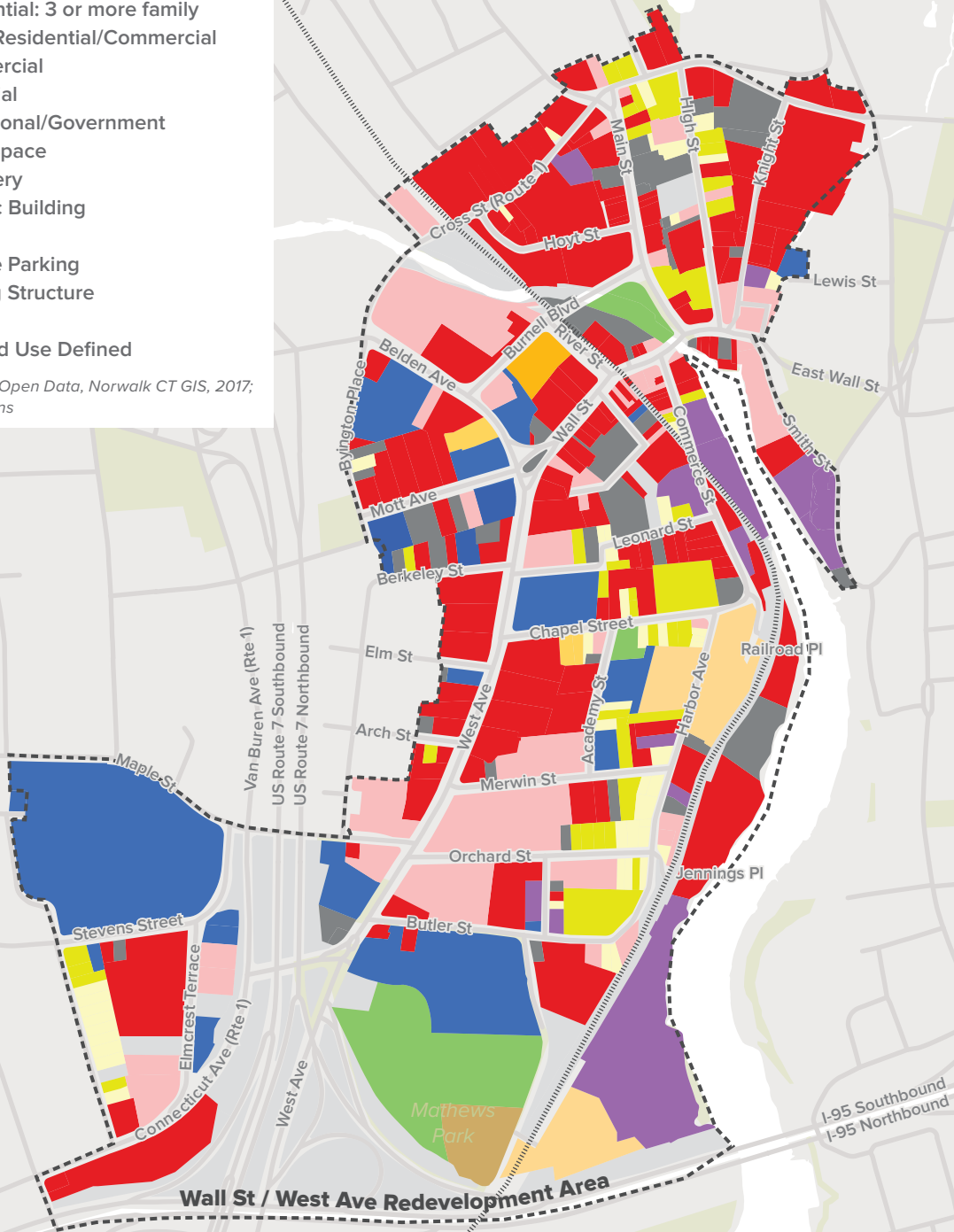


Table 3: Recent Developments and Pipeline Projects

Name & Address	Project Type	Units of Housing	Commercial Square Feet	Status
Avalon Norwalk	Mixed use	311	7700	Completed
Head of the Harbor North (High & Wall Sts)	Mixed use	70	TBD	Pipeline
Head of the Harbor (6 Smith St/East Wall St)	Mixed use	60	5,000	Completed
Wall Street Place (Wall & Isaacs Sts)	Mixed use	101	16,800	Under Construction
Highpoint West (74-88 Main St; 6-8 North Ave; 37-45 High St)	Mixed use	212	14,250	Pipeline
Highpoint East (42-48 High Street)	Mixed use	66	4,320	Pipeline
Waypointe (515 West Ave/Orchard St/Merwin Sts)	Mixed use	529	53,796	Completed
The Pinnacle (Waypointe South)	Mixed use	330	27,416	Under Construction
The Berkeley (Waypointe West)	Mixed use	129	11,875	Completed
Total		1,808	141,157	

Figure 5: Recent Developments & Pipeline Projects

- Completed
- Under Construction
- Planned

Source: Norwalk Redevelopment Agency; RPA



eastern boundary of the neighborhood and is a valuable resource for both residents and industry. Just outside the neighborhood boundary, Oyster Shell Park, Mill Hill Park and Union Park are also important open space assets for the neighborhood.

Recent Development

Wall Street and West Avenue have seen significant development activity over the last fourteen years, adding over 1,000 new residential units and over 78,000 square feet of commercial space between 2004 and 2018, with an additional 780 units and 63,000 square feet of commercial development under construction or in the pipeline. This development activity has helped to strengthen West Avenue as an increasingly vibrant mixed-use corridor and also to bolster activity along Wall Street.

Historic District

The neighborhood contains the Wall Street Historic District, which runs along Wall Street and extends across the Norwalk River, as shown in Figure 6. The area was designated by the National Register of Historic Places in 2009 and is comprised of 42 buildings, including the old trolley barn, Lockwood-Mathews Mansion, an 1860 gothic revival church known as St. Mary's and an 1858 Italianate design church known as Cornerstone Community Church and Parish House. The Mill Hill Historic District is also directly adjacent to the plan area.

In addition to the historic district, there are many historic structures located throughout the Wall Street-West Avenue neighborhood, including the Norwalk Public Library, Norwalk Post Office, Wall Street Theater, Fairfield County Savings Bank, St John Place, and Wall Street Bridge. Abutting the neighborhood is Mill Hill Historic Park, with historic structures including the Norwalk Historical Society as a monument to early Norwalk.

Properties within the historic district that are listed on the National Register of Historic Places include:

- ▶ 6, 7, 10, 11, 12, 13, 14, 16, 20, 26, 28, 32 Commerce Street
- ▶ 2 Knight Street
- ▶ 3-5, 7, 9, 10, 15, 17, 19, 21, 27-29, 33-39, 41-45, 47, 48, 49, 51, 53, 55, 61, 64, 65, 67, 69, 71, 77, 83 Wall Street
- ▶ 718, 724, 731 Wall Street

Any property that is listed on the National Register of Historic Places is eligible for State and/or Federal Historic Tax Credits to rehabilitate and re-use historic properties. The programs can be combined to claim a percentage of eligible improvement expenses against the developer's tax liability which makes rehabilitation and re-use of the properties more cost effective to encourage preservation.

The City of Norwalk, the Agency, and the community have vested interest in maintaining and preserving the historic atmosphere of the Wall Street-West Avenue neighborhood. Any

development that may occur within the district should design sensitively and in accordance with existing structures within the neighborhood. Any proposed development or significant alteration to a historic district property will be reviewed by the Agency with written input from the Historical Commission.

Detailed strategies for preserving the integrity and character of historic structures are detailed in the Draft 2019 Plan of Conservation and Development.

Figure 6: Wall Street Historic District



Source: Norwalk GIS



Source: Historic District Application



Flood Risk

Uses along the Wall Street-West Avenue neighborhood's waterfront are subject to flooding. As shown in Figure 7, properties within the Federal Emergency Management Agency (FEMA) designated 100-year and 500-year flood zone include industrial uses and the Head of the Harbor residential development. With industrial uses in this floodplain, there is a significant risk for environmental contamination entering the Norwalk River during flood events. Many historic properties within the Wall Street Historic District are also at risk for flooding.

As the frequency of flooding events increases, as has been true for the past decade both nationally and locally, new construction, as well as rehabilitation, should be considerate of the 100-Year flood plain level and construct at or above it. Where this is not possible or feasible, developers and property owners should consider alternative flood controls and mitigation measures for properties as these

events reoccur more often in the future. This should also include emergency evacuation plans and procedures for residents and other tenants. Adequately planning for such events can greatly reduce the impacts and associated costs of flood-related consequences.

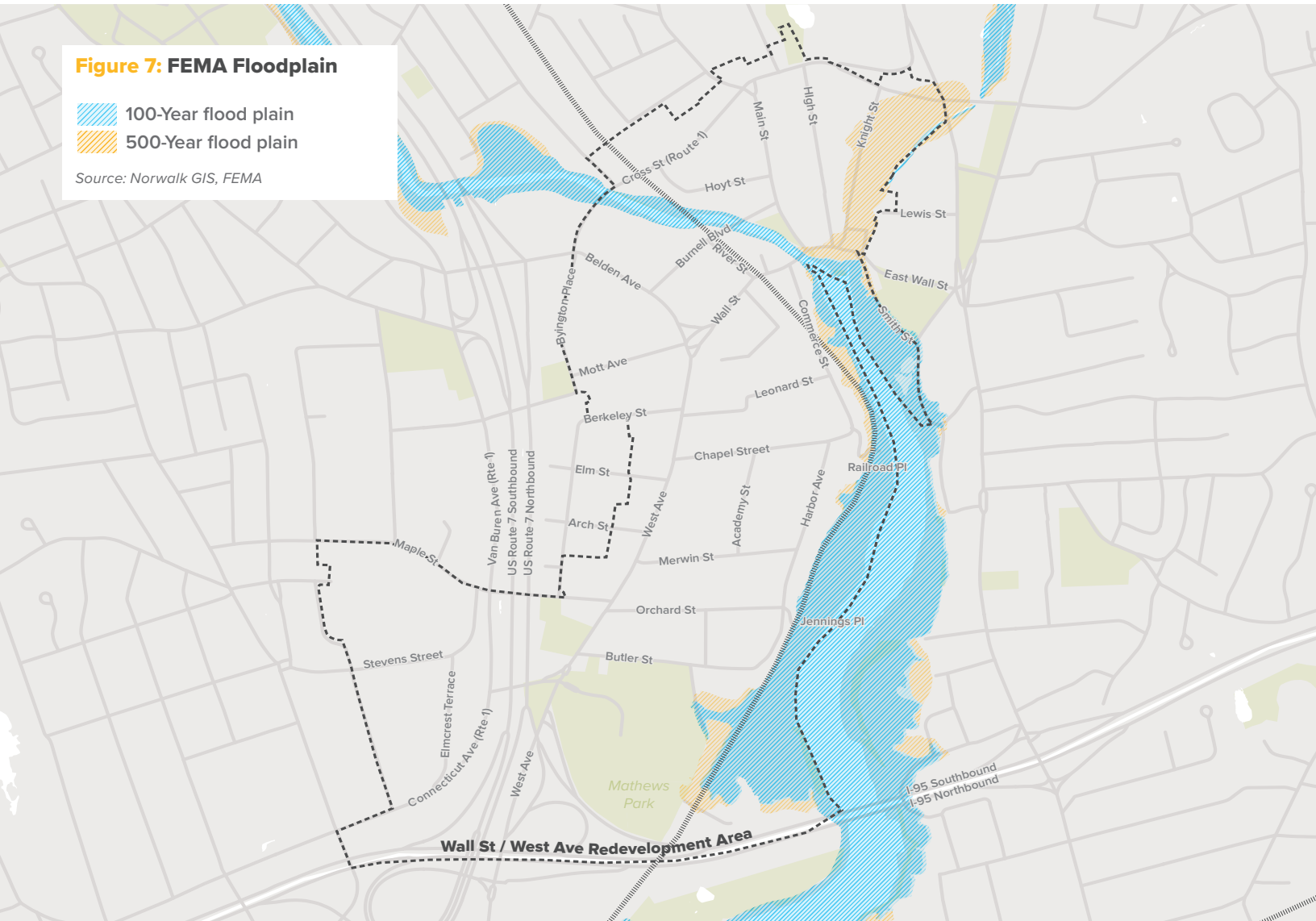
River Designation

The Norwalk River is a prominent asset to the Wall-West neighborhood. While the river does not have a Federal Wild & Scenic River designation, the Plan supports ways to enhance the rivers presence and promote increased public access. The Agency will investigate the feasibility of achieving the Federal Wild & Scenic River Designation.

Figure 7: FEMA Floodplain

- 100-Year flood plain
- 500-Year flood plain

Source: Norwalk GIS, FEMA



Existing Zoning

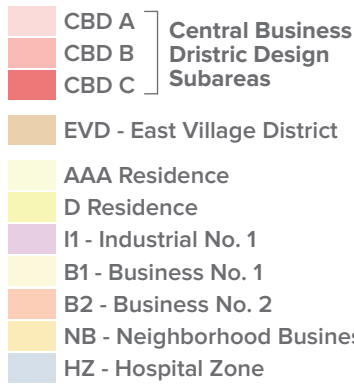
Existing Zoning

There are currently ten zoning districts within the Wall Street-West Avenue neighborhood (see Figure 8). The number and type of districts in this area have been shaped through decades of policy decisions. Most recently, the redevelopment plans for Wall Street and West Avenue recommended three new Central Business District Zones (CBDA, CBDB and CBDC) within the area to promote mixed use development. The CBD zones cross the boundaries of the previously separate West Avenue and Wall Street redevelopment areas.

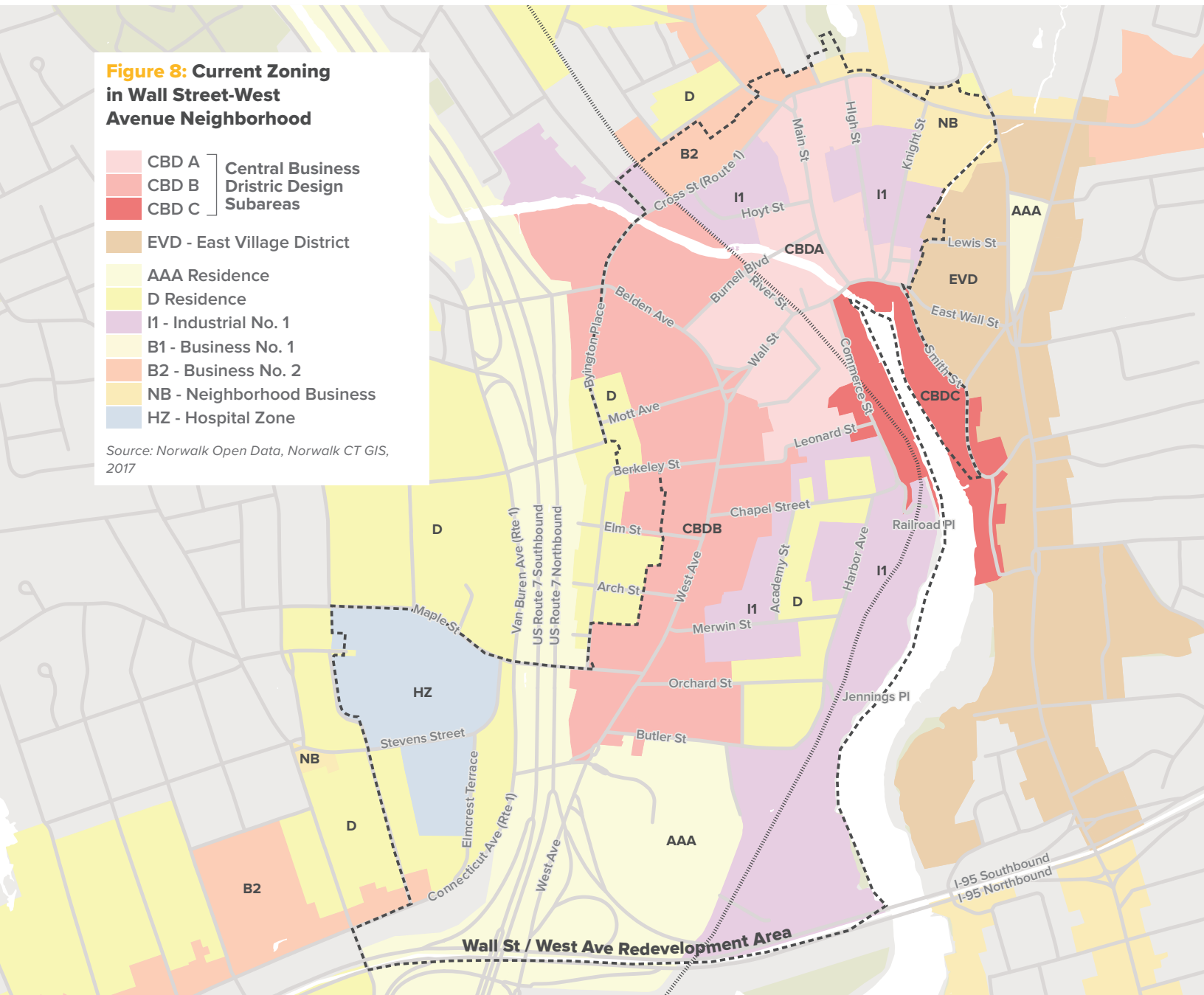
The majority of the Wall Street-West Avenue neighborhood is zoned Central Business District (CBD), Industrial 1 (I1), Neighborhood Business (NB) and Residence D, with the CBD zones accounting for the largest share of land area. The Hospital Zone (HZ), which governs land use for the Norwalk Hospital property, also covers a significant amount of land area.

- ▶ **Central Business District, Subareas A, B & C (CBDA, CBDB and CBDC):** There are three CBD zones- A, B and C. The CBDA and B zones, which comprise the majority of the plan area, are very similar to one another with respect to allowed uses and building heights. They allow for retail, restaurants, banks, daycare centers, cultural arts and enter-

Figure 8: Current Zoning in Wall Street-West Avenue Neighborhood



Source: Norwalk Open Data, Norwalk CT GIS, 2017



tainment facilities, and mixed-use buildings with residences, offices, schools and healthcare facilities. Allowed building height in these zones ranges from six to eight stories.

- ▶ **The CBDC zone**, which is mapped along the waterfront calls for somewhat different uses, including manufacturing and related uses, warehouses, offices, retail, one and two-family homes and heavy industry. Multifamily residences and mixed use developments are allowed by special permit. Maximum building height in this zone is four to six stories.
- ▶ **Industrial 1 (I1):** The I1 zone permits manufacturing and related uses, including warehouses, offices, retail business and single and two-family homes. Special permit uses include heavy industry, multifamily residences, hotels, commercial recreational establishments, gas stations, waste transfer stations, asphalt and concrete plants, animal care centers, adult day care centers and helicopter land sites. The district is intended to provide low-scale industrial facilities interspersed with other uses, recognizing the need for manufacturing space. Maximum allowed building height is four stories, but may be increased to six stories with incentives on sites greater than 30 acres, which does not apply to any sites in the Wall Street-West Avenue neighborhood.
- ▶ **Neighborhood Business (NB):** The Neighborhood Business (NB) zone permits a diversity of uses that provide neighborhood retail and services at a scale compatible with adjacent residential neighborhoods. The zone is intended to encourage mixed-use development in neighborhood commercial areas.
- ▶ **Business 1 and Business 2 (B1 and B2):** The Business 1 (B1) zone permits a diversity of business uses, including offices, retail services and manufacturing, as well as multifamily residences. The Business 2 (B2) zone permits retail stores, service shops, mixed-use development, artist workspace and other compatible uses.
- ▶ **Hospital Zone (HZ):** The Hospital Zone (HZ) is intended to provide for the continued growth and development of Norwalk Hospital in a manner compatible with the surrounding residential neighborhood. It allows for the hospital use, physicians' offices, multifamily residential development, single and two-family homes and a variety of complimentary accessory uses.
- ▶ **D Residence:** The D Residence zone allows for multifamily development as well as single and two family homes.
- ▶ **AAA Residence:** The AAA Residence zone, a low density, single family residence zone, is mapped on the Mathews Park museums properties.

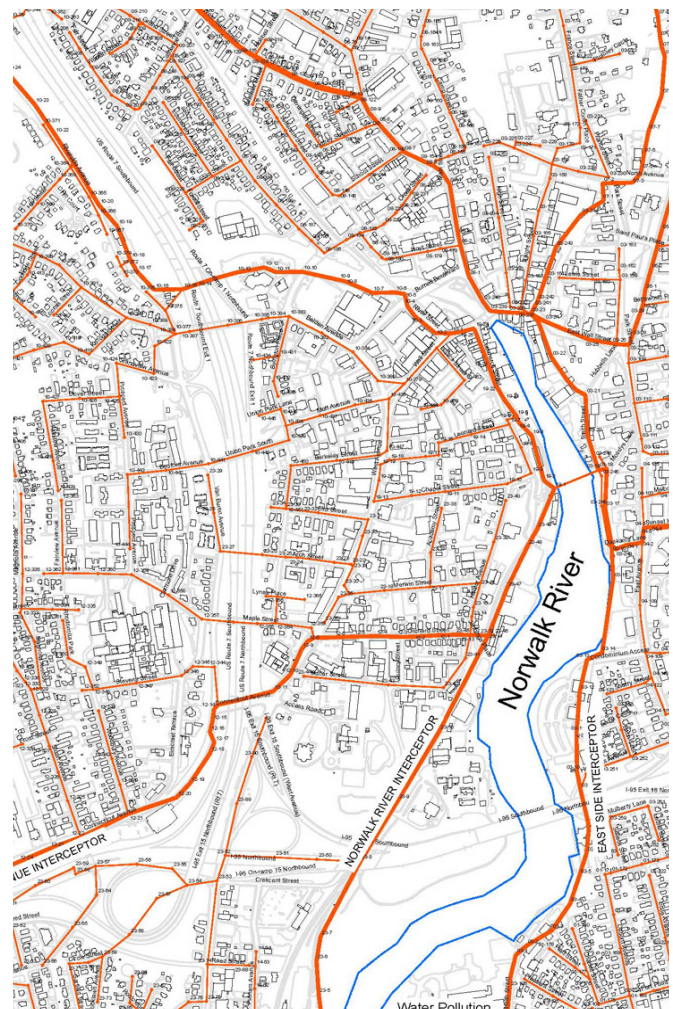
Infrastructure

Water and Sewer

Norwalk's wastewater needs are handled by the Water Pollution Control Authority. The Authority runs an 18 million-gallon-per-day facility across the river and to the south of the Wall Street-West Avenue area. Figure 9 shows the wastewater collection infrastructure within the neighborhood.

The Norwalk Wastewater Treatment Plant has a permit limit of 18 Million Gallons per Day (MGD). If the average flow over a 180-day rolling average exceeds 16.2 MGD the City must develop and submit a plan for future Wastewater Treatment Plant capacity expansion to the Connecticut Department of Energy and Environmental Protection's Commissioner. Currently, the peak 180-day rolling average for the last 3 years is 13.6 MGD providing a current available capacity of approximately 2.6 MGD.

Figure 9: Norwalk Wastewater Collection System Map



Source: Norwalk Water Pollution Control Authority (WPCA); selection from this document: <http://www.wpcanorwalk.org/wp-content/uploads/2009/01/collection-system-map.jpg>

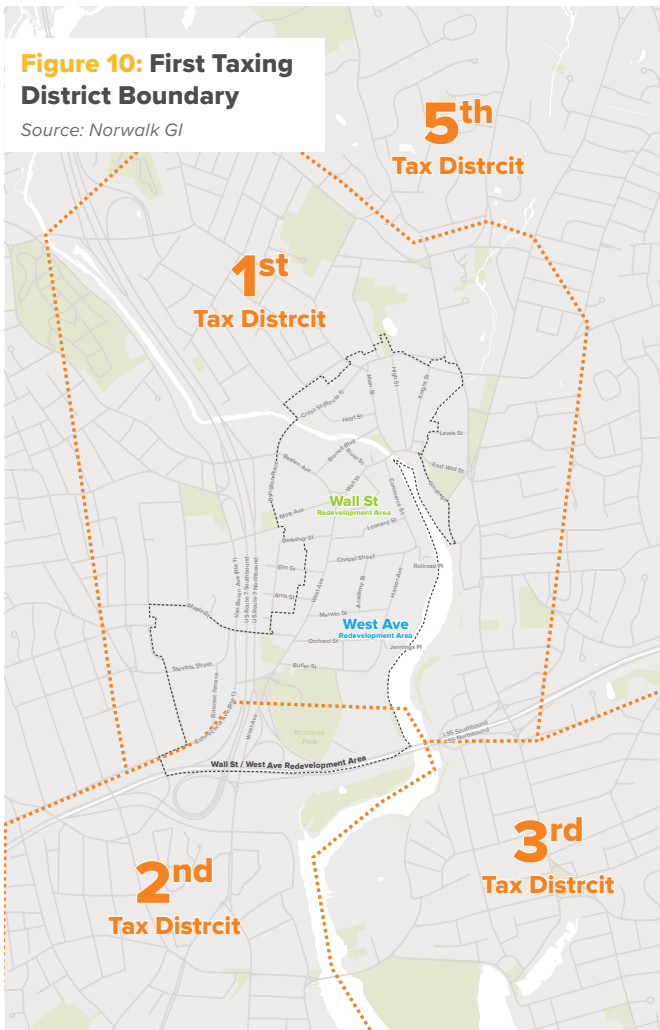


Figure 10: First Taxing District Boundary

Source: Norwalk GI

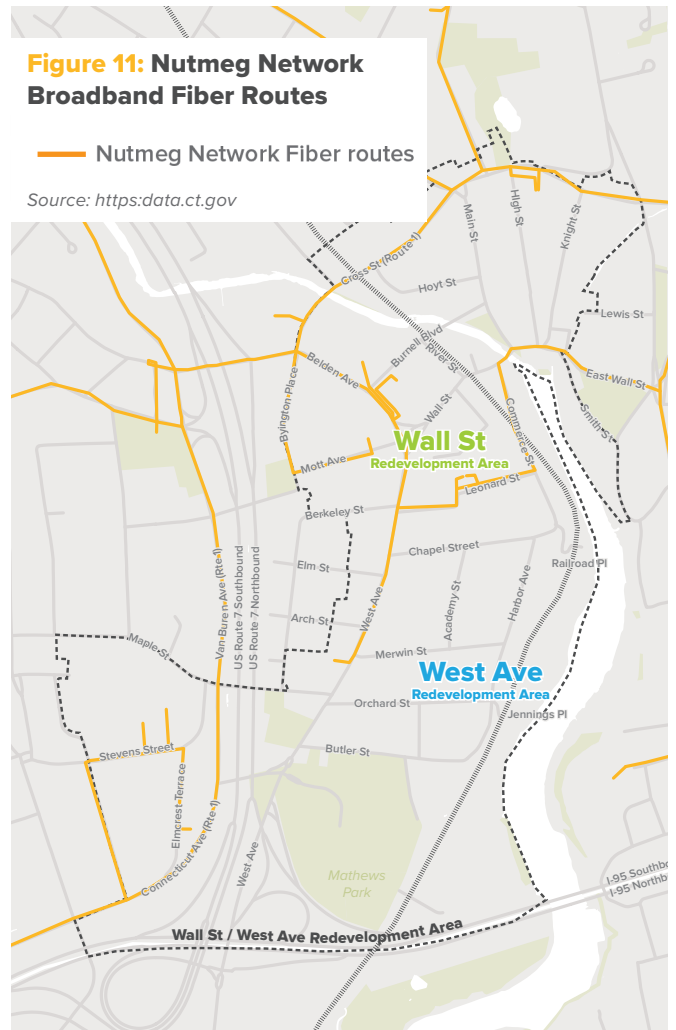


Figure 11: Nutmeg Network Broadband Fiber Routes

Source: <https://data.ct.gov>

Water service is provided by the First Taxing District (see Figure 10). The First Taxing District has made significant improvements to area water and sewer infrastructure within the past few years to address aging pipes and provide capacity and service necessary to accommodate new development. Most recently, the District installed new water mains at various locations between Harbor Avenue and West Avenue to replace existing undersized water mains on West Avenue and portions of Academy Street, Chapel Street, Harbor Avenue, Leonard Street, Merwin Street and Butler Street. Construction on these mains was completed in the fall of 2017. The First Taxing District’s Capital Efficiency Plan calls for installation of new water mains on Arch Street and Berkeley Street in 2021. Any other improvements not planned by the District that would be required to address capacity needs to accommodate new development would need to be addressed as part of such development.

Broadband

In creating a long-range plan, it is key to examine the ability for a neighborhood to access high speed internet. Especially if the neighborhood hopes to leverage the health and education industries, access to internet will be essential.

The ability to connect to the internet at a higher speed is critical to the neighborhood’s ability to attract and retain residents and businesses, grow jobs, particularly in the technology, healthcare and education sectors. Norwalk offers multiple access points for publicly accessible high-speed internet service. Public wifi is currently provided through the Connecticut Education Network (CEN)’s Nutmeg Network at Norwalk Community College, Norwalk Public Schools and both Norwalk Public Library branches with capacity for 1 gigabit upload and download speeds. Norwalk Hospital is also connected to the Nutmeg Network (see Figure 11).

Private internet providers servicing Norwalk include Optimum, Frontier Communications, MegaPath Telecommunications Company, Windstream Communications, Lightower Fiber Networks, Global Capacity, Cogent Communications, Broadview Networks and Level 3 Communications. Connectivity options include cable, DSL, fiber and copper. Data transmission capacity in Norwalk ranges from 5 megabytes per second (mgps) to 1000 mgps, depending upon the type of connectivity and the service provider.

Plan Vision, Goals and Guiding Policies

Stakeholder Insights: Assets and Challenges

The stakeholder engagement effort discussed in this section and described in detail in Appendix B, in tandem with the quantitative analysis of data, land use and physical neighborhood conditions described in Section 2, was instrumental in identifying community assets and challenges from a variety of perspectives and describing a vision for the future of the neighborhood. Questions asked at each stakeholder outreach session centered on what people think about the neighborhood as it exists today, what they would like it to be in future, and their thoughts on the opportunities and challenges associated with achieving that future.

Through these conversations, several themes emerged with respect to the Wall Street-West Avenue neighborhood's strongest assets:

Asset 1: Urban Character

The neighborhood's urban character was identified as a key neighborhood attraction. Specifically, its compact street grid, walkable density, open spaces and potential for rich civic life were all cited as desirable by residents, businesses and investors.

Asset 2: Historic buildings

The neighborhood's history is preserved in much of its architecture. Multiple stakeholders stressed the importance of preserving the neighborhood's historic buildings as well as its existing street network.

Asset 3: Mix of uses

The neighborhood's mix of uses is viewed as a crucial asset to be preserved and expanded upon. Residents and employees working in the neighborhood enjoy its dining and retail and expressed the desire for more active uses available during different parts of the day.

Asset 4: Central location

The neighborhood is the northernmost urban area of Norwalk and contains a wealth of civic institutions. While the area does not currently have a train station, it is accessible to I-95 and US Route 7 and contains the Norwalk Transit District's Pulse Point bus hub where the District's bus lines converge and riders can

easily transfer between routes. It is also flanked by the Norwalk River on its eastern boundary, where freight can be transported without interrupting or adding to vehicle traffic.

Asset 5: Open space and natural resources

Access to trails, the waterfront and local parks were all noted as important community resources to be further enhanced, connected and celebrated to increase the neighborhood's vibrancy. While there are several parks and trails within and connected to the neighborhood, only 5 percent of the land in the Wall Street-West Avenue area is comprised of open space. Therefore, resources including the Norwalk River Valley Trail, Harbor Loop Trail, Mathews Park, Freese Park, and nearby Oyster Shell, Union and Mill Hill Parks, as well as access to the Norwalk River were all noted by stakeholders as critical assets. At the same time, these assets were recognized as somewhat underutilized. In particular, Mathews Park, the largest open space in the neighborhood, was recognized as an open space that could be significantly enhanced to serve both residents and visitors as a "Central Park" for the City of Norwalk.

Asset 6: Potential for Innovation

The Wall Street-West Avenue neighborhood is home to several public institutions including Norwalk Hospital, Norwalk Library, Stepping Stones Museum for Children and Lockwood-Mathews Mansion Museum. These institutions have a long standing stake in the community and are important community anchors. In addition, it is home to two, large industrial employers- King Industries and Devine Brothers. Together these organizations represent significant existing investment in the neighborhood as well as potential for future economic investment and innovation with respect to employment and local procurement of goods and services.

Similarly, there was widespread agreement on the neighborhood's biggest challenges:

Challenge 1: Difficult to navigate by vehicle

A majority of the stakeholders expressed concerns with respect to access and availability of parking within the neighborhood. More specifically, the lack of on-street parking on Wall Street and Main Street were among their top concerns. Stakeholders referenced lack of accessibility and wayfinding to the Yankee Doodle Garage as challenges for businesses. While the garage has updated lighting, better crosswalks and access would be beneficial.

Existing bus service between the neighborhood and the South Norwalk train station was described as insufficient and undesirable by residents. Traffic and congestion around the neighborhood were also described as drawbacks.

While both the industrial and commercial businesses cited proximity to the highway as an asset, they described difficulty with receiving truck deliveries due to narrow turning radii on local streets.

Challenge 2: Difficult to navigate on foot

Many stakeholders noted the need for improving the pedestrian environment in the neighborhood, calling for more attractive streetscapes and sidewalks, street furniture, lighting, trash receptacles and wayfinding signage. Intersection improvements and more crosswalks were also cited as necessary for improving neighborhood walkability and pedestrian safety.

Challenge 3: Commercial and ground floor vacancy

Many neighborhood streets were perceived as undesirable, especially at night, due to lack of foot traffic, underutilized/abandoned buildings and lack of streetlights. Vacant or neglected commercial spaces on the ground floor were described as particularly problematic, deterring potential customers. Industrial operators expressed reservations with allowing pedestrian access to the waterfront due to safety and security concerns.

Challenge 4: Lacks a Cohesive Identity

Stakeholders noted that the neighborhood lacks a cohesive identity. It does not currently serve as an active urban neighborhood and is seen as home to a range of disparate, loosely connected uses.

Challenge 5: Infrastructure

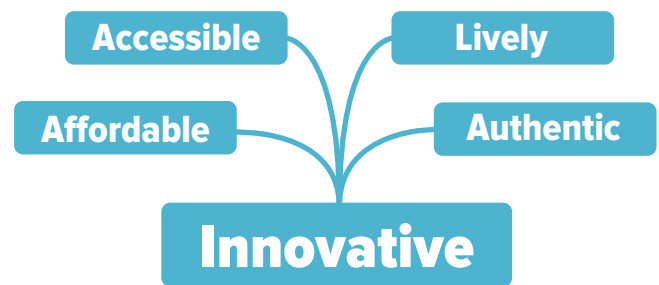
The age and capacity of the neighborhood's water system and its access to broadband infrastructure were identified as a challenges with respect to the neighborhood's ability to attract and accommodate investment. Norwalk's First Taxing District recently completed significant water main capacity upgrades in the area and future upgrades are included in its Capital Efficiency Plan. However, the capacity of the existing mains that have not yet been upgraded remains a challenge. In addition, while the Nutmeg Network's broadband fiber route extends along West Avenue, a significant portion of the neighborhood, including Wall Street, is currently not served by broadband infrastructure.

Plan Vision, Goals and Guiding Policies

The vision for the Wall Street-West Avenue neighborhood that emerged through these conversations was for a **Healthy and Vibrant Urban Core Neighborhood** with a strong economy driven by innovation and collaboration that is accessible, authentic, lively and affordable for residents and businesses.

This vision includes five inter-related goals, described below and is centered on an innovation-driven economic development strategy for leveraging and expanding the capacity of existing businesses, institutions and residents, attracting new companies and emerging entrepreneurs, and developing the infrastructure and amenities necessary to support a dynamic live-work environment in the Wall Street-West Avenue neighborhood. Under each goal is a set of policies that are intended to guide decision-making in the Wall Street-West Avenue neighborhood. They provide a framework for achieving the vision for the future of the neighborhood and for weighing decisions about property development, infrastructure investment, regulation changes and other actions that may be taken by public officials and agencies, private developers, non-profit institutions, business owners and other neighborhood stakeholders to implement the plan.

Figure 12: Plan Goals



Source: RPA

Goal 1: Innovative

The Wall Street-West Avenue neighborhood of the future is a center for entrepreneurs, innovators and creators attracting a dynamic workforce drawn to its lively walkable urban character, cultural and community resources and green spaces.

Policies

1. Incentivize & promote innovation, creativity and entrepreneurship
2. Foster collaboration with anchor institutions and area companies & businesses
3. Enhance partnerships between artists, residents & businesses
4. Preserve and enhance water-dependent uses
5. Support local businesses

Goal 2: Accessible

The Wall Street-West Avenue neighborhood is easily accessible by transit, foot, bike and car. It is well-connected to the City's other urban core neighborhoods and to the region. Parking is easy to find and easy to use. The waterfront works for businesses and people, visually and physically accessible in a manner that respects the safety of all users.

Policies

1. Transit

- a. Create more reliable, faster and safer transit connections
 - b. Create a direct transit link between the Wall Street-West Avenue neighborhood and the South Norwalk train station
 - c. Improve aesthetics and operations of Pulse Point transit hub and explore site and operation alternatives
 - d. Incorporate on-demand transportation into public transit systems
- 2. Pedestrians and Bikes**
- a. Improve sidewalks and streetscapes
 - b. Create bike paths that link the neighborhood to jobs and transit
 - c. Improve connections between the neighborhood and its waterfront
- 3. Trails**
- a. Capitalize on Norwalk River Valley Trail as a neighborhood and connectivity asset
 - b. Complete, enhance and enliven the Harbor Loop Trail
- 4. Vehicles**
- a. Create complete streets that balance the needs of vehicles, transit, bikes and pedestrians
 - b. Improve vehicular flow for freight and deliveries
 - c. Designate truck route connecting industrial waterfront to I-95 and designate loading zones for deliveries
- 5. Parking**
- a. Make parking (on-street & off-street) more easily accessible and business friendly
 - b. Make the Yankee Doodle easier to access and improve ingress/egress through wayfinding and signage

Goal 3: Authentic

The Wall Street-West Avenue neighborhood is recognized as a dynamic urban neighborhood with a thriving arts community, important cultural resources and a strong local business community. Its historic character is recognized and celebrated through preservation of historic buildings and complementary new construction. Its working waterfront is preserved and enhanced and water-dependent and water accessible uses are prioritized along the river.

Policies

1. Draw on the neighborhood's people, places, open spaces and historic character
2. Identify appropriate scale and types of uses for infill development/redevelopment sites
3. Provide design guidelines for new development

Goal 4: Lively

The Wall Street-West Avenue neighborhood is active with people, businesses and civic life throughout the day. Its sidewalks, storefronts, green spaces, trails and arts & cultural venues are connected and well maintained. A culture of health extends across the neighborhood with physical spaces and programs that support resident and business health and well-being.

Policies

1. Activate ground floor and sidewalk spaces
2. Enhance and maintain streetscapes, parks and public spaces
3. Emphasize placemaking
4. Encourage walking & biking in the neighborhood
5. Incentivize investment in buildings, infrastructure and open/public space
6. Brand and promote the neighborhood

Goal 5: Affordable

The Wall Street-West Avenue neighborhood is affordable to existing and new residents, local businesses and the arts community. Reliable funding allows neighborhood infrastructure and public spaces to be maintained and enhanced.

Policies

1. Develop strategies to protect existing neighborhood residents, businesses and artists from displacement
2. Make it easier and more affordable to maintain and upgrade buildings, infrastructure and public spaces
3. Make it easier for people to do business in the neighborhood
4. Make sure that local residents, businesses, and artists benefit from neighborhood improvements
5. Preserve live/work spaces
6. Require creation of permanently protected, affordable apartments as part of new multifamily developments

Implementation Actions

Realizing the vision for the Wall Street-West Avenue neighborhood and implementing the plan's policies will depend upon a series of coordinated actions by a variety of stakeholders. No single action will result in the changes necessary for the neighborhood to become a healthy, vibrant place for residents and businesses. A variety of strategies and tools must be employed in tandem ranging from implementation of design guidelines to facilitating redevelopment of key opportunity sites and promoting cross-sector collaboration amongst the public, private and non-profit sectors to leverage existing community assets, as described below and summarized in the matrix at the end of this section.

Coordinated Planning

Carrying out the multiple implementation strategies outlined in this plan will require substantial collaboration across agencies, departments, institutions, developers, businesses and other community stakeholder groups. While the Norwalk Redevelopment Agency is ultimately tasked with the implementation of this plan, joint planning, program and project development and management in cooperation with these entities will be required to achieve the vision outlined in this plan. Joint projects and planning efforts will provide important opportunities to establish and grow the partnerships necessary to identify shared interests and benefits and leverage investment. This coordinated planning is supported by the political and municipal will necessary to carry out the objectives of this plan, including capital and operating budget allocations, grant funds, and assignment of interdepartmental coordination duties and responsibilities.

Eminent Domain

As prescribed by the Common Council in 2007, eminent domain shall take place only through direct approval by the Norwalk Common Council, and only in connection with a Land Disposition and Development Agreement with a City designated preferred developer, each to be likewise approved by the Norwalk Common Council.

The Redevelopment Agency itself is directly prohibited from undertaking any direct property taking and, further, cannot make a request to the Common Council to consider such a taking on its own behalf even if such taking is deemed beneficial to the advancement of the stated objectives of the Redevelopment

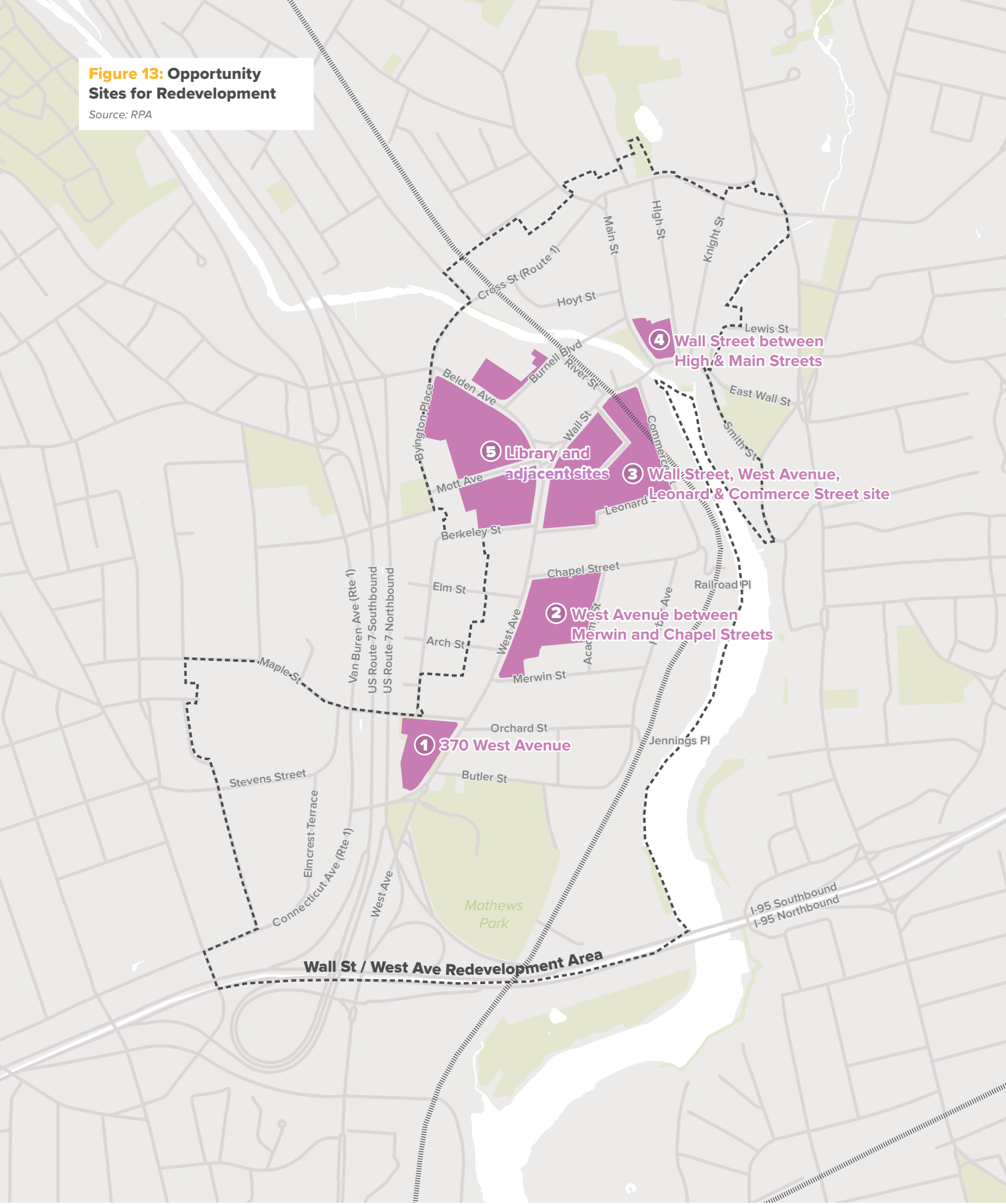
Plan. The Agency can only advance a taking request to the Common Council for its consideration at the behest of a Common Council approved Preferred Developer with a likewise approved Land Disposition Agreement and Conceptual Master Site Plan.

Should the Common Council be receptive to restoring the potential use of eminent domain by the Redevelopment Agency in order to advance the objectives of the Wall Street-West Avenue Redevelopment Plan, the Agency would request the Common Council approve a resolution approving the use of eminent domain under the Wall Street-West Avenue Redevelopment Plan to the Norwalk Redevelopment Agency.

The 2007 modification regarding eminent domain is attached to this Plan.

Figure 13: Opportunity Sites for Redevelopment

Source: RPA



Opportunity Sites for Redevelopment

Central to realizing the vision for the future of the Wall Street-West Avenue neighborhood described in this plan is for the Norwalk Redevelopment Agency and the City of Norwalk to focus attention and resources on specific opportunity sites that can serve as catalysts for broader community development.

The Plan supports the State’s initiative of assessing the feasibility of a Wall Street Train Station as a potential opportunity for the neighborhood. Regardless of the outcomes of the study, the Plan recognizes the need for transportation improvements within the neighborhood and its connections to other areas of the City. The Plan addresses and supports these improvements as well as other previous planning initiatives undertaken by the City.

These sites, identified by the Norwalk Redevelopment Agency, include:

1. 370 West Avenue (former YMCA site)
2. West Avenue between Merwin and Chapel Streets
3. Wall Street, West Avenue, Leonard & Commerce Street site
4. Wall Street between High & Main Streets
5. Library and adjacent sites

These sites have been identified for redevelopment based on the following factors:

- ▶ **Development potential:** Allowable building size on the site is significantly greater than the size of existing buildings.
- ▶ **Land area:** Opportunity exists for 150,000 square feet or more of development
- ▶ **Location:** Frontage on the neighborhood’s primary commercial corridors- West Avenue and Wall Street

The concepts described below for these sites are intended to provide overall direction for future development. The market feasibility of specific proposals to realize these concepts will need to be evaluated as part of the redevelopment process. The analysis of development potential described herein assumes complete tear down of existing structures, with the exception of historic properties, and complete build out of assembled parcels to the maximum floor area ratio allowed under existing zoning.

As part of the development of a plan for the future of the Wall Street-West Avenue neighborhood, the Norwalk Redevelopment Agency engaged the Connecticut Economic Resource Center (CERC) to research current and projected future industry, demographic, housing, retail and employment conditions in Norwalk and the surrounding region. The purpose of this analysis was to inform recommendations for redevelopment on opportunity sites for redevelopment within the neighborhood identified through the planning process, consistent with economic data and market trends.

As discussed in detail in CERC’s analysis, provided in Appendix D, the Wall Street-West Avenue neighborhood has experienced a recent surge in residential development and an increase in commercial activity, with trends toward arts and culture, technology and science and health and wellness. Current and projected industry, demographic, housing, retail and employment conditions, for Norwalk, Fairfield County and the Fairfield-New York Counties regions, summarized in CERC’s report, demonstrate the potential for development on identified opportunity sites consistent with the goals of this plan.



370 West Avenue (former YMCA site)

1 370 West Avenue (former YMCA Site)

370 West Avenue is located at the southern end of West Avenue at Maple Street between Stepping Stones Museum for Children and Norwalk Hospital. This site, which is the former home of Norwalk’s YMCA, is currently vacant and is owned by Norwalk Hospital. Existing structures on the property include the four-story original brick YMCA building and addition at Butler Street and West Avenue and a three-story wood structure at the corner of West Avenue and Orchard Street. The property is 2.83 acres and is currently zoned CBDB. A total of 369,824 square feet of new development could be constructed on the site under existing zoning if all existing structures were removed.

This site, which is currently vacant and is owned by Norwalk Hospital, is located between two important neighborhood anchors- Norwalk Hospital to the west and Matthews Park with Stepping Stones Museum for Children to the east. It is also the southern gateway the new Waypointe District. This site should be reused for mixed-use development that is health and wellness focused, serving both the hospital’s operational and programmatic needs and the local community. New building(s) on the site should front on West Avenue with ground floor design and uses that serve to activate the street.

As part of the redevelopment of this site, the streetscape along Maple Street should be enhanced to encourage pedestrian mobility between Norwalk Hospital and West Avenue and a strong gateway should be created at the intersection of Maple Street, West Avenue and the Norwalk River Valley Trail celebrating health and wellness at this important neighborhood entrance.



West Avenue between Merwin and Chapel Streets

2 West Avenue between Merwin and Chapel Streets

The block between Merwin and Chapel Streets on West Avenue includes one- and two-story auto sales and repair uses with large surface parking lots along with two 2-3 story brick buildings that are built to the lot line on West Avenue. These brick structures are both pedestrian friendly with welcoming sidewalks and landscape treatments. In total, this block includes 6.33 acres and is currently zoned CBDB. Under existing zoning potential development on the block if all existing structures were removed is 827,204 square feet. However, redevelopment on this block is more likely to be infill on the auto sales and repair sites. Infill development on these sites should provide for a continuous street wall along West Avenue and should emphasize active ground floor uses that generate pedestrian activity. Given the existing uses on these properties, redevelopment of these sites is expected to require some level of environmental remediation. Further development of a comprehensive vision for this area should include consideration for improvements for existing businesses and support for enhancing the organic public interactions and community events, such as concerts at Currie's Tires, which currently occur in this area.



Wall Street, West Avenue, Leonard & Commerce Street site

3 Wall Street, West Avenue, Leonard & Commerce Street site

The block bounded by West Avenue, Wall Street, Leonard Street and Commerce Street contains a combination of recently redeveloped/pending development projects, historic properties and a mix of uses along Leonard and Commerce Streets-

- ▶ Recent/pending development: Wall Street Theater and residential development in progress at the corner of Wall and Isaac Streets
- ▶ Historic properties: fronting on Wall Street and Commerce Street
- ▶ Leonard and Commerce Streets: a mix of residential, commercial and light industrial and related surface parking

Considering this block as a whole provides an important opportunity to rationalize the disparate character of existing buildings on these sites and realize additional development potential as part of a cohesive redevelopment strategy. This block includes 5.2 acres of developable property. This developable property currently includes three zoning designations- CBDA, CBDB and CBDC. Based on this existing zoning, this developable area represents a total of 628,783 square feet of development potential. However, land assemblage and a consistent zoning designation across these parcels would likely be required to facilitate redevelopment of these properties.

The mixed use nature of the block is an asset that should be maintained with a variety of residential, commercial, restaurant uses, light manufacturing, boutique manufacturing office and live/work spaces as redevelopment occurs. For properties fronting on Wall Street, new development should respect and incorporate existing designated historic structures. Building facades should be consistent with the existing street wall and should step back above five stories. Ground floors uses should be active and pedestrian-oriented. The streetscape in front of these properties should include welcoming sidewalk and landscape treatments as well as pedestrian-scale lighting. For interior properties within the block that reflect a more suburban scale and design, redevelopment presents an opportunity to orient buildings to face the street and to introduce sidewalk, landscaping and lighting treatments similar to those on Wall Street.



Wall Street between High & Main Streets



Library and adjacent sites

4 Wall Street between High & Main Streets

On the north side of Wall Street between High and Main Streets is an underutilized, 1.31-acre parcel containing one- and two-story buildings and surface parking. Existing uses on the site include a one-story commercial building fronting on Wall Street that includes retail uses and vacant storefronts, a two-story commercial building fronting on Main Street that includes Connecticut Surgical Supplies and a nail salon, and a surface parking lot with entrances on both Main and High Streets. The site is currently zoned CBDA. A total of 171,191 square feet of new development could be constructed on the site under existing zoning if all existing structures were removed.

This site is an important gateway into the Wall Street neighborhood and currently provides a critical public parking asset for surrounding properties. Consideration of this parking should be addressed as part of any redevelopment proposal for the site, which could be transformed into a four to six-story building(s) with attractive, pedestrian-oriented frontage along Main, Wall and High Streets. The site could be programmed for a mix of residential, commercial, office, light manufacturing, boutique manufacturing and parking, and should be designed to activate the streetscape and maximize its relationship with Freese Park. As part of the redevelopment of this parcel, sidewalks along Wall Street should be widened, pedestrian amenities should be provided and the Wall Street Avenue roadway should be redesigned to better balance pedestrian, bicycle and vehicular needs and improve the look and feel of the street.

5 Library and adjacent sites

This site includes parcels on three adjacent blocks-

- ▶ **North block:** The property at the corner of Belden Avenue and Burnell Boulevard, which currently contains a high rise office building, and the property at the other end of the block at the corner of Burnell Boulevard and River Street, which currently contains a small, one-story building occupied by Winners off-track betting. These two properties are currently zoned CBDB and represent a total of 250,168 square feet of development potential under existing zoning if all existing structures were removed.
- ▶ **Library block:** Bounded by Belden Avenue, Mott Avenue and Byington Place, this block includes the main branch of the Norwalk Public Library, Norwalk Courthouse, People's United Bank and other commercial uses. Buildings on this block range from one to three-stories and are surrounded by surface parking. Properties on this block are currently zoned CBDB. Excluding the library building and the Norwalk Islamic Center located at the corner of Mott Avenue and

Byington Place, a total of 733,115 square feet of development could be built on this block under existing zoning if all other existing structures were removed.

- ▶ **South block:** The block south of the library, bounded by Mott Avenue, West Avenue and Berkeley Street includes Cornerstone Community Church and Parish House, one and two-story commercial buildings fronting on West Avenue and surface parking. Properties on this block are currently zoned CBDB. Excluding Cornerstone Church and Parish House, a total of 399,881 square feet of development could be built on this block under existing zoning if all other existing structures were removed.

The focus for redevelopment on these three adjacent blocks is to create a cohesive, pedestrian-friendly environment that activates West Avenue with a mix of community-oriented uses, including a new and/or expanded library, with strong connections to open space at Union Park and transit and parking on Burnell Boulevard. The Library is a central focus of this opportunity site and redevelopment should address growing demand for library services and programs and the need for more space for research, exhibitions and meeting rooms as well as indoor and outdoor public gathering spaces and parking for patrons.

To the north of the library block, there is a significant opportunity to redevelop a vacant office building site adjacent to Norwalk Transit District's Pulse Point for mixed use development with ground floor uses that provide passenger amenities and services with residential, commercial and/or shared work space above. As part of this redevelopment, Burnell Boulevard should be made two-way to improve vehicular circulation to and from the Yankee Doodle garage. Redevelopment of properties along West Avenue between Burnell Boulevard and the Library should strongly emphasize pedestrian comfort through building and streetscape design to encourage walkability in this corridor and encourage use of both transit and Yankee Doodle garage parking by library patrons. To the south of the library, active pedestrian-oriented mixed use development fronting on West Avenue should also be encouraged.

In planning for the future redevelopment of this important site, the Redevelopment Agency and the City of Norwalk should work with the Transit District to transform its existing Pulse Point bus hub into a 21st Century transit center with comfortable, attractive and energy efficient transit vehicles and passenger amenities. This area should be upgraded to serve not only as a citywide bus transfer point, but also as a neighborhood serving amenity as well as an origin/destination for a direct transit link between the Wall Street-West Avenue neighborhood and the South Norwalk train station.

Micro-units

In planning for redevelopment in the Wall Street-West Avenue neighborhood, there is consideration of the opportunities and constraints associated with incorporating micro-units into redevelopment plans within the area. Micro-units are small studio apartments, typically less than 400 square feet, with a fully functioning and accessibility compliant kitchen and bathroom. Buildings containing micro units typically provide shared amenities and common areas for use by tenants. These units typically lease at 20-30 percent lower monthly rent than conventional units, but yield high value ratios for developers as a result of higher rent per square foot.

The target market for micro-units is young, professional singles. Secondary segments include younger couples, older, downsizing singles, and pied-a-terre users. Factors driving interest in micro-units include:

- ▶ Desire of younger residents to live in walkable locations in the urban core of relatively expensive apartment markets.
- ▶ Willingness to trade off a smaller unit for lower absolute monthly rental payment in a highly desirable location.
- ▶ Desire to live alone.
- ▶ Where renters seem to choose micro units over conventional studios or one-bedroom units, or roommates is when micro-unit rents are approximately 25-30% below conventional units.

These factors should be considered as part of the decision-making process for specific zoning recommendations within the Wall Street-West Avenue neighborhood.



DINING FOR TEN



SLEEPING FOR TWO

Source: New York Times, 2018

Parks and Open Space

Just five percent of the neighborhood’s land area is dedicated as park/open space. The 15-acre Mathews Park, located at the southern boundary of the neighborhood, is the area’s most significant open space asset. In addition to open fields and playground space, the park contains the historic Lockwood-Matthew’s Mansion, Stepping Stones Museum for Children, and the Center for Contemporary Printmaking. The Norwalk River Valley Trail also traverses the park, and links with the Harbor Loop Trail east of the Norwalk River. While this park plays an important role in the community today, it has the potential to become a much more prominent open space within Norwalk- a central park- serving the local neighborhood, the broader Norwalk community and outside visitors with stronger connections to Oyster Shell Park, just south of I-95 and the Norwalk River.

Mathews Park



Freese Park

Freese Park at the intersection of Burnell Boulevard and Main Street is a small, but important open space asset in a neighborhood with little green space. At the request of the Common Council, the Norwalk Redevelopment Agency recently completed a master plan for this park, which proposes design improvements intended to activate this relatively underutilized open space. Proposed improvements include an amphitheater with views of the water, lawn and garden space, a street side plaza and new trees along Burnell Boulevard and Main Street.

Freese Park Master Plan



Stantec

Union Park

Union Park is a small neighborhood park located just outside of the plan area boundary, one block west of the Norwalk Public Library. Owned by the First Taxing District, this park is part of the Norwalk River Valley Trail and is lined with trees to the west, which serve as a buffer from Route 7. Given the lack of open space within the Wall Street-West Avenue neighborhood, this park presents an important opportunity to enhance open space access for neighborhood residents through park improvements and physical and programming connections with the Norwalk Public Library.

Union Park

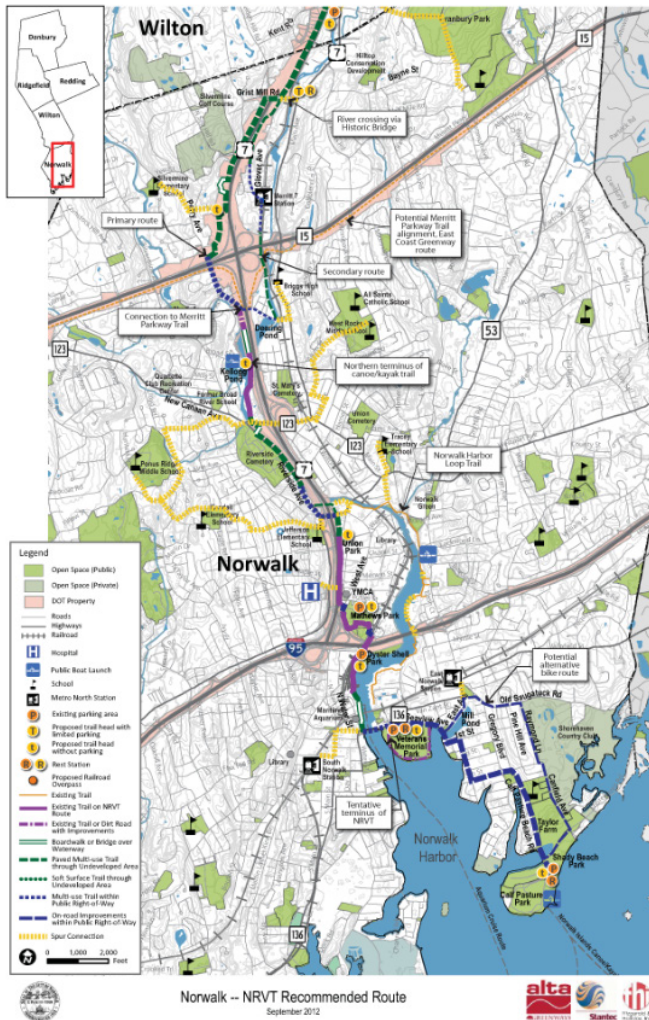


Google Maps

Norwalk River Valley Trail

The Norwalk River Valley Trail (NRVT) is 33 mile trail planned to connect Calf Pasture Beach in Norwalk to Rogers Park in Danbury. In Norwalk the trail includes on and off road segments that traverse both urban areas and woodlands. Starting at Calf Pasture Beach, the trail extends on-road north to the Maritime Aquarium. North from the Aquarium, 1.5 miles of off-road trail has been completed through Oyster Shell Park under I-95 to Mathews Park, then west parallel to Route 7 to Union Park. The portion of the Norwalk River Valley Trail located within the Wall Street-West Avenue neighborhood is largely complete. Norwalk's Connectivity Master Plan recommends trail improvements within the area including a direct connection to Mathews Park and the NRVT via a sloped trail along the embankment at the south end of the park. This would significantly improve the trail connection between the I-95 and Wall Street bridges over the Norwalk River.

Figure 14: Norwalk River Valley Trail Map



Source: Norwalk River Valley Trail

Harbor Loop Trail

Connected to the Norwalk River Valley Trail is the Harbor Loop Trail, which is envisioned as a continuous on and off-road trail bounded by the Norwalk River to the north and east, the Norwalk River Valley Trail to the west, and Washington Street to the south. The trail is largely complete with the exception of a missing link on the east side of the Norwalk River (see Figure 15).

Figure 15: Harbor Loop Trail



Source: RPA

Except for the parks described above there is very little green and/or open space in the Wall Street-West Avenue neighborhood. As redevelopment occurs along the West Avenue and Wall Street corridors and other sites within the neighborhood, new open spaces should be emphasized. This can be achieved by encouraging, requiring or incentivizing the creation of privately owned green, public spaces as part of new development projects as well as through the creation of parklets within public rights of way.

Waterfront Improvements

Over the past several years there has been significant development on the northeastern side of Norwalk's harbor as well as expansion of public access to the waterfront via the Harbor Loop Trail. On the east side of the river, the Norwalk River Esplanade extends north from I-95 to Head of Harbor, providing residents and visitors with a pedestrian and bicycle connection along the river's edge. On the western side of the river, however, public waterfront access is limited. This waterfront area is largely an active industrial and commercial corridor and the railroad line that runs parallel to the river creates a physical barrier between these properties and the Wall Street-West Avenue neighborhood (see Figure 16).

The Norwalk River is largely hidden from view from Wall Street and West Avenue, although it is only a few blocks away. The only through streets linking West Avenue to the waterfront are Chapel Street and Jennings Place. At the intersection of Chapel and Commerce Streets, Railroad Place provides access to the waterfront across the railroad tracks. At the intersection of Harbor Avenue and Orchard Street, similar access is provided along Jennings Place. There are no public waterfront access easements in these locations and neither Jennings Place nor Railroad Avenue is welcoming to pedestrians. Sidewalks along Commerce Street and Harbor Avenue, which run parallel to the waterfront are in poor condition and are uninviting for pedestrians.

View from Orchard Street towards Jennings Place



Source: Google Maps

View south on Commerce Street



Source: Google Maps

If any of the properties along the waterfront are considered for redevelopment in the future, the following goals and the design principles should serve as a guide for development. All new development must be consistent with the City of Norwalk's Harbor Management Plan.

- ▶ Support existing industrial businesses;
- ▶ Connect residents and visitors to the waterfront;
- ▶ Repurpose vacant or abandoned properties for job creation and public space;
- ▶ Enhance the ecological health of the Norwalk River; and
- ▶ Enhance neighborhood resilience.

Zoning Changes

One of the City's most important tools for implementing this plan is its zoning regulations, which control the way that land in the neighborhood is used and developed. Therefore, a key next step in the planning process should be to evaluate existing zoning in the neighborhood for consistency with the recommendations of this plan. The results of the zoning analysis should be used to propose amendments to existing zoning, prioritize necessary infrastructure investments, define the terms of business incentive programs, inform the creation of marketing concepts and advance the formation of public-private partnerships.

In order to help realize the goal of affordability in the Plan Area, proposed zoning should include the City's Workforce Housing Regulation (Norwalk Zoning Code Article 101, Section 118-1050) that is in effect in the SoNo Station Design District be the regulation in effect in the Redevelopment Area.

Norwalk Connectivity Master Plan Recommendations

Making it easier for people to get to, from and around Wall Street-West Avenue is essential to realizing the vision for this area as a healthy and vibrant neighborhood. In 2012 Norwalk adopted a Connectivity Master Plan with a strong emphasis on connectivity, which is actively used by the City and the Redevelopment Agency to guide investments in street, pedestrian, bicycle and wayfinding improvements. Implementation of the recommendations of that plan is critical to realizing the vision for the future of the Wall Street-West Avenue neighborhood. The recommendations of that plan should serve as the guide for area connectivity and mobility investments. These improvements include, but are not limited to the following:

West Avenue complete streets project

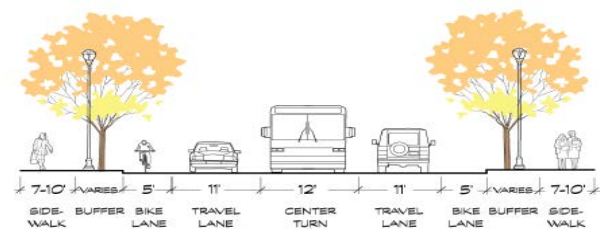
West Avenue from Orchard Street to Wall Street should be redesigned to improve pedestrian and bicycle mobility and vehicular traffic flow. Options to be evaluated to achieve this goal include 1) converting West Avenue from a four-lane undivided suburban street to a three-lane street with a two-way left-turn lane; and 2) a boulevard configuration with a center, two-way protected bicycle lane.

Proposed Bicycle Lanes along West Avenue



Source: Norwalk Connectivity Master Plan, 2012

Proposed West Avenue Lane dimensions between Orchard Street and Wall Street



Source: Norwalk Connectivity Master Plan, 2012

Crescent Street and Science Road improvements

A comprehensive improvement program should be implemented to make the Crescent Street underpass safe, visually appealing

and attractive as a pedestrian and bicycle route. Crescent Street should be widened to two travel lanes north of the I-95 overpass.

West Avenue Highway Overpass Barrier/Gateways

West Avenue should be enhanced with landscape and streetscape elements to make it more walkable and aesthetically pleasing. Artwork or rotating exhibits should be added along the route, thematically connecting corridor attractions. Under the overpasses banners and LED lighting should be used to enhance pedestrian experience and safety.

West Avenue under I-95 Bridge



Source: Norwalk Connectivity Master Plan, 2012

Cross Street-Belden Avenue Safety Improvements

The Norwalk Connectivity Master Plan recommends that the signalized intersection at Cross and Belden be converted to a roundabout. However, this alternative is currently not favored by the City of Norwalk and other alternatives for the intersection should be further evaluated as part of a traffic engineering analysis with the objective of improving pedestrian, bicycle and vehicular safety at and around the intersection.

Modern Roundabouts along Belden Avenue



Source: Norwalk Connectivity Master Plan, 2012

Financial Resources

The following information provides potential financial resources for use within the Wall Street-West Avenue Neighborhood.

Historic Property Rehabilitation

There are both federal and state programs that provide assistance to historic properties. The Redevelopment Agency and the City of Norwalk also sponsor a Historic Facade Improvement Grant Program for properties within the district and throughout the urban core.

- ▶ **Federal Historic Preservation Tax Incentive:** Eligible applicants can earn federal tax credit for qualifying historic rehabilitation projects.

Link: https://portal.ct.gov/DECD/Content/Historic-Preservation/02_Review_Funding_Opportunities/Tax-Credits/Federal-Historic-Preservation-Tax-Credit

- ▶ **State Historic Rehabilitation Tax Credit:** Eligible applicants can earn state tax credit on expenses used to rehabilitate a certified historic structure.

Link: https://portal.ct.gov/DECD/Content/Historic-Preservation/02_Review_Funding_Opportunities/Tax-Credits/Historic-Rehabilitation-Tax-Credit

- ▶ **Historic Facade Improvement Grant Program:** Eligible applicants can apply for grants to complete historic facade rehabilitation. This program is typically for properties that are too small to generate traditional state and/or federal Historic Tax Credits.

Link: <https://www.norwalkct.org/1749/Facade-Improvement-Grant-Program>

Small Businesses

The City of Norwalk does not currently have any direct financing programs for small businesses. The Department of Community of Economic should explore potential financing programs to further and promote the success of small businesses within the neighborhood.

The State of Connecticut has the following resources available for small businesses:

- ▶ **Economic and Manufacturing Assistance Act (MMA):** This act makes available low-interest loans and incentive-driven direct loans for projects when there is a strong economic development potential. Funding may be used for purchase of equipment, furniture and fixtures, construction, leasehold improvements, training and other eligible project-related activities.

Link: https://portal.ct.gov/DECD/Content/Business-Development/05_Funding_Opportunities/Manufacturing-Assistance-Act

- ▶ **Small Business Express Program:** This program provides loans and grants to small businesses to spur job creation and growth.

Link: https://portal.ct.gov/DECD/Content/Business-Development/05_Funding_Opportunities/Small-Business-Express

Housing Development and Rehabilitation

There are both Federal and State housing development programs to facilitate the development of housing. The Redevelopment Agency also administers a Residential Rehabilitation Loan Program.

- ▶ **Federal Low Income Housing Tax Credit:** The program provides tax incentives to encourage developers to create affordable housing.

Link: <https://www.chfa.org/developers/tax-credit-program/lihtc/>

- ▶ **State Housing Tax Credit Contribution Program :** The HTCC program helps nonprofit developers build affordable housing in Connecticut and gives local businesses an opportunity to invest in the projects.

Link: <https://www.chfa.org/developers/tax-credit-program/htcc/>

- ▶ **Housing Developer Financing Products:** The Connecticut Housing Finance Authority (CHFA) provides low interest loans and other financial assistance to affordable housing developers.

Link: <https://www.chfa.org/developers/financing-products/>

- ▶ **CHFA / DOH Consolidated Application:** The CHFA and the Department of Housing (DOH) Consolidated Application is used to apply for a combination of state and federal funds, including mortgages and tax credits.

Link: <http://www.chfa.org/developers/consolidated-application/>

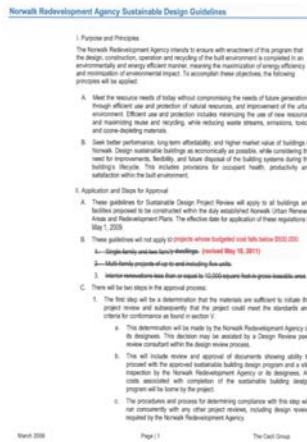
- ▶ **New Market Tax Credit Program:** The NMTC Program incentivizes community development and economic growth through the use of tax credits that attract private investment to distressed communities.

Link: <https://www.cdfifund.gov/programs-training/Programs/new-markets-tax-credit/Pages/default.aspx>

- ▶ **Residential Rehabilitation Loan Program:** To maintain and improve the condition of the existing housing stock in Norwalk, the Redevelopment Agency provides technical and financial assistance to owners of residential property in the making of permanent improvements to their properties.

Link: <https://norwalkredevelopmentagency.com/programs/housing/>

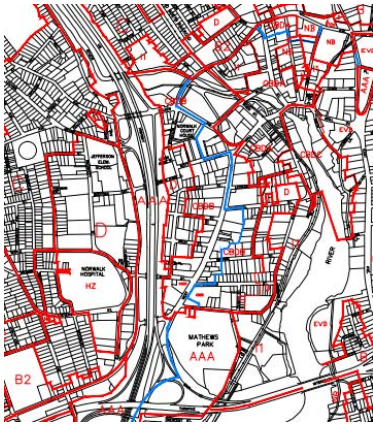
Sustainable Design Guidelines



Source: <https://www.norwalkct.org/1598/Design-Review>

All new construction within the Wall Street-West Avenue neighborhood is subject to sustainable design review. This is to ensure that the design, construction, operation, and recycling of the built environment is completed in an environmentally and energy efficient manner, meaning the maximization of energy efficiency and minimization of environmental impact.

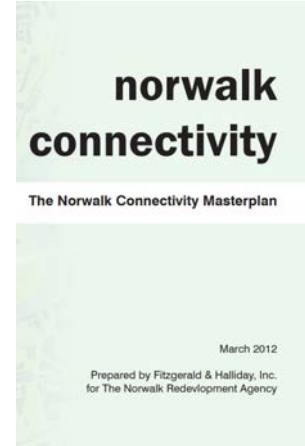
Norwalk Zoning Code



Source: <https://www.norwalkct.org/203/Building-Zone-Regulations>

The Norwalk Zoning Code should be consulted when altering any property within Norwalk. The specific zones that are related to the Plan area are recorded on the zoning map that accompany the regulations at the above link. These should be consulted in parallel to the Design Guidelines within this Plan.

Connectivity Master Plan



Source: https://www.norwalkct.org/DocumentCenter/View/2216/Norwalk_Connectivity_Final-Task-C-Report-031612?bidId=

The Connectivity Master Plan (CMP) ensures that development of the Downtown provides the necessary transportation and visual linkages to unify separate developments and improve circulation overall. The CMP gives direction for transit improvements in both the Wall Street and West Avenue areas.

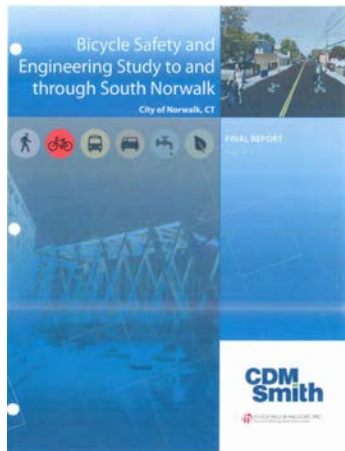
Norwalk Transportation Management Plan



Source: <https://www.ct.gov/dot/cwp/view.asp?A=3529&Q=542234>

The City of Norwalk and its Department of Public Works (DPW), in its role as the steward of the roadways and transportation system considers a broad range of factors in maintaining and improving its transportation system. This Transportation Management Plan is intended to provide guidance and direction for the City and provide templates for transportation resources that are planned, designed, and constructed.

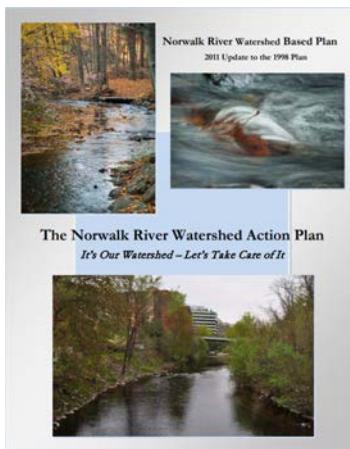
Bicycle Safety and Engineering Study



Source: <https://www.norwalkct.org/DocumentCenter/View/9139/Bicycle-Safety-and-Engineering-Study-to-and-through-South-Norwalk?bidId=>

The Bicycle Safety and Engineering Study gives specific direction when implementing bicycle improvements. This study specifically targets Norwalk's Urban Core including the Plan area.

Norwalk River Action Plan



Source: https://www.ct.gov/deep/lib/deep/water/watershed_management/wm_plans/norwalk_watershedplan_final.pdf

The planning efforts described in this Watershed Based Plan cover the characterization, analysis and pollutant load calculations performed in the fresh water portion of the Norwalk River watershed, which extends from headwaters in Ridgefield southward towards Wall Street near the top of the Norwalk Harbor. This plan should be consulted when making any alterations near the Norwalk River.

Harbor Management Plan

NORWALK HARBOR MANAGEMENT PLAN 2009 PLAN AMENDMENTS

Prepared by:
NORWALK HARBOR MANAGEMENT COMMISSION

Adopted by:
NORWALK COMMON COUNCIL
City of Norwalk, Connecticut

Adopted August 11, 2009

Source: <https://www.norwalkct.org/963/Harbor-Management-Plan>

The Harbor Management Plan provides the foundation for the City's efforts to maintain safe and beneficial use of the harbor as well as conservation of the harbor's natural resources. Any development on the waterfront should consider the objectives of the Harbor Management Plan.

Reference Documents Guide

Type of Project	Guiding Document
New Construction (housing, mixed use, commercial, etc.)	Norwalk Zoning Code
	Design Guidelines (attached to this Plan)
	Design and Sign Review
	Sustainable Design Guidelines
Historic Rehabilitation or Construction	Norwalk Zoning Code
	Design Guidelines (attached to this Plan)
	Design and Sign Review
	State Historic Preservation Standards
	Sustainable Design Guidelines
Waterfront Development	Norwalk Zoning Code
	Design Guidelines (attached to this Plan)
	Design and Sign Review
	Sustainable Design Guidelines
	Norwalk River Action Plan
	Harbor Management Plan
Facade Improvements and Signs	Norwalk Zoning Code
	Design Guidelines (attached to this Plan)
	Design and Sign Review
	State Historic Preservation Standards (if applicable)
Transit Improvements (including street, bicycle, pedestrian, sidewalk, and mass transit)	Norwalk Transportation Management Plan
	Connectivity Master Plan
	Bicycle Safety and Engineering Study
	DPW Roadway Standards
	Design Guidelines (attached to this Plan)

Implementation Actions Summary Matrix

A. Coordinated Planning

Action	Timeframe	Responsible Party
A1. Establish and institutionalize a cross-agency/cross-department framework for joint planning, program and project development	Immediate	<ul style="list-style-type: none"> Norwalk Redevelopment Agency

B. Opportunity Sites for Redevelopment

Site	Actions	Timeframe	Responsible Party
B1. 370 West Avenue (former YMCA site)	Program collaboration	1-3 years	<ul style="list-style-type: none"> Norwalk Hospital Norwalk Redevelopment Agency
	Site planning	1-3 years	<ul style="list-style-type: none"> Norwalk Hospital Norwalk Redevelopment Agency Norwalk Economic & Comm. Development
	Maple Street improvements	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations & Public Works
	Site development	3-5 years	<ul style="list-style-type: none"> Norwalk Hospital Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations and Public Works
B2. West Avenue b/w Merwin & Chapel Streets	Develop comprehensive vision for redevelopment of site	1 year	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development
	Update zoning	Immediate	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Planning & Zoning Department
	Redevelop site	3-5 years	<ul style="list-style-type: none"> Property owner(s) and/or developer Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations & Public Works
B3. Wall Street, West Avenue, Leonard & Commerce Street site	Develop comprehensive vision for redevelopment of site	1 year	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development
	Update zoning	Immediate	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development
	Redevelop site	3-5 years	<ul style="list-style-type: none"> Property owner(s) and/or developer Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations & Public Works
B4. Wall Street b/w High & Main Streets	Improve streetscape along Wall, Main & High Streets	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency
	Complete Street improvements on Wall & Main Streets	1-3 years	<ul style="list-style-type: none"> Norwalk Operations & Public Works
	Update zoning	Immediate	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development
	Redevelop underutilized parcel on Wall Street b/w High & Main Streets	3-5 years	<ul style="list-style-type: none"> Property owners and/or developer Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations & Public Works
	Implement Freese Park Master Plan	Ongoing	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Operations & Public Works

Site	Actions	Timeframe	Responsible Party
B5. Library & adjacent blocks	Library expansion planning	1-3 years	<ul style="list-style-type: none"> Norwalk Public Library
	Develop comprehensive vision/plan for library block, north block (bounded by Belden & Burnell Blvd.) and south block (bounded by Mott Ave., West Ave. & Berkeley Street)	1 year	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Public Library
	Traffic study and implementation of 2-way traffic on Burnell Blvd.	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development
	Redevelop library block	3-5 years	<ul style="list-style-type: none"> Norwalk Public Library Library block property owners Norwalk Redevelopment Agency First Taxing District Norwalk Parking Authority Norwalk Economic & Comm. Development Norwalk Operations & Public Works
	Transform Pulse Point bus hub into 21st Century transit center	3-5 years	<ul style="list-style-type: none"> Norwalk Transit District Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations & Public Works Connecticut Department of Transportation
	Redevelop 24 Belden Avenue	3-5 years	<ul style="list-style-type: none"> Property owner and/or developer Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations & Public Works Norwalk Transit District
	Improve Yankee Doodle Garage	3-5 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Operations & Public Works

C. Microunits

Action	Timeframe	Responsible Party
C1. Develop guiding principles for micro-unit development	Immediate	<ul style="list-style-type: none"> Norwalk Redevelopment Agency
C2. Consider updating zoning to allow for micro-units	Immediate	<ul style="list-style-type: none"> Norwalk Economic & Comm. Development

D. Parks and Open Space

Action	Timeframe	Responsible Party
D1. Implement Freese Park Master Plan	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency
D2. Complete Harbor Loop Trail	1-3 years	<ul style="list-style-type: none"> Norwalk Economic & Comm. Development Norwalk Operations & Public Works
D3. Create Mathews Park Master Plan	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Operations & Public Works First Taxing District Norwalk Public Library
Implement Mathews Park improvements	3-5 years	
D4. Develop plan for Union Park improvements	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Operations & Public Works First Taxing District Norwalk Public Library
Implement Union Park improvements	3-5 years	
D5. Investigate the feasibility of getting a Federal Wild & Scenic River Designation for the Norwalk River	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Conservation Office

E. Zoning Changes & Economic Development Strategies

Action	Timeframe	Responsible Party
E1. Evaluate existing zoning	Immediate	<ul style="list-style-type: none"> Norwalk Redevelopment Agency
E2. Amend zoning regulations	Immediate	<ul style="list-style-type: none"> Norwalk Economic & Comm. Development
E3. Implement financial incentives & economic development strategies	1-2 years	<ul style="list-style-type: none"> Norwalk Common Council

F. Collaborative Planning & Investment

Action	Timeframe	Responsible Party
F1. Organize anchor institution collaborative	Immediate	<ul style="list-style-type: none"> Norwalk Redevelopment Agency
F2. Identify shared values & collaborative projects	1-3 years	<ul style="list-style-type: none"> Norwalk Economic & Comm. Development
F3. Develop and implement community investment strategy	1-3 years	
F4. Support local artists, cultural institutions and creative spaces Zoning for live/work & maker spaces Incentives for public art, cultural institutions and community spaces	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development
F5. Preserve and adapt historic buildings for reuse	Ongoing	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Property owners and/or developers Community organizations

G. Connectivity and Mobility Improvements

Action	Timeframe	Responsible Party
G1. Conduct transit alternatives analysis for connecting the Wall Street-West Avenue neighborhood to the South Norwalk train station & local job centers	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Transit District
G2. Planning for direct transit link to South Norwalk train station & connectivity to local job centers	3-5 years	<ul style="list-style-type: none"> Norwalk Economic & Comm. Development Norwalk Parking Authority
G3. Implementation of direct transit link to South Norwalk train station & connectivity to local job centers	4-6+ years	
G4. Implement Maple Street improvements	1-3 years	<ul style="list-style-type: none"> Norwalk Redevelopment Agency
G5. Implement Wall Street improvements	1-3 years	<ul style="list-style-type: none"> Norwalk Operations & Public Works
G6. Implement Norwalk Connectivity Master Plan Recommendations	Ongoing	<ul style="list-style-type: none"> Norwalk Redevelopment Agency Norwalk Economic & Comm. Development Norwalk Operations & Public Works

Design Guidelines and Neighborhood Improvements

The Norwalk Redevelopment Agency has the authority to review the design of any project proposed within the Wall Street-West Avenue Redevelopment Area. The following section explains the process for review of all development applications within the Redevelopment area and provides specific design guidelines for the Wall Street-West Avenue Neighborhood.

Development Plan Review

The Norwalk Redevelopment Agency, in conjunction with the Zoning Commission, shall review for approval or disapproval all development plans for new construction and building rehabilitation within the Redevelopment Area to determine compatibility with the appropriate Design Guidelines. These plans must include proposed use, site plan, exterior design of all buildings, architectural treatment, landscaping, design of all signs, and other items subject to Design Review. In such review, the Agency may draw upon technical assistance as it deems necessary. Plans or any portion of plans may be rejected for noncompliance with this Redevelopment Plan.

It is the responsibility of any applicant proposing a project within Redevelopment Area to comply with the design guidelines under this Redevelopment Plan for any project within the Redevelopment Area.

Review procedures of the Agency shall be such that there is a continuing review of the redeveloper's proposals at various stages of the design process. The process shall be such as to preclude the possibility that a redeveloper might devote considerable time and cost to a plan only to find that it is completely unacceptable to the Agency.

The site plan and exterior design of all buildings and development proposed for the project area shall be subject to final approval by the Norwalk Redevelopment Agency.

Applicability

The Design Guidelines are to be followed by developers, property owners, architects, landscape architects, and others working with the City when advancing new projects in the Wall Street-West Avenue Neighborhood Plan area and will be used by the Norwalk Redevelopment Agency and the Zoning Commission in the process of project review and approval.

These design guidelines are organized as follows:

Site Design Specifications

Guidelines for site design that apply to all development proposals within the Wall Street-West Avenue plan area. These specifications address building orientation, site access, parking, green infrastructure, sidewalks, street furniture, landscaping, open space, lighting and signage. These guidelines also apply to public infrastructure projects within the Redevelopment Area.

Building/Architectural Design Specifications

Guidelines for building/architectural design that apply to renovation of existing structures and construction of new buildings within the Wall Street-West Avenue plan area. These specifications address building massing, facades and roofs, as well as rehabilitation of historic structures and compatibility of new development with historic structures.

Waterfront Design Guidelines

Guidelines for any future redevelopment of waterfront properties, consistent with Norwalk's Harbor Management Plan. These guidelines are intended to 1) support existing businesses while connecting residents and visitors to the waterfront, 2) repurpose vacant or abandoned properties for job creation and public space, 3) enhance the ecological health of the Norwalk River, and 4) enhance neighborhood resilience.

Application to Corridor Typologies

This section describes the applicability of the site design specifications and building/architectural design specifications to primary (commercial) and secondary (connecting) corridors within the neighborhood, as follows:

Commercial Corridors

- ▶ West Avenue
- ▶ Wall Street
- ▶ Belden Avenue
- ▶ Route 1 (Cross Street)
- ▶ Main Street

Connecting Corridors

- ▶ Maple Street
- ▶ Knight Street
- ▶ High Street
- ▶ Commerce Street
- ▶ Harbor Avenue

Relationship to other codes and regulations

All projects, new construction as well as rehabilitation, must also be in compliance with all applicable codes and ordinances. These include, but are not limited to:

- ▶ Norwalk Housing Code
- ▶ Connecticut Building Code
- ▶ Norwalk Electrical Code
- ▶ Norwalk Plumbing Code
- ▶ Norwalk Fire Prevention Code
- ▶ Norwalk Building Zoning Regulations
- ▶ Norwalk Building Ordinance
- ▶ Norwalk Conservation and Development Policies
- ▶ Coastal and Environmental requirements
- ▶ Other applicable Norwalk Design Guidelines
- ▶ The Fair Housing Act
- ▶ ADA Accessibility Guidelines and Standards
- ▶ City of Norwalk Roadway Standards

Design and Engineering Reference Documents

	Guiding Document	
Site Design	A. Building Orientation	Design Guidelines
	B. Site access, parking and loading	See Zoning, Roadway Standards, Design Guidelines
	C. Green infrastructure	Design Guidelines
	D. Sidewalks, Street Furniture and Landscaping	Roadway Standards, Design Guidelines
	E. Open Space and Parklets	Roadway Standards, Design Guidelines
	F. Lighting	Roadway Standards, Design Guidelines
	G. Signage	Zoning, Design Guidelines
Building / Architectural Design	A. Building Massing	Zoning, Design Guidelines
	B. Rooflines	Design Guidelines
	C. Building Facades	Design Guidelines
	D. Historic Structures	State Historic Preservation Standards, Design Guidelines
	E. Sustainability/Green Infrastructure	Design Guidelines, Sustainability Design Guidelines
Application to Corridor Typologies	A. West Avenue	2012 Connectivity Master Plan, Design Guidelines
	B. Wall Street	2012 Connectivity Master Plan, Design Guidelines
	C. Route 1	2012 Connectivity Master Plan, Design Guidelines
	D. Connecting Corridors	2012 Connectivity Master Plan, Design Guidelines
Neighborhood Gateways	Design Guidelines	
Norwalk Connectivity Master Plan Recommendations	A. West Avenue Complete Streets	2012 Connectivity Master Plan, Design Guidelines
	B. Crescent Street and Science Road	2012 Connectivity Master Plan, Design Guidelines
	C. West Avenue Highway Overpass	2012 Connectivity Master Plan, Design Guidelines
	D. Cross St- Belden Avenue Safety Improvements	2012 Connectivity Master Plan, Design Guidelines
Transit Improvements	Roadway Standards, Bicycle Safety and Engineering Study, 2012 Connectivity Master Plan, Design Guidelines	

A. Building Orientation

Buildings should be sited to create a strong relationship with the street, conceal parking and loading areas, and frame open space.

(For setback, height and density requirements see Norwalk Zoning Code)

- ▶ Front facades and primary building entrances should face public streets.
- ▶ Buildings should be uniformly located at the edge of the sidewalk to create an uninterrupted street wall and a sense of enclosure of the space of the street.

B. Site access, parking and loading

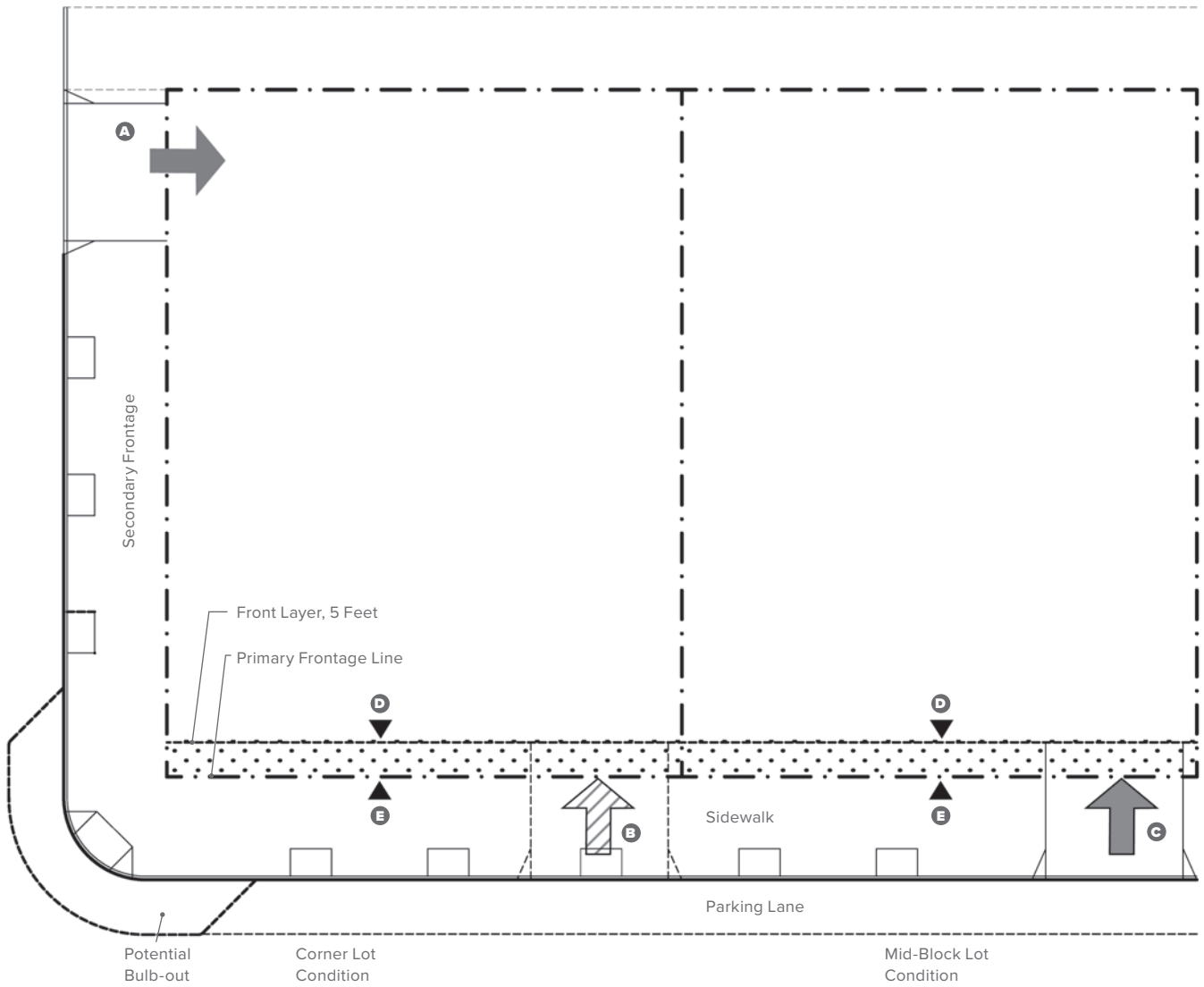
Clear and legible routes connecting all modes of transportation to the site must be provided, including pedestrians, bicycles, transit, on-demand transportation, and owner-occupied vehicles.

(See Norwalk Zoning Code and City of Norwalk Roadway Standards)

Note: The City of Norwalk is currently undertaking a city-wide parking study to create policies for effective parking provision and management throughout the city. Parking issues most crucial to resolve in the Wall Street-West Avenue neighborhood are management of on-street parking and provision of off-street parking spaces to support local businesses. The parking study's recommendations for addressing these issues will be incorporated into this neighborhood plan when that study has been completed.

- ▶ The number and width of vehicular access points should be minimized.
- ▶ Pedestrian crossings should be marked and differentiated with variations in paving materials. (See City of Norwalk Roadway Standards)
- ▶ Sidewalks are required:
 - Along all perimeter street frontages.
 - Linking public frontage streets to all building entries.
- ▶ Off-street parking and loading zones to serve delivery needs should be located behind buildings and should not be located between the sidewalk and the building frontage.
 - In cases where the Redevelopment Agency deems this is infeasible, parking should be located to the side of the building and should be limited in length and well screened.
 - For existing parking areas located within the front yard setback, they should be screened with low landscaped berms, landscape beds, and/or low decorative fences or stone walls, and softened with additional planting internal to the parking area.
 - Large parking areas should be broken into smaller areas with landscaped islands containing low plantings and trees.
- ▶ Loading zones for on-demand transportation services (i.e. Uber, Lyft, etc.) should be incorporated into site design.
- ▶ Curb cuts to parking areas and service areas should come, wherever possible, from secondary streets or alleys.

Site Access



- A** Driveway at corner lot to be at Secondary Frontage.
- B** Driveway only when condition A. not feasible.
- C** Driveway at midblock Lot
- D Front Layer:** Parking and dumpsters are not permitted in Front Layer.
- E Frontage Build-out:** Building front must occupy a minimum of 50% of Primary Frontage Line.
- E Loading:** Loading shall be on private premises when feasible.

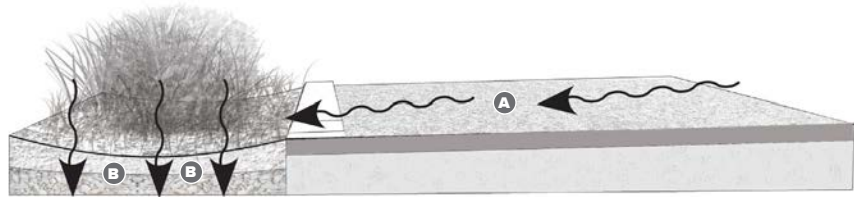
C. Green Infrastructure

- ▶ Green infrastructure, such as bio-swales, rain gardens, porous pavements, and street tree trenches absorb run off within parking lots and along the street, beautify the street and provide shade and should be included in all parking lot design and streetscape improvement projects.
- ▶ Along streets and within parking areas, the width of paved areas should be minimized and a continuous planting zone should be provided to maximize infiltration and reduce heating of paved surfaces.

Bioswales

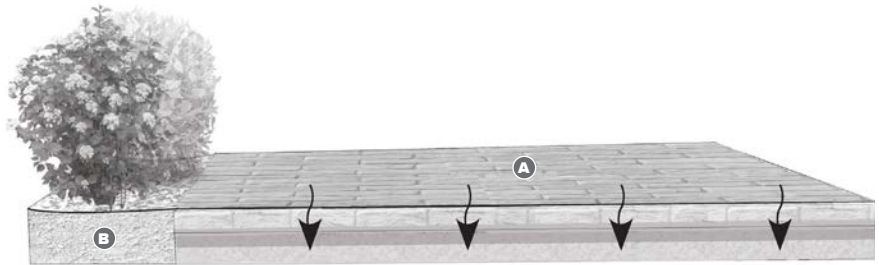
Impervious Paving

- A Pavement:** Conventional pavement sloped to drain to bioswale.
- B Bioswale** — Plantings, soil materials, and aggregate to be consistent with bioswale technical design best practices.



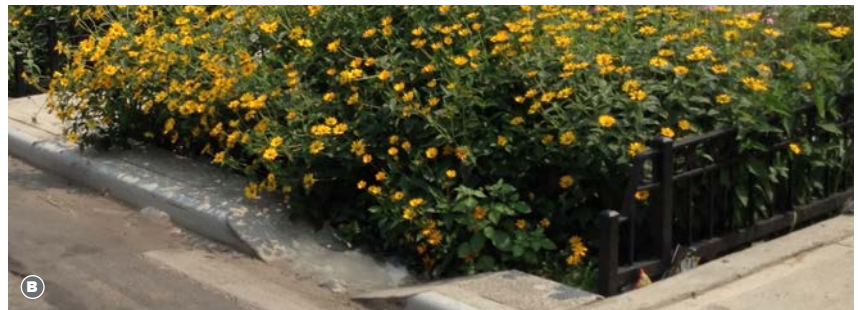
Pervious Paving

- A Pavement:** Pavement to be Pervious Pavers, Pervious Concrete, Pervious Asphalt.
- B Conventional Landscaping**



Sidewalk

- A R.O.W. Bioswale:** Sidewalk bioswales may be installed with through-curb inlets to capture stormwater from the R.O.W.
- B Connected Tree Bed:** A series of tree wells / tree beds may be connected subsurface to allow infiltration of stormwater.



D. Sidewalks, street furniture and landscaping

Elements that should be incorporated into the streetscapes in the Wall Street-West Avenue neighborhood as part of development projects or as capital infrastructure investments by the City of Norwalk include sidewalks, crosswalks, signage, lighting, street furniture, landscaping and public art.

(See City of Norwalk Roadway Standards – Urban Area)

▶ Materials and species utilized should be lasting, sustainable and relatively low maintenance. Specifically, amenities should be:

- Composed of durable, long lasting materials
- Unique to Norwalk, reinforcing sense of place
- Simple and comfortable
- Visible, safe and accessible

Sidewalks

(See City of Norwalk Roadway Standards – Urban Area)

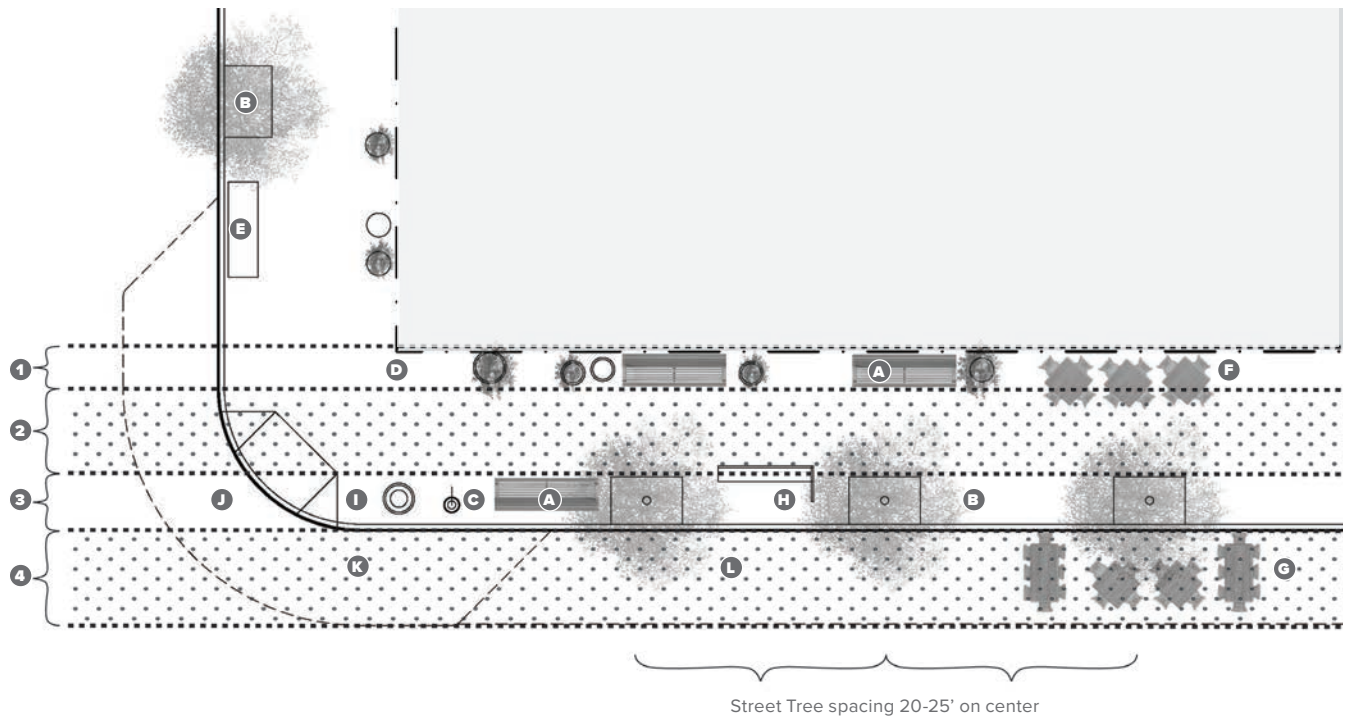
- ▶ Where possible, vehicle lanes should be narrowed to extend curbs and reclaim more width for sidewalk activation.
 - While traffic flow has traditionally been emphasized along these corridors, in planning for the future, a complete streets approach should be taken that balances the needs of all users, including pedestrians and bicyclists.
- ▶ Sidewalks must be at least 7 feet in width from curb to face of building, per the City of Norwalk's Roadway Standards for business areas. In designated historic areas, sidewalk width and paving material should be consistent with the historic character of the area, as approved by the City of Norwalk's Director of Public Works. Sidewalks should accommodate 2-way pedestrian traffic, planting strips, ADA accessibility, and outdoor dining tables, benches and transit shelters where feasible.

Streetscape amenities

(See City of Norwalk Roadway Standards – Complete Streets)

- ▶ **Benches:** located under trees where possible; face seating away from the street
 - ▶ **Tree, medium:** 20-25' on center
 - ▶ **Pedestrian Lights:** 12-15' high; spacing depends on strength of light; historic fixture where applicable
 - ▶ **Awning:** located above entrance, 3-6' protruding from façade, min. 8' high; continuous across building front if possible
 - ▶ **Garbage receptacle:** 1-2 per block
 - ▶ **Bike racks:** locate near major destinations and be placed on the sidewalk outside of pedestrian zone
 - ▶ **Public art including sculptures, murals, statues, and any other visual art accessible to the public:** locate in prominent spaces; work with the Norwalk Arts Commission to select artists and place art
 - ▶ **Signage:** neighborhood wayfinding signage must be consistent throughout the plan area
-

Streetscape Amenities



- 1 **Frontage Zone** is located directly in front of building. Zone is occupied by elements that belong to building such as potted plants, benches.
- 2 **Throughway Zone** is an unobstructed passage for pedestrians. Minimum 5ft width.
- 3 **Furniture Zone** contains benches, street lamps, sign posts, benches, and more.
- 4 **Parking Zone:** includes parallel parking and parklets.

- A Benches
- B Street Tree
- C Street Lamp
- D Potted Plants
- E Bike Rack
- F Tables & Chairs
- G Parklet
- H Bus Stop
- I Trash Can
- J Accessible curb ramp
- K Bulb Out
- L Parking

Landscaping

Development projects should include elements of landscaping that contribute to the overall site design and integrates with adjacent properties. This includes landscape elements that address buildings on the site, the streetscape, and buffering of service and mechanical features on the site as well as adjacent properties. Plantings should be drought tolerant or adapted to the local climate. Irrigation is encouraged provided sustainable practices are followed. Whenever possible, native plant materials shall be used. At no time shall any plant listed by the Connecticut Invasive Plants Council be included.

(See City of Norwalk Roadway Standards – Complete Streets)

- ▶ **Building landscaping:** should be used to soften building edges, building entries and plaza areas and mitigate or screen less desirable parts of a building façade
 - Foundation plantings, planter beds and raised planters
- ▶ **Streetscape plantings:** should be used to enhance public sidewalks and create a relationship between the building and the pedestrian realm
 - Street trees, grassy strips, planter beds and green infrastructure sidewalk features (bioswales, bio-swales, rain gardens, porous pavements, etc.)
- ▶ **Landscape buffers and decorative fences:** should be used to conceal parking, dumpsters, recycling areas, staging areas, utilities and other outdoor equipment or service uses from pedestrian views
 - Fencing may not be used as a buffer between buildings and the pedestrian realm on commercial or connecting corridors.
 - Where a commercially zoned property abuts a residentially zoned property, buffering elements should be provided to screen the property along the adjoining property line
 - Landscape buffers should be at least three-season and of lushly planted vegetation, averaging 4-5 feet tall

Landscaping

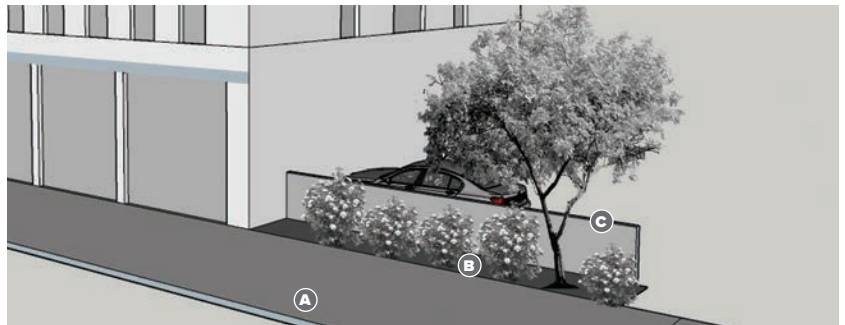
Frontage Concept 1

- ▶ **A Front Sidewalk**
- ▶ **B Front Layer** — Plantings and trees are located behind fencing. Minimum one tree per 20 feet of sidewalk length.
- ▶ **C Fencing** — Metal Fencing on Primary Frontage Line.



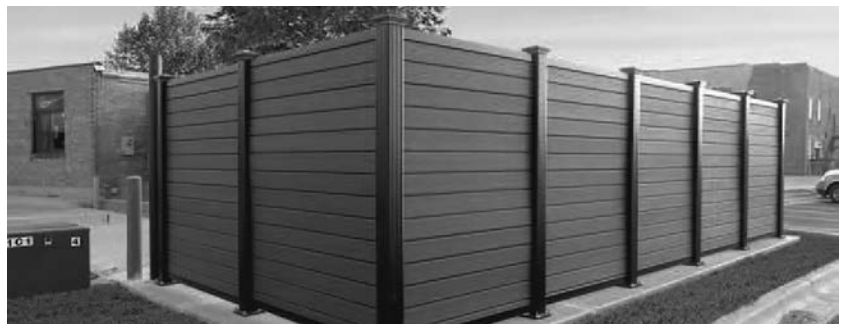
Frontage Concept 2

- ▶ **A Front Sidewalk**
- ▶ **B Front Layer** — Plantings and trees are located in front of fencing. Minimum one tree per 20 feet of sidewalk length.
- ▶ **C Screen Wall** — Masonry wall with historically compatible materials



Dumpster Screening

- ▶ **A Dumpster Screening** material must fully obstruct view of containers.
- ▶ **B Trash container screening** may be constructed of wooden fencing or similar screening devices.



E. Open space and Parklets

As redevelopment occurs in the neighborhood, the creation of new public open spaces should be emphasized. This can be achieved by encouraging, requiring or incentivizing the creation of green, public spaces as part of new development projects as well as through the creation of Parklets within public rights of way.

(See City of Norwalk Roadway Standards)

The following categories of open space should be incorporated into new development proposals, as appropriate:

- ▶ **Public open space:** Whether created by a private developer or by a public entity, some public open space should be provided as part of any new development.
- ▶ **Open space linkages:** Open space created as part of a new development should link to existing or proposed trails or pathways adjacent or near to the property to create a network of connected open spaces and walking routes
- ▶ **Parklets:** Small open space within the public right of way that are typically installed within parking lanes



Through building passage



Pocket park / public garden



Parklet



Parklet

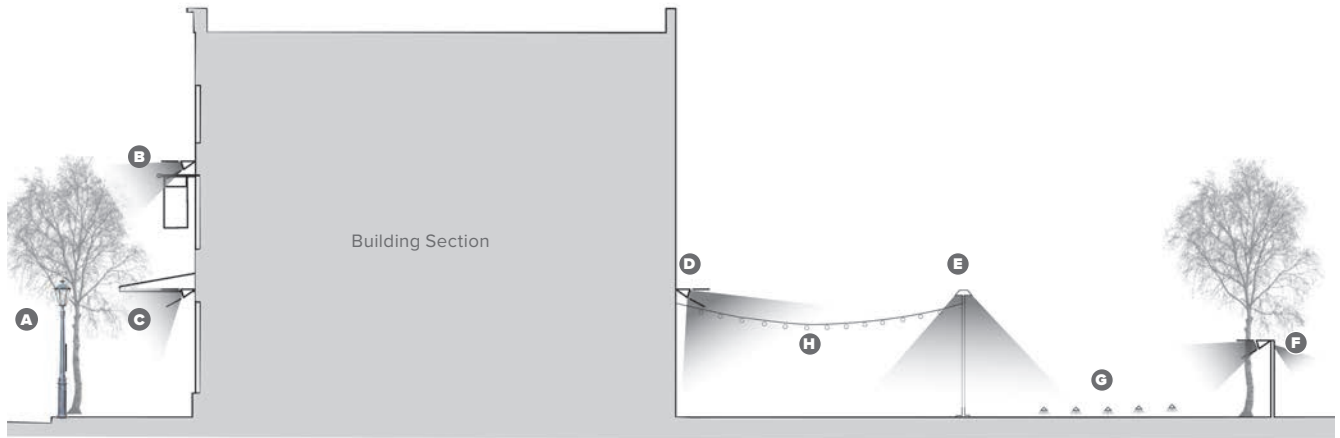
F. Lighting

An integrated lighting plan should be provided as part of all development applications, addressing both on site and directly adjacent off-site needs for pedestrians, vehicles, building entries and parking areas and should be considerate of neighboring properties

(See City of Norwalk Roadway Standards)

- ▶ Highlight key areas and attractive features of the site
- ▶ Scaled appropriately to use and historic design
- ▶ Pedestrian height lighting in non-vehicular areas
- ▶ Lighting with various height must have similar design and fixtures.
- ▶ Minimize glare and spillage and not trespass onto the street or neighboring properties
- ▶ All fixtures shall contain energy efficient light sources
- ▶ Comply with City of Norwalk Roadway Standards

Lighting



A Street Lamp

B Building lighting street level: Directed to sidewalk and to signage.

C Building lighting

D Building lighting rear yard: Cut-off to minimize spill onto adjacent property and into dark sky.

E Rear yard lighting: Cut-off to minimize spill onto adjacent property and into dark sky.

F Street lighting

G Ground lighting:

Allowed with low light levels. Cut-off to minimize spill onto adjacent property and into dark sky.

H Rope lighting:

Permitted at ground floor with low light levels.

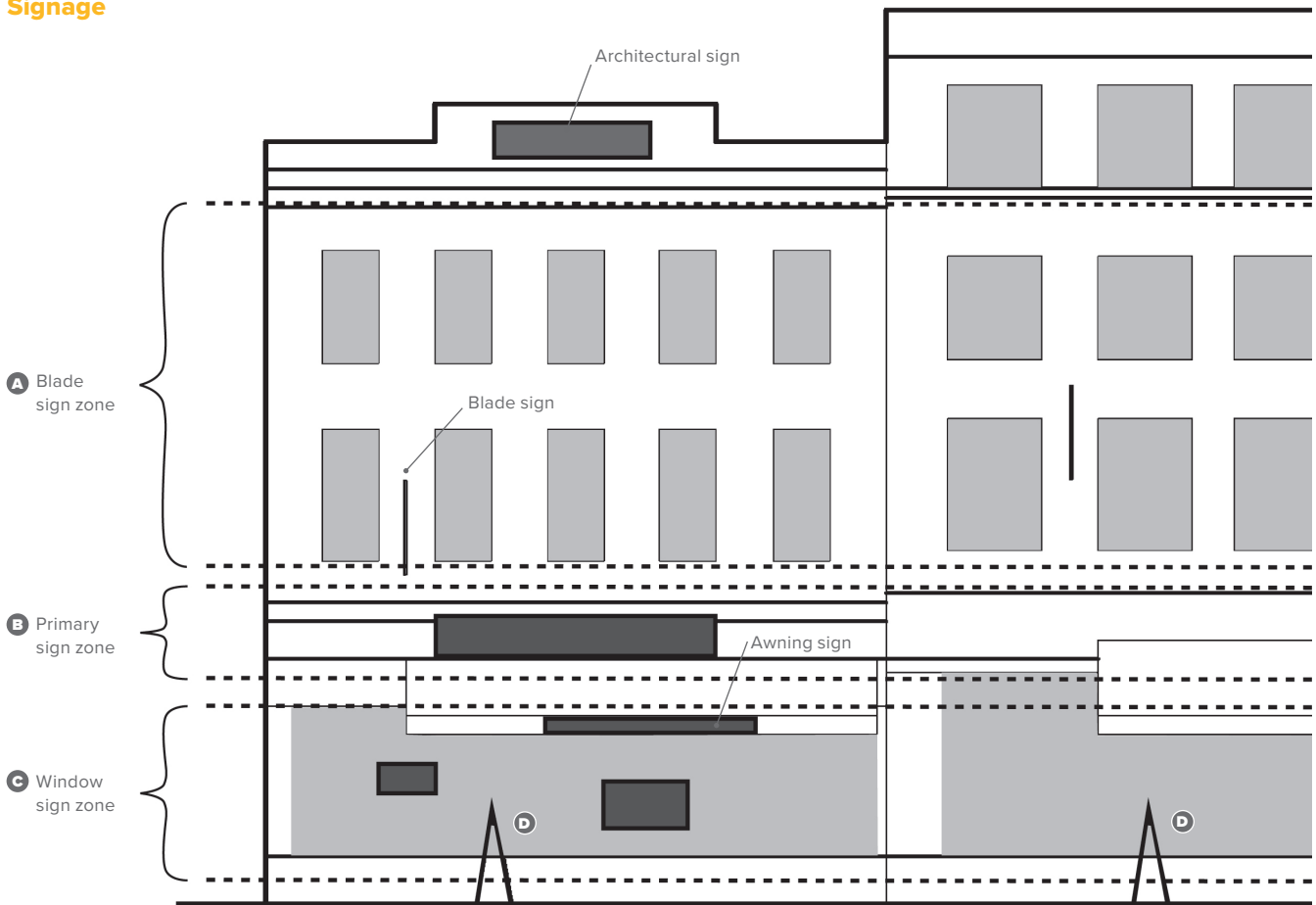
G. Signage

Signage for business/commercial uses should comply with the City of Norwalk’s signage regulations and communicate a positive and clear identity for the establishment.

(See Norwalk Zoning Code)

- ▶ Must be a part of the building and façade design
- ▶ Design and placement should harmonize with the building’s architectural features
- ▶ Materials must be durable, low maintenance, and compatible with building materials and design
- ▶ Scale must be appropriate for its intended use and location on the building or site
- ▶ Buildings with more than one sign should be compatible with one another in terms of materials, color, lettering, style, and logo use
- ▶ Comply with Norwalk Zoning Code re: Signage

Signage



- A Blade Sign Zone**
- B Primary Sign Zone:** Commercial signage is located at top of first floor.
- C Window Signage Zone:** All signage to be behind glass and in conformance with zoning code.
- D Sidewalk Board Sign**

Definitions

Blade Sign: A sign placed perpendicular to the facade of the building located at top of ground floor or higher. Blade signs may project maximum of 5 feet over sidewalk.

A. Building massing

Buildings should be designed to harmonize with existing structures with respect to design, scale and materials.

(See Norwalk Zoning Code)

- ▶ Structures should be designed to reduce their perceived height and bulk by dividing the building mass into smaller-scale components.
- ▶ Where new construction is permitted above five stories, buildings must step back at the fifth story
- ▶ Sites located at a prominent corner, intersection, or recognized gateway should have building features and orientation that recognize the corner or gateway and respond to it with a suitable building form
 - Examples of prominent building features include tower or cupola elements, corner detailing, additional building height, or other building forms that provide a visual anchor
- ▶ Sustainable design principles and practices should be employed in the design of buildings

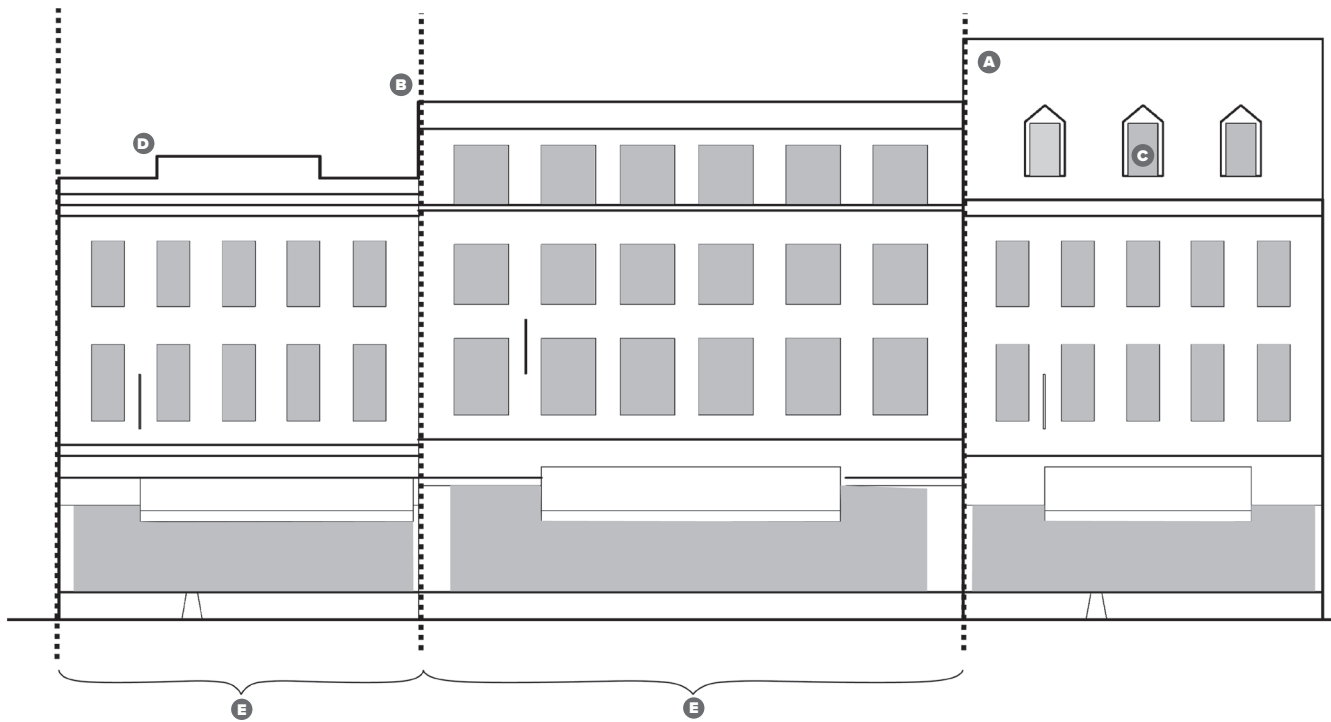
Building Massing



B. Rooflines

- ▶ On larger buildings, should follow the variation in massing so as to appear as a series of side-by-side buildings
- ▶ Can be emphasized with gabled or other pitched roof forms, parapets, balustrades, and/or cornices
- ▶ Buildings should have a distinct base, middle and top. This can be achieved with color, materials and setbacks.

Rooflines

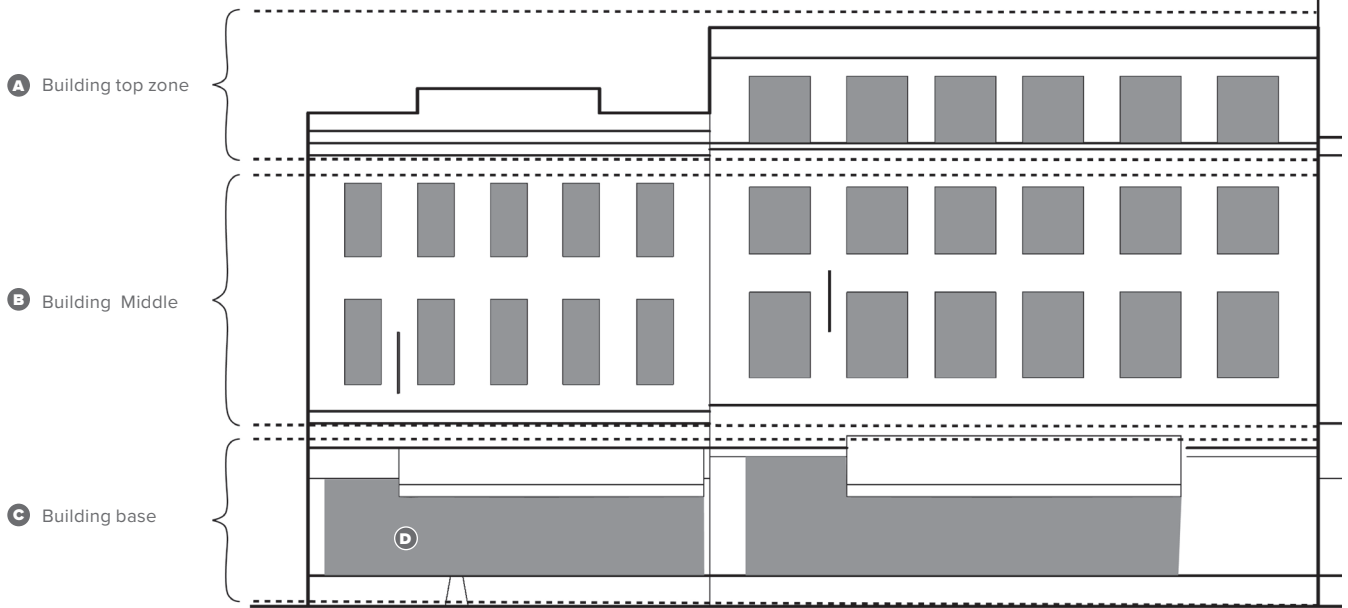


- A** Building sloped roof
- B** Changes in building height
- C** Roof articulation such as dormers
- D** Changes in parapet height
- E** Maximum 50ft without variation in roofline

C. Building facades

- ▶ Broken into vertical and horizontal parts that reinforce a rhythm and pattern
- ▶ Designed to be activated with at least 75% of the ground floor of street-facing facades composed of transparent materials
- ▶ Rendered with texture and depth
- ▶ Differentiated at intervals of not less than 50 feet by a change in material, a variation in the plane of the wall, decorative components, or functional element such as entryway or portico
- ▶ Should not over-prioritize franchise features or identity. The building form, roof form and façade design should not be overly specific to a franchise or brand.

Building Facades



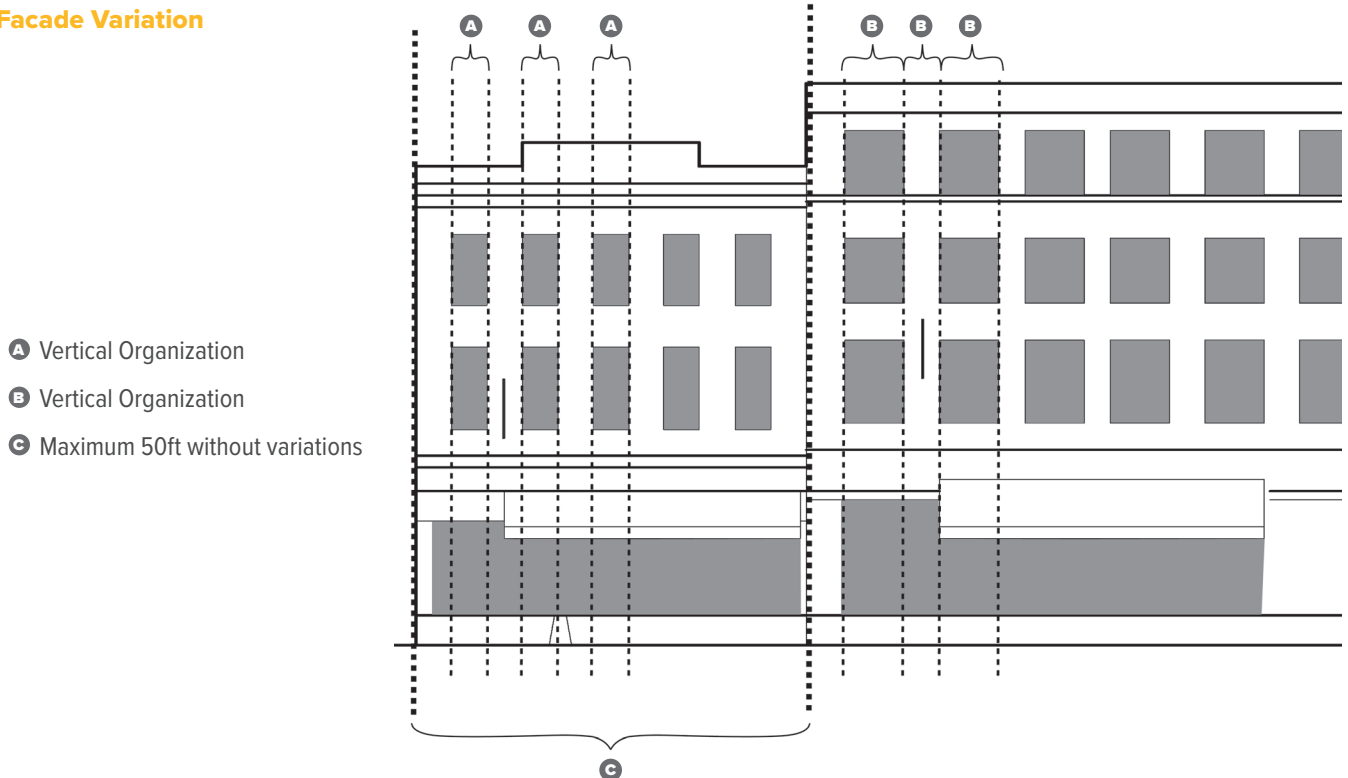
A Building Top Zone: Building top should be distinguished with materials. Building Top Zone: Building top should be distinguished with materials and architectural details. Top Zone may range from 2ft to multiple stories, and architectural details. Top Zone may range from 2ft to multiple stories.

B Building Middle: Facade with generally repetitive organization of fenestration.

C Building Base: Building base should be distinguished from middle by change in materials and architectural details. Base height may range from 2ft to multiple stories.

D Minimum 75% transparent surface at ground floor.

Facade Variation



A Vertical Organization

B Vertical Organization

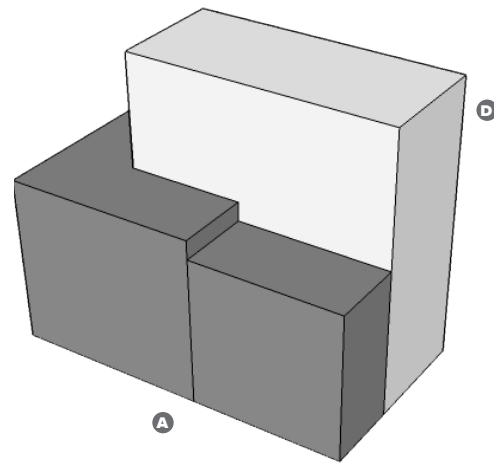
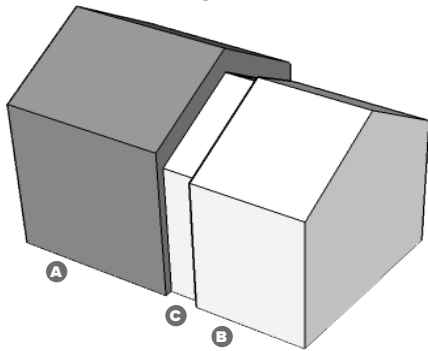
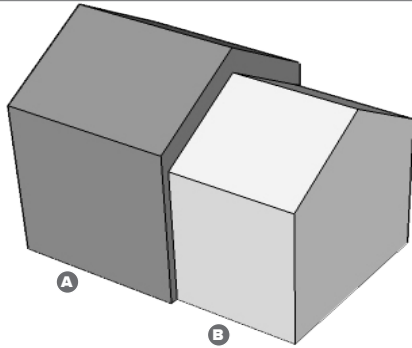
C Maximum 50ft without variations

D. Historic structures

New development should complement existing historic structures and additions to existing historic buildings should be compatible with the architectural style of such buildings.

(See State Historic Preservation Standards)

- ▶ Existing historic structures should be integrated into any proposed development plan
- ▶ New buildings and additions should complement and reflect the structure and style of historic structures
- ▶ Historic structures should be considered for restoration, sensitive rehabilitation, preservation or adaptive reuse as may be appropriate to the historic structure and nature of its reuse
- ▶ Rehabilitation and reuse of historic properties must comply with all relevant local, state and federal requirements



- Ⓐ Existing Historic Structure
- Ⓑ New addition with similar massing
- Ⓒ Hyphen between historic and new construction.
- Ⓓ Rear addition with set back at upper floors

E. Sustainability/Green Infrastructure

As the effects of climate change become more prevalent in communities it becomes increasingly important to plan for development and communities that are resilient. This plan supports and promotes resiliency by including sustainable design principles by requiring sustainability review. These include standards that reduce the urban heat island effect such as color and materials, increasing and requiring green spaces, further integration of the natural and urban environments, and sustainable practices including, but not limited to, alternative energy sources and coastal resiliency measures in new construction and rehabilitation projects.

New development or rehabilitation of existing structures should include green infrastructure such as solar panels, green roofs, green walls and recycled materials.

- ▶ Green infrastructure should be exempt from zoning bulk and height requirements.
- ▶ Historic structures should also consider these measures where possible.

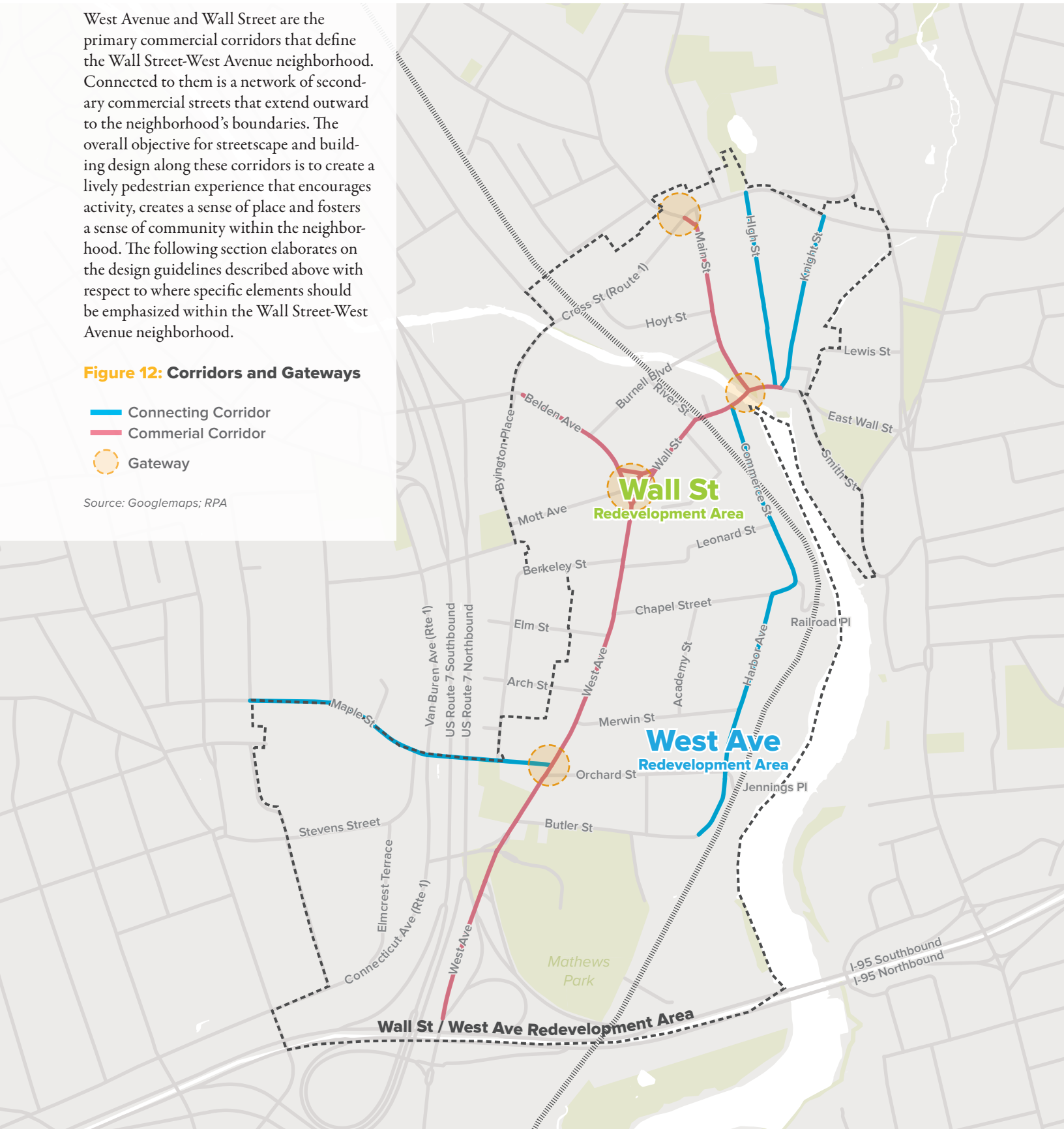
Application to Corridor Typologies

West Avenue and Wall Street are the primary commercial corridors that define the Wall Street-West Avenue neighborhood. Connected to them is a network of secondary commercial streets that extend outward to the neighborhood's boundaries. The overall objective for streetscape and building design along these corridors is to create a lively pedestrian experience that encourages activity, creates a sense of place and fosters a sense of community within the neighborhood. The following section elaborates on the design guidelines described above with respect to where specific elements should be emphasized within the Wall Street-West Avenue neighborhood.

Figure 12: Corridors and Gateways

- Connecting Corridor
- Commercial Corridor
- Gateway

Source: Googlemaps; RPA



West Avenue

West Avenue is the main commercial corridor in the neighborhood. It features a wide variety of uses ranging from walkable, urban scale to suburban commercial. The roadway is relatively wide and has four traffic lanes in most locations as well as on-street parking. Consistent with Norwalk's 2012 Connectivity Master Plan, West Avenue should be redesigned as a complete street that emphasizes not only vehicular flow, but also walkability and bikeability.

Buildings

As sites fronting on or adjacent to West Avenue are redeveloped, emphasis should be placed on creating street frontage that prioritizes the pedestrian experience.

(See Norwalk Zoning Code)

- ▶ Building facades should be consistent with the existing street wall and height and setbacks should conform with Norwalk Zoning code.
- ▶ First floors should be occupied by uses that generate pedestrian activity at different hours throughout the day
- ▶ At least 75% of the ground floor of street-facing facades should be composed of transparent materials

Streetscape

Given the width of the roadway, there is ample space to accommodate multiple modes and shift the emphasis from cars to people. Such a shift would not only enliven the streetscape along the West Avenue corridor, but it would also help to establish a more seamless relationship between West Avenue and Wall Street.

Currently, sidewalks along West Avenue are in relatively good condition and include an attractive brick paving detail. There is pedestrian scale lighting along the corridor. Street trees are planted in front of recent development sites and existing urban scale buildings but are lacking along stretches of West Avenue that are occupied by older suburban scale development sites.

Sites that may be redeveloped in the future should incorporate:

- ▶ Pedestrian scale lighting
- ▶ Landscaping
- ▶ Street trees
- ▶ Street furniture
- ▶ Parklets (where feasible)

Wall Street

The historic character and scale of Wall Street is one of its most important assets. The streetscape features commercial and mixed-use buildings that range from 1-5 stories. Brick and stone are the predominant façade material. Sidewalks are narrow, constrained by two to three vehicle lanes and on-street parking. There are decorative sidewalk treatments along most of Wall Street and some street furniture, including planters, benches and trash receptacles. While there are some street trees around the intersection of Wall Street and Belden Avenue and around the intersection of Wall and River Streets, street trees are sparse throughout the corridor. Cobra head fixtures light the corridor; there is no pedestrian scale lighting along Wall Street sidewalks.

Buildings

Renovation of existing structures and new development on Wall Street should respect and reflect the historic character of the neighborhood. Activation of the streetscape is critical to creating an attractive and vibrant urban environment in this corridor.

(See Norwalk Zoning Code)

- ▶ Building facades should be consistent with the existing street wall and height and setbacks should conform with Norwalk Zoning code.
- ▶ First floors should be occupied by uses that generate pedestrian activity at different hours throughout the day
- ▶ At least 75% of the ground floor of street-facing facades should be composed of transparent materials.

Streetscape

Improving pedestrian comfort is an essential building block for supporting existing businesses and attracting new businesses to the area that are seeking a lively, urban environment and pedestrian activity. A complete streets approach should be taken along the length of Wall Street, including the introduction of sharrows or bike lanes where feasible. Permanent public art and temporary installations should be introduced along the corridor to strengthen sense of place and celebrate the local arts community.

Sites that may be redeveloped in the future should incorporate:

- ▶ Pedestrian scale lighting
- ▶ Landscaping
- ▶ Street trees
- ▶ Street furniture

Connecting Corridors

Connecting corridors provide critical links between the neighborhood's internal blocks and its main commercial thoroughfares and include:

- ▶ Maple Street
- ▶ Knight Street
- ▶ High Street
- ▶ Cross Street
- ▶ Commerce Street
- ▶ Harbor Avenue

Along these corridors emphasis should be placed on enhancing pedestrian comfort and improving mobility for vehicles and cyclists. The following elements should be included as part of any site development application for properties along connecting corridors.

- ▶ Sidewalks
- ▶ Street trees
- ▶ Street furniture
- ▶ Pedestrian-scale lighting
- ▶ Loading zones

Consistent with Norwalk's 2012 Connectivity Master Plan, Commerce Street and Harbor Avenue should be designated as a shared-lane bicycle route. In addition, a truck route should be designated along a connecting corridor(s) to connect the waterfront to I-95 and Route 7.

Neighborhood Gateways

Gateways announce key entry points into the neighborhood and provide an important opportunity to create a sense of arrival, indicate an identity and celebrate the local community. Gateway treatments can include landscaping, public art and signage.

Key gateways within the Wall Street-West Avenue neighborhood include:

- ▶ West Avenue & Maple Street
- ▶ West Avenue, Wall Street & Belden Avenue
- ▶ Wall Street & Main Street
- ▶ Cross Street & Main Street

As redevelopment occurs in the vicinity of these gateways, Norwalk should work with developers to enhance these gateways.

Maple Street

Maple Street, which connects Norwalk Hospital to West Avenue is a critical connecting corridor within the Wall Street-West Avenue neighborhood. While the physical distance between the hospital and West Avenue is only one block, the visual distance makes it feel much longer. Pedestrians walking from the hospital along Maple Street to West Avenue must cross four lanes of traffic and walk underneath the Route 7 overpasses. The walk is uncomfortable- the landscape is not attractive; sidewalks are narrow and are not shaded; and the underpass is not well lit. Norwalk Hospital is the City of Norwalk's largest employer and hospital employees and visitors represent tremendous purchasing power that could be applied to the local neighborhood. Key to unlocking this economic potential is helping people bridge the short physical distance between the hospital and West Avenue. Streetscape improvements including landscaping, lighting, wider and more attractive sidewalks, street furniture and other place-making treatments would make the short walk from Norwalk Hospital to West Avenue a much more attractive option.



Transit Improvements

Enhancing transit connectivity between the Wall Street-West Avenue neighborhood and employment centers within the City of Norwalk and the greater Norwalk region is essential to economic development in the Wall Street-West Avenue neighborhood. One of the area's key assets is its urban character and walkability, which is attractive to existing and future neighborhood residents and businesses. Transit accessibility is essential to serving the needs of low- and moderate-income residents and workers who depend on public transportation to access jobs as well as higher income residents and businesses seeking a dynamic, urban environment to live and do business. Previous planning efforts have focused on a high frequency (10 minutes or less) electric or low-emitting transit circulator service along West Avenue. The circulator system would connect to the South Norwalk rail station and Norwalk Transit District bus hub on Belden Avenue and circulate around each area prior to making the return trip. The service has been envisioned to not only benefit commuters, but also bring visitors from South Norwalk to the Wall Street-West Avenue neighborhood.

Over the past six years, however, the transit landscape has shifted dramatically with the introduction of on-demand transportation network companies such as Uber and Lyft and new direct shuttle services provided by developments such as Avalon and Waypointe, which bring transport residents to and from the South Norwalk train station. Given these changes, a new approach to transit connectivity between the Wall Street-West Avenue neighborhood and the South Norwalk train station should be considered and evaluated with the overall goal of providing a direct transit connection between the neighborhood and the South Norwalk train station and also to increase transit access to major employment hubs including the Merritt 7 office park and Norwalk Hospital. Opportunities to be explored should include, but not be limited to:

- ▶ An on-demand service with routing centered on the West Avenue corridor
- ▶ A bus rapid transit (and/or potential future autonomous vehicle) corridor along West Avenue and Martin Luther King Boulevard
- ▶ A new neighborhood train station on the Danbury branch line

Parking

Walker Consulting is preparing a Citywide Parking Plan for Norwalk, which will include parking policy recommendations for the Wall Street-West Avenue neighborhood. Parking policies for this neighborhood should be consistent with that plan.



Highpointe West Highpointe East

Head of the Harbor North

Head of the Harbor South

Avalon Norwalk

Wall St Redevelopment Area

West Ave Redevelopment Area

The Berkeley at Waypointe

Waypointe

The Pinnacle (Waypointe South)

Wall St / West Ave Redevelopment Area

Mathews Park

I-95 Southbound I-95 Northbound

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Appendix B: Stakeholder Outreach and Visioning

Figure 1: The Redevelopment Area Plan Update for the Wall Street-West Avenue Redevelopment Area engaged a wide range of stakeholders to form a guiding vision for the future of the area. This will be incorporated into all aspects of the plan. / B1

Figure 2: The Wall Street and West Avenue Redevelopment Areas were previously planned for separately. With this Redevelopment Plan Area Update, RPA and NRA are treating the two areas as a combined single redevelopment area in order to plan more comprehensively. / B2

Figure 3: The Wall Street and West Avenue Redevelopment Area Plan Update has been carried out over many months, and the plan will be released this fall. / B3

Table 1: RPA and NRA used different methods to gather information from various stakeholder groups in order to create a more informed redevelopment area plan. / B4

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Table 11: Jobs Trends, 2000-2014 / C4

Figure 6: South Norwalk Area Jobs by Industry Sector, 2015 / C5

Figure 7: Wall Street Area Jobs by Industry Sector, 2015 / C5

Table 11: Asking Prices on Office Space in Wall Street-West Avenue Neighborhood / C5

Figure 8: Means of Transportation to Work for Wall Street-West Avenue Residents, 2015 / C5

Table 12: Car Ownership Rates by Household, 2015 / C5

Appendix A: Analysis of Deteriorating or Deteriorated Conditions

Summary of Findings

Based on public comment regarding the approach to determining the existence of deteriorating or deteriorated conditions in the draft Wall Street-West Avenue Redevelopment Plan, Harriman has conducted a quantitative analysis of the proposed Wall Street-West Avenue Redevelopment Area for the Norwalk Redevelopment Agency (NRA). Based on this assessment, Harriman has determined that the area meets the criteria for designation as a deteriorating area as defined in both state and federal statutes (Connecticut General Statute Chapter 130, Section 8-125(7) and CFR 5780.208(b)(1)) and therefore fully qualifies for designation as a redevelopment area.

The Wall Street-West Avenue Redevelopment Area is bounded by Cross Street and North Avenue to the north, the Norwalk River to the east, Route I-95 to the south and the western boundary of the properties fronting on West Avenue and Belden Avenue to the west, and Norwalk Hospital. More than a third of the study area is commercial; these uses are generally concentrated along the Wall Street and West Avenue corridors and in the northeast corner of the study area. Over the past several years there has been significant new residential development over ground floor retail space on both West and Belden Avenues. Industrial uses are generally concentrated along the waterfront. Institutional uses, including religious institutions, government buildings, and community uses are found throughout the area. Open space is limited to a few small pockets within the neighborhood, including Freese Park at the corner of Main Street and Burnell Boulevard. Mathews Park at the southern boundary of the area is the most significant open space asset in the neighborhood.

The Wall Street-West Avenue Redevelopment Area includes 372 buildings on 304 parcels. Table 1 summarizes the assessor’s assessment of the building conditions in the Plan Area which is the basis by which the Plan meets state and federal criteria for the determination of the area as a deteriorating area, as discussed in detail in this report.

Table 1: Summary Of Deteriorating Conditions in the Wall Street-West Avenue Redevelopment Area

Amount of Physical Depreciation	>30%	>35%	>40%
Buildings	221	158	109
% of Total Buildings	59%	42%	29%
% of Total Parcels	73%	52%	36%

*Source: Harriman Analysis based on Norwalk Tax Assessor Data

Figure 1: Wall Street-West Avenue Redevelopment Area Boundary



Defining the Redevelopment Area Boundary

The Wall Street-West Avenue Redevelopment Area is bounded by Cross Street and North Avenue to the north, the Norwalk River to the east, Route 1-95 to the south and the western boundary of the properties fronting on West Avenue and Belden Avenue to the west, including Norwalk Hospital (See Figure 1). This area includes the industrial uses along the waterfront and Mathews Park, which were previously not included in the existing Wall Street or West Avenue Redevelopment Areas. These properties have been added to the combined redevelopment area to allow the Redevelopment Agency to develop a holistic plan for the neighborhood that recognizes existing water-dependent and industrial uses and ensures that planning for the area accounts for the unique challenges associated with preserving such uses as redevelopment occurs within the broader neighborhood.

Deteriorating or Deteriorated Conditions Analysis

Methodology

This determination of deteriorating conditions analyzes individual properties within the study area, pursuant to Connecticut General Statute Chapter 130, Section 8-125(7) and CFR 5780.208(b)(1).

Connecticut General Statutes, Chapter 130, Section 8-125(7) defines thirteen criteria and requires that 20% of properties within the designated boundary meet one or more of these criteria in order to qualify as a redevelopment area. Of the thirteen criteria, the most relevant to this analysis is c) Extensive minor defects that collectively have a negative effect on the surrounding area. The purpose of this analysis is to determine whether 20% or more of the properties meet this standard.

Per the U.S. Department of Housing and Urban Development (HUD) Code of Federal Regulations (CFR 5780.208(b)(1)), federal criteria can be divided into two standards, A and B. The focus of A is on building and property conditions. The focus of B is on the condition of public improvements. For the purpose of this analysis, A.1 Physical deterioration of buildings or improvements is the most relevant and the analysis must show that 25% of properties within the designated boundary meet these criteria in order to qualify as a redevelopment area.

Findings

The most relevant data available for evaluation was parcel and building condition data from the office of the Tax Assessor for the City of Norwalk. Assessment data is the most comprehensive source of verified official real estate information in a municipality. The Tax Assessor's Office collects many different data points related to building value including the location, building and lot sizes, valuation data, land use and building type, and data about the condition of the building, the grade of construction used, the level of obsolescence, and the level of depreciation.

Depreciation is defined as the loss in value of a property. Whereas financial depreciation is a rolling deduction in value based on an accounting standard for the life of the asset (usually 39.5 years for a building), physical depreciation is a measure of the loss in value from lack of maintenance, the effect of the elements, or the passage of time. Obsolescence is another form of depreciation: it may be economic (loss in value due to market or regulatory changes) or functional (loss in value due to the design or construction of the building relative to market needs).

For the purpose of this quantitative evaluation, Harriman used the depreciation data points. Parcel data extracted from the City's GIS system was matched against building condition data provided by the Assessors' Office in January 2019. The building condition data is recent; a revaluation effort took place in 2018. The City hired Tyler Technologies' CLT Appraisal Services (Tyler) to conduct the process. Tyler is an established national firm with significant expertise in conducting appraisals.

To establish whether the Wall Street-West Avenue Redevelopment Area is a deteriorating area, Harriman obtained and analyzed the data on building conditions. The most relevant metric was the measure of depreciation; properties were evaluated on how the value of the property decreased based on existing conditions as determined by the person assessing the property. In the City of Norwalk's data, this estimate of depreciation is expressed as a percentage. Properties with depreciation of 30% or more are considered undesirable.

This analysis identified the buildings within the Wall Street-West Avenue Redevelopment Area. Some parcels are unbuilt and other parcels have more than one building. The next step was the calculation of the number of buildings whose depreciation was greater than 30%, 35%, and 40% to see if the 20% state requirement and the 25% HUD requirement could be met. Note that the criteria are c) Extensive minor defects that collectively have a negative effect on the surrounding area (State of Connecticut) and A.1 physical deterioration of buildings or improvements (HUD).

Table 2: Percentage of Buildings in Deteriorating Conditions by Number of Buildings

Amount of Physical Depreciation	>30%	>35%	>40%
Buildings	221	158	109
% of Total Buildings	59%	42%	29%

*Source: Harriman Analysis based on Norwalk Tax Assessor Data

By these calculations, a significant number of buildings meet both the state and federal criteria for a deteriorating area. However, the state and federal criteria require an evaluation based on the number of land parcels in a given area rather than the number of buildings. Because some parcels include multiple buildings, the duplicate addresses were removed. This left 304 parcels with buildings on them. The number of buildings meeting the depreciation criteria was calculated as a percentage of the number of parcels.

Table 3: Percentage of Buildings in Deteriorating Conditions by Number of Parcels

Amount of Physical Depreciation	>30%	>35%	>40%
% of Total Parcels	73%	52%	36%

*Source: Harriman Analysis based on Norwalk Tax Assessor Data

Whether calculating the denominator as the number of buildings or the number of parcels, the state and federal criteria have been met.

State and federal criteria for a deteriorating area includes some conditions that were not examined in this analysis but were previously considered in the original determination which was the basis of some public comment. These conditions include the following:

- ▶ The presence of environmental hazards, including lead, asbestos, or hazardous material spills
- ▶ The condition of public infrastructure, including roads, sidewalks, water, and sewer
- ▶ The prevalence of flood-induced blight
- ▶ The relative valuation of buildings in this area compared to others (depreciation was, in part, a proxy for this calculation)
- ▶ Property and building vacancy
- ▶ Interior conditions such as inadequate alterations, plumbing, heating, or electrical
- ▶ Functional or economic obsolescence
- ▶ Building grade or condition
- ▶ Length of time under construction

Had this analysis included these conditions, there is a reasonable likelihood that additional deteriorating conditions would be identified. As noted above, however, the recent data collected by the professionals at Tyler, in itself, is sufficient to establish the conditions of a deteriorating area.

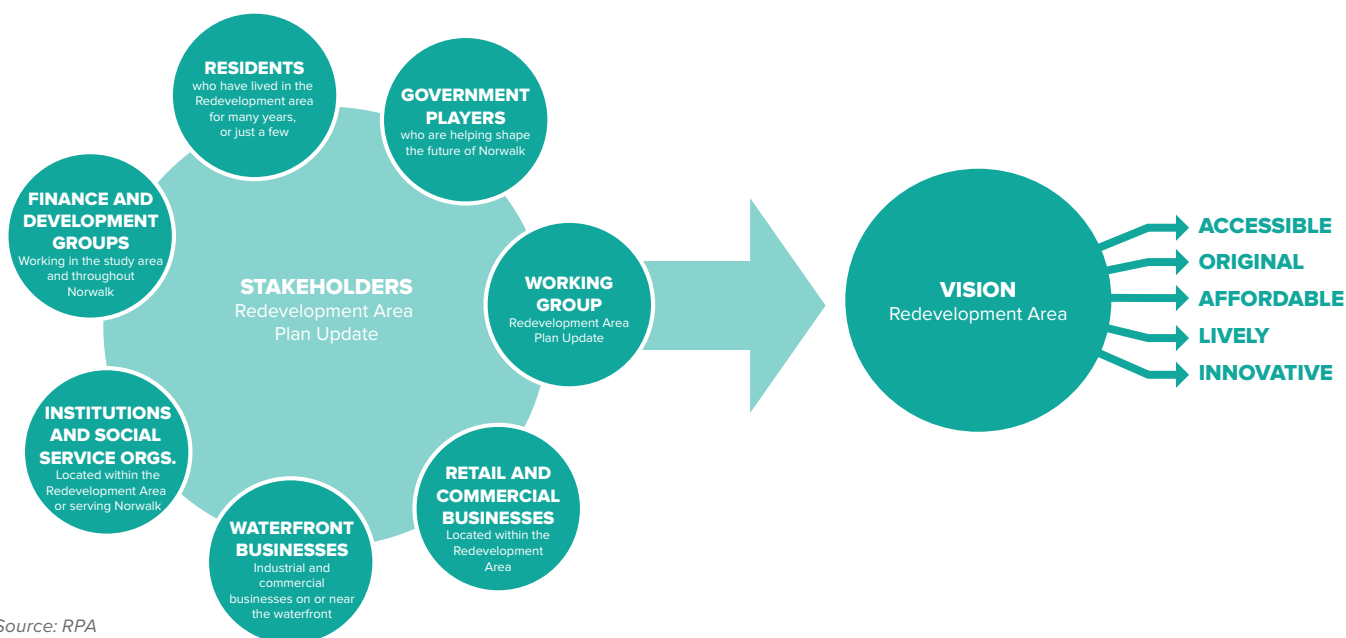
Appendix B: Stakeholder Outreach and Visioning

Executive Summary

Norwalk Redevelopment Agency is working to update its redevelopment area plans for the Wall Street and West Avenue neighborhoods. Currently the Redevelopment Agency has two distinct plans for these areas- the West Avenue Corridor Redevelopment Plan, adopted in June 2006, and the Wall Street Redevelopment Area Plan, adopted in July 2004 and modified in March 2007. Consistent with State statute, these redevelopment area plans must be updated every ten years to remain in effect. The City of Norwalk has approved an extension of these existing plans, as the Redevelopment Agency is currently in the process of updating these plans.

This plan update is being led by Norwalk Redevelopment Agency staff in collaboration with Regional Plan Association (RPA), who have been hired as consultants to the Agency, and is being guided by a working group composed of representatives from City boards, commissions and agencies, neighborhood institutions and business owners and residents, who serve as an advisory group to the Agency and RPA on the development of the plan. A key component of this plan update process has been a carefully designed stakeholder outreach strategy intended to engage the myriad of stakeholders with vested interests in this area. The purpose of this strategy is to gain a comprehensive understanding of the opportunities and challenges in these neighborhoods and develop a shared vision for the future.

Figure 1: The Redevelopment Area Plan Update for the Wall Street-West Avenue Redevelopment Area engaged a wide range of stakeholders to form a guiding vision for the future of the area. This will be incorporated into all aspects of the plan.



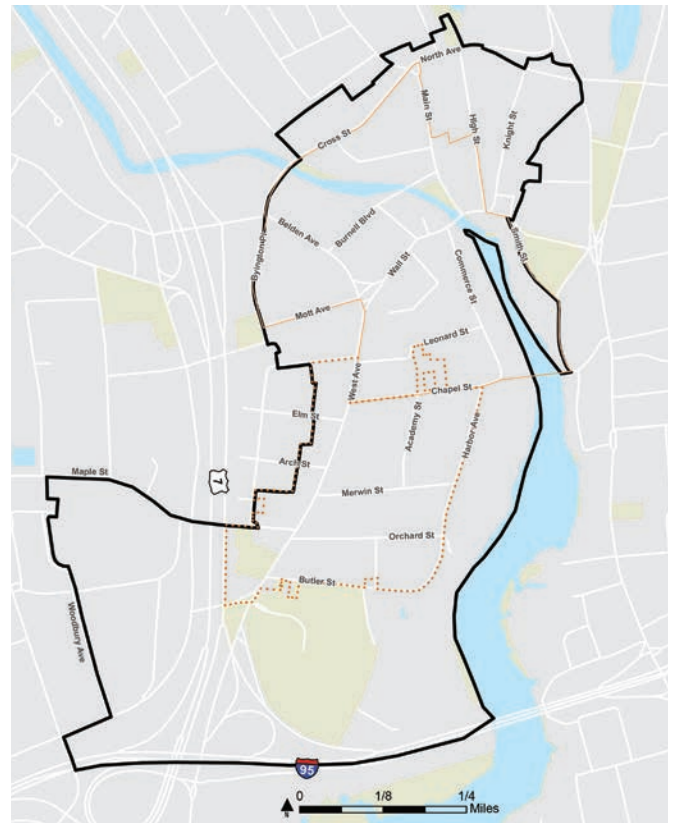
Source: RPA

Between Spring and Summer of 2017 the Redevelopment Agency and RPA conducted focus groups and one-on-one stakeholder conversations with community residents, local retail and commercial businesses, waterfront industrial property owners, neighborhood institutions and social service organizations, local real estate developers, and government department and agency staff to understand the multiple viewpoints on the current status and desired future of the Wall Street and West Avenue areas. The Agency and RPA also designed and conducted a business owner survey in order to gain a deeper understanding of the needs and concerns of existing businesses in the areas' commercial corridors.

Based on discussions with the working group and feedback from stakeholders, it was determined that as revitalization has occurred in both the Wall Street and West Avenue areas over the last ten years, these neighborhoods are becoming more economically and physically connected. Looking forward towards the next ten years these areas will become increasingly linked and their geographies should be combined into one cohesive redevelopment area plan. As illustrated in Figure 1 and discussed in detail in this report, the comprehensive vision for the future of the Wall Street-West Avenue area is an accessible, affordable and lively neighborhood with an original character anchored by a creative, innovation-based economy.

This report describes how this vision was developed, and offers details about our conversations with each stakeholder group. At the end of this report, RPA also describes how this feedback will be used in creating the redevelopment area plan update.

Figure 2: The Wall Street and West Avenue Redevelopment Areas were previously planned for separately. With this Redevelopment Plan Area Update, RPA and NRA are treating the two areas as a combined single redevelopment area in order to plan more comprehensively.



Source: RPA; Norwalk GIS

Project Overview

The Norwalk Redevelopment Agency (NRA) hired Regional Plan Association (RPA) to complete an update of their redevelopment plan for the Wall Street and West Avenue redevelopment areas. RPA began by diving into research about the existing residents, businesses, and zoning of the neighborhood through data. In order to verify our analysis, we created an ambitious outreach process to inform the plan, which will be released for public comment in the fall of 2017.

Combining Geographies from Past Plans

The redevelopment areas of West Avenue and Wall Street have historically been planned for separately, even though they are economically and physically linked. This plan joins the two areas into one plan because they are connected through mobility, access, and economic conditions and also have a shared identity. The former and current boundary for the redevelopment area (or “neighborhood” as we will refer to it) is shown in Figure 2.

Figure 3: The Wall Street and West Avenue Redevelopment Area Plan Update has been carried out over many months, and the plan will be released this fall.



Source: RPA

Timeline

The Redevelopment Area Plan Update process began in the Spring of 2017 and will be completed in the Fall of 2017. The final plan will provide a vision for the Wall Street-West Avenue area and a strategy for achieving the vision through the right combination of zoning and policy initiatives.

During the spring, RPA began by analyzing existing conditions for the area. Generous amounts of data were analyzed to assess the demographic, economic, and environmental forces within the study area. RPA also analyzed the existing zoning allowances and infrastructure in the area. This data will be presented in the final report, and has been used as the foundation for the plan’s recommendations.

The engagement process for the plan was completed through the spring and summer of 2017. First, NRA formed the Redevelopment Area Plan Update Working Group (“the working group”) through a combination of public notice and targeted outreach to government staff, invested residents, and other individual stakeholders. The working group meetings were designed to have RPA and NRA present the latest research on the plan and gather feedback and guidance from working group members.

While the working group provides valuable input, RPA also needed to speak to other voices. Multiple stakeholder roundtables and individual meetings were held throughout the Spring and Summer of 2017. This was the bulk of our outreach for the plan, which is summarized through this report.

Following the outreach time period, RPA will draft the final recommendations for the Wall Street-West Avenue Redevelopment Area Plan Update. The plan will then be reviewed with NRA staff, circulated for comment, and revised as necessary. Once the review is complete, the plan will be sent for adoption and implemented for many years to come.

Outreach Strategy

Maps and data are extremely valuable tools for a redevelopment plan, but they do not convey the entire story. RPA and NRA know the importance of community engagement, and worked to incorporate the concerns and vision of numerous stakeholders in the Wall Street-West Avenue Updated Redevelopment Plan. Instead of posting public meetings and hoping a wide array of interested parties would show, we targeted our outreach for different stakeholder groups who we believed would have valuable input into the plan, and offer differing opinions from each other. For each group of stakeholders we tailored the engagement approach, ranging from roundtables, to surveys, to interviews.

Targeting Strategy

In targeting stakeholders, we asked three main questions:

- ▶ **Who would be most impacted by the plan?**
Current residents, business owners, and property owners in the study area are all affected by the recommendations that would be in the plan, in terms of their property values, jobs, and lifestyle.
- ▶ **Who understands the neighborhood best today?**
To understand the neighborhood, we needed to speak with current residents, government staff, developers working in the neighborhood, and businesses who have been located here for decades.
- ▶ **Who will be influential in achieving the plan?**
In order to achieve the plan, there must be buy-in from financial intuitions, government, property and business owners, as well as residents.
- ▶ **Who will have differing visions for the future of the neighborhood?**
Finally, we knew it was important to understand the different perspectives for how the neighborhood should grow, and tried to capture this through all of our outreach efforts.

Using these questions, we asked local residents, commercial businesses, industrial businesses, private citizens, social organizations, private organizations and government officials to speak with us in various ways.

Outreach Methods

Understandably, there is never a “one-size-fits-all” approach to managing an effective outreach process. For this reason we chose several different methods to gather information from different stakeholders. Table 1 describes the different stakeholder groups and the methods we used to gather information from them.

Table 1: RPA and NRA used different methods to gather information from various stakeholder groups in order to create a more informed redevelopment area plan.

Stakeholders	Outreach Methods
Working Group	Presentations and facilitated small group workshops
Residents	Presentations and facilitated small group discussions (at Waypointe and the Carver Center*)
Finance and Development Groups	Focus Group with key players in the study area and Norwalk
Government Players	Individual conversations and meetings with various public servants who know the infrastructure, policy, and zoning in the neighborhood.
Retail and Commercial Businesses	Business Owner Survey (in English and Spanish) was distributed to 44 business owners within the study area, with 20 surveys completed
Waterfront Businesses	Focus Group with large industrial businesses in the study area and on the waterfront.
Institutions and Social Service Organizations	Focus Group with organizations working in the Study Area

Source: RPA

For most of the stakeholder groups, we employed a traditional “focus group” meeting format. RPA gave a presentation about the objectives of the plan and our existing conditions research, and then facilitated small group discussions around a map of the study area. This format gave participants an opportunity to voice their concerns and vision for the area, while discussing how it fits into the larger Norwalk context. Focus groups were conducted with a variety of stakeholder groups that included: local social institutions, banks, developers, industrial business owners, and some Norwalk government staff.

For the retail and commercial businesses in the study area, RPA realized it may be difficult to gather their opinions through meetings. For this reason, we distributed a business survey to 44 businesses in the study area, and received 20 completed surveys back (an incredible response rate). The business survey focused on information regarding business owner’s experiences with the city of Norwalk. The completed business owner surveys are available in the appendix.

For residents of the study area, we attempted to create a more personal meeting style. After RPA presented the current trends observed in the neighborhood, we then asked residents to answer a series of digital polls using an online software called Poll Everywhere. Using this software allowed RPA to gather real data from the participants of the resident meetings, while also allowing people to see their responses being recorded and acknowledged by NRA staff. Following the polls, RPA facilitated small-group discussions around maps of the study area, allowing residents to find where they live and discuss their concerns and vision for the neighborhood.

While our methods do not gather information from all residents of the area, we do feel that we have gathered a sufficient number of perspectives to inform the plan. As the plan is written and implemented, we hope the NRA will continue to perform regular outreach, ensuring as many members of the community as possible are involved in the shaping of their neighborhood.

Summarizing What We Heard

Forming a collective set of opinions from a diverse set of stakeholders is an ambitious task. However, we recognized clear themes and recurring issues throughout the engagement process. The first part of this chapter presents a summary of the current conditions in the neighborhood—what stakeholders like now, and what they would prefer to change. Next we offer a shared vision for the neighborhood based on what we heard in meetings, surveys, and interviews.

The Neighborhood Now

The first questions we asked at each outreach session were about the neighborhood as it exists today. We asked participants what they liked about their neighborhood and also what they did not like. This is summarized in a short list of Assets and Weaknesses for the Wall Street-West Avenue Redevelopment Area.

Assets

There are many reasons that residents decided to move to the neighborhood and that businesses located here. Stakeholders across the board expressed the importance of maintaining a neighborhood that is:

- ▶ **Urban:** Residents, businesses, and developers mentioned that they decided to locate their homes, businesses, or projects in the Wall Street-West Avenue neighborhood because of its urban character. They like the neighborhood’s street grid, open spaces, building density, and potential for rich street life.
- ▶ **Historic:** The neighborhood’s history is preserved in much of its architecture. Multiple groups of people involved in our outreach stressed the importance of preserving the historic buildings in Norwalk, as well as its existing street network.

- ▶ **Mixed Use:** Across the board, those we spoke to about the Wall Street-West Avenue neighborhood were interested in preserving the mixed-use quality of the neighborhood. Residents and people who work in the neighborhood enjoy the dining and retail options, but wish it were more active during different parts of the day.
- ▶ **Central:** The Wall Street-West Avenue neighborhood is close to the geographic center of Norwalk, and contains a wealth of the city's institutions. While the neighborhood does not have a train station, it is between the Merritt 7 and South Norwalk Stations, and contains the Pulse Point Bus Hub. Its location is beneficial for business too, since it is located between I-95, US 7 and the Norwalk River, which transports freight without interrupting or adding to vehicle traffic.

Shortcomings

While the area has many assets, most representatives and stakeholders we spoke with felt that there were many existing issues to address before the vision for the area can be realized.

- ▶ **Difficult to Navigate by Car:** A majority of the stakeholders were most concerned with access and availability of parking spaces within the study area. More specifically, the lack of street parking on Wall Street and Main Street were among their top concerns. Stakeholders specifically referenced accessibility and wayfinding to the Yankee Doodle Garage as their biggest barriers. Transportation to and from the South Norwalk train station is seen as insufficient and not attractive to residents. Traffic and congestion within and around the study area was seen as a drawback for residents and business owners. There is a parking study underway for Norwalk as a whole, but the redevelopment plan for Wall Street-West Avenue will address certain aspects of parking for the area. While both the industrial and business community felt the area was beneficial due to its proximity to the highway, they mentioned how difficult it was for them to receive truck deliveries. Residents and business owners stressed the lack of parking in the area.
- ▶ **Difficult to Navigate on Foot:** The street design in the study area was seen as needing improvement from various stakeholder groups. Stakeholders indicated that street beautification is a need that would improve the area for pedestrians and businesses alike. Trash receptacles were not as frequent or numerous as the stakeholders saw fit for the area and therefore trash was found frequently on the sidewalks. Pedestrian flow was hindered by the lack of crosswalks and connectivity of streets within the area, predominantly on Wall Street and the intersection of Wall Street and West Avenue. Physical street impediments, i.e. narrow curbs, were seen as a hindrance for commercial truck traffic to effectively navigate the area when making deliveries to local businesses.
- ▶ **Feels unsafe to walk, especially at night:** Safety issues were raised by several groups of stakeholders. Streets in the study area are perceived as unsafe at night because of the lack of foot traffic, underutilized/abandoned buildings and the

lack of streetlights. Vacant or neglected commercial spaces on the ground floor are seen as a deterrent to possible customers. Stakeholders also expressed reservations with allowing pedestrian access to the waterfront because it is currently a working waterfront that may not be safe for pedestrians to access. Feeds into a lack of retail space.

- ▶ **Lacks an Identity:** Stakeholders were concerned with the lack of identity of the area. The mix of uses ranging from single family residential to industrial waterfront businesses makes it difficult for the area to solidify its status within greater Norwalk.
- ▶ **Expensive:** From residents to developers to business owners we heard the numerous ways the neighborhood is too expensive. Residents stressed frustration with their inability to buy in the neighborhood, and that rents were too expensive. Businesses also stressed the same frustration with rents- both their commercial rent and the inability of their employees to live nearby due to high rents.

The Neighborhood in the Future

Based on the wealth of feedback received from stakeholders throughout the engagement process, RPA has summarized a collective vision for the area—a neighborhood that is accessible, original, affordable, and lively.

- ▶ Accessible with adequate parking, easy connection to SoNo train station, better streets and sidewalks for walking, bicycle infrastructure, waterfront access, and designated truck routes.
- ▶ Original with preserved historic character, growing arts organizations, local restaurants, connections to the waterfront, preserved industrial uses as well as new “maker” uses.
- ▶ Affordable for residents in terms of renting and buying homes, for business owners in terms of space, for parking, for developers to conduct business here, for industrial businesses to keep working and using the waterway, and for the government to maintain public spaces and assets in a more effective way.
- ▶ Lively with more people, more shops, fewer vacant storefronts and stalled developments, more activities, well-maintained and programmed public spaces, nightlife, daytime uses, and cultural opportunities.

Details from each Stakeholder Group

This chapter provides more detail about what we heard throughout the outreach process from each stakeholder group. For each group, we describe who the group represents and why it was important to involve them in the process. We also summarize the group's opinions, assets and shortcomings—both for themselves, and the neighborhood—as well as how they envision the future of the neighborhood and their role within that future.

Redevelopment Area Plan Update Working Group

The Working Group was the initial outreach component of the Wall Street-West Avenue Redevelopment Area Plan Update. The group consists of representatives from various backgrounds including private citizens, government employees and other engaged and interested individuals from the community. The general public is also invited to attend the working group meetings, and the agendas have designated space for public comment. The first three meetings were designed in order to gather members' feedback on the future of the neighborhood, with the next few meetings asking for more direct input on the recommendations within the redevelopment area plan.

The Working Group has met multiple times over the course of this outreach strategy to inform the scope of the plan's research and recommendations within the plan. Working Group meetings were held at Norwalk City Hall with public notice. Meeting minutes and materials posted online at the Norwalk Redevelopment Agency's website. So far, there have been four meetings held on: March 3, May 12, June 7, and September 15, 2017.

Current Assets

- ▶ Members like the existing character of Norwalk's land use mix, diversity, and built environment. They hope to grow the focus on historic buildings and existing institutions to create a more vibrant neighborhood.
- ▶ Walkability is listed as a key goal, but also as a current strength. Residents enjoy the character of buildings and the existing street layout (saying the neighborhood has "good bones"), but would like to see better use of the urban fabric to fill vacant storefronts, densify, and beautify the area.
- ▶ Members enjoy many of the new and old businesses in the area as well as the neighborhood cultural institutions. The study area has a concentration of historic buildings in the Wall Street area with character that working group members enjoy. These existing resources could be leveraged and enhanced to create a sense of place and neighborhood identity for the study area.

Current Shortcomings

- ▶ Working group members were concerned that infrastructure is inadequate, especially for newer, denser development. Residents stressed the need to have adequate gas, sewer, water, fire and police to serve existing, and future, residents of the area. Desire for streetscape and façade improvements was also noted.
- ▶ Lack of a transit access and adequate parking were also mentioned as challenges for the area for residents and businesses. Many members mentioned the idea of a bus or trolley circulator that could carry people from this neighborhood to the South Norwalk or Merritt 7 train stations and facilitate better connectivity. They also mentioned that the Pulse Point Bus Hub could be a better neighborhood asset with some design improvements and more amenities.
- ▶ Parking looms as a large unsolved problem for the area. While working group members dislike Yankee Doodle garage's centralized parking, some seem adverse to dispersed parking garages throughout the area. Many residents are opposed to paying for parking, but noted that parking is largely unavailable due to cars being parked for long periods of time.

Future Vision

- ▶ Members had some disagreement over appropriate type of new development. While some would like to see "contextual"/lower density developments, others suggested the need for density to support revitalization. There is consensus that new development should not just be luxury housing.
- ▶ The study area has a concentration of historic buildings in the Wall Street area with character that residents enjoy. These existing resources could be leveraged and enhanced to create a sense of place and neighborhood identity for the study area.
- ▶ Unoccupied and vacant spaces create clear opportunities for businesses and residences. Some residents wish to see these become areas for entrepreneurs, arts organizations, or other community-serving needs, in addition to more restaurants. They hope to see a nice mix of day and night activity.
- ▶ Access to the waterfront was desired by many residents to create space for recreation and "hanging out." Many also expressed the desire to maintain manufacturing from both the perspective of jobs and neighborhood character.

Retail and Commercial Business Owners

Business owners are a key group to involve in any redevelopment plan, as they have decided to invest in a neighborhood, and could decide to take their investment elsewhere if they are not satisfied. To gather the most information from retail and commercial business owners, we decided it was best to reach them at their businesses, rather than asking them to come to a separate meeting. RPA distributed 44 business owner surveys over the course of a month, held conversations with individual business owners who wished to speak to us one-on-one while delivering these

surveys, and collected 20 completed surveys to inform the plan. The complete survey results can be found in the appendix of this report.

The businesses surveyed cover a wide range of sectors from restaurants to sporting goods stores, with the majority being locally owned and operated. The businesses have varying degrees of tenure within the area and have been located there from one year to over 70 years. 75 percent of the businesses rent their current location and only 25 percent own. The majority of the businesses employ less than five people, 60 percent, and 70 percent of those surveyed say their employees drive to work.

Current Assets

- ▶ The top three things that business owners like about the neighborhood are the free parking, the mix of uses and the affordability of the area. Half of the business owners are optimistic about the future of the neighborhood and Norwalk as a whole and feel that it is on a positive tract.
- ▶ The top three advantages that the neighborhood provides identified by the business owners were: Location/Accessibility, neighborhood is up and coming and the free parking in the area.

Current Shortcomings

- ▶ The top three disadvantages identified by business owners in the survey were: perceived safety, mobility and foot traffic/walkability.
- ▶ The survey showed an intense concern with parking access and location. Business owners feel that parking is the biggest issue they face in keeping their businesses successful and keeping and attracting customers to their location.
- ▶ 62 percent of those surveyed cited mobility as what they like least about the neighborhood.

Future Vision

- ▶ The majority of business owners, 65 percent, believe the new residential developments in the area will have a positive impact on the neighborhood. Almost 90 percent of the business owners would like to see more businesses located in the area.
- ▶ The top three most important factors identified by business owners for keeping their business in the neighborhood was new customers, maintaining customers and lower rents.
- ▶ Half of the business owners cited the idea that the neighborhood was up and coming for being the reason they located their business in the area.

Waterfront Business Owners

Norwalk is an historically industrial city which still has a working waterfront. For this reason, it was essential to gather information from the current industrial business owners within the study area to explore their plans and ideas for the future. RPA

decided to hold a focus group with major industrial business owners instead of surveying industrial businesses in the study area in the same way as the retail and commercial businesses. This meeting was held on August 8, 2017 at Norwalk City Hall.

Understandably, the industrial business owners had different concerns and ambitions than residents or retail businesses. They were less interested in increasing foot traffic, especially near their businesses as this could cause dangerous situations with trucks or heavy machinery. However, they did mention serious concerns around parking, truck movement, and maintaining a working waterfront.

Current Assets

- ▶ Most of the business owners stressed that the location was the biggest asset of the neighborhood. Sitting between I-95 and US 7 makes deliveries easy (in certain ways) for businesses that rely on tractor-trailers to stock their goods.
- ▶ The Norwalk River is a federally dredged waterway, which allows certain businesses to receive freight by barge. This reduces trucks on the road, and maintains a working waterfront.

Current Shortcomings

- ▶ Industrial business owners were very concerned with the difficulty of tractor-trailers and other large trucks to navigate the streets within the study area. Unpredictable street closers and obstructions due to new residential construction has been impacting their businesses' ability to receive deliveries.
- ▶ Owners also expressed frustration that many of their employees cannot afford to live near their workplace, as the area has become too expensive. Their employees must live further out, and often have to contend with heavy traffic when traveling to and from work.

Future Vision

- ▶ Business owners expressed desire for designated truck routes through the study area, which would both decrease traffic throughout residential streets while ensuring smoother driving for heavier trucks making deliveries. In order to do this, they also mentioned the idea of creating curbs that are wide enough to accommodate tractor-trailers along these routes, as right now the trailers must make several-point turns. Business owners noted about many difficulties regarding traffic, and expressed concern about the future traffic effects of the mall opening in the area.
- ▶ Industrial business owners want to maintain an industrially zoned waterfront. This would not only ensure an industrial future for the area, but is also a necessity for the Norwalk River to receive federal assistance in dredging the waterway. This will also be beneficial to boating clubs along the river. Business owners were less interested in pedestrian access to the water, but noted this is already being achieved on the opposite side of the river.

- ▶ While they want to maintain the industrial character of part of the neighborhood, the business owners were also interested in seeing a mixed-use community. They were intrigued by the idea of tapering the “heaviness” of industrial uses: from the heaviest on the waterfront, to more light manufacturing or “live-work” spaces behind, to residential and commercial areas closer to West Avenue.

Institutions and Social Service Organizations

Multiple institutions, religious organizations, and social service groups are located within the Wall Street-West Avenue neighborhood. In reaching out to these organizations, we hoped to gather information not only about their future plans for the neighborhood, but also what they’ve heard from residents who use their services. We held a focus group with several institutions within the study area on June 7th, 2017 at Norwalk City Hall.

The organizations we spoke with are all interested in staying in the neighborhood (or returning to the neighborhood) and investing in the future of Norwalk. Throughout their work, they are concerned with the lack of affordability in the neighborhood.

Current Assets

- ▶ The institutions and social services themselves are an incredible asset to the neighborhood. They provide multiple layers of support, education, childcare, and health services to the neighborhood and Norwalk.
- ▶ Representatives from these organizations mentioned that the new residential developments have brought more interest and attendance to local institutions.

Current Shortcomings

- ▶ Parking needs to be expanded to accommodate some institutions (mainly the library, the Carver Center and Cornerstone Church have had issues with parking) The Yankee Doodle Garage is seen as underutilized because it is perceived as unsafe and unwelcoming-needs better wayfinding and design.
- ▶ The stalled or abandoned developments are causing problems with the appearance of the area.

Future Vision

- ▶ A need for mobility is a major idea between and among the institutions in the area, which could be facilitated by connecting bike lanes, pathways or sidewalks that are designed as user friendly.
- ▶ As the neighborhood becomes more dense and gains population, there will be a need to increase capacity at local institutions. Many of those we spoke with are looking to expand capacity through purchasing another building/lot for parking or physical building space. Some are concerned about a lack of funding for social services as the area redevelops.

Residents

Current residents are one of the most valuable groups to consult when creating a redevelopment plan. Residents are not only likely to be most affected by the recommendations within the plan, but can also provide valuable insight into why they moved to the neighborhood, why they choose to stay here, or why they are choosing—or are being forced to—leave. Residential outreach was performed through a stakeholder meeting within the Waypointe development on July 25, 2017. The meeting attracted over 25 people living within the development who expressed their views about the area.

Waypointe residents were involved in this process due to their clear interest in the neighborhood, having recently decided to live in Waypointe. RPA and NRA believed residents of this housing development would be a valuable voice to hear what they expected from the neighborhood, and what the neighborhood needs to meet those expectations.

At the beginning of the meeting, RPA staff presented our existing conditions research then asked the residents to participate in a brief polling exercise using an online software called PollEverywhere. From this polling, we were able to learn quite a bit about the participants. The vast majority of the residents that attended the Waypointe outreach meeting (80 percent) have lived in Norwalk for less than 2 years. These residents have been attracted to Norwalk from as far away as Phoenix and Chicago, or have chosen to relocate to Norwalk from New Canaan or Fairfield. There was a wide age range at the meeting, and their reasons for moving to Waypointe include downsizing for the recently retired and close proximity to NYC for younger workers and families. The location of the Waypointe development was the most influential factor for drawing the participants into Norwalk. The amenities and the nearby train station were the top two factors attracting people into this particular neighborhood. About 60 percent of those living in the Waypointe work within Fairfield County and almost 20 percent of those surveyed work in NYC. This is supported by the modes of transportation to work with 50 percent driving to work and almost 20 percent taking the train.

Current Assets

- ▶ Residents like the mixed-use nature of the neighborhood, and like that they are living in an urban environment.
- ▶ While they wish there were more restaurants, they do like many of the existing offerings.
- ▶ Residents also enjoy the architecture of the neighborhood and hope to see this preserved.

Current Shortcomings

- ▶ While they enjoy many of the restaurants within the neighborhood, residents do not feel safe walking home at night. They wish there were more people out on the streets in order for it to feel safer.
- ▶ One of the biggest complaints was the lack of a grocery store. Residents are dissatisfied with the current store options, and wish there were a larger store located in the neighborhood.
- ▶ Waypointe residents with children are dissatisfied with the daycare and children-friendly activities in the area. There are a few activities for children, but not enough.

Future Vision

- ▶ Waypointe residents wish there were more stores, retail, bars, and restaurants. They also wish for there to be a gym in the area.
- ▶ In addition to hoping for a more walkable neighborhood, residents are also dissatisfied with the existing streets. They hope to see more bike lanes and more greenways along the waterfront.
- ▶ While they like the mixed-use nature of the neighborhood, they hope to see more creative uses such as galleries, maker spaces, or music venues in the neighborhood.

Finance and Development Groups

The private sector plays an integral role in the future redevelopment of the Wall Street-West Avenue Neighborhood. For this reason, RPA facilitated a roundtable discussion with multiple developers, banks, and property owners working within the study area or within Norwalk as a whole. The meeting was held on June 7, 2017 at Norwalk City Hall.

Current Assets

- ▶ The large companies located north of the redevelopment area have attracted younger people, but keeping them invested in the area long term is a larger question.
- ▶ Developers also believe the existing urban fabric is an asset to the neighborhood, allowing it to have the potential to be a walkable urban space.

Current Shortcomings

- ▶ The Yankee Doodle Garage is seen as underutilized and needs better wayfinding to make it more prominent and accessible. They recommend dividing parking into commercial prime and residential prime in order to capitalize on the existing parking in the area.
- ▶ Developers expressed difficulty in having their plans approved by Norwalk staff, and would like to see a more streamlined process.

Future Vision

- ▶ Transit oriented development was identified as a major need for connecting the redevelopment area to the SONO train station. Foot traffic was identified as a main economic driver for the area.
- ▶ They believe that the redevelopment plan should be flexible in order to accommodate future changes in building technology and social trends. Smaller office buildings and a mix of uses were seen as a strength moving forward for the area.
- ▶ Arts and culture of the redevelopment area should be the feature of the plan and a way to keep younger folks invested here. This group also recommended investment in schools as an essential piece to drawing younger populations, as they may wish to have children in an urban area, rather than the suburbs.

Government Players

We spoke with multiple people involved in planning Norwalk to learn more about how planning and development approvals are carried out, as well as whether there are issues with infrastructure or utilities within the study area that could hinder redevelopment efforts. There was not a single focus group, but rather individual interviews with the following departments or groups involved in Norwalk:

- ▶ Planning and Zoning
- ▶ Economic Development
- ▶ Mayor's Office
- ▶ Public Works
- ▶ Norwalk Chamber of Commerce
- ▶ Norwalk Transit District

As expected, each group had differing concerns around priorities toward shaping a stronger Wall Street-West Avenue neighborhood. Overall, they primarily stressed concern over funding toward public space and infrastructure maintenance for any developments within the neighborhood, as well as different city agencies abilities to coordinate the approvals process.

Current Assets

- ▶ Public works in the area are seen as adequate for the new developments now and in the future.
- ▶ The mixed-use quality of the area is important for city government to maintain, in particular the working waterfront.

Current Shortcomings

- ▶ There was concern around the ad-hoc nature of development approvals within the study area and Norwalk as a whole. Several staff we spoke with were interested in reforming the planning approvals process for new developments into a more holistic and streamlined timeline.
- ▶ While the existing bus route would take travelers from the Wall Street-West Avenue neighborhood directly to the South Norwalk Train Station, residents of the major new housing developments are not using the bus very often. This could be due to inadequate education around bus resources, or residents believe the bus may take longer than the private shuttles provided at their residence.
- ▶ Multiple people mentioned difficulty around maintenance for Freese Park. There seems to be a lack of funding available to maintain existing public space.

Future Vision

- ▶ Multiple staff stressed the difficulty in funding long-term maintenance for public spaces, public infrastructure, and other amenities within new developments. The possibility for TIF (tax increment financing) districts was raised, as well as the desire to tie maintenance to development approvals.
- ▶ In order to realize a holistic vision for the neighborhood, multiple staff stressed the importance of a more holistic planning approval process. This process could have a defined timeline, order of steps, and guaranteed end date. This would alleviate developer uncertainty, and ensure Norwalk staff are adequately informed of new developments.
- ▶ There is a general sense that the neighborhood has a great amount of potential based on its existing urban fabric and interest in creating somewhat of an “eclectic” or “artsy” identity for the neighborhood.

Appendix 1: Retail and Commercial Business Survey Results

Throughout the month of July 2017, RPA staff wrote and distributed a retail and commercial business survey in English and Spanish to 44 businesses within the Wall Street-West Avenue neighborhood and received 20 responses. A summary of the responses from each question is presented within this appendix.

English Language Business Owner Survey (Source: RPA)

Norwalk Business Owners Survey
Regional Plan Association & Norwalk Redevelopment Agency
July 2017

Regional Plan Association (RPA) and its partner, Norwalk Redevelopment Agency (NRA), are pleased to present this information to you for the Wall Street-West Avenue. This survey is the first of two surveys that will be conducted in the Wall Street-West Avenue neighborhood. The second survey will be conducted in the Wall Street-West Avenue neighborhood in the fall of 2017.

Learn more about the plan at NorwalkDevelopmentAgency.com

IDENTIFYING INFORMATION

Business Name: _____

Your Business Established: _____

Business Address: _____

Respondent's Name: _____

Respondent: do you live in Norwalk?
 Yes if yes, which neighborhood?
 No

SURVEY QUESTIONS

1. Do you wish to start the business location?
 Yes
 No

2. How many years has the business been at this location?
 _____ years at this location

3. How many years has the business been in Norwalk, even if in a different location?
 _____ years in Norwalk

4. Does this business currently have a single location or multiple locations?
 Single Location
 Multiple Locations in Norwalk
 Multiple Locations outside Norwalk

NORWALK DEVELOPMENT AGENCY Regional Plan Association

5. What made you decide to locate your business in this part of Norwalk?
 Because the neighborhood was "up and coming"
 The neighborhood was hot
 Good Traffic
 I was located here before me
 Other

6. What are the advantages of your current location for your business? What are the disadvantages?
Advantages: _____
Disadvantages: _____

7. Do you feel that the Norwalk and the neighborhood is an area that will make your business more successful or less successful?
 More Successful
 Less Successful
 Unsure
 Please explain your answer: _____

8. In what way(s) is the business environment in the neighborhood helpful and/or harmful to your business?
Answer: _____

9. What do you think of the recent developments in the neighborhood? What impact do you think future residential developments will have on your business?
 Positive Impact
 Negative Impact
 Mixed/Unsure
 Please explain your answer: _____

NORWALK DEVELOPMENT AGENCY Regional Plan Association

10. Do you believe the neighborhood needs more businesses to locate here?
 Yes
 No
 Please explain your answer: _____

11. How long do you see your business staying in Norwalk?
 For the foreseeable future
 For the next 5-10 years
 For the next 10-15 years
 Less than 2 years
 Please explain your answer: _____

12. What are the three most important factors for keeping your business in the neighborhood versus other parts of Norwalk or the region?
 Maintaining existing customers
 New customers
 More business nearby
 Lower rents
 Lower property taxes
 Activity in the neighborhood
 Employees are easy to find/like the location
 Other

13. What is the top factor that would have the greatest impact on your ability to stay in the neighborhood?
 Rent
 Property taxes
 Customer base
 Other

14. How many employees does your business have?
 0-4
 5-9
 10-19
 20+

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15. Where do the majority of your employees live?
 Within Norwalk
 Adjacent to Norwalk
 Elsewhere
 Unsure/Don't know

16. Do you know how the majority of your employees get to work?
 Walk
 Drive
 Bus
 Train
 Other
 Unsure/Don't know

17. Do you believe the Wall Street-West Avenue neighborhood has an identity?
 Yes
 No
 Please explain your answer: _____

18. What infrastructure is most important to support your business?
 Parking
 Transit access
 Pedestrian/public spaces
 Other

19. What do you like most about the neighborhood that you would change if you could?
Answer: _____

20. What do you like least about the neighborhood that should never change?
Answer: _____

NORWALK DEVELOPMENT AGENCY Regional Plan Association

Spanish Language Business Owner Survey (Source: RPA)

Encuesta de Propietarios de Negocios en Norwalk
Regional Plan Association & Norwalk Redevelopment Agency
Julio 2017

Regional Plan Association (RPA) and its partner, Norwalk Redevelopment Agency (NRA), are pleased to present this information to you for the Wall Street-West Avenue. This survey is the first of two surveys that will be conducted in the Wall Street-West Avenue neighborhood. The second survey will be conducted in the Wall Street-West Avenue neighborhood in the fall of 2017.

Conoce más sobre el plan en NorwalkDevelopmentAgency.com

INFORMACIÓN IDENTIFICATIVA

Nombre del Negocio: _____

Año en el Establecimiento: _____

Dirección del Negocio: _____

SURVEY QUESTIONS

1. ¿Le gustaría iniciar o pasar la ubicación de la empresa?
 Sí
 No

2. ¿Cuántos años ha estado el negocio en este lugar?
 _____ años en este lugar

3. ¿Cuántos años ha estado el negocio en Norwalk, aunque en una ubicación diferente?
 _____ años en Norwalk

4. ¿Este negocio tiene un establecimiento o más de uno?
 Un lugar
 Múltiples lugares en Norwalk
 Múltiples lugares fuera de Norwalk

NORWALK DEVELOPMENT AGENCY Regional Plan Association

5. ¿Qué le hizo decidir localizar su negocio en esta parte de Norwalk?
 Porque que el barrio estaba creciendo rápido
 El precio de alquiler estaba barato
 Faltó de un proveedor cercano
 Estaba ubicado aquí antes
 Otro motivo

6. ¿Cuáles son los ventajas de la localización actual de su negocio? ¿Cuáles son las desventajas?
Ventajas: _____
Desventajas: _____

7. ¿Puede decir que el futuro de Norwalk hará su negocio más exitoso o menos exitoso?
 Más Exitoso
 Menos Exitoso
 No sé
 Explique su respuesta por favor: _____

8. ¿Qué aspectos es el ambiente de negocios en este barrio útil o perjudicial para su negocio?
Respuesta: _____

9. ¿Qué piensa Ud. del desarrollo reciente en el barrio? ¿Qué impacto cree Ud. futuro desarrollo residencial tendrá en su negocio?
 Impacto positivo
 Impacto negativo
 No sé
 Explique su respuesta por favor: _____

10. ¿Cree Ud. que el barrio necesita más negocios?
 Sí
 No
 Explique su respuesta por favor: _____

NORWALK DEVELOPMENT AGENCY Regional Plan Association

11. ¿Cuánto tiempo cree que su negocio va a estar en Norwalk?
 Por un tiempo indefinido
 5-10 años
 10-15 años
 Menos que 2 años
 Explique su respuesta por favor: _____

12. ¿Cuáles son los tres factores más importantes para mantener su negocio en este barrio frente a otros partes de Norwalk o la región?
 Mantener a los clientes existentes
 Clientes nuevos
 Más negocios cerca
 Alquileres más bajos
 Impuestos más bajos de la propiedad
 Actividad en el barrio
 Empleados son fáciles de encontrar/ gusta el trabajo
 Otro

13. ¿Qué es lo superior que tendría el mayor impacto en la capacidad de quedarse en el barrio?
 El alquiler
 Impuestos de la propiedad
 Base de clientes
 Otro

14. ¿Cuántos empleados tiene su negocio?
 0-4
 5-9
 10-19
 20+

NORWALK DEVELOPMENT AGENCY Regional Plan Association

15. ¿Dónde viven la mayoría de sus empleados?
 En Norwalk
 Adyacente de Norwalk
 En otro lugar
 No sé

16. ¿Cómo creen la mayoría de sus empleados llegar al trabajo?
 Caminar
 Conducir
 Tren
 Otro
 No sé

17. ¿Cree que Wall Street-West Avenue tiene una identidad?
 Sí
 No
 Explique su respuesta por favor: _____

18. ¿Qué infraestructura es más importante para apoyar su negocio?
 Estacionamiento
 Acceso al transporte
 Recreación y espacio público
 Otro

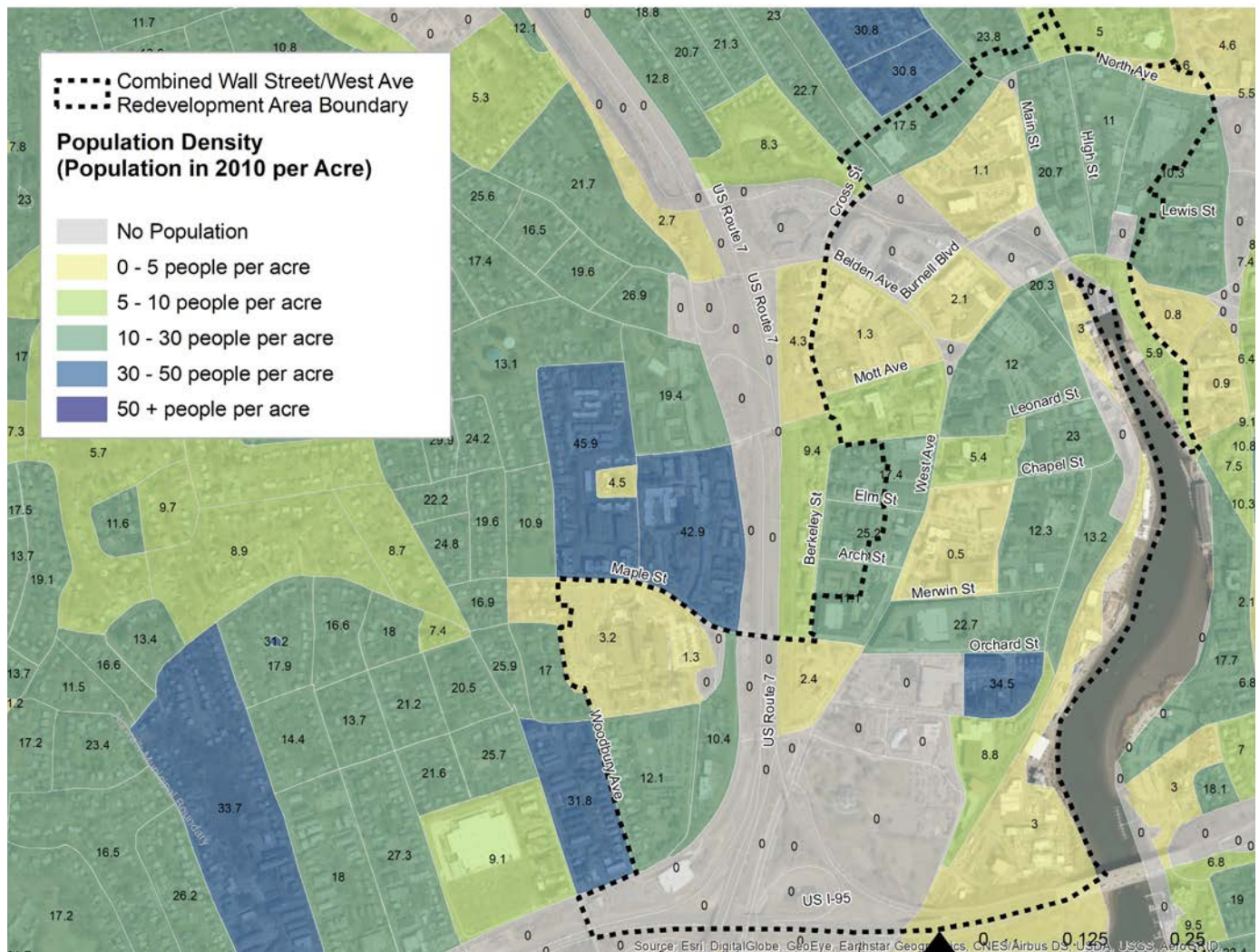
19. ¿Qué le gusta menos sobre el barrio que cambiaría si pudiera?
Respuesta: _____

20. ¿Qué le gusta más de su barrio que nunca debe cambiar?
Respuesta: _____

NORWALK DEVELOPMENT AGENCY Regional Plan Association

Appendix C: Demographic & Socioeconomic Analysis

Figure 1: Population Density in Study Area by Census Block, 2010



Source: U.S. Census Decennial Census 2010

The Wall Street-West Avenue neighborhood has seen a notable shift in population and affluence over the course of the last decade. As discussed below, while the neighborhood is currently less densely populated and less affluent than Norwalk as a whole, it is home to more residents and businesses than it was ten years ago. And long-standing neighborhood institutions including Norwalk Hospital, which is currently the City’s largest employer, the Norwalk Public Library, and Stepping Stones Museum for Children have expanded their internal programs and external reach significantly over that time, infusing new energy and creating new synergies within the community.

Residents

According to 2010 Census data there are approximately 2,073 residents living in the Wall Street-West Avenue neighborhood¹. As shown on Figure 1 residential density is concentrated in the Waypointe District, the High and Knight Street area in northern part of neighborhood and along residential streets to the west of West Avenue. The 2010 Census data total does not reflect new residents living in recent developments such as Avalon and Waypointe, which have added an estimated 1,000 people to

¹ Technical note: For the purposes of this analysis, Wall Street-West Avenue is defined as Census Tract 437. While the boundary of the combined and expanded redevelopment area crosses Tract 438, including this tract would capture the residential neighborhood across US Highway 7, creating a different picture of the neighborhood. Where possible, 2010 block-level data was analyzed, and will be pointed out. When South Norwalk is referred to, the data referenced is for Census Tract 441.

the neighborhood since 2010, increasing the area's residential population by 72%. New residential population is expected to continue to grow as additional new developments in the pipeline are approved.

Table 1: Total Population, 2000-2015

	2000	2015	Change 2000-2015 Absolute Percentage
Wall Street-West Avenue	2,011	2,073	62 3.1%
South Norwalk	3,410	3,284	-126 -3.7%
Norwalk Total	82,951	87,701	4,750 5.7%

Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Race and Ethnicity

The Wall Street-West Avenue neighborhood is more racially and ethnically diverse than the city of Norwalk as a whole. As of 2015, the largest share of the neighborhood's residents were Hispanic or Latino, representing 41% of the population, which is a 43% increase since 2000 and much higher than Norwalk's share of 24% (see Table 2). White residents make up 39% of the population, and also increased in the same time period. One fifth of the neighborhood's residents are black or African American, and this population has seen a decline of 39% from 2000. Again, it is worth noting that this data does not reflect the residents of the most recent developments that have been constructed in the area.

Table 2: Share of Population by Race, 2000-2015

	Wall Street-West Avenue		South Norwalk		Norwalk Total	
	2000	2015	2000	2015	2000	2015
White, Non-Hispanic	34%	39%	23%	34%	64%	55%
Black, Non-Hispanic	33%	20%	35%	24%	15%	14%
Asian, Non-Hispanic	2%	0%	1%	3%	3%	5%
Some Other Race*	0%	0%	0%	0%	0%	1%
Two or more races, Non-Hispanic	1%	0%	3%	2%	2%	1%
Hispanic or Latino	29%	41%	39%	38%	16%	24%
Total Population	2,011	2,073	3,410	3,284	82,951	87,701

*Includes Native American/Alaska Native and Native Hawaiian/Pacific Islander
Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Age

The U.S. population is aging at a rapid pace. At the same time a large cohort of young adults have entered the workforce and are looking for places to live. Both millennials and seniors are showing preference for walkable, urban neighborhoods. The Wall Street-West Avenue neighborhood has seen some of these trends realized.

Between 2000 and 2015, the share of millennials (population age 25-34) in Norwalk as a whole declined from 17.7% to 14.7%. In this same time period, however, Norwalk's downtown neighborhoods (Main Street, Wall Street and South Norwalk, did not see the same dramatic decline. One quarter of residents in the Wall Street-West Avenue neighborhood are millennials, the same share as South Norwalk and 73% higher than Norwalk's total share of millennials (Table 3).

The share of senior population in Norwalk has increased from 12.8% in 2000 to 14% in 2015. While this shift has occurred, the Wall Street-West Avenue neighborhood has seen a slight decline in senior population, from 10% to 9%.

Table 3: Share of Millennial and Senior Population, 2000-2015

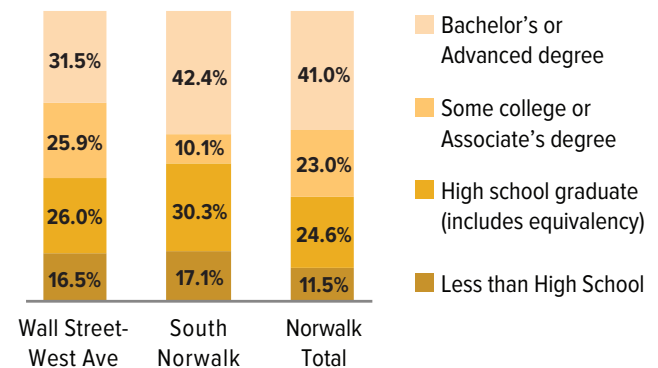
Location	Millennials (25-34)		Seniors (65+)	
	2000	2015	2000	2015
Wall Street-West Avenue	26.0%	25.5%	10.1%	9.0%
South Norwalk	23.8%	25.8%	5.0%	7.2%
City of Norwalk	17.7%	14.7%	12.8%	14.0%

Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Educational Attainment

Compared to both South Norwalk and Norwalk as a whole, the Wall Street-West Avenue neighborhood has a lower share of population with bachelor's degrees or higher. As shown in Figure 2, 31.5% of those over the age of 25 in the Wall Street-West Avenue neighborhood have bachelors or advanced degrees, compared to 42.4% and 41% in South Norwalk and Norwalk total. Both South Norwalk and Wall Street-West Avenue have higher rates of individuals without high school diplomas when compared to Norwalk.

Figure 2: Educational Attainment of Population 25 Years and older, 2015

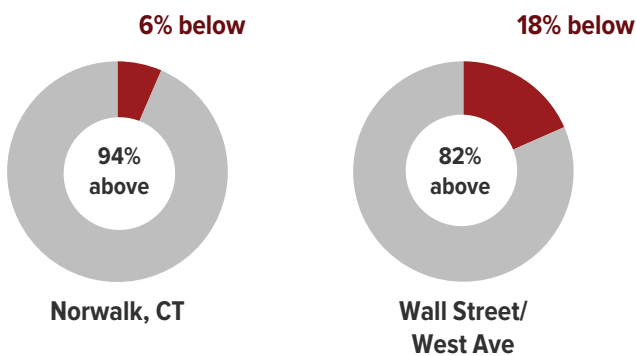


Source: U.S. Census Bureau American Community Survey 2015, 5 Year estimates

Income

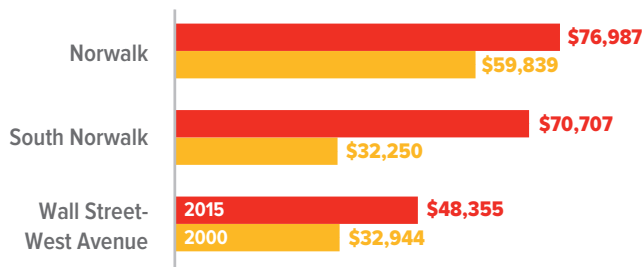
Currently the neighborhood is less affluent than Norwalk as a whole with more than two times the share of residents living below poverty compared to the City of Norwalk (Figure 3). Median household income in the neighborhood is \$48,355 which is substantially lower than Norwalk’s median income of \$76,987 (Figure 4). While this is a stark economic difference between the neighborhood’s residents and Norwalk residents in general, this pattern is shifting. The median household income in the neighborhood has increased by \$25,000 between 2010 and 2015, likely due to wealthier households moving into newly constructed housing units. At the same time, overall the City of Norwalk’s median household income declined by \$7,000 during the same time period, while South Norwalk’s median household income has increased more than two-fold.

Figure 3: Share of Residents living below the poverty level, 2015



Source: U.S. Census American Community Survey 2015, 5 Year Estimates

Figure 4: Median Household Income, 2000-2015



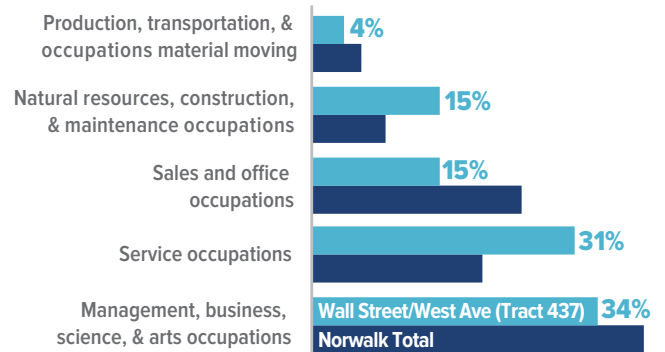
Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Table 4: Housing Trends, 2000-2015

	2000	2015	Change 2000-2015 Number	Percent
Wall Street-West Avenue	918	973	55	6%
South Norwalk	1,358	1,511	153	11%
Norwalk Total	32,711	34,137	1,426	4%

Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Figure 5: Population 16 and Older by Occupation, 2015



Source: U.S. Census American Community Survey 2015, 5 Year Estimates

Housing

According to the 2015 Census American Community Survey, in 2010 there were 973 housing units within the Wall Street-West Avenue neighborhood, representing a 6% increase from 2000. However, this modest increase does not reflect the most recent developments in the neighborhood. In Norwalk overall housing units increased by 4%, while South Norwalk saw an 11% increase in units.

Employment

Close to one third of the neighborhood’s residents work within service sector occupations, compared to roughly one fifth of Norwalk’s total population. While service sector occupations are becoming much more prevalent within the nation’s economy, these jobs tend to pay lower wages than other types of work, and could explain the lower incomes and higher poverty rates within the neighborhood.

Tenure

Compared to Norwalk overall, the neighborhood has a much lower share of owner-occupied housing. Both of these trends were stable for Norwalk and Wall Street-West Avenue, while in the same time period South Norwalk has seen a shift in tenure, toward more owner-occupied housing.

Table 5: Tenure, 2000-2015

	Wall Street-West Avenue		South Norwalk		Norwalk Total	
	2000	2015	2000	2015	2000	2015
Owner Occupied	18%	18%	19%	25%	62%	62%
Renter Occupied	82%	82%	81%	75%	38%	38%
Total Units	918	973	1,358	1,511	32,711	34,137

Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Units in Structure

In general, the character of residential development in the neighborhood is shifting towards multifamily. As shown in Figure 6, more than half (54%) of homes in Norwalk are single family structures. Both Wall-Street West Avenue and South Norwalk have very different housing stock, with more multifamily and less one and two-family homes.

Table 6: Housing Units by Units in Structure, 2000-2015

	Wall Street-West Avenue		South Norwalk		Norwalk Total	
	2000	2015	2000	2015	2000	2015
Single Family	6%	6%	10%	3%	56%	54%
Duplex	15%	6%	11%	6%	12%	11%
3 to 4	19%	30%	16%	18%	8%	10%
5 or more	79%	88%	80%	91%	32%	35%
Total:	982	1,068	1,437	1,667	33,753	35,800

Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Unit Size

More than half of the homes in the neighborhood (57%) are in buildings with five or more units, and a vast majority (87%) of homes are located in structures with 3 or more units, demonstrating a much denser urban fabric. Homes in the Wall Street-West Avenue neighborhood have fewer bedrooms than homes in Norwalk as a whole. As shown in Table 7, 92% of units have fewer than three bedrooms, while more than half of housing units in Norwalk have more than three bedrooms. The neighborhood has a lower share of studios than South Norwalk, suggesting the housing stock is geared more towards growing families than young, single professionals.

Table 7: Housing Units by Number of Bedrooms, 2000-2015

	Wall Street-West Avenue		South Norwalk		Norwalk Total	
	2000	2015	2000	2015	2000	2015
No Bedroom	6%	6%	17%	11%	3%	2%
1 Bedroom	46%	39%	38%	48%	18%	17%
2 Bedrooms	41%	39%	28%	30%	29%	29%
3+ Bedrooms	8%	16%	18%	12%	50%	51%
Total Units	982	1,068	1,437	1,667	33,753	35,800

Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Median Rent

In 2015 the median rent in the neighborhood was \$1,353 per month, a 17% increase from the median rent in 2000. This translates to an increase of \$195 per month, which is higher than the city's overall median rent increase of \$175 per month during the same period. In South Norwalk, rents have increased by \$616 per month during this time. This indicates that market demand increased much more sharply in South Norwalk than it did in the Wall Street-West Avenue neighborhood. As previously mentioned, it is worth noting that this data does not reflect the most recent developments in the neighborhood.

Table 8: Median Gross Rent, 2000-2015

	2000*	2015	Change 2000-2015	
			Absolute	%
Wall Street-West Avenue	\$1,158	\$1,353	\$195	17%
South Norwalk	\$943	\$1,559	\$616	65%
Norwalk Total	\$1,234	\$1,408	\$174	14%

* Inflation adjusted to 2015 Dollars based on Bureau of Labor Statistics CPI
Source: U.S. Census Decennial Census 2000 and American Community Survey, 5 Year Estimates 2015

Jobs

Home to Norwalk Hospital, the City of Norwalk's largest employer, the Wall Street-West Avenue neighborhood has a considerable share of Norwalk's jobs. There are an estimated 6,096 jobs in the neighborhood, representing 15% of Norwalk's total job base. This is almost twice the number of jobs located in South Norwalk (Table 10). However, there has been a 5.9% decline in the number of jobs in the neighborhood since 2002, compared to an 8.2% increase in jobs within South Norwalk.

Table 9: Top Employers in the City of Norwalk

Rank	Employer	Industry
1	Norwalk Hospital	Healthcare
2	Cablevision	Cable and Internet Provider
3	GE Capital	Industrial and Energy Finance
4	Diageo	Beverage Production
5	Stew Leonard's	Grocery

Source: Connecticut Data Collaborative; Norwalk Innovation District Opportunities Analysis, KDLLC

Table 10: Jobs Trends, 2000-2014

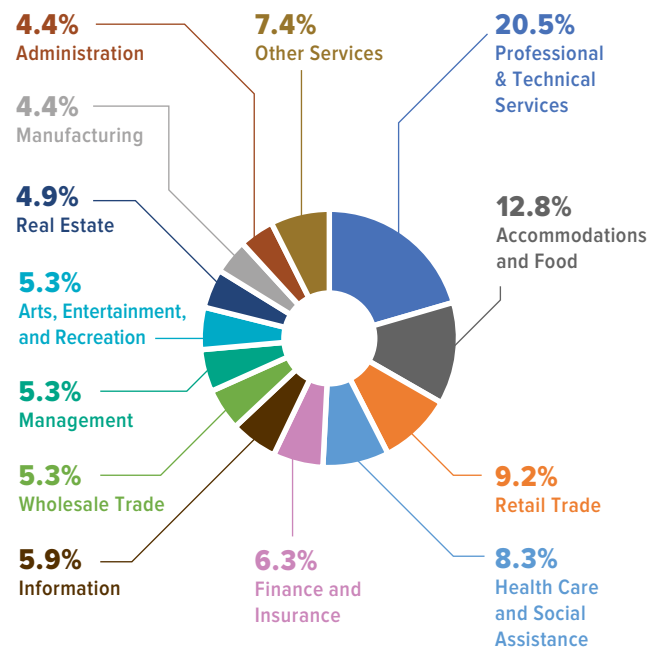
Neighborhood	2002	2010/ 2014	Percentage Change 2000- 2010/14
Wall Street-West Avenue	6,480	6,096	-5.9%
South Norwalk	3,246	3,513	8.2%
City of Norwalk	41,276	41,130	-0.4%

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics – Origin Destination Employment Statistics

Jobs by sector

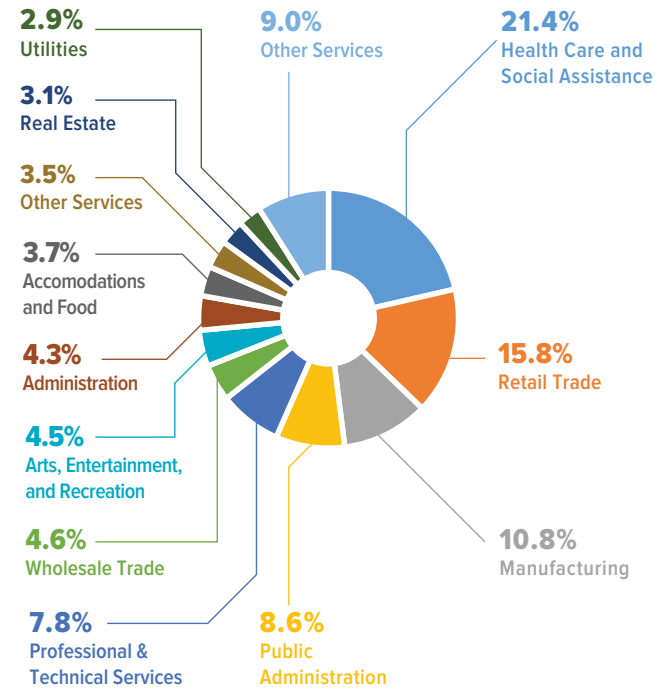
Over one-fifth (21.4%) of the jobs in the Wall Street-West Avenue neighborhood are related to health care and social service (Figure 6). The next highest shares of jobs are Retail Trade at 15.8% and Manufacturing at 10.8%. The concentration of manufacturing within the neighborhood is somewhat unique to the city. Figure 7 also shows the highest concentrations by industry for South Norwalk, which are quite different from the Wall Street-West Avenue neighborhood. While health care, retail, and manufacturing are the major sectors in the Wall Street-West Avenue neighborhood, South Norwalk's major sectors are professional and tech services, accommodation and food, and retail trade. While most of the Wall Street-West Avenue area residents work in service sector jobs, it seems that many of these jobs are concentrated in South Norwalk.

Figure 6: South Norwalk Area Jobs by Industry Sector, 2015



Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics – Origin Destination Employment Statistics

Figure 7: Wall Street Area Jobs by Industry Sector, 2015



Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics – Origin Destination Employment Statistics

Table 11: Asking Prices on Office Space in Wall Street-West Avenue Neighborhood

Property Address	Asking Price	Square Feet	Asking Price per Sq. Ft	Class
747 Belden Ave	-	44,526	-	B
25 Harbor Ave #1	\$2,833/month	2,000	\$1.42/month	-
25 Harbor Ave#2	\$4,533/month	3,200	\$1.42/month	-
9 Mott Ave — 207	\$375/month	375	\$1.00/month	-
9 Mott Ave — 1	\$500/month	380	\$1.32/month	-
11 Belden Ave	\$6,556/month	4,628	\$1.42/month	-
5 Cross St	\$3,500/month	2,000	\$1.75/month	-
48 Wall St	\$2,025/month	1,350	\$1.50/month	-
666 West Ave	\$22,167/month	14,000	\$1.58/month	-
515 West Ave (8 total listings)	\$63,443/month	19,052	\$3.33/month	-
Average			\$1.64 per sq. ft./month	

10 Wall Street has been excluded from average due to skewing for small square footage.

Source: Loopnet.com and Cityfeet.com as of March 24th, 2017; analysis by KDLLC

Office Space

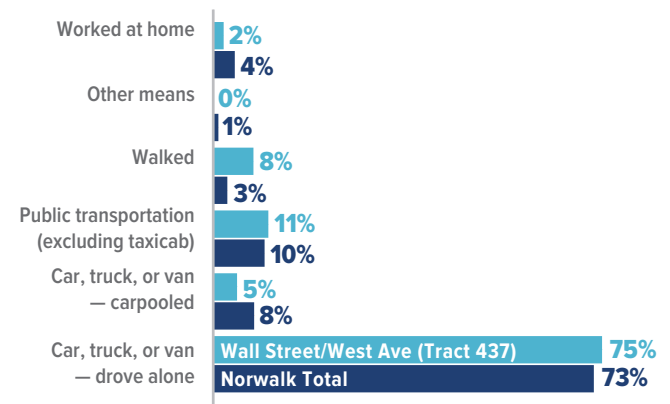
Based on an analysis of 2016 commercial office performance, the overall office vacancy rate for Norwalk is around 23%. Between 2016 and 2017, the average asking price for commercial office space in the city increased slightly from \$26.80 to \$27.80 per square foot.²

As shown on Table 11, the average value per square foot for properties in the Wall Street-West Avenue neighborhood is \$1.64 per month, which is slightly lower than South Norwalk’s average asking price of \$1.68 per square foot per month.

Transportation to work

While the neighborhood is very walkable, scoring “Very Walkable” on WalkScore’s index,³ the vast majority of neighborhood residents (80%) commute to work by car; only 8% walk to work. As shown in Figure 8 the share of residents walking to work is higher in the Wall Street-West Avenue neighborhood than in Norwalk as a whole. And as shown in Table 12, a higher share of residents in the neighborhood do not own a car, suggesting a reliance on public transportation or other means to travel to work.

Figure 8: Means of Transportation to Work for Wall Street-West Avenue Residents, 2015



Source: U.S. Census American Community Survey 2015, 5 Year Estimates

Table 12: Car Ownership Rates by Household, 2015

Number of Cars Available	Norwalk Total	South Norwalk	Wall Street-West Avenue
No car available	9%	22%	20%
1 car available	36%	52%	48%
2 cars available	39%	18%	25%
3 cars available	12%	7%	4%
4 or more cars available	5%	1%	3%
All Households	34,137	1,511	973

Source: U.S. Census American Community Survey 2015, 5 Year Estimates

² Source: KDLLC Opportunities Analysis, Norwalk Innovation District

³ <https://www.walkscore.com/>

Appendix 2: Waypointe Residents Meeting Real-Time Survey Results

At the July 25, 2017 Waypointe Residents Meeting, RPA used a software called PollEverywhere to gather input from the meeting participants about where they live and work, as well as what drew them to the neighborhood. These results are attached in full in this appendix.

Q: How long have you lived in Norwalk?		
	Number	Percent
Less than 2 Years	12	80%
2 to 5 Years	3	20%
More than 5 years	0	0%
Total	15	100%
Q: How did you get to and from work today?		
	Number	Percent
Drove	8	50%
Other	4	25%
Took the train	3	19%
Rode a bus	1	6%
Total	16	100%
Q: How long do you plan to live in Norwalk?		
	Number	Percent
the next 2-4 years	10	56%
For the foreseeable future	6	33%
Leaving in the next year	1	6%
the next 5-9 years	1	6%
Total	18	100%
Q: Where do you work?		
	Number	Percent
In Fairfield County (Outside Norwalk)	6	38%
Elsewhere	4	25%
In New York City	3	19%
In Norwalk	3	19%
Total	16	100%
Q: If you aren't from Norwalk, where did you move from?		
Astoria, Queens, NYC	Monroe, CT	
Cambridge, MA	New Canaan, CT (2)	
Chandler, AZ	New Rochelle, NY	
Chicago, IL	Phoenix, AZ	
Eastham, MA	Ridgefield	
Fairfield, CT (3)	Stony Point, NY	
Manhattan, NYC	Wilton, CT (2)	
Monroe, CT		
Q: What drew you to Norwalk?		

Proximity to Manhattan near beaches, restaurants and retail
Work, Access, Restaurants
Cheaper than Stamford
New, relatively affordable, safe housing
Cute and near New York
New building, shorter commute
Proximity
Quaint area near SONO!
Location/restaurants
Location, restaurants, amenities
Norwalk Redevelopment
Family
Proximity
More space for less money
Bar scene
My birth :p
Closest city to Stamford
Job
Q: What drew you to this particular neighborhood?
Waypointe restaurants and shuttle to train station
New neighborhood, luxury housing
There r a lot of amenities in this bldg.
Restaurants downstairs
New, Waypointe
Value train station walking
Interesting transitional area
Colony Grill
Waypointe
Ease of move in, Free 2 mos rent and close to train station
It made my commute really easy
"Luxury" Apartments
Waypointe
Only came for waypointe and amenities promised
Waypointe
Barcelona and bobby qs
Modern facilities

**January
2019**

Market Feasibility Study for the Wall Street-West Avenue Redevelopment Area, Norwalk, CT

**Prepared for The Norwalk Redevelopment Agency
Prepared by Connecticut Economic Resource Center, Inc.**



Connecticut
Economic
Resource Center

Collaboration at Work

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Introduction

For the City of Norwalk Redevelopment Agency, CERC conducted research into industry, demographic, housing, retail and employment conditions in Norwalk and the surrounding region, both current and projected, in order to determine how the Wall Street-West Avenue Neighborhood Plan drafted for the Norwalk Redevelopment Agency by the Regional Plan Association is supported by various market and economic data.

The Wall Street-West Avenue Neighborhood Plan defined a new market area, designated the Wall Street-West Avenue Neighborhood. This neighborhood has experienced a recent surge in real estate growth, with over 1,000 new apartments and 78,000 square feet of commercial space added since 2010. An additional 780 residential units and 63,000 square feet of commercial space are under construction or in the development pipeline. This area has also seen an increase in commercial activity, with trends toward arts and culture, technology and science and health and wellness.

The goal for the Wall Street-West Avenue Neighborhood is to be an innovative urban environment that is accessible, authentic, lively and affordable. The area consists of 230 acres bordered by Route I-95 to the south, Norwalk Hospital to the west, the Norwalk River to the east and Highpointe to the north.

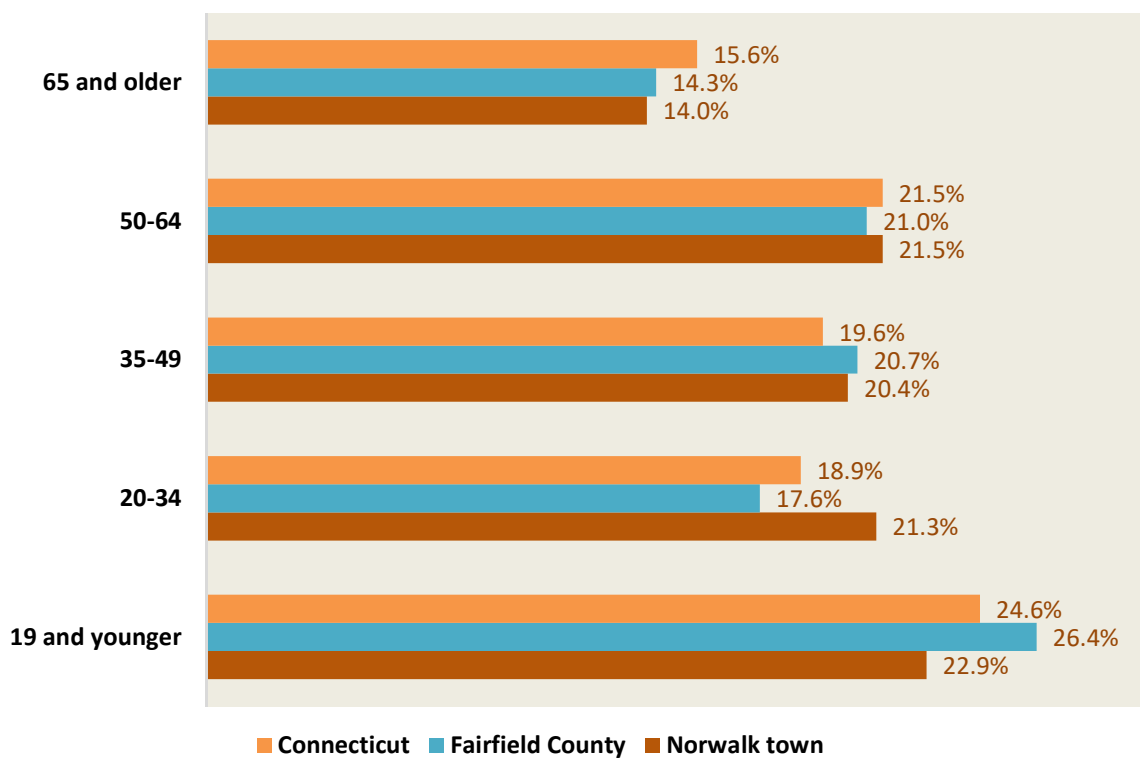
The industry, demographic, housing, retail and employment conditions, both current and projected, for Norwalk, Fairfield County and the Fairfield-New York Counties regions are summarized below. Overall, the data demonstrate that the Area is very well positioned to meet the goals of the Plan.

Demographic Trends

Comparing the populations by age for Norwalk, Fairfield County, and Connecticut illustrates some of the identifying characteristics of the city. The youngest and oldest age cohorts are proportionally smaller in Norwalk than in Fairfield County or Connecticut as a whole, as seen in Figure 1.¹ The 19 and younger age group comprises 22.9% of Norwalk’s population, versus 26.4% in Fairfield County and 24.6% in Connecticut. The 65 and older age group accounts for 14.0% of the population in Norwalk, while it represents 14.3% of the population in Fairfield County and 15.6% statewide. Conversely, the proportion of young, working-age population (ages 20-34) is much higher in Norwalk (21.3%) than at the county or state levels (17.6% and 18.9%, respectively). Fairfield County and Norwalk have slightly higher percentages of residents age 35-49 than Connecticut, and a similar pattern is seen with the shares of residents ages 50-64. Norwalk, Fairfield County, and Connecticut had median ages of 39.3, 39.9, and 40.6, respectively in 2016. Cumulatively, this may indicate that Norwalk has a higher portion of working-age population as well as fewer families and retirees than Fairfield County or Connecticut as a whole.

Figure 1: Population by Age, 2016²

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



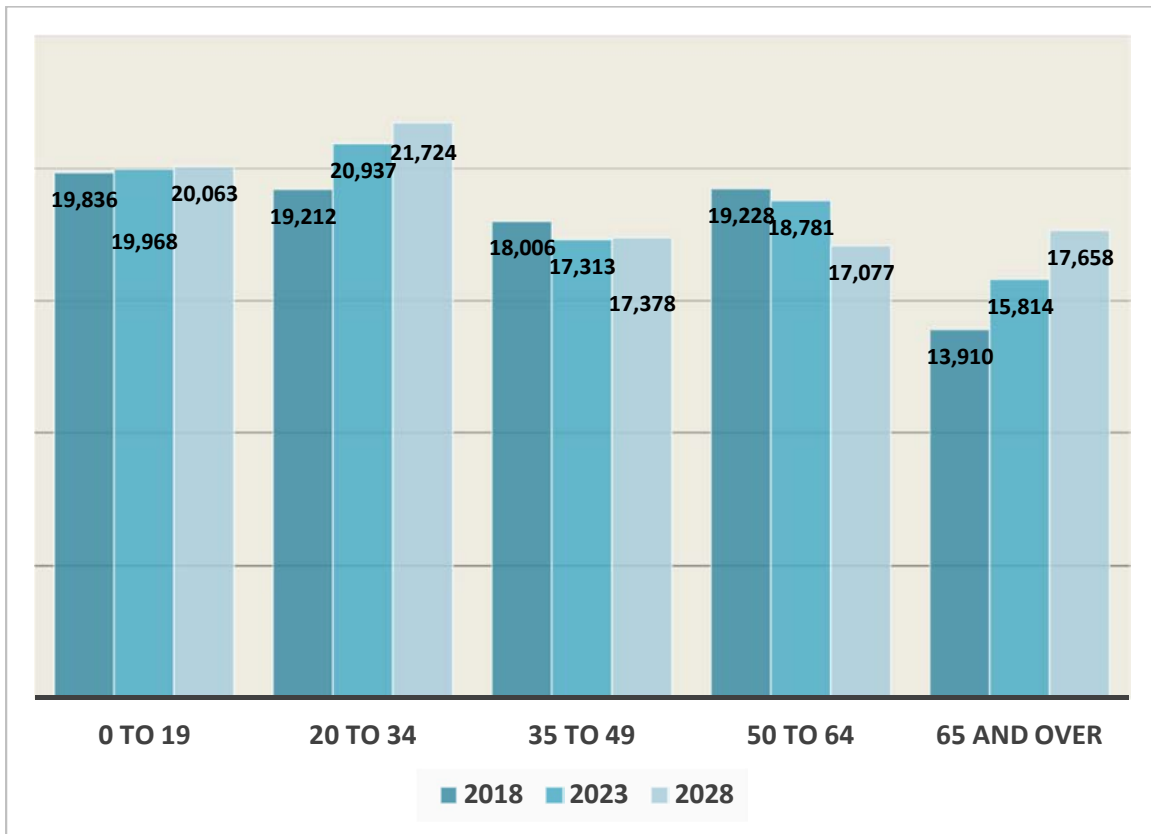
¹ Demographic data shown here generally use U.S. Census American Community Survey (ACS) 2016 5-year estimates, the most recent available at the time of this writing. As such, figures shown may differ slightly from Appendix C of the Norwalk Center Neighborhood Plan for the Wall Street-West Avenue Redevelopment Area (dated January 2018), which uses 2015 ACS data. Population projections shown in this analysis were obtained from EMSI, and so may differ slightly, from the 2015 ACS data used in the Wall Street-West Avenue Redevelopment Plan.

² For charts showing percentages, the supplemental data tables may be found in Appendix A.

By 2028, the population of Norwalk is projected to grow to 93,900, an increase of approximately 3,700 from estimated 2018 levels, as is shown in Figure 2.³ Some of the age cohort characteristics in Norwalk noted in Figure 1 are expected to shift in upcoming years, with a pronounced 13% increase in the young, working age (20-34) population, while the population aged 35-64 is expected to decline by 7%. The under 19 population will increase slightly (1%), while the over 65 population is expected to increase by 27%.⁴ As the town, businesses, and other stakeholders plan for upcoming years, it will be important to consider that a majority of the population increase in Norwalk is expected to occur in the 20-34 and over 65 age cohorts.

Figure 2: Norwalk Population, 2018-2028 (Projected)

Source: EMSI



By race and ethnicity, Norwalk is more diverse than Fairfield County and Connecticut. As seen in Figure 3, compared to the other areas, Norwalk has a smaller portion of white residents and a much larger percentage of African American residents. The three areas have more similar percent shares of other

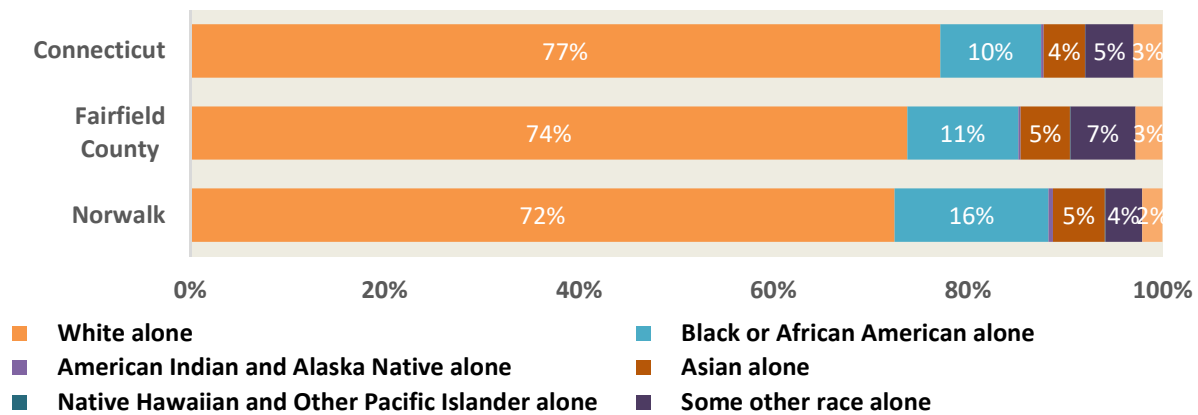
³ Population projections are from EMSI. However, as with any forecast, there is a level of uncertainty and a number of external factors may impact a local area’s population.

⁴ City of Norwalk, Norwalk Public School enrollment projections by Milone and MacBroom as of January 20, 2016 show a moderate scenario in which the total Norwalk school enrollment increases slightly through 2020, then tapers to a slow decline through 2025. This is consistent with the negligible under-19 population change (1%) shown here. The high and low scenarios modeled by Milone and MacBroom project a range of +3.6% to -3.8%. https://norwalkps.org/UserFiles/Servers/Server_71596/File/departments/Facilities/Part%20%20Demographics%20&%20Enrollment_Projections%201-20-16.pdf.

racial groups. Additionally, 25.1% of Norwalk residents (of any race) identify as Hispanic or Latino, while corresponding shares for Fairfield County and Connecticut are 18.6% and 15.0% respectively.

Figure 3: Population by Race, 2016

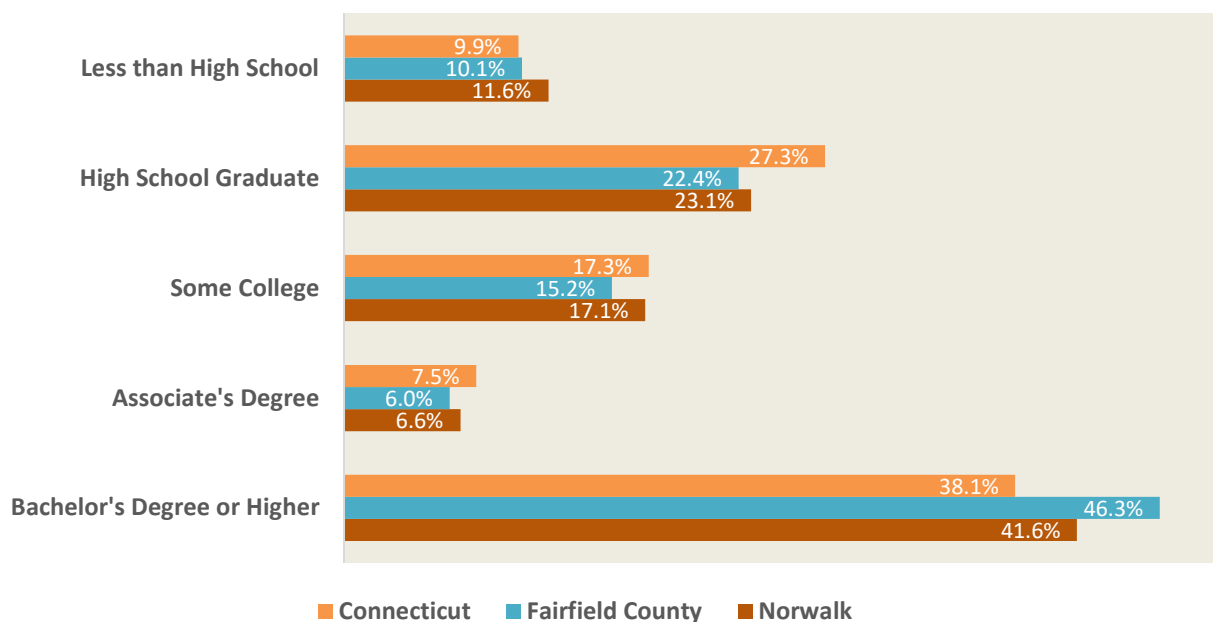
Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



By educational attainment, Norwalk has a higher portion of residents at both ends of the educational spectrum than the state does. Of Norwalk residents age 25 and over, 41.6% have a bachelor’s degree or higher, 4.7 percentage points less than Fairfield County, but 3.5 percentage points above statewide levels. Of the three geographies considered, Norwalk also has a slightly higher portion of residents with less than a high school diploma, at 11.6%, versus 10.1% in Fairfield County and 9.9% in Connecticut. The portion of Norwalk residents with the highest attainment of “some college” or an Associate’s degree is higher than Fairfield County, but below statewide levels. Smaller shares of the adult population in Norwalk and Fairfield County have “high school graduate” as their highest level of educational attainment (23.1% and 22.4%, respectively) compared to the state as a whole (27.3%).

Figure 4: Population by Educational Attainment (Population Age 25 Years and Over), 2016

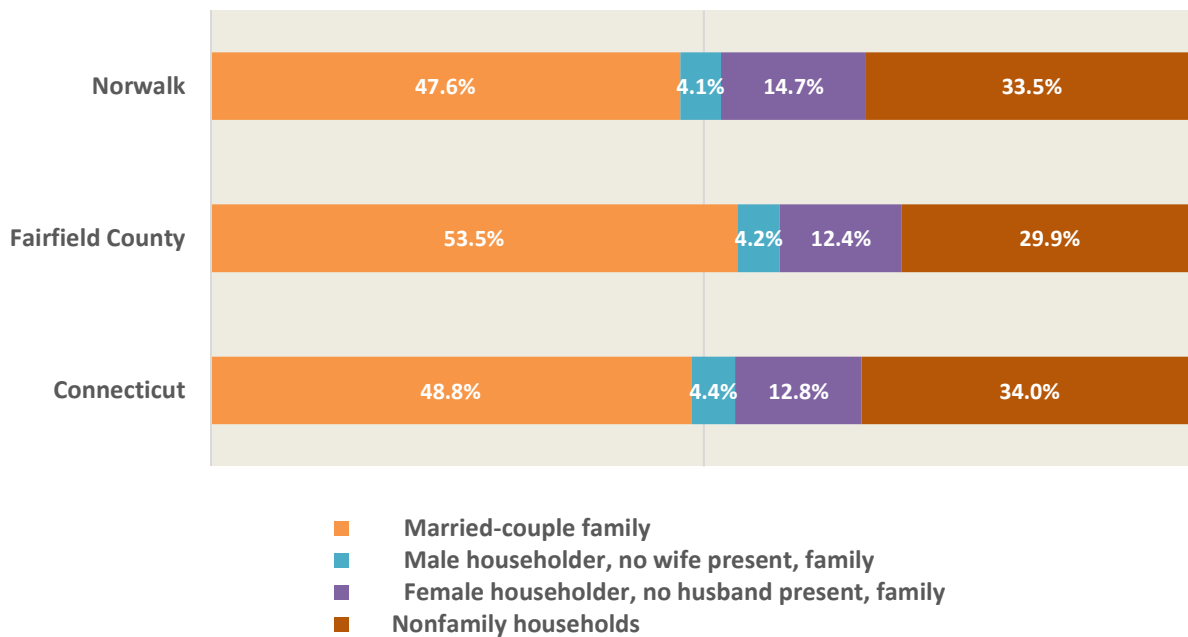
Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



Looking at the composition of households, Norwalk has a greater variety of household types than Fairfield County or the state does. A much lower portion of Norwalk households (47.6%) consist of married-couple families than Fairfield County overall (53.5%) and Connecticut (48.8%). The portion of nonfamily households, such as a single person living alone or with non-family members (such as a roommate), is 33.5% in Norwalk and 34.0% in Connecticut, but only 29.5% in Fairfield County. The varied distribution of household type results in different average household size across areas. In Norwalk, the average household is 2.63 people, which is below the 2.75 average in Fairfield County but above the 2.56 statewide average.

Figure 5: Household Composition, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

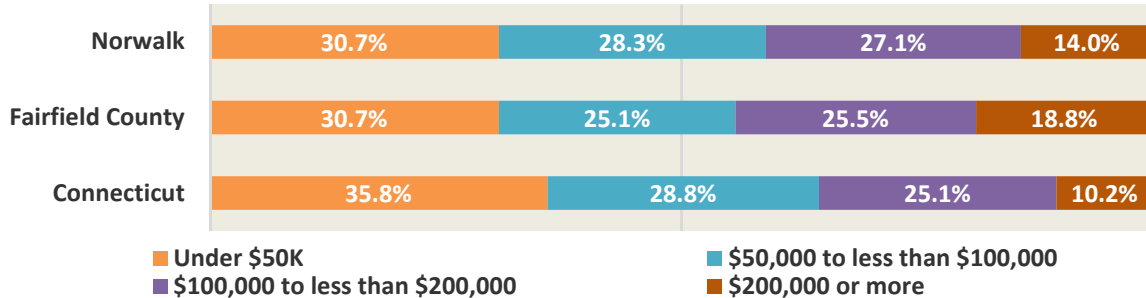


Norwalk households have higher incomes than Connecticut but lower than Fairfield County overall. Median household income in Norwalk for 2016 was \$80,896, above the statewide median of \$71,755 but below Fairfield County's median of \$86,670. Figure 6 shows household income broken down into 4 tiers to illustrate these differences. Of the three geographies, Fairfield County has the largest share of its households in the \$200,000 or more income bracket, at 18.8%, with Norwalk slightly lower at 14.0% and Connecticut at 10.2%. Looking at households earning over \$100,000 per year (including those earning over \$200,000 per year), 41.1% of Norwalk households fall into this category, compared with 44.3% of Fairfield County households and 35.3% of Connecticut households. Norwalk and Fairfield County both

have a smaller portion of households earning below \$50,000 per year than Connecticut, 30.7% for each of those two geographies versus 35.8% statewide.

Figure 6: Household Income, 2016

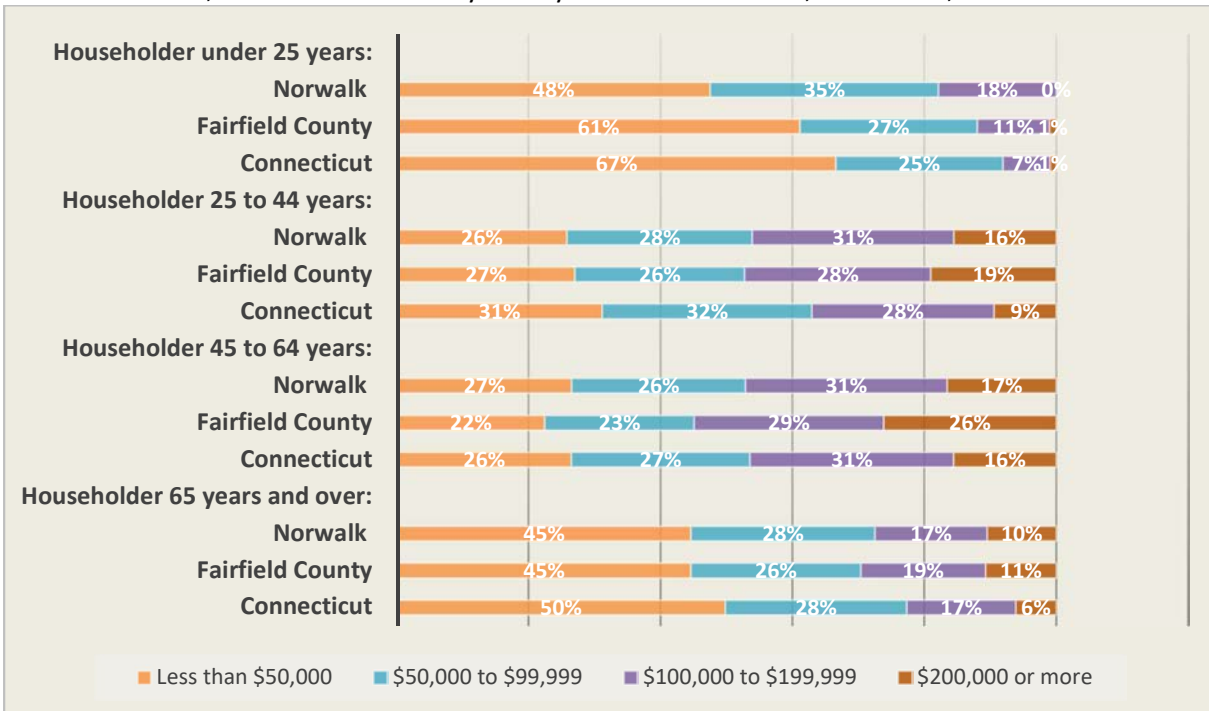
Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



While household incomes in Norwalk are higher than the state average, this difference is most pronounced among the youngest age cohort, as seen in Figure 7. Among households with householders under age 25, only 48% of those in Norwalk have a household income less than \$50,000 per year, while that figure is 61% in Fairfield County and 67% in Connecticut.⁵ For householders aged 25-44 and those 65 and over, Norwalk’s income distribution is very similar to that of Fairfield County; for the 45-64 age group, Norwalk has fewer households in the very highest (over \$200,000) income category than Fairfield County, but the town’s income distribution is similar to the rest of Connecticut.

Figure 7: Household Income by Age of Householder

Source: US Census, American Community Survey Five-Year Estimates, 2013-2017;



⁵ A portion of this higher household income may be attributable to a higher propensity to have a roommate, discussed in the section on housing and headship rates.

Tapestry Segmentation

Another useful analysis to understand a community’s population is a tapestry segmentation profile, which utilizes demographic characteristics to further identify typical lifestyle choices, purchasing patterns, and preferences of different segments of the population. For this section, data from Esri was utilized to identify characteristics of the populations within 1-, 3-, and 5- mile radii from the Wall Street-West Avenue neighborhood.

Figure 8: Wall Street-West Avenue Neighborhood; 1 mile radius

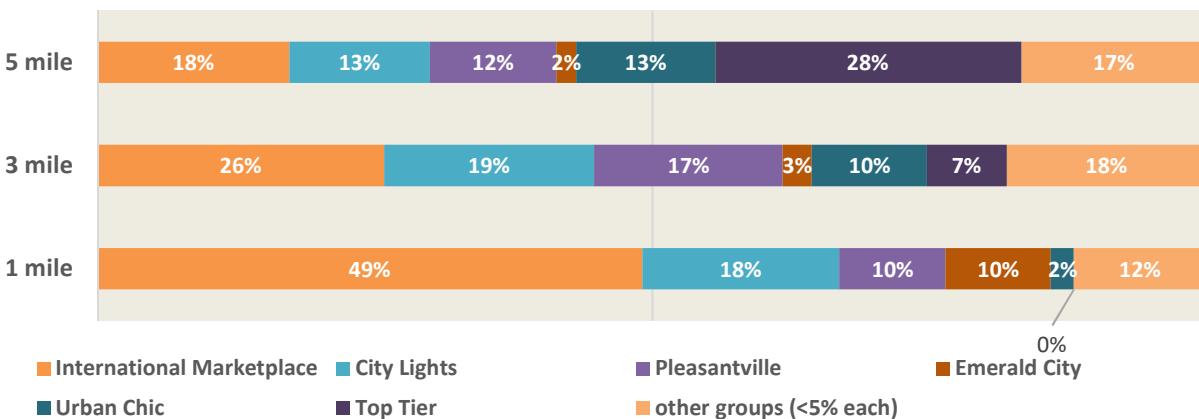


In the closest region, a 1-mile radius (Figure 8), the most significant lifestyle group, comprising 49% of residents, is the “International Marketplace,” as seen in Figure 9. These residents represent a diverse range of cultures and backgrounds in the dense, urban periphery, with a much larger portion of foreign-born residents and more households speaking non-English languages than average. These residents have a high labor force participation rate and are typically employed in white-collar or service professions, but they also have lower incomes and face higher housing costs than average. As such, young families renting in older apartment buildings are typical of this

segment. Though these families have significantly lower net worth than average and little extra money for savings and investment, they are style-conscious consumers and also spend on family and baby products and activities. Spanish-language programming on internet, tv, and radio may also be important to this lifestyle group.

Figure 9: Tapestry Segmentation within 1, 3, and 5 miles of the Study Area

Source: Esri



The second-largest lifestyle group within 1 mile of the redevelopment area consists of “City Lights,” at 18% of the population. These neighborhoods are also racially and ethnically diverse, but with slightly higher incomes than average and with workers in professional and service occupations. These residents still lag relative to the nation in net worth, but are cost-conscious, budget well, and often are saving for a home purchase.

“Pleasantville” and “Emerald City,” at 10% each, round out the top categories of the population nearest to the study area. “Pleasantville” residents consist of older, married-couple families who are well-educated and financially well-off. They tend to own their homes, have higher net worth, work in professions such as finance, information/technology, education, or management, and are willing to spend money for quality and brands they like. “Emerald City” residents are also educated and well-employed, though they are younger and more mobile than the “Pleasantville” group and more likely to rent. They are well-connected, health-conscious, and spend more money on experiential activities than other groups.

Figure 10: Wall Street-West Avenue Neighborhood; 3 mile radius



At the 3-mile range, household incomes rise. “International Marketplace” remains the largest group, but represents 26% of the population, while the more affluent “City Lights” and “Pleasantville” groups rising to 19% and 17%, respectively. “Urban Chic” residents comprise 10% of the population within this range, and these individuals are busy, tech-savvy, and environmentally-conscious consumers with significantly higher incomes and net worth than average. “Top Tier,” the wealthiest tapestry segment, also comprises 8% of the population at this geographic range. These residents earn more than three times the U.S. household

income and have the highest net worth and significant purchasing power. Typical expenditures include salons, spas, and fitness centers, high-end retailers, vacations, concerts, charity dinners, and spending on their homes and estates. These residents are older, typically married couples with no or older children, who earn a living through consulting or investment income.

Figure 11: Wall Street-West Avenue Neighborhood; 3 mile radius



At the 5-mile range, “Top Tier” becomes the largest segment of the population, at 28%. Reflecting the socioeconomic stratification of the area, the second largest group is “International Marketplace,” at 18% of the population, followed by “City Lights” and “Urban Chic” at 13% each and “Pleasantville” at 12%.

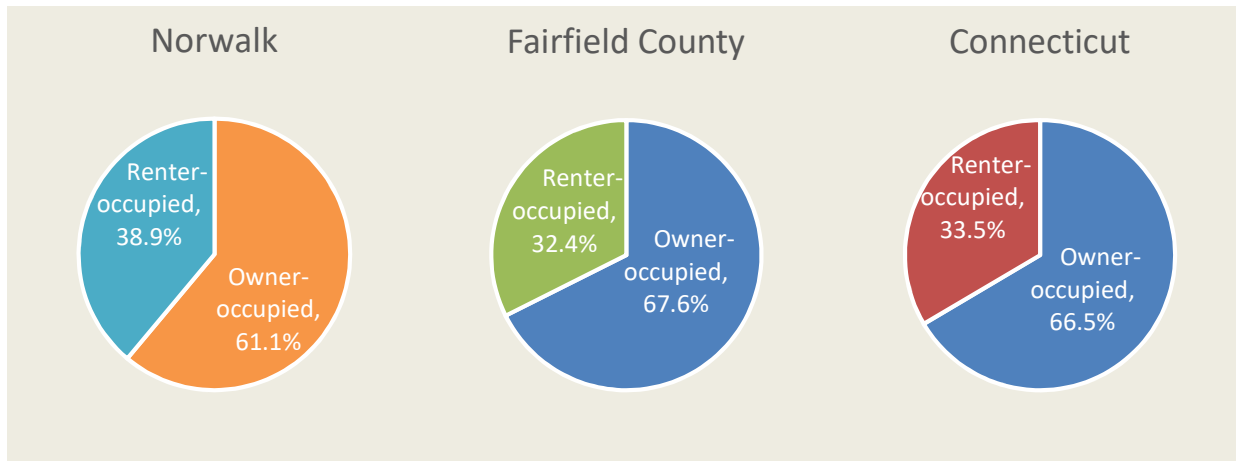
Housing Analysis

Existing Housing Stock

Norwalk has a much larger portion of renter-occupied units and a smaller portion of owner-occupied units than does Fairfield County or Connecticut. As seen in Figure 12, 38.9% of the housing units in Norwalk are renter-occupied, while 61.1% are owner-occupied. Fairfield County, by contrast, has a much smaller portion of occupied rental units, at 32.5%, while in Connecticut 33.5% of units are renter-occupied. One implication of this trend, coupled with the higher portion of young, working-age residents, is that Norwalk residents may be more transient than residents in other geographies. Young renters may move more frequently than older adults who own their home, and this may also represent an opportunity to convert these young people into longer-term residents as they age and start families.

Figure 12: Housing Stock by Occupancy Type, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

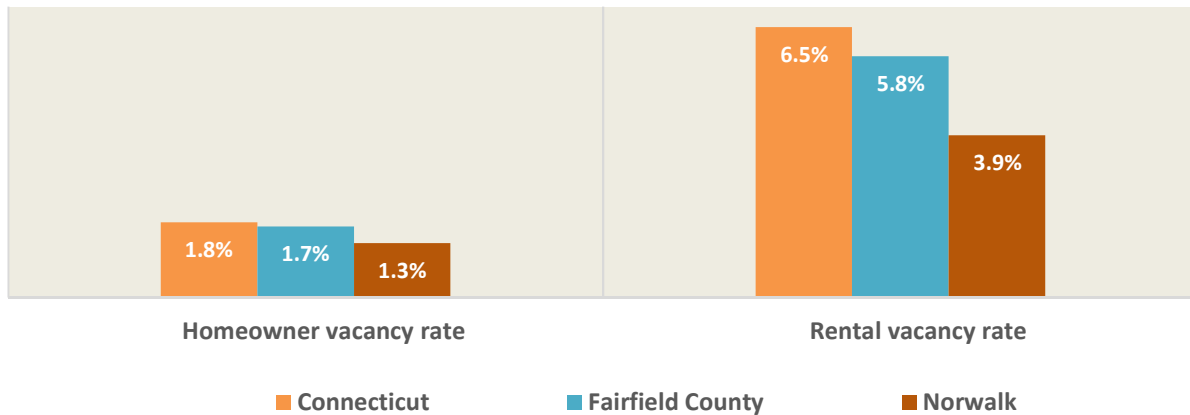


As of 2016, Norwalk had much lower vacancy rates for both owner-occupied and renter-occupied units than did Fairfield County or Connecticut. For renter-occupied units, Norwalk's vacancy rate of 3.9% was well below corresponding rates for Fairfield County (5.8%) and Connecticut (6.5%). Owner-occupied

vacancy rates across areas are both lower and less varied, though Norwalk’s 1.3% rate is slightly lower than the rates for Fairfield County (1.7%) and Connecticut (1.8%), as seen in Figure 13.

Figure 13: Housing Vacancy Rates, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



There are also more recent indications that the Norwalk housing market continues to be tight.⁶ In the second quarter of 2018, REIS reported a similarly low median apartment vacancy rate of 3.8% for West Fairfield County, with asking rental rate growth hovering around 2% annually over the last 5 years, as growth in inventory has roughly matched new housing formations.⁷ Real estate brokerage and analysis firm Marcus and Millichap has also noted extremely low rental vacancy rates in Norwalk in the third quarter, 2018.⁸

A distinct feature of Norwalk’s housing stock is its large share of multi-unit housing, which encompasses 51.7% of total housing in the city (Figure 14).⁹ This multi-unit share is much greater than the 41.8% and 40% shares respectively in Fairfield County and Connecticut. This breakdown corresponds with the

⁶ While a tight housing market is good for those who wish to sell their homes, it also restricts people from moving around. This, combined with high housing costs, can prevent new people from moving in (for example, in conjunction with job growth or new hires). Households may settle for less-than-ideal living arrangements, or employees may be prevented from living near their place of work, due to lack of options.

⁷ REIS’s West Fairfield County submarket includes Greenwich, Stamford, Norwalk, New Canaan, Wilton, Weston, and Westport.

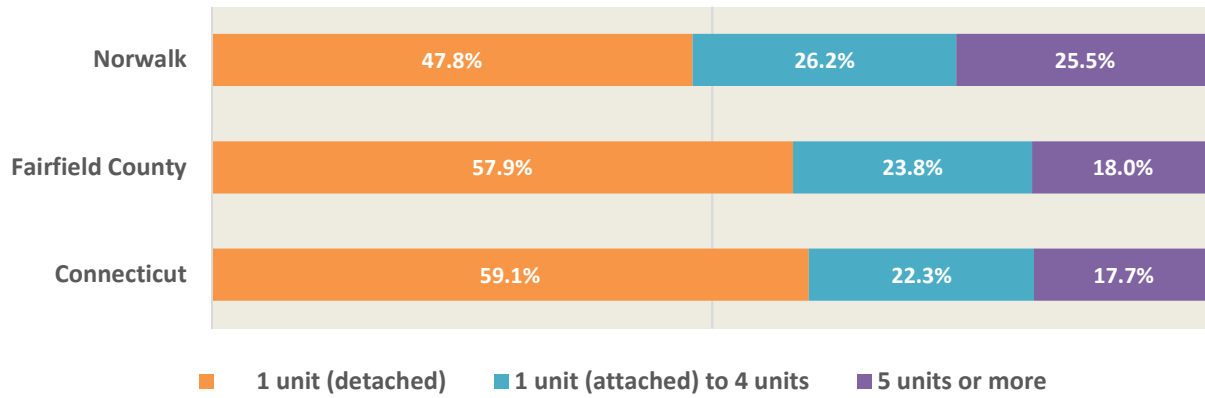
⁸ Grice, Jordan. “Property Rounds: Residential Apartment Amenities Reach New Heights,” AP, 10/24/18. <https://www.apnews.com/1f98093b475e4685b97292ec1ac109d0> Accessed 10/30/18.

⁹ By Census definitions, a single-family detached home has no other dwellings touching the exterior walls. Single-family attached homes include structures such as duplexes, townhomes, and row houses; each unit must have a floor-to-ceiling wall separating it from the adjacent unit; each unit must have its own heating system and utility meters; and no unit may be located above or below another unit. Two- to four-unit buildings or larger may share common areas such as an attic or basement; may be built on top of each other; and may share building mechanical systems and utilities. References to “dwellings” or “housing units” includes all types of structures.

higher rental rates noted in Figure 12, as multi-unit housing is more likely to consist of rental units (such as apartment buildings) than single-family housing is.

Figure 14: Housing Stock by Building Type, 2016

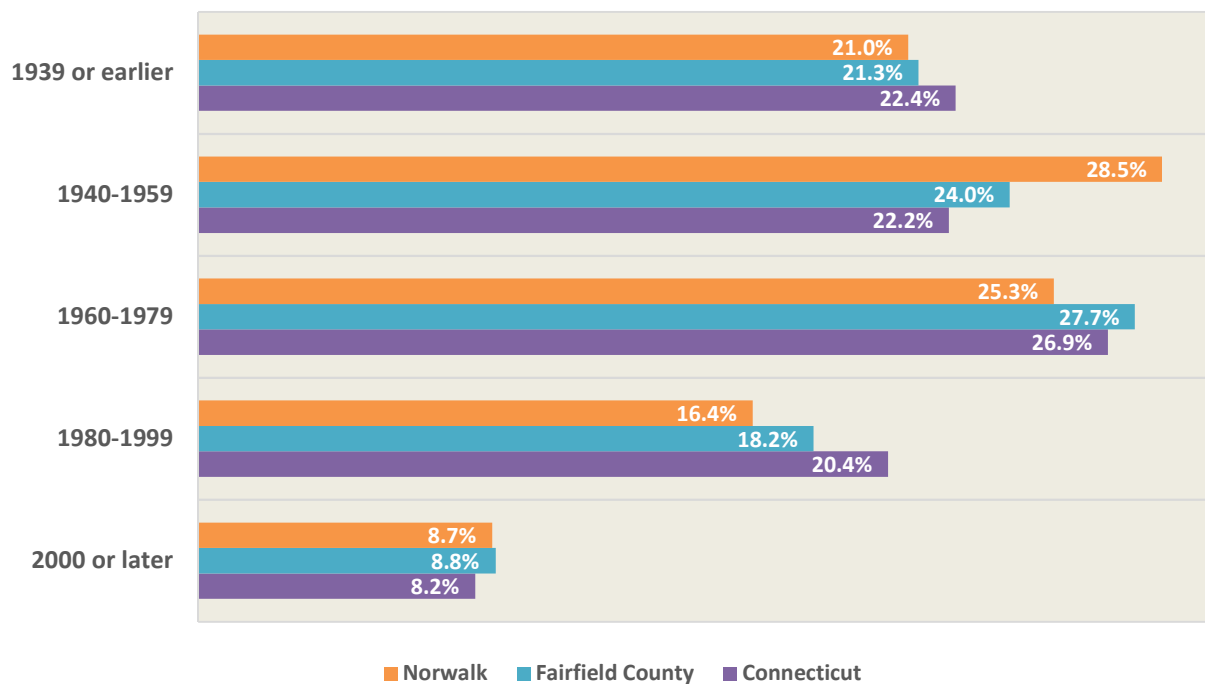
Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



Overall, the housing stock in Norwalk is somewhat older than in Fairfield County or Connecticut, with a large portion of its housing stock built between 1940 and 1959 (Figure 15). During the subsequent decades through 1999, the town lagged in new construction compared to the larger geographic areas. For Connecticut overall, a larger portion of the housing stock was built during the 1980s and 1990s. The three geographies have much less variation in their portion of the newest housing stock, as defined by housing constructed since 2000.

Figure 15: Housing Stock by Year Constructed, 2016

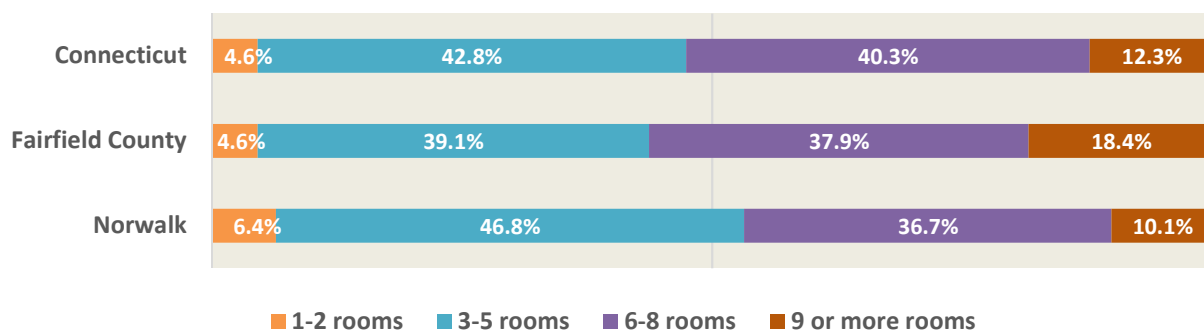
Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



Housing stock in Norwalk also has fewer rooms on average than in Fairfield County or Connecticut. As shown in Figure 16, 53.2% of the housing stock in Norwalk consists of units with 5 or fewer rooms. In Fairfield County and Connecticut, corresponding rates are 43.7% and 47.4%, respectively. A larger share of the housing in Norwalk consists of units with 1-2 rooms (6.4%), while Fairfield County and Connecticut both have rates of 4.6%. On the other end of the housing size distribution, 10.1% of Norwalk housing units have 9 rooms or more, below the 18.4% rate for Fairfield County and just below the statewide level of 12.3%.

Figure 16: Housing Stock by Number of Rooms, 2016

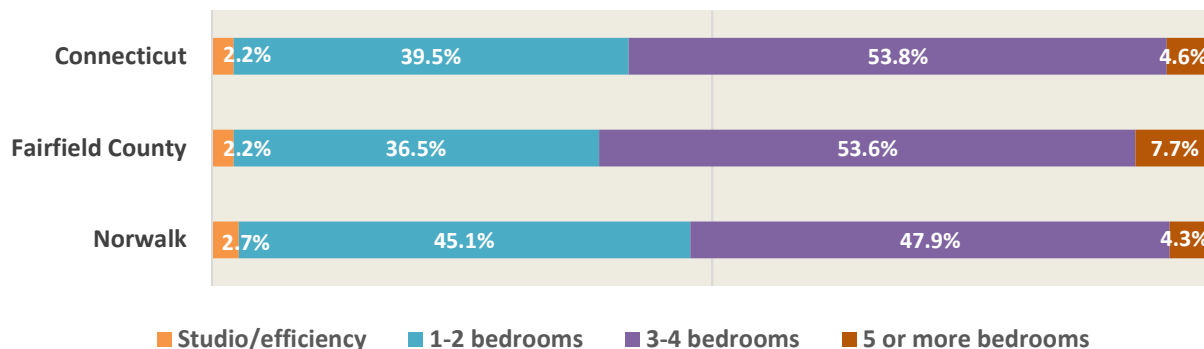
Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



Norwalk’s housing stock consists primarily of 1-2 bedroom units, with 45.1% of the housing stock in this category (Figure 17). Studio/efficiency apartments make up 2.7% of Norwalk’s housing. Overall, 47.8% of housing stock in the city has 2 bedrooms or fewer, higher than corresponding levels in Fairfield County (38.7%) and Connecticut (41.7%). Houses with 3-4 bedrooms are less common in Norwalk (47.9%) than in Fairfield County (53.6%) or Connecticut (53.8%). This corresponds with the age cohort characteristics in the town, particularly the large share of the population aged 20-34, who may be earlier on in their careers and less able to afford a larger home, as well as a smaller percentage of youths under 19 that would be indicative of families, who may have a preference for a larger home. REIS had similar findings in the second quarter of 2018 for Norwalk and West Fairfield County, especially concerning the small share of renter housing comprised of studio apartments; of note, however, is that rents for studios are growing faster than for the larger units over 5 years.

Figure 17: Housing Stock by Number of Bedrooms, 2016

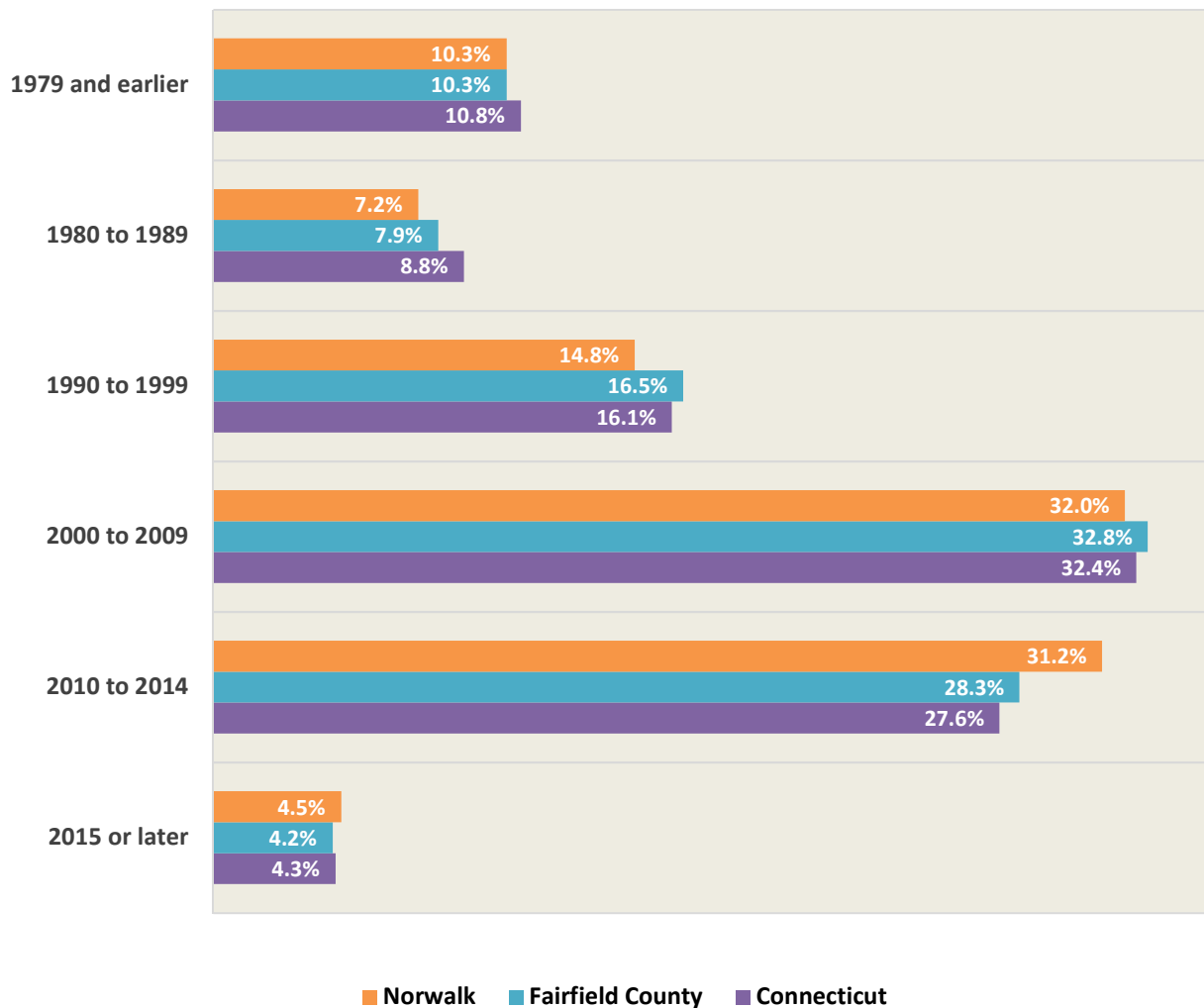
Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



The demographics of Norwalk are also reflected in data regarding when the householder moved into their current home. Younger adult age cohorts are more likely to move into their current home recently as that age group relocates more as they finish college, obtain jobs, and start families. Figure 18 shows that a larger percentage of Norwalk residents (35.7%) have moved into their home between 2010 and 2016, whereas Fairfield County and Connecticut have rates of 32.5% and 31.9% respectively. This is also consistent with the rental occupancy rates in Norwalk, as renters are more likely to move than homeowners.¹⁰ Interestingly, the share of long-term Norwalk residents, those who moved in before 1980, is equal to the Fairfield County level at 10.3% and just below the statewide level of 10.8%. Proportionally fewer Norwalk residents moved into their home during the 1980s, 1990s, and early 2000s than in Fairfield County or Connecticut overall.

Figure 18: Housing Stock by Year Householder Moved In, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

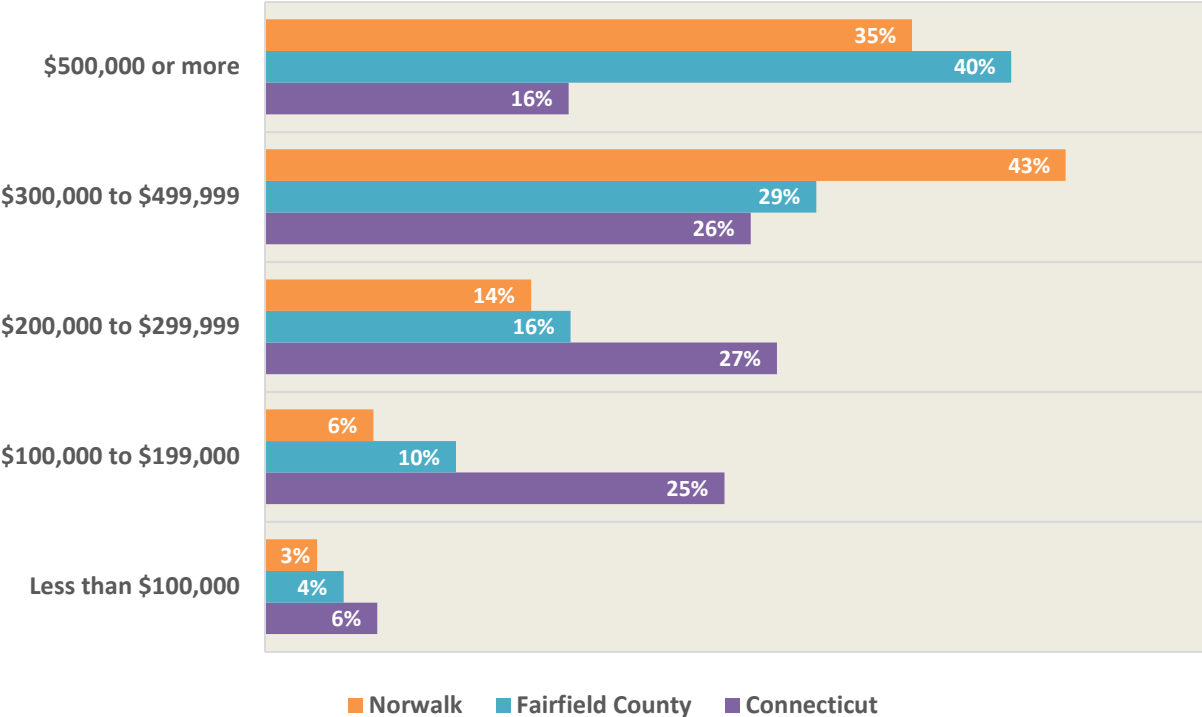


¹⁰ U.S. Census Bureau, “U.S. Mover Rate Remains Stable at About 12 Percent Since 2008, Census Bureau Reports,” March 18, 2015. <https://www.census.gov/newsroom/press-releases/2015/cb15-47.html>.

Figure 19 highlights another distinction of the housing market in Fairfield County relative to Connecticut: owner-occupied housing tends to be much more expensive in the county and in Norwalk compared to the state overall. Both Norwalk and Fairfield County have a much smaller portion of owner-occupied housing units valued below \$300,000 than does the state overall. Only 22.8% of units fall into this category in Norwalk and 30.7% in Fairfield County, while 57.8% of owner-occupied housing units in Connecticut are valued below that threshold. The bulk of Norwalk’s owner-occupied housing units (42.7%) are valued between \$300,000 to \$499,999, while Fairfield County and Connecticut both have fewer than 30% of units in that range. Norwalk also has a significantly higher portion of expensive (valued \$500,000 or higher) homes (34.5%) than the state (16.2%), though a smaller portion than in Fairfield County, which has 39.8% valued above \$500,000.

Figure 19: Value of Owner-Occupied Units, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016



Future Housing Demand

To estimate the current and future housing demand in Norwalk, a methodology using headship rates to estimate household formation was used. Headship rates refer to the portion of the population considered head of household divided by the population, usually segmented by certain demographic characteristics (such as age).¹¹ The components that drive household formation include growth in the adult population, shifts in the age distribution, and changes in the headship rate.

¹¹ Organizations that use a similar approach based on headship rates include the Joint Center for Housing Studies at Harvard University, the Federal Reserve Bank of Kansas City, and the Turner Center for Housing Innovation at University of California, Berkeley.

For this analysis, population projections from EMSI, a leading data source, were used to estimate the future population by age of Norwalk. In addition to the projected 3,700 population increase in Norwalk shown in Figure 2, EMSI data also suggest that the population within a 20-minute drive of the Wall Street-West Avenue neighborhood is expected to grow by approximately 5,650 people, with 77% of this growth expected to occur within the City of Norwalk alone.¹² These data points would imply an increase in the future demand for housing.

Besides the overall population level, demographic shifts can also impact the demand for housing, particularly by age. It is this shift that produces the most dramatic effects in the change in housing demand for Norwalk in the next 10-15 years. As seen in Figure 20, the overall change in the number of projected households for Norwalk through 2028 is a net increase of over 1,800 households. However, when examining this change by age cohort, we see more notable shifts. The number of households in which the householder is under age 35 is expected to increase by more than 1,000. Similarly, the number of households headed by those aged 65 and over is projected to increase by almost 3,000. Offsetting this trend is an expected decrease in the number of households headed by householders aged 35-64, projected to drop by more than 1,550 households during the same time frame.

Figure 20: Headship Rate and Household Formation through 2028

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016; EMSI projections, 2018.Q4; calculations by CERC

Age of Householder	Headship Rate	Number of Households			Change, 2015-2028	Median Household Income ¹³
		2018	2023	2028		
15-24¹⁴	7%	783	767	733	(51)	\$53,352
25-34	38%	4,855	5,570	5,970	1,115	\$92,507
35-44	51%	6,036	5,991	6,052	16	\$92,507
45-54	56%	7,183	6,502	6,088	(1,095)	\$93,690
55-64	55%	6,977	7,062	6,498	(480)	\$93,690
65-74	62%	5,029	5,812	6,488	1,460	\$57,739
75-84	60%	2,301	2,723	3,108	807	\$57,739
85 and over	63%	1,243	1,203	1,273	31	\$57,739
Total Households		34,407	35,629	36,210	1,803	\$81,546

It is worth noting that these projections only account for the anticipated change in the number of households in Norwalk; these projections do not include any additional units to ease the tight housing market; if this condition persists, additional units above those estimated here may be warranted.

Additionally, this demographic shift could have impacts beyond the number of housing units needed in Norwalk; as the size, type of home, and price point desired by these groups may differ. For example, as

¹² EMSI 2018.Q4 Demographic Overviews and CERC calculations.

¹³ Household income data is available for the following age cohorts: Under 25 years; 25-44; 45-64; 65 and over. Income data from the US Census American Community Survey, 2013-2017 5-year estimates.

¹⁴ These are the age categories used by the US Census; however, it is likely that most householders are age 18 or older, unless they have been emancipated.

noted by Marcus and Millichap, there is a trend in renters treating apartments as long-term accommodations, rather than temporary, and the younger generation, especially, are looking for integrated technology and more amenities than in the past.¹⁵

Furthermore, this shift may also have implications for city services; for example, senior services may be in greater demand as the population ages. And while the projected increase in the total number of children under age 19 is slight, the mix of elementary school versus middle or high school children may shift, given the changes in the number of households likely to have children of those ages (e.g. slightly more elementary school children and slightly fewer middle and high school children).

Turning to headship rates, or the portion of the population by age that is head of household, Norwalk's rates are very similar to those of Fairfield County and of the state, which are within 1-2 percentage points for each age cohort. However, headship rates tend to increase with age. So, for example, the 15-24 age group has a headship rate of only 7% in Norwalk, rising to 38% for the 25-34 age group; meanwhile, the 35-64 age groups all have headship rates between 51-56%, while over age 65, headship rates rise to the low 60% range.

Looking at headship rates nationally, some interesting trends emerge. Across the U.S., headship rates have declined in recent years, especially among younger population groups. This is attributed in part to the Great Recession and to financial factors such as high levels of student loan debt, increases in unemployment, and declines in income among the young adult population. Other cultural trends driving down household formation include increasing educational levels and delaying marriage, both of which decrease the likelihood that a young person lives independently. While there are increases in the portion of young people "doubled up," such as living with a roommate or relative, the majority of the decline in the headship rate is due to young people living with their parents at a higher rate than in prior years.¹⁶ Beyond headship rates, this trend of young residents living with their parents for a longer period of time may also reduce the number of older residents who are ready or able to downsize, impacting the turnover of single family homes.

What remains to be seen is whether this decrease in headship rates among the younger age group is a temporary decline which will bounce back as the economy recovers, or whether it represents a cultural shift that will persist for a longer period of time. This report uses a conservative approach, assuming that headship rates for younger demographic groups remain low over the study period. However, if this trend reverses and headship rates begin to increase, the number of new housing units needed for the younger age cohorts will be higher than projected.

¹⁵ Grice, Jordan. "Property Rounds: Residential Apartment Amenities Reach New Heights," AP, 10/24/18. <https://www.apnews.com/1f98093b475e4685b97292ec1ac109d0> Accessed 10/30/18.

¹⁶ For further discussion, see McCue, Daniel, and Christopher Herbert, "Updated Household Projections, 2015-2035: Methodology and Result," Harvard Joint Center for Housing Studies, Working Paper December 2016, http://www.jchs.harvard.edu/sites/default/files/household_growth_projections2016_jchs.pdf; Rapaport, Jordan, "Millennials, Baby Boomers, and Rebounding Multifamily Home Construction," Federal Reserve Bank of Kansas City, Economic Review, Second Quarter 2015, <https://www.kansascityfed.org/~media/files/publicat/econrev/econrevarchive/2015/2q15rappaport.pdf>; Goodman, Laurie, Rolf Pendall and Jun Zhu, "Headship and Homeownership: What does the Future Hold?" Urban Institute, June 2015, <https://www.urban.org/sites/default/files/2000257-headship-and-homeownership-what-does-the-future-hold.pdf>; and Fry, Richard, "More Millennials Living with Family Despite Improved Job Market," Pew Research Center, July 29, 2015, <http://www.pewsocialtrends.org/2015/07/29/more-millennials-living-with-family-despite-improved-job-market/>.

Furthermore, as noted previously, population projections generally reflect natural population growth based on existing birth, death, economic growth, and migration patterns. External factors such as unexpected economic events, government policies, or local and regional events also impact population growth but are very difficult to accurately predict. It is worth noting that continued economic growth would likely increase population growth and, therefore, housing demand beyond what is forecasted here.

Looking at specific living arrangements by age of the householder, Norwalk is similar to Connecticut in most categories, with a few notable exceptions. Among younger (ages 15-34) householders without a family who are renters, those who reside in Norwalk were more likely to be living with roommates (50%) than is the case statewide (42%). While this may be due to personal choice, it may also be indicative of high costs or lack of reasonably-priced rental options for single individuals. Among married-couple families, Norwalk residents were less likely to own their home than Connecticut residents overall; this was true for both the younger (15-34) and middle (35-64) age ranges. For younger married-couple families, 55% own their home statewide, while only 47% own in Norwalk. For the middle age ranges, 88% own their home statewide, while only 77% within this age range in Norwalk own their homes.

There can be external factors impacting choices to rent or own. For example, workers who relocate frequently may not own because they cannot recoup the costs of home ownership (e.g., downpayment or repairs). Similarly, the financial characteristics of a household (e.g. lack of credit, low income, or low savings) may make purchasing difficult. However, low ownership rates along with high rental rates could also be indicative of tight housing stock or lack of options for prospective purchasers. This may be the case in Norwalk since, as noted in the existing housing stock analysis prior, the city has more multifamily and 1-2 bedroom units than Connecticut as a whole, but fewer housing units in the lower price ranges than in Connecticut as a whole. Anecdotally, the stakeholder outreach sessions held during the development of the Norwalk Center Neighborhood Plan confirmed that many residents feel rents are too high; businesses also indicated that many employees cannot live nearby because they cannot afford to live there. Residents also desired to purchase homes in the area, but recounted they were unable to do so due to high housing costs.¹⁷ In light of the low vacancy rates noted earlier, it is possible that Norwalk's growth is somewhat constrained due to current housing unavailability or unaffordability.

Figure 21 shows the number of new housing units projected to be needed in Norwalk through 2028, based on projected population growth and including the breakdown between rental and owner-occupied units, and between single-person and multiple-person households. This data could be supplemented through discussions with large employers and key institutions regarding their growth plans and the housing needs of the employees they hope to attract, which can also help indicate where Norwalk's housing options may need to be expanded. Over the next 10 years or so, Norwalk may need an additional 345 to 420 rental units for individuals, and between 390 to 395 for roommate or family renter households. Additionally, the city will need 440 to 530 ownership units for individuals and 460 to 630 ownership units for roommate or family households. Interestingly, if Norwalk had the same homeownership rates among households as the state of Connecticut has, the city would need approximately 1,400 additional homeownership units compared to its current housing stock.

¹⁷ Norwalk Center Neighborhood Plan for the Wall Street-West Avenue Redevelopment area, submitted by the Regional Plan Association, January 19, 2018, p. 20. http://tomorrow.norwalkct.org/wp-content/uploads/2018/01/Revised-Draft-Wall-Street_West-Ave-Plan_011918.pdf.

Figure 21: New Housing Units Needed through 2030 by Household Size and Tenure

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016; EMSI projections 2018.Q4; calculations by CERC

	Individuals	Multiple-Person Households	Total by Tenure
Rent	345-420	390-395	735-815
Own	440-530	460-630	900-1,160
Total by Size	785-950	850-1,025	

Much of the growth of future ownership needs is being driven by Baby Boomers who currently own their own homes, although there may be evidence of changing preferences as older Boomers retire and downsize to rented, rather than self-owned, units. If this preference is shifting, there may be sufficient ownership units available to meet demand as Boomers sell their homes to downsize and younger workers purchase them. Norwalk’s housing composition also differs from the state in other ways that may affect future city housing needs. Norwalk has a higher proportion of married couple families renting than in the state as a whole, which could indicate renters are drawn to Norwalk or that there could be a shortage of suitable housing for them to purchase. Likewise, Norwalk has a much higher proportion relative to the state of households with two or more people in the youngest age group. This would seem to indicate Norwalk’s younger workers are living with roommates, although it is unknown if they are choosing to live together due a lack of reasonably priced housing options or for other reasons (e.g., companionship).

These findings suggest that additional units may be warranted, given that the largest components of the existing population consist of young, mobile professionals who are not ready to buy and lower-income, asset-constrained families who may not have the financial wherewithal to purchase, but that a lower ownership figure may be more appropriate. The findings also suggest the need to consider additional housing options, such as microunits or studio apartments, which could be more accessible financially to younger workers or those of retirement age. Considering the future needs of these groups, housing that will attract young professionals permanently to the area as well as more reasonably priced housing options for working families will be important for satisfying future residential demand. This additional housing stock would also help meet concerns that housing is currently too expensive in Norwalk.

Industry Analysis Overview

CERC also conducted an analysis of industry trends in the Norwalk region, including both Fairfield and New York counties¹⁸ separately and combined. The industry analysis examined various trends and key characteristics for every industry in the region to determine which industries should be the focus of economic development efforts.

An industry analysis matrix was developed to assess the key industries in Fairfield County and their performance. Each industry received a score based on the following criteria: 1) whether the industry showed a competitive edge within an industry segmentation analysis; 2) whether the employment location quotient was relatively high (i.e., how concentrated the industry was in the region as compared to the nation); 3) whether the industry's regional jobs as a share of U.S total jobs increased; 4) whether the industry's recent national job growth was greater than the U.S. average job growth; 5) whether the average income multiplier was greater than average for the state as a whole, meaning that an increase in income in that industry had a relatively large effect on the economy; 6) whether the employment multiplier was greater than average for the state as a whole, meaning that an increase in workers in that industry had a relatively large effect on the economy; and 7) whether the industry wage was greater than the state average wage. Depending on the scores received, the key regional industries were classified into one of three categories: growing industries with a strong Fairfield County presence; mature industries with a strong Fairfield-New York counties' presence; and potential attraction candidates. These three categories represent key industries that Norwalk should consider supporting.

Growing Industries with a Strong Fairfield County Presence: This group consists of those industries that already have a strong presence in Fairfield County (indicated by a location quotient greater than 1.1) and are growing nationally. For these industries, a development strategy can maintain Norwalk's reputation as an attractive area to locate and take advantage of their continued growth. This category includes the following industries:¹⁹

NAICS 454	<i>Nonstore Retailers</i>
NAICS 512	<i>Motion Picture and Sound Recording Industries</i>
NAICS 519	<i>Other Information Services</i>
NAICS 713	<i>Amusement, Gambling, and Recreation Industries</i>

Mature Industries with a Strong Fairfield County Presence: The industries in this group also have a strong presence in Fairfield County (indicated by a location quotient greater than 1.1) but have not seen job growth at the national level over the last 7 years. All of these industries had higher than average multipliers and wages, and strategies should be considered to determine what support these industries might need locally to maintain their presence. Industries in this category include:

NAICS 425	<i>Wholesale Electronic Markets and Agents and Brokers</i>
NAICS 511	<i>Publishing Industries (except internet)</i>
NAICS 515	<i>Broadcasting (except internet)</i>
NAICS 517	<i>Telecommunications</i>

¹⁸ New York County is coextensive with Manhattan.

¹⁹ Descriptions for each industry are included in the Results section later in this chapter. Detailed information on specific businesses in each NAICS category can be found in Appendix B.

Potential Attraction Candidates: This category includes industries that do not have a strong presence in Fairfield County (location quotient not greater than 1.1), but that scored relatively high in the other categories. One industry, Beverage and Tobacco Product Manufacturing, did not have a concentration in Fairfield County but scored high in all other categories, including a growing proportion of jobs in the region, good national growth, and higher than average wages and multipliers. The other industries listed below do not have a concentration in Fairfield County alone but do have a strong presence in the larger region that includes New York County. Since over 10% of workers commute from Norwalk to Manhattan, it is possible the skill set to support these industries exists in Norwalk, and the proximity to existing firms and workers may make them viable candidates to attract to the area. Norwalk should research these industries further to determine whether they are a good fit for the regional economy:

<i>NAICS 312</i>	<i>Beverage and Tobacco Product Manufacturing</i>
<i>NAICS 518</i>	<i>Data Processing, Hosting, and Related Services</i>
<i>NAICS 522</i>	<i>Credit Intermediation and Related Activities</i>
<i>NAICS 523</i>	<i>Securities, Commodity Contracts, and Other Financial Investments and Related Activities</i>
<i>NAICS 524</i>	<i>Insurance Carriers and Related Activities</i>
<i>NAICS 551</i>	<i>Management of Companies and Enterprises</i>

Priority Retention Targets: This category includes industries that have previously done well in the region, have a strong location quotient and employment, but have recently lost competitive share (as determined from the Segmentation Analysis in this chapter). A loss of competitive share means that regional growth was lower than would have been expected over a period of time. Further investigation may be warranted to understand what is driving the recent loss of competitive share and how Norwalk can support these industries.

<i>NAICS 445</i>	<i>Food and Beverage Stores</i>
<i>NAICS 519</i>	<i>Other Information Services</i>
<i>NAICS 541</i>	<i>Professional, Scientific and Technical Services</i>
<i>NAICS 562</i>	<i>Waste Management and Remediation Services</i>
<i>NAICS 621</i>	<i>Ambulatory Healthcare Services</i>
<i>NAICS 632</i>	<i>Nursing and Residential Care Facilities</i>
<i>NAICS 624</i>	<i>Social Assistance</i>

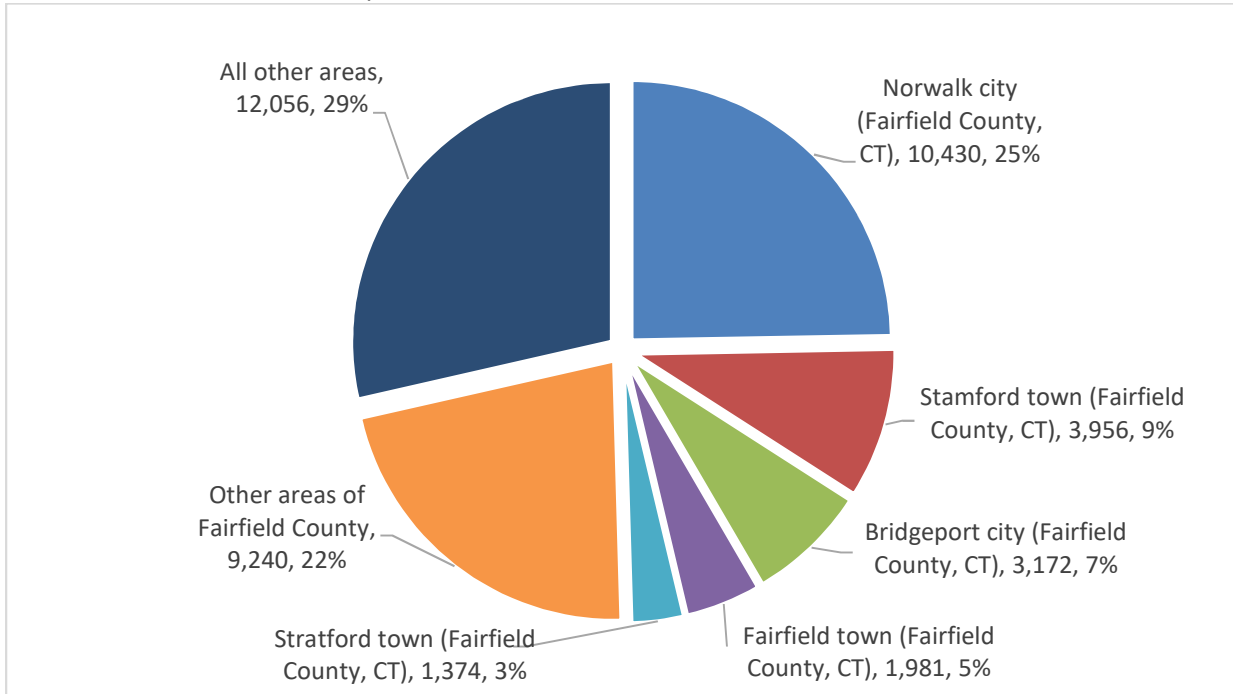
Market Area

The market area for Norwalk was identified by examining commuting patterns. These commuting patterns show where the majority of Norwalk residents travel for work and where the majority of employees who work in Norwalk live. This market area is used for the analyses that follow.

Of the roughly 42,200 employees that work in Norwalk, 25% also live in Norwalk, as seen in Figure 22. Almost 20,000 additional workers live elsewhere in Fairfield County, which means that over 71% of Norwalk workers live in the county and that 29% commuting from outside the county, including from Hartford and New York City.

Figure 22: Where Workers Live Who Are Employed in Norwalk, Connecticut

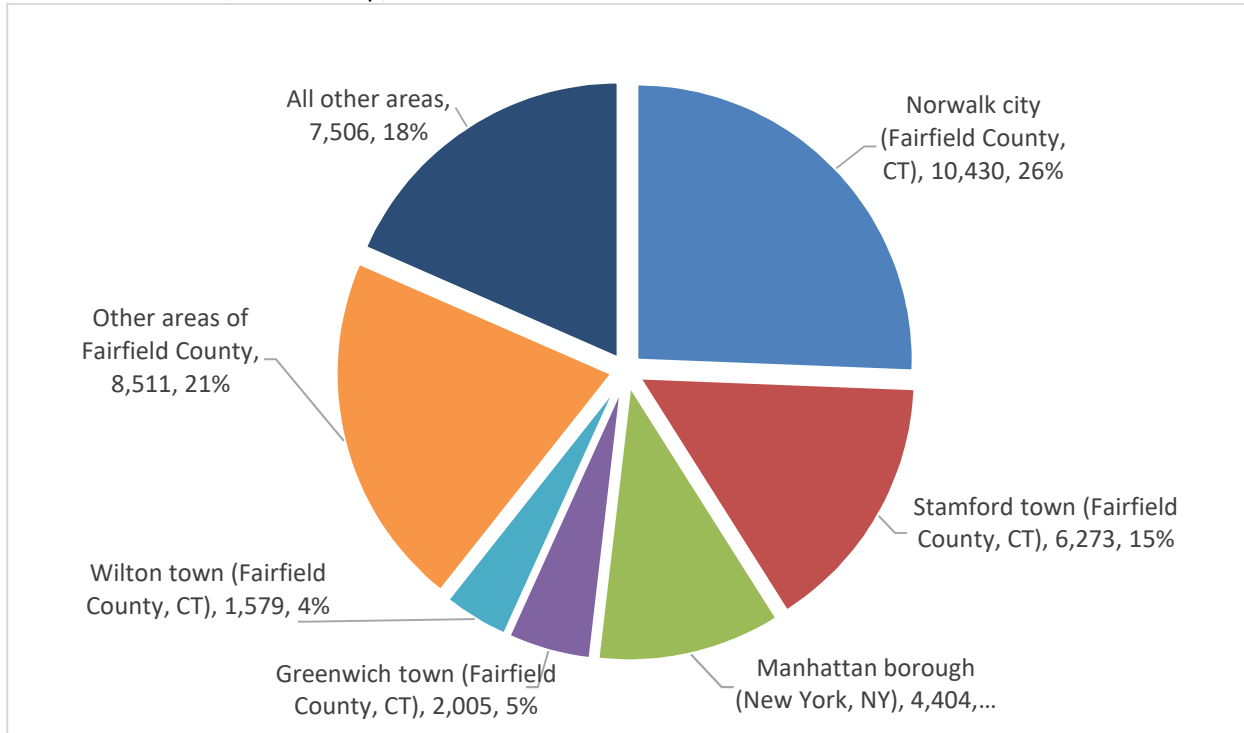
Source: US Census, On the Map, 2015



Of the 40,700 employed Norwalk residents, 26% (10,430 residents) who also work in the city (Figure 23). Another 15% work in Stamford and 11% commute to Manhattan. Almost 71% of all employed Norwalk residents work in Fairfield County.

Figure 23: Where Norwalk, Connecticut Residents Work

Source: US Census, On the Map, 2015



Based on these commuting patterns, two market areas were identified. One is Fairfield County, where the majority of Norwalk residents work and the majority of Norwalk workers live. Additionally, since a substantial number of Norwalk residents also commute to Manhattan for work, a second market area was identified that included both Fairfield County and New York County. In this report, two charts are shown for each indicator; the first one considering the “region” as Fairfield County and the second one considering the “region” as Fairfield County plus New York County. Using these two market areas helps determine what industries are strong in Fairfield County and which industries should be considered on the basis of Norwalk’s proximity to New York City.

Industry Analysis

Objective

The purpose of the industry analysis is to fully examine the regional economy by answering questions such as which industries are growing, which industries have a concentration in the region (and, thus, a regional specialization or advantage), and which industries provide higher wages both in the region and nationally. Those answers identify industries that have the greatest growth potential within the region and, thus, which industries city officials may consider targeting.

Methodology

Regional industries were assessed according to the following criteria, with each industry receiving one point for each “yes” answer. For the Industry Segmentation, the industry received one point for being identified as a current strength or an emerging strength.

Regional Industry Segmentation

1. Was the industry a current or emerging strength or high priority retention target according to the industry segmentation analysis described in the next section?

Regional Employment Concentration

2. Did the industry have a high relative employment concentration (location quotient) in the region?

Regional and National Employment Trends

3. Did the ratio of regional jobs as a portion of U.S total jobs in the industry increase since 2010?
4. Has the industry experienced positive job growth nationally since 2010?

Regional Multipliers

5. Was the industry’s employment multiplier²⁰ greater than the average of all the employment multipliers in the region?
6. Was the industry’s income multiplier²¹ greater than the average of all the income multipliers in the region?

Regional Wages

7. Was the industry’s average regional wage greater than the overall average regional wage?

Matrix Development

Each step in developing the matrix is explained briefly below, followed by the results of the analysis.

Regional Industry Segmentation. Regional economic drivers were identified through an industry segmentation analysis. For this analysis, all industries (defined using 3-digit NAICS codes) in the region were compared to the nation’s industries. The steps of the industry segmentation analysis included:

- Calculating relative employment concentration for each industry in the region for 2017;
- Calculating the absolute change in employment for each industry in the region from 2010 to 2017;
- Calculating the regional employment for each industry for 2017; and

²⁰ An employment multiplier indicates how important an industry is in regional job creation. An employment multiplier of 3 means that for every new “direct” job in that industry, two more jobs are created in other industries in that region (i.e., for a total of three jobs). Typically, these additional jobs include many “fractions” of jobs spread over many industries.

²¹ An income multiplier indicates the total amount of employee compensation paid out by employers as a result of an economic activity. An income multiplier of 1.5 means that for every dollar of compensation entered as a “direct effect” in a new scenario, an additional \$1.50 is paid out in wages, salaries, and other compensation throughout the economy in that region.

- Performing a shift-share analysis²² to determine each industry's competitive share.²³ If the competitive share component is positive, then the region's performance is not merely caused by national trends and a local advantage is helping the industry succeed.

After the calculations were complete, each industry was classified into one of the following categories:

1. Current Strengths have been able to develop a regional presence and thrive, as demonstrated by a relative employment concentration in the regional economy and recent growth.
2. Emerging Strengths have seen regional growth but there is not yet an employment concentration.
3. Priority Retention Targets have done well in the past in the region, but a recent loss of competitive share suggests the need for attention to stave off further decline.

For the Fairfield County market area, this process identified eleven industries as Current Strengths because they had high regional employment, a regional concentration, an increase in regional jobs, and a regional competitive advantage (Figure 24, on next page). Seven industries were identified as Emerging Strengths of Fairfield County, and seven industries were classified as Priority Retention Targets. Appendix C provides segmentation results for all industries for the Fairfield County market area.

²² Shift share analysis is a standard regional analysis method that determines how much regional job growth can be attributed to national trends and how much is due to unique regional factors. Shift share analysis helps answer why employment is growing or declining in a regional industry, cluster, or occupation. The source of this data was EMSI.

²³ Competitive share indicates how much of the change in a given industry is due to some unique competitive advantage that the region possesses, because the growth cannot be explained by national trends in that industry or the economy as whole.

Figure 24: Industry Segmentation Results for Fairfield County

Current Strength

•	425	Wholesale Electronic Markets and Agents and Brokers
•	446	Health and Personal Care Stores
•	453	Miscellaneous Store Retailers
•	485	Transit and Ground Passenger Transportation
•	511	Publishing Industries (except Internet)
•	512	Motion Picture and Sound Recording Industries
•	517	Telecommunications
•	611	Educational Services
•	713	Amusement, Gambling, and Recreation Industries
•	812	Personal and Laundry Services
•	814	Private Households

Emerging Strength

•	237	Heavy and Civil Engineering Construction
•	311	Food Manufacturing
•	323	Printing and Related Support Activities
•	452	General Merchandise Stores
•	711	Performing Arts, Spectator Sports, and Related Industries
•	721	Accommodation
•	722	Food Services and Drinking Places

Priority Retention Target

•	445	Food and Beverage Stores
•	519	Other Information Services
•	541	Professional, Scientific, and Technical Services
•	562	Waste Management and Remediation Services
•	621	Ambulatory Health Care Services
•	623	Nursing and Residential Care Facilities
•	624	Social Assistance

Limited Prospect (See Appendix C)

For the combined New York and Fairfield counties market area, this process identified fourteen industries as Current Strengths, twelve as Emerging Strengths, and six as Priority Retention Targets (Figure 25). Appendix D contains the full industry segmentation results for the combined New York and Fairfield counties market area.

Figure 25: Industry Segmentation Results for New York and Fairfield Counties

Current Strength

•	446	Health and Personal Care Stores
•	448	Clothing and Clothing Accessories Stores
•	512	Motion Picture and Sound Recording Industries
•	515	Broadcasting (except Internet)
•	518	Data Processing, Hosting, and Related Services
•	519	Other Information Services
•	522	Credit Intermediation and Related Activities
•	541	Professional, Scientific, and Technical Services
•	611	Educational Services
•	721	Accommodation
•	812	Personal and Laundry Services
•	813	Religious, Grantmaking, Civic, Professional, and Similar Organizations
•	814	Private Households
•	999	Unclassified Industry

Emerging Strength

•	236	Construction of Buildings
•	238	Specialty Trade Contractors
•	311	Food Manufacturing
•	425	Wholesale Electronic Markets and Agents and Brokers
•	445	Food and Beverage Stores
•	452	General Merchandise Stores
•	453	Miscellaneous Store Retailers
•	485	Transit and Ground Passenger Transportation
•	561	Administrative and Support Services
•	621	Ambulatory Health Care Services
•	713	Amusement, Gambling, and Recreation Industries
•	722	Food Services and Drinking Places

Priority Retention Target

•	523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities
•	524	Insurance Carriers and Related Activities
•	531	Real Estate
•	551	Management of Companies and Enterprises
•	711	Performing Arts, Spectator Sports, and Related Industries
•	712	Museums, Historical Sites, and Similar Institutions

Limited Prospect (See Appendix D)

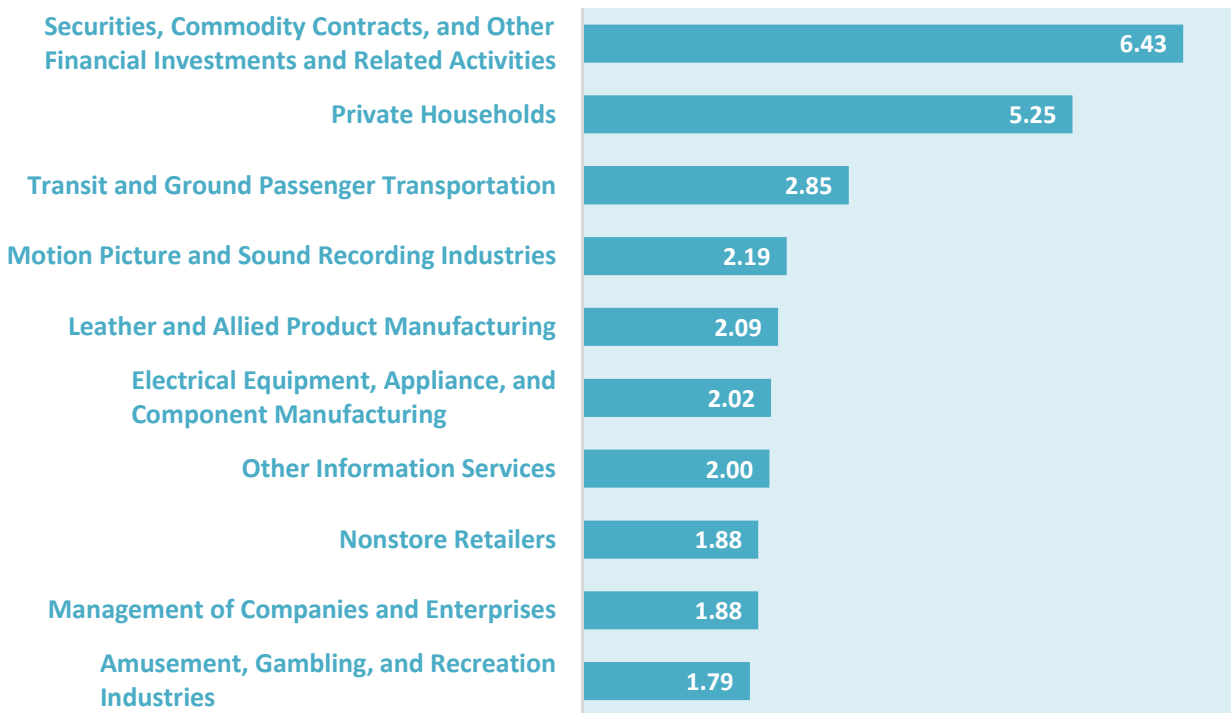
Regional Employment Concentration. Employment concentration shows which industries have regional employment levels that are higher than the U.S. average and provides a measure of the overall health of industries.

Concentration is typically measured through the location quotient (LQ), which is calculated by dividing the regional employment in an industry as a proportion of national employment in that industry by total regional employment as a proportion of total national employment. Thus, a LQ of 1.0 indicates that the industry in a region represents the same share of total regional employment as that industry represents at the national level, while an LQ above 1.1 is typically considered evidence of a regional concentration (and, thus, specialization or advantage) in that industry.

Thirty-four industries (as defined by 3-digit NAICS codes) in Fairfield County had LQs above 1.1 in 2017, indicating they were relatively concentrated compared to employment at the national level. The top ten industries by location quotient for Fairfield County are shown in Figure 26, with the top three industries related to securities, commodity contracts, and other financial investments and related activities; private households; and transit and ground passenger transportation.

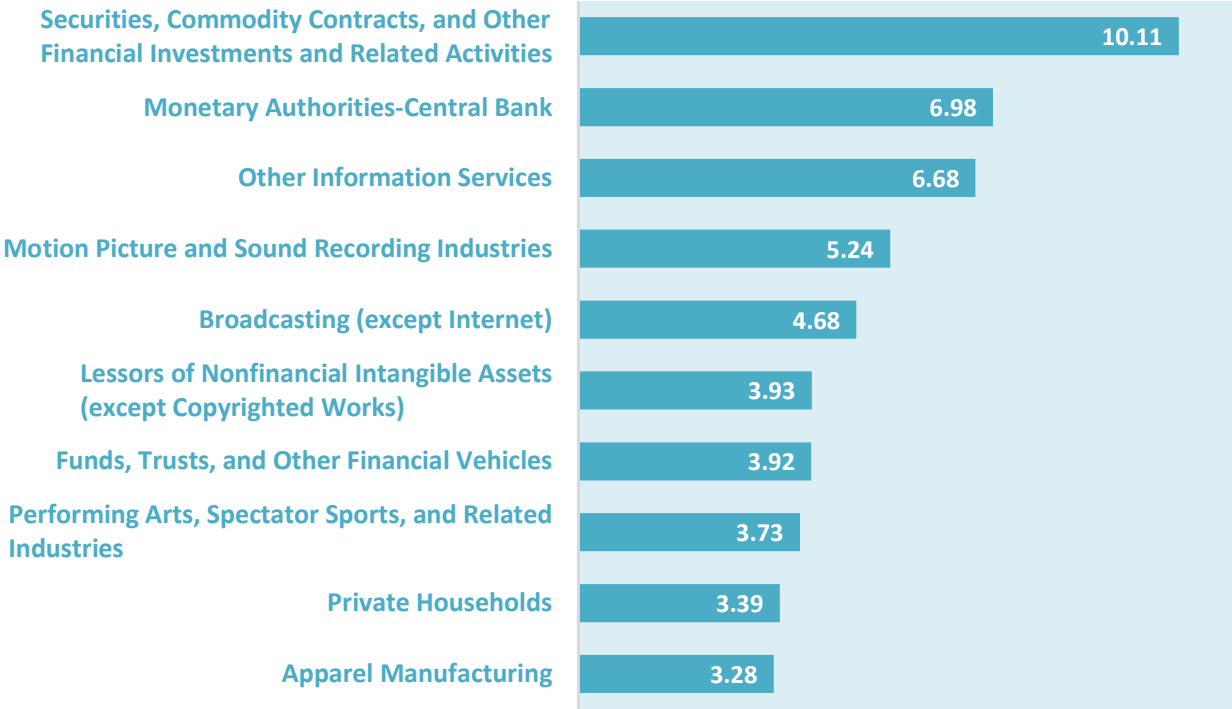
Figure 26: Top Ten Industries by Location Quotient for Fairfield County, 2017

Source: EMSI, with CERC calculations



For the larger market area of New York and Fairfield counties, 26 industries had a LQ greater than 1.1 in 2017, with the top ten listed below in Figure 27. Securities, Commodity Contracts, and other Financial Investments and Related Activities had the highest concentration in both geographies, while Private Households, Motion Picture and Sound Recording Industries, and Other Information Services also appeared in the top ten LQs for the larger market area.

Figure 27: Top Ten Industries by Location Quotient for New York and Fairfield Counties, 2017²⁴
 Source: EMSI, with CERC calculations



²⁴ Private Households refers to employees who are hired directly by a private individual or household rather than by a company. Examples may include nannies, housekeepers, groundskeepers, personal assistants, etc.

National Employment Trends. It is also useful to analyze national employment trends in order to understand larger economic changes that may affect the regional economy. Overall national growth or decline of an industry will also likely affect the region, so incorporating the direction of the industry’s share of national employment and whether the industry’s national employment growth is outpacing that of the U.S. overall helps identify industries with strong fundamentals nationwide. Figure 28 shows the top ten industries nationwide by job growth from 2010-2017. The fastest growing industry was Other Information Services, followed by Unclassified Industries then Warehousing and Storage.

Figure 28: Top Ten Industries Nationwide by Job Growth since 2010

Source: EMSI

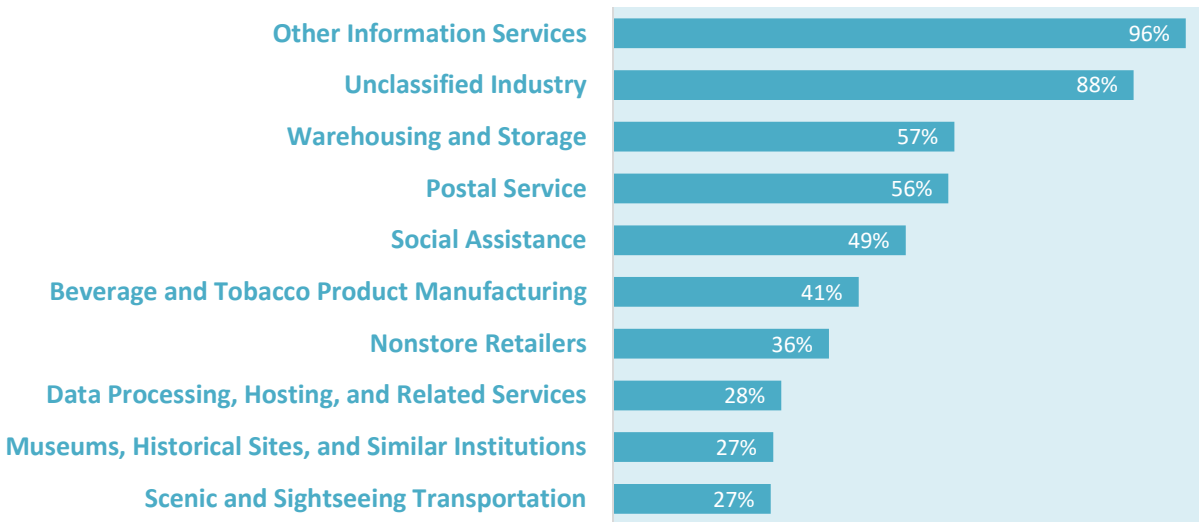


Figure 29 and Figure 30 show, for the two market areas, the top ten industries whose regional industry employment as a portion of the national employment in that same industry have grown the most. This means that the portion of jobs in the industry that are located in the subject region has increased. For Fairfield County (Figure 29), the industry with the largest increase from 2010-2017 was Private Households, followed by Motion Picture and Sound Recording Industries, and Transit and Ground Passenger Transportation. For New York and Fairfield Counties (Figure 30), Private Households also claimed the top spot, followed by Monetary Authorities-Central Bank, and Other Information Services.²⁵

²⁵ Please note that this chart examines the relative size of the regional employment compared to national employment in each industry, regardless of the overall size of the industry as a whole. As such, industries that have low employment nationally (such as Fishing, Hunting and Trapping; Rail Transportation; and Postal Service; which each have fewer than 10,000 employees nationally), may show up as fast-growing industries with what are, in absolute terms, relatively small increases in regional employment.

Figure 29: Top Ten Industries with the Largest Increase in Regional Employment as a Portion of National Employment, Fairfield County, 2010-2017

Source: EMSI, with CERC calculations

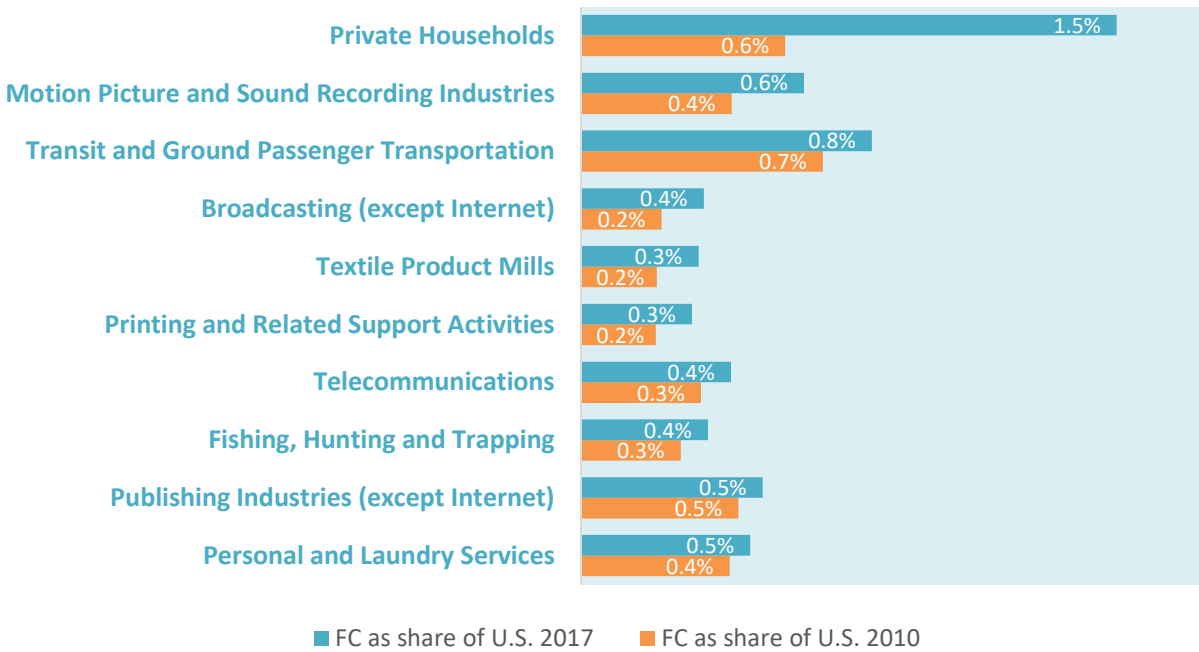
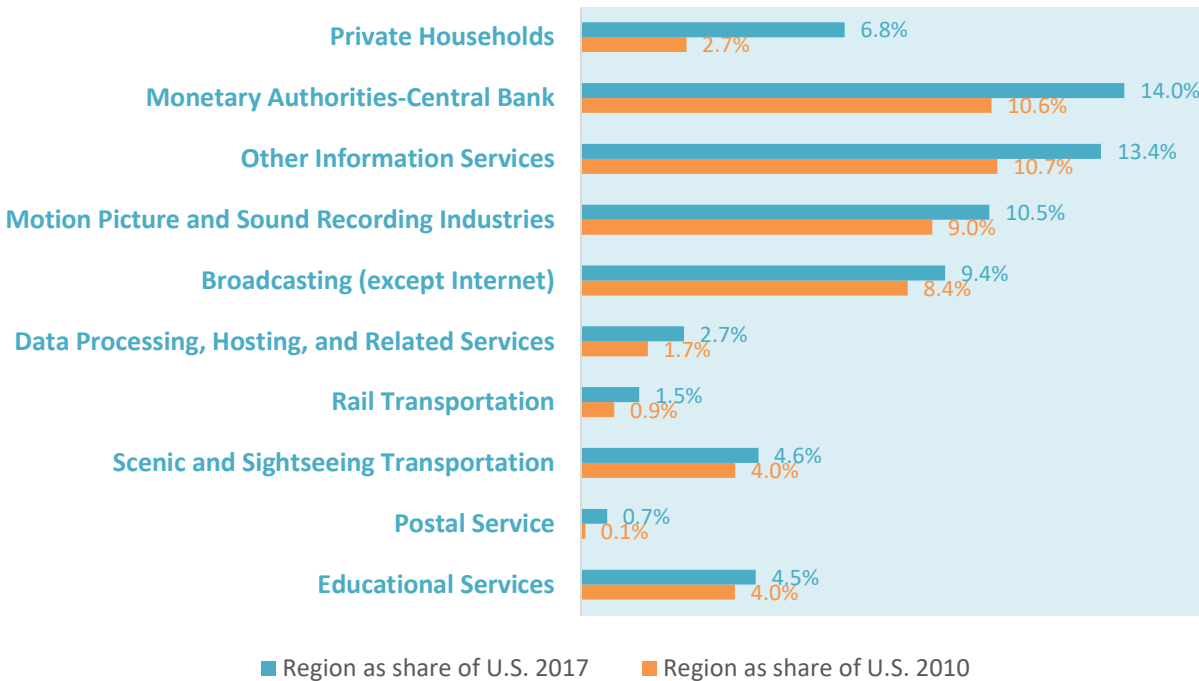


Figure 30: Top Ten Industries with the Largest Increase in Regional Employment as a Portion of National Employment, New York and Fairfield Counties, 2010-2017

Source: EMSI, with CERC calculations

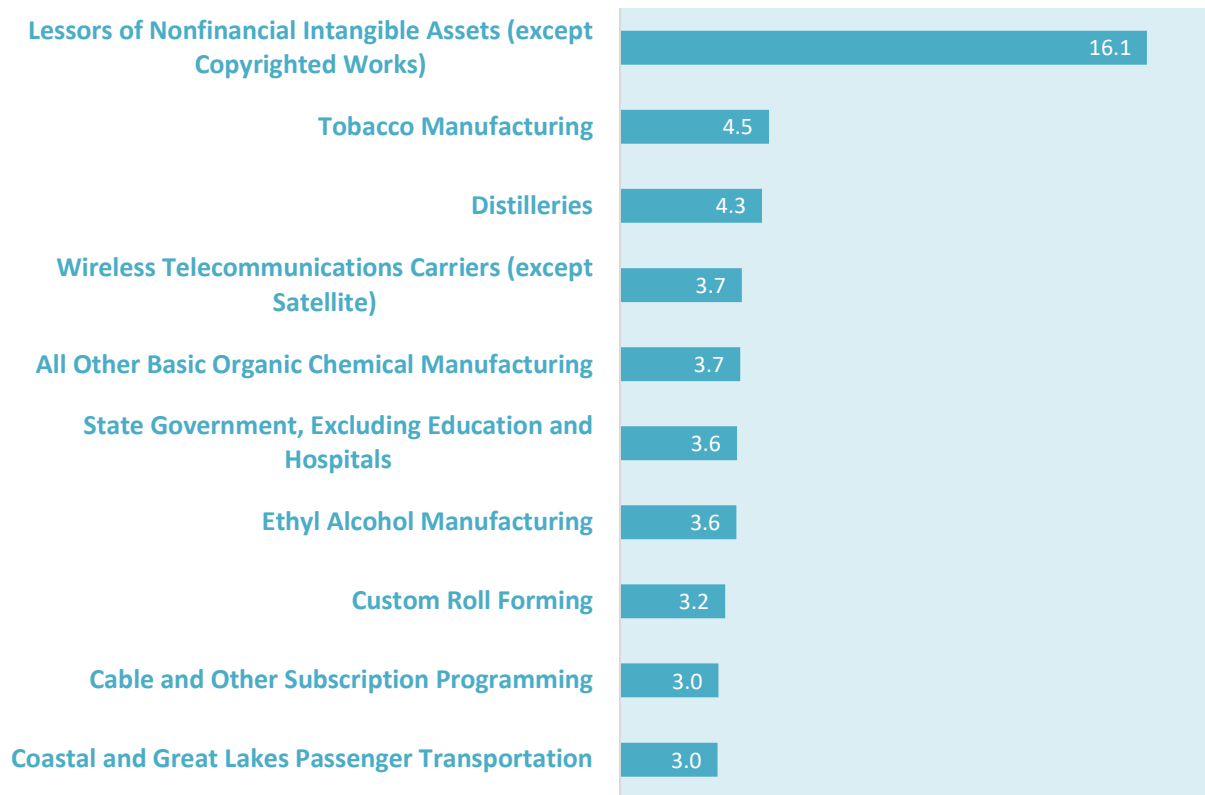


Regional Multipliers. Economic multipliers calculate the total effect of an economic change in a region. An employment multiplier, for example, estimates how the addition (or subtraction) of one job will affect employment in other industries in the region. New industry sales or employee earnings also create additional sales or earnings, respectively, in the regional economy.

Figure 31 lists the top industries in Fairfield County whose compensation has the greatest ripple effects in income through the regional economy. For instance, a per dollar increase in income in the Lessors of Nonfinancial Intangible Assets industry is likely to bring about a \$16.1 increase in local income.

Figure 31: Top Ten Industries in Fairfield County by Income Multipliers

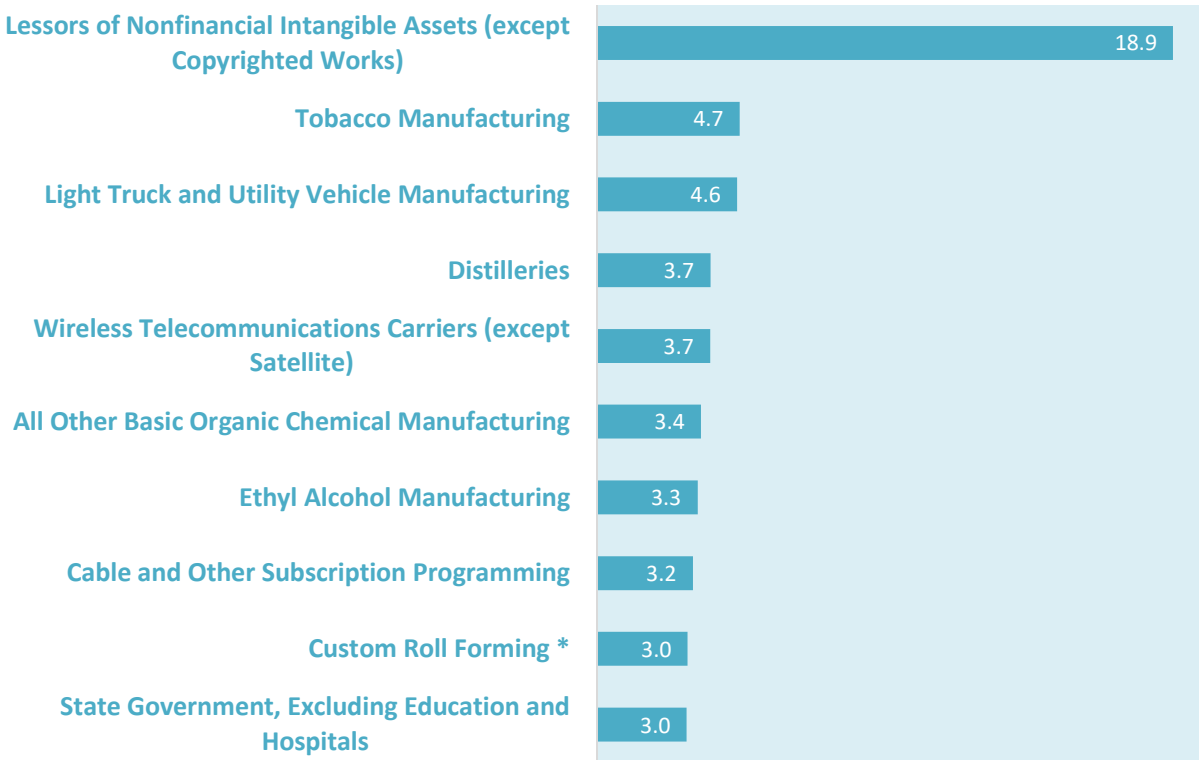
Source: EMSI



Similarly, Figure 32: Top Ten Industries in New York and Fairfield Counties by Income Multipliers Figure 32 shows the industries with the largest income multipliers in New York and Fairfield counties. Like Fairfield County, Lessors of Nonfinancial Intangible Assets tops the list, with Coastal and Great Lakes Passenger Transportation and Light Truck and Utility Vehicle Manufacturing as the only industries not appearing on both lists.

Figure 32: Top Ten Industries in New York and Fairfield Counties by Income Multipliers

Source: EMSI



* Custom Roll Forming involves bending and shaping metal products using rotary motion. Products include items such as gutters and sheet metal. This is a subcategory of the NAICS 332, Fabricated Metal Product Manufacturing classification.

Figure 33 lists the top industries whose job creation would lead to additional job creations in Fairfield County. For instance, every job created in the Other Financial Vehicles industry (e.g., mortgage real estate investment trusts or closed-end investment funds) is likely to generate about 25.2 jobs in Fairfield County.

Figure 33: Top Ten Industries in Fairfield County by Employment Multipliers

Source: EMSI

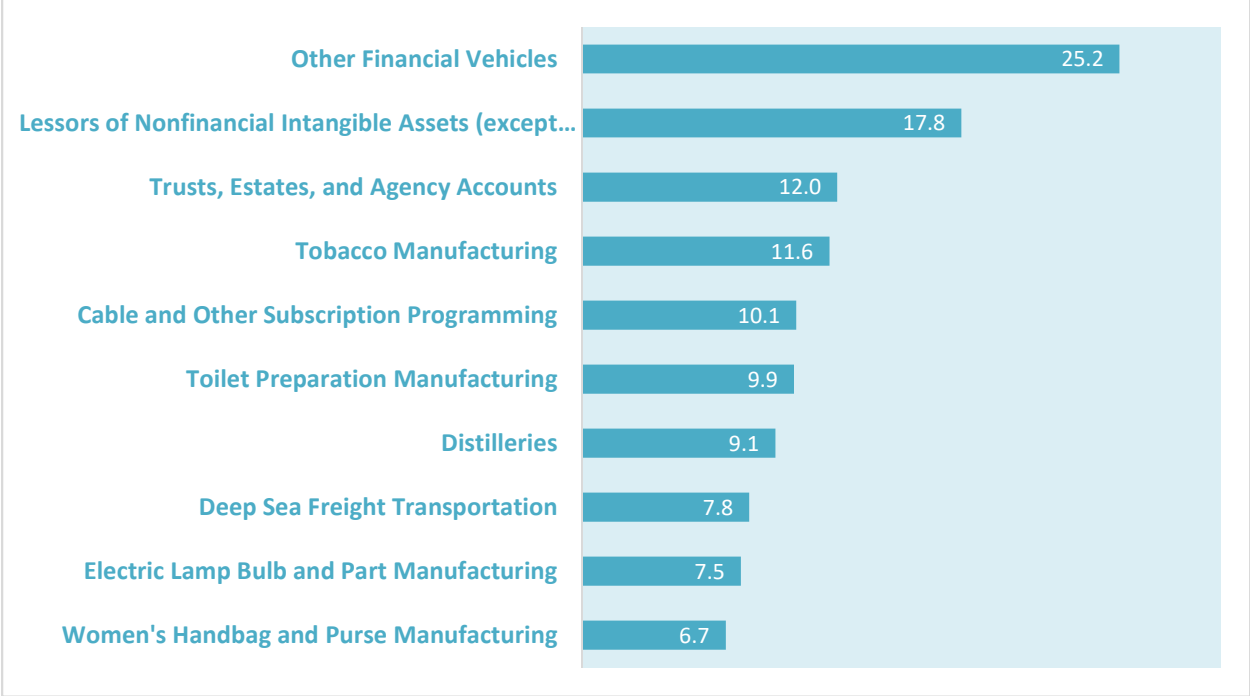
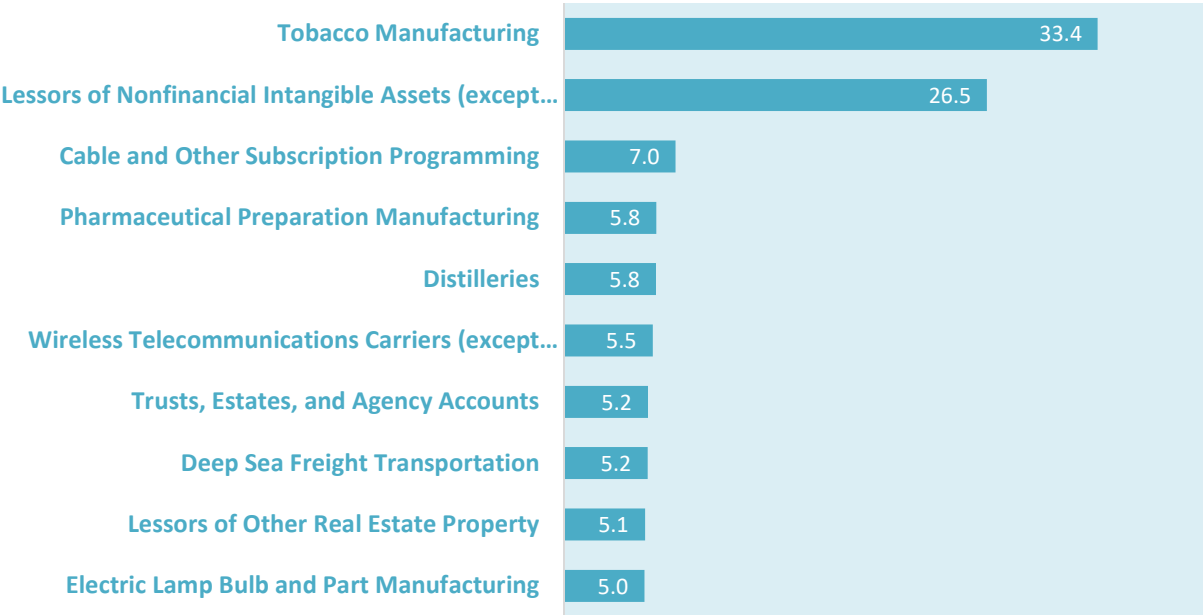


Figure 34 shows the employment multipliers for New York and Fairfield counties. While Other Financial Vehicles has the largest employment multiplier for industries within Fairfield County, Tobacco Manufacturing takes the top spot when combining New York and Fairfield counties. Toilet Preparation Manufacturing, Women’s Handbag and Purse Manufacturing, and Other Financial Vehicles all appeared in the top ten for Fairfield County but not in the larger New York and Fairfield counties, where they were replaced by Pharmaceutical Preparation Manufacturing, Wireless Telecommunications Carriers, and Lessors of Other Real Estate Property in the top ten list.

Figure 34: Top Ten Industries in New York and Fairfield Counties by Employment Multipliers

Source: EMSI



Regional Wages. To maintain and improve the local economy, it is desirable to have a wide range of well-paying jobs, especially in light of Connecticut’s higher average wages and more highly skilled residents (compared to the nation overall). Therefore, it is useful to compare average earnings in each industry to the overall average wage to identify which regional industries are producing higher paying jobs, which would attract or retain residents and allow them to consume additional goods or services. Figure 35 shows the top ten industries in Fairfield County by average annual wages and earnings in 2017, and Figure 36 shows the top ten for New York and Fairfield counties.

Figure 35: Top Ten Industries in Fairfield County by Average Annual Wages and Earnings

Source: EMSI

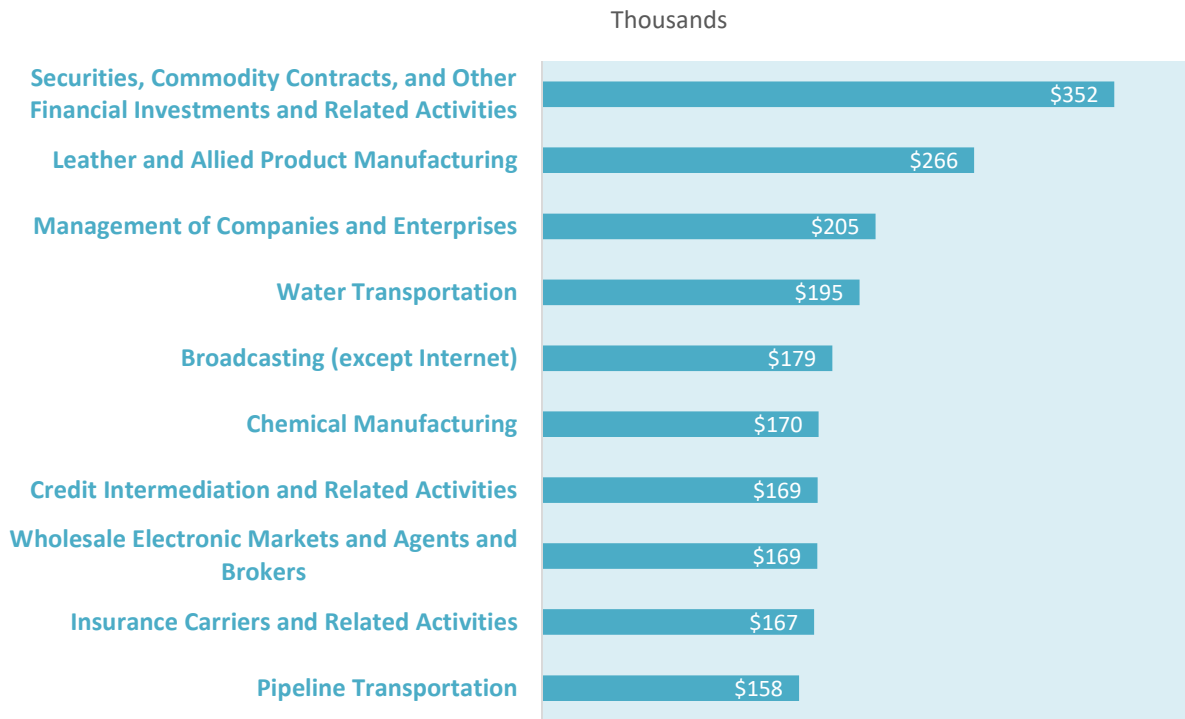
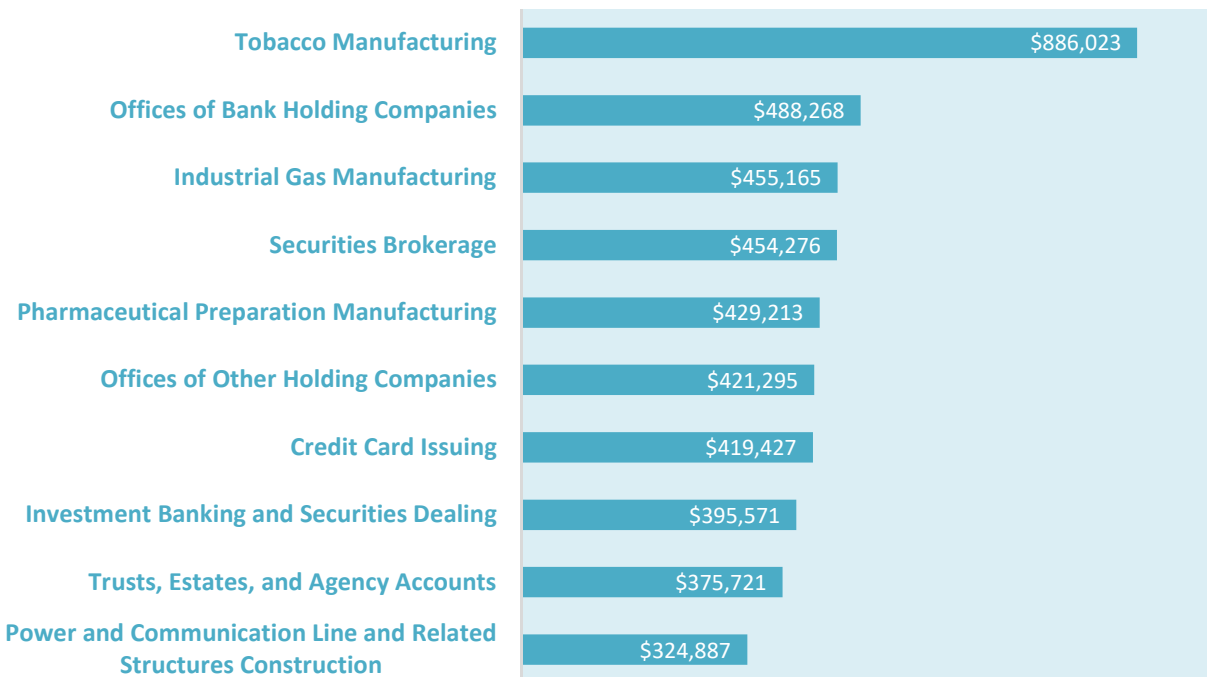


Figure 36: Top Ten Industries in New York and Fairfield Counties by Average Annual Wages and Earnings

Source: EMSI



Results

Key Regional Industries. The industry analysis below provides a comprehensive illustration of each industry’s performance. This analysis identified 19 industries that scored positively on at least five of the seven previously described criteria for at least one of the market areas examined (Figure 37). The complete industry analysis tables can be found in Appendices E and F.

Figure 37: Industry Analysis Results

NAICS Code	Industry Description	Region	Industry Segmentation	LQ>1.1 (2017)	Share of U.S. Jobs Increase (2010-17)	Recent U.S. Ind Growth > U.S. average	Employment Multiplier > Average	Income Multiplier > Average	Industry Wage > Regional Average
312	Beverage and Tobacco Product Manufacturing	Fairfield			Yes	Yes	Yes	Yes	Yes
425	Wholesale Electronic Markets and Agents and Brokers	New York and Fairfield	Emerging Strength		Yes		Yes	Yes	Yes
425	Wholesale Electronic Markets and Agents and Brokers	Fairfield	Current Strength	Yes	Yes		Yes	Yes	Yes
454	Nonstore Retailers	Fairfield		Yes		Yes	Yes	Yes	Yes
511	Publishing Industries (except Internet)	New York and Fairfield		Yes	Yes		Yes	Yes	Yes
511	Publishing Industries (except Internet)	Fairfield	Current Strength	Yes	Yes		Yes	Yes	Yes
512	Motion Picture and Sound Recording Industries	New York and Fairfield	Current Strength	Yes	Yes	Yes	Yes	Yes	
512	Motion Picture and Sound Recording Industries	Fairfield	Current Strength	Yes	Yes	Yes	Yes	Yes	Yes
515	Broadcasting (except Internet)	New York and Fairfield	Current Strength	Yes	Yes		Yes	Yes	Yes
515	Broadcasting (except Internet)	Fairfield		Yes	Yes		Yes	Yes	Yes
517	Telecommunications	Fairfield	Current Strength	Yes	Yes		Yes	Yes	Yes
518	Data Processing, Hosting, and Related Services	New York and Fairfield	Current Strength	Yes	Yes	Yes	Yes	Yes	Yes
518	Data Processing, Hosting, and Related Services	Fairfield			Yes	Yes	Yes	Yes	Yes
519	Other Information Services	New York and Fairfield	Current Strength	Yes	Yes	Yes	Yes	Yes	Yes
519	Other Information Services	Fairfield	Priority Retention Target	Yes		Yes	Yes	Yes	Yes
521	Monetary Authorities-Central Bank	New York and Fairfield		Yes	Yes		Yes	Yes	Yes
522	Credit Intermediation and Related Activities	New York and Fairfield	Current Strength	Yes	Yes		Yes	Yes	Yes
523	Securities, Commodity Contracts, and Other Financial In	New York and Fairfield	Priority Retention Target	Yes		Yes	Yes		Yes
524	Insurance Carriers and Related Activities	New York and Fairfield	Priority Retention Target	Yes		Yes	Yes	Yes	Yes
525	Funds, Trusts, and Other Financial Vehicles	New York and Fairfield		Yes	Yes		Yes	Yes	Yes
531	Real Estate	New York and Fairfield	Priority Retention Target	Yes		Yes	Yes	Yes	
541	Professional, Scientific, and Technical Services	New York and Fairfield	Current Strength	Yes	Yes	Yes			Yes
551	Management of Companies and Enterprises	New York and Fairfield	Priority Retention Target	Yes		Yes	Yes		Yes
713	Amusement, Gambling, and Recreation Industries	Fairfield	Current Strength	Yes	Yes	Yes		Yes	
721	Accommodation	New York and Fairfield	Current Strength	Yes	Yes	Yes		Yes	

Categorization. The key industries sharing similar features are further organized into three groups. This practice helps better evaluate the potential of the industries in Norwalk and customize a development strategy for each group. The categorization is explained in detail below.

Growing Industries with a Strong Fairfield County Presence: This group consists of those industries that already have a strong presence in Fairfield County (indicated by a location quotient greater than 1.1), and which are growing nationally. For these industries, a development strategy can ensure that Norwalk continues to be an attractive area to locate and take advantage of continued growth. This category includes the following industries:

NAICS 454 Nonstore Retailers. This consists of retail sales through non-store methods, such as home delivery, vending machines, electronic shopping, portable stalls, infomercials, etc. This includes companies such as Devine Bros.

NAICS 512 Motion Picture and Sound Recording Industries. These establishments are involved in activities such as contracting with performers, creating the film or sound content, and providing technical postproduction services. This includes companies such as Factory Underground and the Wall Street Theater.

NAICS 519 Other Information Services. These companies supply, store, and provide access to information, operate search engine websites, or publish and/or broadcast content exclusively on the Internet. The main components of the subsector are news syndicates, libraries, archives, exclusive Internet publishing and/or broadcasting, and Web Search Portals.

NAICS 713 Amusement, Gambling, and Recreation Industries. These companies operate facilities where patrons can primarily engage in sports, recreation, amusement, or gambling activities, or supply and service amusement devices in places of business operated by others. Sports teams, clubs, or leagues engaged in playing games for recreational purposes and guided tours without transportation equipment also fall into this category.

Mature Industries with a Strong Fairfield County Presence: The industries in this group also have a strong presence in Fairfield County (indicated by a location quotient greater than 1.1), but have not seen job growth at the national level over the last seven years. All of these industries had higher than average multipliers and wages, and strategies should be considered to determine what support these industries might need locally to maintain their presence. Industries in this category include:

NAICS 425 Wholesale Electronic Markets and Agents and Brokers. This subsector contains agents and brokers as well as business to business electronic markets that facilitate wholesale trade, or who facilitate the sale of goods owned by others.

NAICS 511 Publishing Industries (except internet). These companies are engaged in the publishing of newspapers, magazines, other periodicals, and books, as well as directory and mailing list and software publishing.

NAICS 515 Broadcasting (except internet). This category includes companies that create content or acquire the right to distribute content and subsequently broadcast the content, typically for over the air or satellite delivery of radio and television programs of entertainment, news, talk, and the like. Connecticut Public Television is one example of a company in this industry.

NAICS 517 Telecommunications. This subsector is primarily engaged in operating, and/or providing access to facilities for the transmission of voice, data, text, sound, and video.

Potential Attraction Candidates: This category includes industries that don't have a strong presence in Fairfield County (location quotient not greater than 1.1), but that scored high in the other categories. One industry, Beverage and Tobacco Product Manufacturing, did not have a concentration in Fairfield County but scored high in all of the other categories, including a growing proportion of jobs in the region, good national growth, and higher than average wages and multipliers. The remaining industries do not have a concentration in Fairfield County alone but do have a strong presence in the larger region that includes New York County. Since over 10% of workers commute from Norwalk to Manhattan, it is possible the skill set to support these industries exists in Norwalk, and the proximity to existing firms and workers may make them viable candidates to attract to the area. Norwalk should research these industries further to determine whether they are a good fit for the regional economy:

NAICS 312 Beverage and Tobacco Product Manufacturing. Beverage Manufacturing includes three types of establishments: (1) those that manufacture nonalcoholic beverages; (2) those that manufacture alcoholic beverages through the fermentation process; and (3) those that produce distilled alcoholic beverages. Ice manufacturing, while not a beverage, is included with nonalcoholic beverage manufacturing because it uses the same production process as water purification. Tobacco Manufacturing includes two types of establishments: (1) those engaged in redrying and stemming tobacco and, (2) those that manufacture tobacco products, such as cigarettes and cigars.

NAICS 518 *Data Processing, Hosting, and Related Services. These companies provide the infrastructure for hosting and/or data processing services.*

NAICS 522 *Credit Intermediation and Related Activities. This industry group includes companies that (1) lend funds raised from depositors; (2) lend funds raised from credit market borrowing; or (3) facilitate the lending of funds or issuance of credit by engaging in such activities as mortgage and loan brokerage, clearinghouse and reserve services, and check cashing services.*

NAICS 523 *Securities, Commodity Contracts, and Other Financial Investments and Related Activities. This group of companies is engaged in (1) underwriting securities issues and/or making markets for securities and commodities; (2) acting as agents (i.e., brokers) between buyers and sellers of securities and commodities; (3) providing securities and commodity exchange services; and (4) providing other services, such as managing portfolios of assets; providing investment advice; and trust, fiduciary, and custody services.*

NAICS 524 *Insurance Carriers and Related Activities. Companies in this category (1) underwrite (assuming the risk, assigning premiums, and so forth) annuities and insurance policies or (2) facilitate such underwriting by selling insurance policies, and by providing other insurance and employee-benefit related services.*

NAICS 551 *Management of Companies and Enterprises. This sector comprises (1) establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision-making role of the company or enterprise.*

Priority Retention Targets: This category includes industries that have previously done well in the region, have a strong location quotient and employment, but have recently lost competitive share (as determined from the Segmentation Analysis in this chapter). A loss of competitive share means that regional growth was lower than would have been expected over a period of time. Further investigation may be warranted to understand what is driving the recent loss of competitive share and how Norwalk can support these industries.

NAICS 445 *Food and Beverage Stores. This industry encompasses those businesses engaged in the retail sale of food and beverages.*

NAICS 519 *Other Information Services. Industries in this group include establishments supplying information, storing and providing access to information, searching and retrieving information, operating Web sites that use search engines to allow for searching information on the Internet, or publishing and/or broadcasting content exclusively on the Internet. The main components of the subsector are news syndicates, libraries, archives, exclusive Internet publishing and/or broadcasting, and Web search portals. Examples in the study area include the Norwalk Main Library.*

NAICS 541 *Professional, Scientific and Technical Services. These companies are engaged in processes where human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client.*

NAICS 562 Waste Management and Remediation Services. These companies collect, treat, and dispose of waste materials.

NAICS 621 Ambulatory Healthcare Services. These businesses provide outpatient care services, and include doctors, dentists, medical and diagnostic labs, and other similar services.

NAICS 623 Nursing and Residential Care Facilities. These facilities provide residential care combined with either nursing, supervisory, or other types of care.

NAICS 624 Social Assistance. These companies provide social services to their clients, and includes activities such as individual and family services, community food and housing, emergency and other relief services, vocational rehabilitation services, and child day care services.

Norwalk Anchor Industries. In addition to the industries that emerged as part of the regional analysis above, the City of Norwalk has identified four key clusters that have a strong presence or constitute large anchor institutions within the city and deserve special mention. These clusters are healthcare, science, design, and technology. While the analysis above cannot be conducted on a city-level basis due to data availability, it is important to understand how these key clusters are performing regionally and nationally, which may impact their regional presence now and in the future. Based on the analysis above, the healthcare industry would include NAICS 621, Ambulatory Healthcare Services, NAICS 622, Hospitals, and NAICS 623, Nursing and Residential Care Facilities; while science, design and technology are subcategories within NAICS 541, Professional, Scientific, and Technical Services.

Ambulatory Healthcare Services (NAICS 621) scored a 3 in the analysis above, for having a strong presence in Fairfield County, for strong growth nationally, and for being a “priority retention target” in the segmentation analysis. However, the industry was weaker in the categories of employment and income multipliers, and wages were lower than average for the Fairfield County region. So, although the ripple effects on the economy from growth in this industry may not be as strong as with other types of businesses, the Ambulatory Healthcare Services industry is strong and growing, and could continue to be an important anchor in Norwalk in the coming years. The potential conversion of the former YMCA site into medical offices would be supported by this industry trend.

A second healthcare-related industry, *Hospitals (NAICS 622)*, scored a 1 in the analysis above, for having an employment multiplier higher than average for the region (i.e., job growth in this industry results in additional job creation at a level higher than is typical). While hospitals did not score high in the other categories, Norwalk Hospital and Yale-New Haven Children’s Hospital remain key anchors in Norwalk, and their presence contributes to strong growth in other healthcare-related industries. Similarly, *Nursing and Residential Care Facilities (NAICS 623)* scored a 2 for a strong presence in Fairfield County and for being a Priority Retention Target.

Together, Ambulatory Healthcare Services, Hospitals, and Nursing and Residential Care Facilities create an important healthcare cluster in Norwalk. These three industries comprise over 49,700 jobs in Fairfield County as of 2017.²⁶

²⁶ County-level employment data is from EMSI.

In the areas of science, design and technology, *Professional, Scientific, and Technical Services (NAICS 541)* scored a 4 in Fairfield County, but scored higher in the combined New York and Fairfield counties region. These professions are high-paying, growing nationally, and have a strong presence in Fairfield County, as well as being considered a Priority Retention Target from the segmentation analysis. Like Ambulatory Healthcare Services, this industry scored lower in terms of the employment and income multipliers for Fairfield County. This industry accounted for just under 30,000 jobs in Fairfield County as of 2017,²⁷ and the strong presence in Fairfield County may indicate that favorable conditions, such as a skilled labor pool or strong market demand, exist for this industry's success. The growth at the national level means that with the right support, the industry could continue to be a key segment of the Norwalk economy.

²⁷ County-level employment data is from EMSI.

Retail Analysis

A retail sales analysis utilizes consumer expenditure data to determine whether an area is over- or under-served by different categories of retail establishments.

A retail sales surplus, where retail sales are higher than what would be anticipated given the local population, indicates that the area is attracting a consumer base beyond residents. A surplus essentially represents a draw of individuals living outside the respective geography to the location because of an existing retail advantage. Developing complementary industries to those with a consumer surplus can be a good economic development strategy for a city.

On the other hand, a sales leakage means demand for goods and services is not being met locally and so residents are shopping for goods and services elsewhere. There can be a number of reasons for sales leakage; for example, it could mean that there is a very strong competitor in a nearby area. However, areas of sales leakage often represent retail industries where there is opportunity to capture consumer expenditure that is leaving the area and to capitalize on a mismatch of demand and supply.

Once retail opportunities are identified, an area can target retailers to determine if their site selection criteria match the demographics of the community and identify where those retailers could locate if there is a match.

The following data provides a retail market profile for areas within a certain radius of the Wall Street-West Avenue Redevelopment Area. The Leakage/Surplus Index indicates the relative strength of the retail gap, from +100 (total leakage) to -100 (total surplus).

Convenience Retail (1-mile Trade Area)

The area within a one-mile radius is the domain of convenience retail. These are goods and services for which customers are not willing to travel very far. Shops such as convenience stores, pharmacies, small grocery, coffee shops, and the like tend to be smaller and rely on local traffic to support their enterprise.

Figure 38: Wall Street- West Avenue Redevelopment Area; 1-mile radius



The area within a one mile radius of the Wall Street-West Avenue Redevelopment Area encompasses a population of 24,831, or 9,858 households. The median disposable household income was \$46,456 as of 2018, and per capita income was \$32,239.²⁸

As can be seen in Figure 39, within a one-mile radius of the study area, ten retail segments experience surplus, where supply exceeds the area’s demand. Within these broad categories, most sub-groups also have a surplus, meaning greater spending in the area than would be anticipated given the population. These sub-categories include specialty food stores, beer, wine and liquor stores, and book, periodical and music stores.

Four retail categories currently experience a sales leakage, presenting an opportunity to capture demand in these markets. Of these, the category most relevant to the convenience trade area is Food and Beverage Stores, which exhibits a gap (expected demand higher than supply) of approximately \$18 million per year.²⁹ It should also be noted that additional housing development in the immediate area would increase demand for convenience-oriented retail, which may allow for additional establishments to be supported.

Figure 39: Wall Street- West Avenue Redevelopment Area Retail Profile; 1-mile radius³⁰

Source: ESRI, 2018

Retail Gap Index (+ Leak -Surplus)

1-mile radius



²⁸ ESRI Retail MarketPlace Profile for Wall Street-West Avenue Redevelopment Area.

²⁹ While the other three categories of General Merchandise Stores, Furniture and Home Furnishings Stores, and Clothing and Accessories Stores have leakage within this geography, those types of stores tend to be less convenience-oriented and generally have a larger trade area than 1 mile.

³⁰ Retail gap data for subcategories are not included in the figures. Please refer to retail marketplace profile in the Appendix.

Neighborhood Retail (3-mile Trade Area)

This geography, encompassing a 3-mile ring surrounding the study area, includes a population of 93,508 comprising 35,605 households, with a median disposable household income of \$60,897 and a per capita income of \$45,477.³¹ Retail that typically has a trade area in this 3-mile range includes larger grocery and drug stores, discount stores, and general merchandise, apparel, electronics, home goods, and sporting goods stores.

Figure 40: Wall Street- West Avenue Redevelopment Area; 3-mile radius

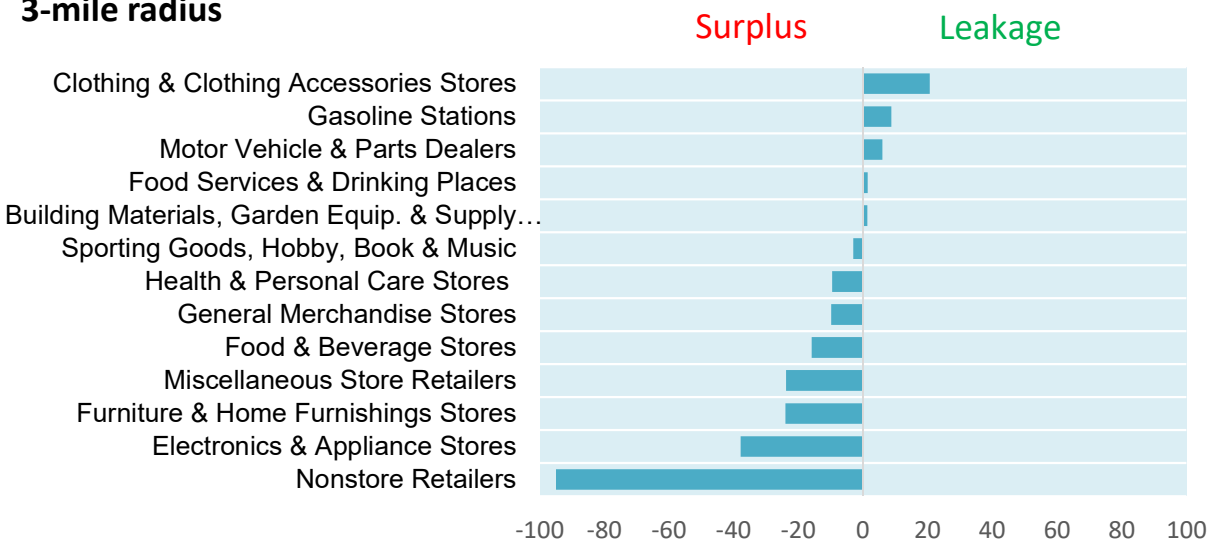


Within 3 miles of the study area, categories that experience leakage include Clothing and Clothing Accessories Stores (\$46 million in leakage, primarily in the subcategory of shoe stores), Gasoline Stations (\$22 million), Motor Vehicle and Parts Dealers (\$37 million), Food Services and Drinking Places (\$5 million, consisting primarily of restaurant and eating places), and Building Materials, Garden Equipment and Supply Stores (\$3 million; Figure 41). These categories are consistent with those that would typically be found in a moderately-sized community shopping center.

Figure 41: Wall Street- West Avenue Redevelopment Area Retail Profile; 3-mile radius;

Source: ESRI, 2018

Retail Gap Index (+ Leak -Surplus) 3-mile radius



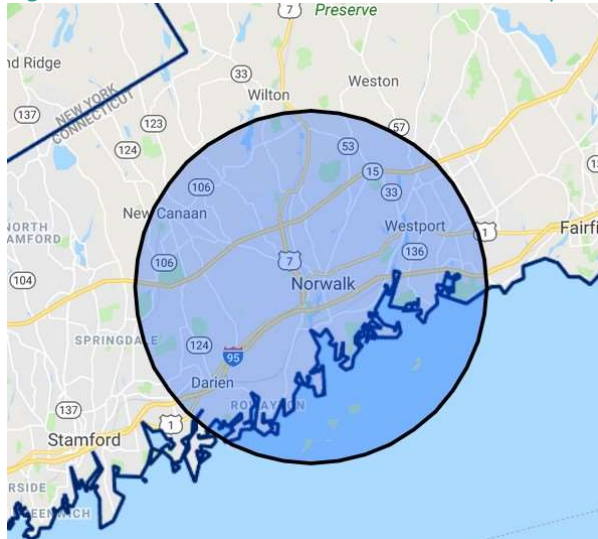
³¹ ESRI Retail MarketPlace Profile for Wall Street-West Avenue Redevelopment Area.

Conversely, there are several categories in this geographic range that have a significant surplus, meaning the overall retail sales exceed the expected demand for the area, so shoppers are being drawn from outside the region. These categories include Electronics and Appliance Stores, Furniture and Home Furnishings, Food and Beverage Stores, General Merchandise Stores, and Miscellaneous Store Retailers.

Community/Regional Retail (5-mile Trade Area)

The largest trade area examined (5 miles) encompasses a population of 139,967, or 52,168 households, with a 2018 median disposable household income of \$76,125 and a per capita income of \$59,967.³² This larger trade area is appropriate for lifestyle or specialty centers, power centers, or city centers. Anchor retailers located in these centers typically include larger specialty and destination stores such as automobile dealers, furniture stores, warehouse clubs, outlets, fashion, and the like.

Figure 42: Wall Street- West Avenue Redevelopment Area; 5-mile radius



In this larger trade area there is retail leakage in the categories of Building Materials, Garden Equipment and Supply Stores (\$79 million), Motor Vehicle Parts and Dealers (\$177 million, primarily in the automobile dealers subcategory), and General Merchandise Stores (\$116 million, primarily in the department stores subcategory), which may represent opportunities for large, well-anchored destination shopping (Figure 43). Conversely, there is a surplus in categories such as Health and Personal Care Stores, Miscellaneous Store Retailers, Furniture and Home Furnishings Stores, Electronics and Appliance Stores, and Sporting Goods, Hobby, Book and Music Stores.

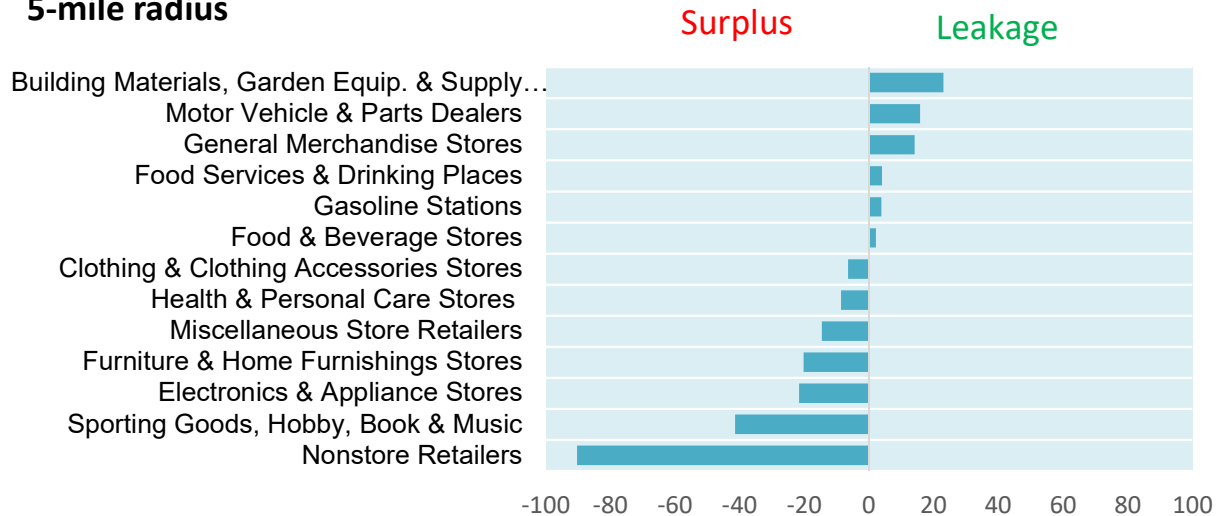
³² ESRI Retail MarketPlace Profile for Wall Street-West Avenue Redevelopment Area.

Figure 43: Wall Street- West Avenue Redevelopment Area Retail Profile; 5-mile radius;

Source: ESRI, 2018

Retail Gap Index (+ Leak -Surplus)

5-mile radius



It should be noted that Norwalk currently has one of the few malls nationwide that is newly under construction. SoNo Collection, scheduled to open by 2019, will feature over 675,000 square feet of retail space, including Nordstrom’s and Bloomingdale’s; 58,000 square feet of restaurant space, and over 3000 parking spaces, and is expected to have a large, regional draw. As such, the existing retail leakage in categories of General Merchandise stores, Clothing and Clothing Accessories stores, and Food and Beverage stores will decrease significantly or shift to a surplus as shoppers from outside the immediate area will likely be drawn to the new mall. Furthermore, the mix of street-level activity that may be feasible for the Wall Street-West Avenue Neighborhood may be impacted by this upcoming shift in nearby retail patterns.

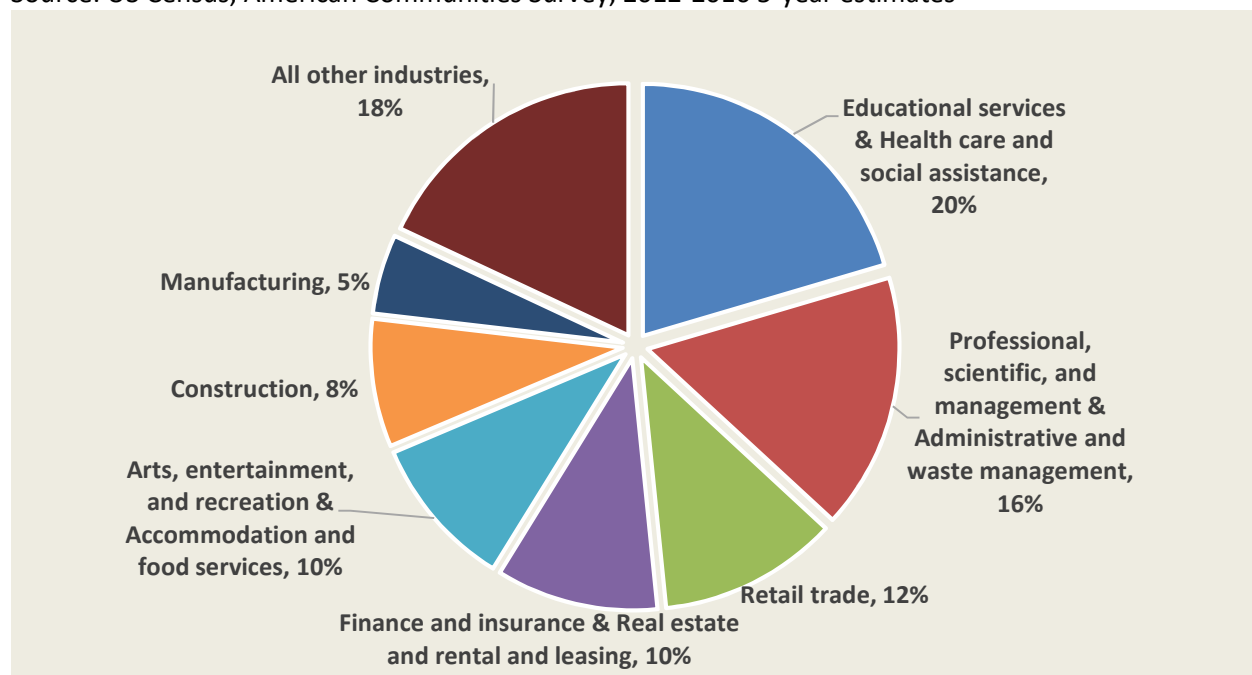
That said, REIS indicated in their 3rd Quarter 2018 “Retail First Glance” report that nationwide, vacancy rates at both malls and neighborhood and community shopping centers are in the 9-10% range, and store closures continue. Fairfield County, notably, was among the 5 metro areas with the largest declines in rental rates year-over-year as well as the largest decrease in retail employment in the last 12 months. While most retail sectors continue to shrink, restaurants and e-commerce businesses increased their employment in many metro areas, and were the fastest growing retail sectors nationwide. Companies backfilling vacated retail space include gyms, grocery stores, trampoline parks, and furniture stores, as well as non-retail businesses such as self-storage.

Economic and Employment Analysis

To understand what development might suit an area, it is also helpful to understand the existing industry and employment trends and characteristics. In Norwalk, the largest portion of residents are employed in Educational services and Health care and social assistance industries (20%), followed by Professional, scientific, and management industries and in Administrative and waste management Services (16% of residents) and retail trade (12% of residents; Figure 44). Finance and insurance along with Real estate rental and leasing employ 10% of residents, as does Arts, entertainment, and recreation combined with Accommodation and food services.

Figure 44: Norwalk Employment by Industry

Source: US Census, American Communities Survey, 2012-2016 5-year estimates



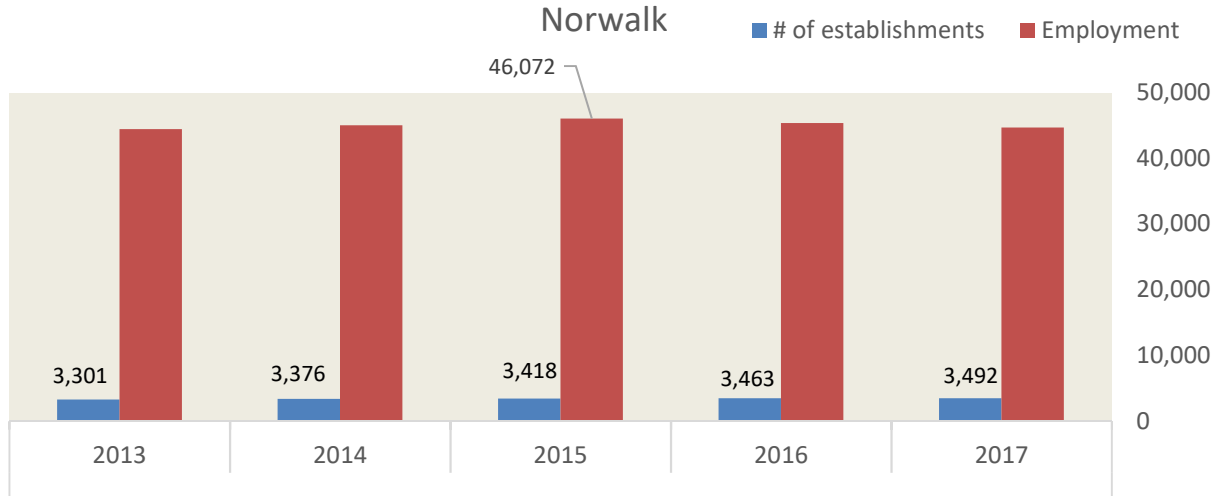
Overall, Norwalk's employment profile is similar to the profiles of Fairfield County and Connecticut, with most categories falling within two percentage points of each other. The largest exception is Educational services and Health care and social assistance. While this is the largest category in both Norwalk and Connecticut, Norwalk's share of total employed residents is lower than the 27% employed in this sector statewide. Conversely, Norwalk has more residents employed in Professional, scientific, and management and Administrative and waste management industries than the state, at 16% compared to 12% statewide. Norwalk also has notably lower Manufacturing employment than the state or Fairfield County, with only 5% of Norwalk residents employed in this industry as opposed to 8% in Fairfield County and 11% statewide.

The number of business establishments in Norwalk has grown consistently over the last five years, although total employment declined between 2015 and 2017 by approximately 1.5% per year (Figure 45). The numbers of businesses in Fairfield County and Connecticut have also been growing at similar rates, between 1% to 2% per year, and while Fairfield County employment declined between 2016 and 2017, Connecticut's total employment continued to increase, albeit more slowly than in the years

immediately prior. Similarly, the overall labor force in all three geographies declined from 2011 to 2013 but then rose through 2017.

Figure 45: Norwalk Total Employment and Number of Establishments

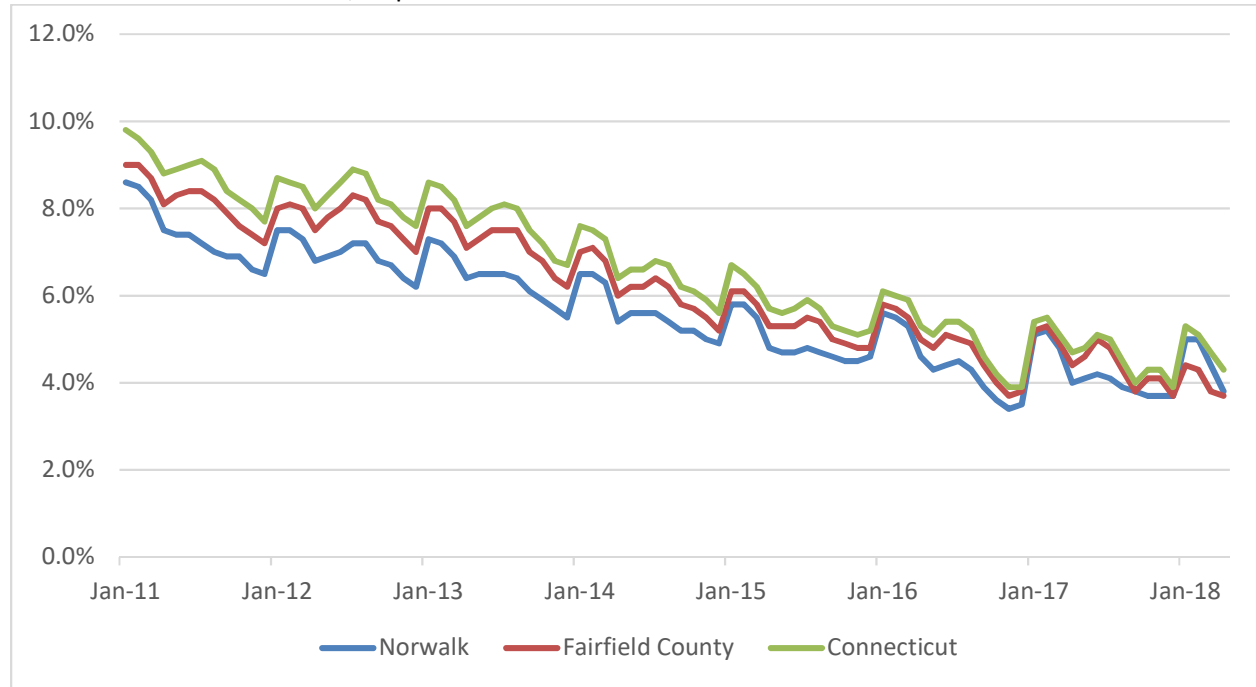
Source: State of Connecticut, Department of Labor



Since 2011, Norwalk’s unemployment rate has followed a similar path as the rates in Fairfield County and Connecticut, but Norwalk’s unemployment rate has remained consistently lower (Figure 46). However, as rates in all three areas have decreased, the gap has narrowed over time. As of April 2018, Norwalk’s unemployment rate was 3.8%.

Figure 46: Unemployment Rate

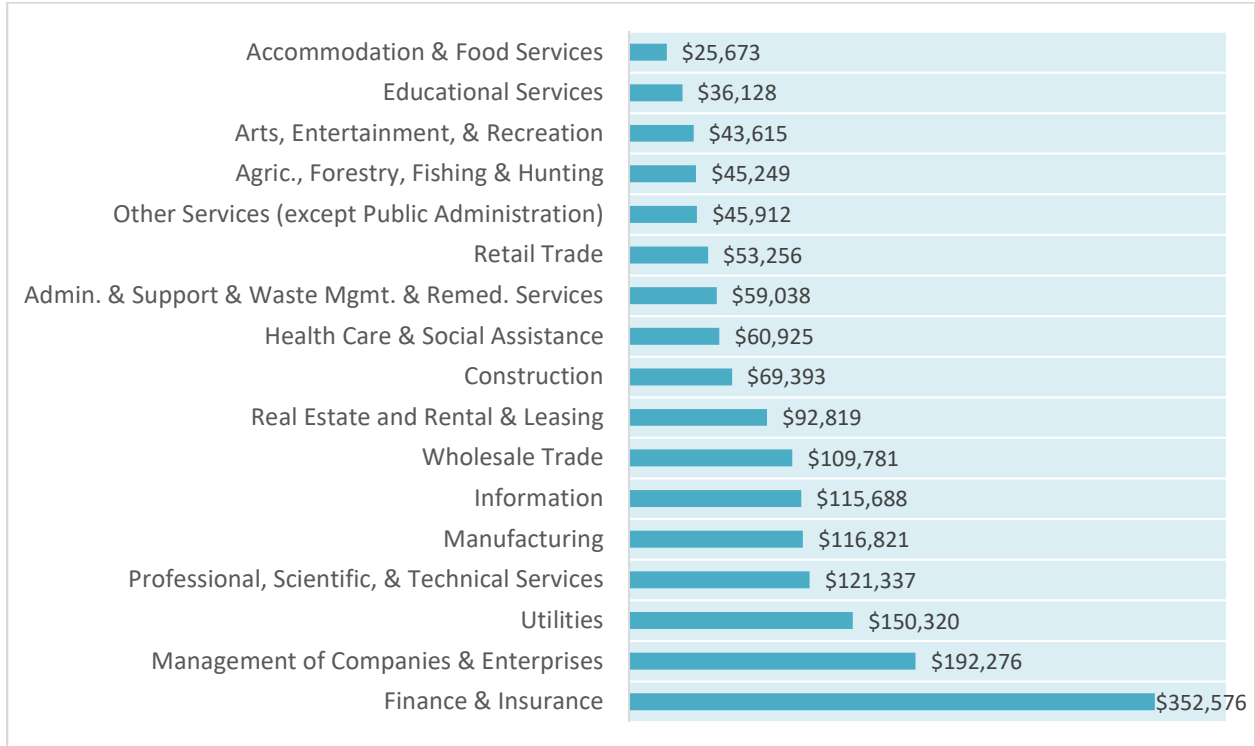
Source: State of Connecticut, Department of Labor



Annual wages for employees in Norwalk vary widely by industry (Figure 47). The city has significant employment in high-wage industries including Finance and insurance, Management, Professional, scientific and technical services, and Real estate. Conversely, some of the other major employment sectors in the city, including Accommodation and food services, Educational services, and Arts, entertainment and recreation, are among the lowest-paid industries.

Figure 47: Average Annual Wage in Norwalk, 2017

Source: State of Connecticut, Department of Labor



Looking at employment by industry sector, there have been significant shifts in the last 10 years (Figure 48). The largest sector, Educational services and Health care and social assistance, expanded by 46% over that time frame, while Manufacturing employment contracted by 39%. Arts, entertainment, and recreation and Accommodation and food services employment declined between 2006 and 2010, but has since rebounded to levels 38% higher than 2006. Finance and insurance and Real estate did the opposite, as employment rose between 2006 and 2010 but then fell between 2010 and 2016, resulting in a net increase of 17%. Employment in Retail trade and Construction are similar to 2006 levels, while employment in Professional, scientific, and management and Administrative and waste management

services grew by a more modest 6% over that time frame. However, due to the size of these industries, this change still represents a notable increase in total number of jobs.

Figure 48: Change in Norwalk Employment by Sector

Source: US Census, American Communities Survey, 2012-2016 5-year estimates

Industry Sector	2006	2010	2016	Percent change
Educational services, and health care and social assistance	6,756	8,777	9,867	46%
Professional, scientific, and management, and administrative and waste management services	7,551	7,721	7,969	6%
Retail trade	5,515	5,465	5,590	1%
Finance and insurance, and real estate and rental and leasing	4,292	5,181	5,043	17%
Arts, entertainment, and recreation, and accommodation and food services	3,449	3,175	4,770	38%
Construction	4,088	3,606	3,990	-2%
Other services, except public administration	1,746	2,687	2,670	53%
Manufacturing	4,119	3,866	2,495	-39%

Wall Street-West Avenue Redevelopment Sites

Comparing the foregoing analyses to the proposed Wall Street-West Avenue Neighborhood Plan conducted for the Norwalk Redevelopment Agency by the Regional Plan Association and particularly the proposed Implementation Actions reveals how the proposed actions are supported by the various economic data.

For this analysis, the five in the Wall Street-West Avenue area were examined and compared to both various research findings and general impressions. CERC analysts toured the sites on October 12, 2018 and met with staff of the Redevelopment Agency, Ms. Tami Strauss, Director of Community Development Planning and Ms. Sabrina Church, Community Development Planner.

(1) 370 West Avenue (former YWCA site)

This site, as described in the Plan, is proposed for a mixed-use development focused on health and wellness to serve both nearby Norwalk Hospital and the local community.

The proposed development would support Priority Retention NAICS 621 (Ambulatory Health Care Services), 623 (Nursing and Residential Care Facilities), and 624 (Social Assistance). As noted in the industry analysis section, the healthcare industry has a strong presence in Fairfield County, potentially signaling some competitive advantages, and has exhibited strong growth on the national level. The site's proximity to Norwalk Hospital and strong support for development from that institution could help support this industry's expansion in Norwalk. Furthermore, between 2006 and 2016, employment in educational services, and health care and social assistance was the second-fastest growing industry in Norwalk, increasing 46% over that time period. Combined with the projected increase in the population over age 65, which tends to utilize healthcare services at a higher rate than many other age groups, a healthcare-focused development at this site is well-supported by the data.

Priority Retention NAICS 541 (Professional, Scientific, and Technical Services) could also be well-situated here. In addition, convenience retail complementary to the proposed healthcare and wellness uses such as a café or restaurant, pharmacy, and/or convenience store may be suitable for ground-level activation at the site or in nearby retail space at properties immediately adjacent.

(2) West Avenue between Merwin and Chapel Streets

The Plan goals for this site are based on infill development near auto sales and repair sites as well as uses that generate pedestrian activity (with environmental remediation potentially needed), including public and community events.

Relating to the existing businesses currently located in this area, a retail analysis indicates leakage for Motor Vehicle and Parts Dealers (441) and Gasoline Stations (447) within a 3-mile radius. However, more automobile-focused businesses are less likely to generate pedestrian activity. Growth Industries to consider in this context could include NAICS 454 (Nonstore Retailers) and 713 (Amusement, Gambling and Recreation Industries).

(3) Wall Street, West Avenue, Leonard and Commerce Street

For this relatively large site, the Plan envisions a complete residential development at the corner of Wall and Isaac Streets, the Wall Street Theater, and a variety of residential, commercial, restaurants, boutique and light manufacturing, office space, and live/work space, with the ground floors being active and pedestrian-oriented.

The analysis herein supports the need for additional residential units, keeping in mind the age and socioeconomic stratification of Norwalk. Technologically-integrated units geared toward young professionals and a few empty-nesters who may wish to downsize may be popular, given the expected growth in the 20-34 and 65 and over age ranges; more affluent individuals and households will be looking for a variety of amenities and services. Also in demand will be less expensive units that may be within the price range of younger workers or those in white-collar or service professions with more limited income. While the data also support the construction of additional single-family homes, such development may not provide the appropriate density for a city-center location; residents who would otherwise choose to purchase but cannot afford to due to high sales prices or lack of inventory may continue to rent for a longer period of time, increasing rental demand for rental units above levels seen elsewhere in the state. Smaller-sized units, such as studios or microunits, may also be more cost-effective for workers currently priced out of the market or who may be living with roommates but would prefer to have their own unit. Additional workforce housing may also be considered for this site.

Relevant industries with solid growth prospects that could help increase street-level activity in the area include NAICS 512 (Motion Picture and Sound Recording Industries) and 713 (Amusement, Gambling and Recreation Industries), especially given that the growing youthful population exhibits a preference for spending their money on experiential activities. A priority retention industry, NAICS 541 (Professional, Scientific, and Technical Services), includes consulting, advertising, legal, accounting and other services and may also meet goals for the area. Increased density and additional housing in the immediate area could increase the demand for more traditional convenience-oriented retail, such as Food and Beverage Stores (445) and Food Services and Drinking Places (722). Retail shops that reflect the diversity of the city may be appropriate for local clientele.

Other office or commercial space in the neighborhood could be occupied by growth industries such as NAICS 519 (Other Information Services), as well as potential attraction candidates include NAICS 518 (Data Processing, Hosting, and Related Services), 522 (Credit Intermediation and Related Activities), 523 (Securities, Commodity Contracts, and Other Financial Investments and Related Activities) and 524 (Insurance Carriers and Related Activities). Another potential attraction industry, 312 (Beverage and Tobacco Product Manufacturing), such as a microbrewery, may be a good fit due to the proximity to both residents and light industrial areas.

(4) Wall Street between High and Main Streets

The site consists of two buildings and a large parking lot. Goals for the site are keeping parking spaces, and developing a mix of residential, commercial, office, and light and boutique manufacturing and maximizing the site's connection with Freese Park.

As discussed above, data support the development of additional residential units in the area; furthermore, the site is adjacent to additional residential sections of the city and the proximity to Freese Park could be a significant amenity to future residents.

Based on the industry analysis and site characteristics, NAICS appropriately considered for this site include: 445 (Food and Beverage Stores), 522 (Credit Intermediation and Related Activities), 523 (Securities, Commodity Contracts, and Other Financial Investments and Related Activities), 524 (Insurance Carriers and Related Activities), 551 (Management of Companies and Enterprises) and 713 (Amusement, Gambling, and Recreation Industries).

Retail analysis of the vicinity indicated leakage from the Area that could be addressed in the following categories: Food and Beverage Stores (445), Furniture and Home Furnishings Stores (442), and Food Services and Drinking Places (722).

(5) Library and adjacent sites

There are three blocks making up this large site: South Block, Library Block and North Block. For South Block, goals include developing an active, pedestrian-oriented mixed-use area with an orientation fronting West Street. For Library Block, goals include a new/expanded library, a connection to Union Park, more community meeting space and room for research, exhibits, programs and parking. For North Block, goals include mixed use development near the Norwalk Transit Pulse Point transit center including passenger amenities, with additional residential, commercial and/or shared work space, increased walkability from the transit center to the library and a greater connection between the transit hub and the South Norwalk train station.

Cushman and Wakefield's third quarter 2018 Fairfield County Office Marketbeat indicated that office locations near transportation are the most in-demand, so improving connections between the bus and rail service (over a mile away) could increase the area's desirability and improve prospects for redevelopment. The report also indicated that as tenants continue to economize on space, office vacancy rates remain almost 3 percentage points above the 5-year historical average (24.6% versus the average of 21.7%), and rental rates have continued to decline since 2016. If transportation networks were improved, proximity to these resources may also make this an attractive location for workforce housing, as well as a location for businesses.

NAICS 485 (Transit and Ground Passenger Transportation) 511 (Publishing Industries), 515 (Broadcasting), 519 (Other Information Services), 522 (Credit Intermediation and Related Activities), 523 (Securities, Commodity Contracts and Other Financial Investments and Related Activities), 524 (Insurance Carriers and Related Activities) and 541 (Professional, Scientific, and Technical Services) deserve particular consideration for this section of the

neighborhood, as they represent strong employment, Mature Industries, Potential Attraction Industries or Priority Retention Industries in the region.

Retail analysis of the vicinity indicated leakage from the Area that could be addressed at the sites in the following categories: Food and Beverage Stores (445), Furniture and Home Furnishings Stores (442), and Food Services and Drinking Places (722).

Appendix A: Supplemental Data Tables

Demographic Trends

Table 1: Population by Age, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
19 and younger	20,136	248,587	882,788
20-34	18,729	165,725	678,240
35-49	17,938	194,915	703,360
50-64	18,905	197,740	771,543
65 and older	12,310	134,651	559,817

Note: Totals do not sum to total population due to rounding in available Census data.

Table 2: Norwalk Population, 2015-2030 (Projected)

Source: Connecticut State Data Center, 2015-2040 Population Projections, 2017 release

	Norwalk	Fairfield County	Connecticut
19 and younger	20,675	225,117	863,230
20-34	20,425	177,155	712,972
35-49	19,143	184,478	728,967
50-64	15,951	166,769	678,614
65 and older	12,055	144,034	650,210

Table 3: Population by Race, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
White alone	63,700	694,622	2,768,080
Black or African American alone	13,917	107,282	372,696
American Indian and Alaska Native alone	403	2,441	9,399
Asian alone	4,702	47,742	152,782
Native Hawaiian and Other Pacific Islander alone	53	392	1,031
Some other race alone	3,315	62,931	177,594
Two or more races	1,840	26,208	106,988

Table 4: Population by Educational Attainment (Population Age 25 Years and Over), 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
Less than High School	7,169	64,298	242,932
High School Graduate	14,288	142,289	673,220
Some College	10,585	96,734	427,232
Associate's Degree	4,106	38,024	184,426
Bachelor's Degree or Higher	25,716	295,047	938,319

Table 5: Household Composition, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
Married-couple family	15,807	179,406	660,846
Male householder, no wife present, family	1,367	14,140	60,024
Female householder, no husband present, family	4,884	41,518	173,543
Nonfamily households	11,126	100,145	460,300

Table 6: Household Income, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
Under \$50K	10,178	102,835	485,087
\$50,000 to less than \$100,000	9,386	84,026	390,098
\$100,000 to less than \$200,000	8,977	85,468	340,700
\$200,000 or more	4,643	62,880	138,828

Housing Analysis

Table 7: Housing Stock by Occupancy Type, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
Owner-occupied	20,290	226,707	900,223
Renter-occupied	12,894	108,502	454,490

Table 8: Housing Stock by Building Type, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
1 unit (detached)	16,802	211,004	882,236
1 unit (attached) to 4 units	9,230	86,951	334,477
5 units or more	8,996	65,399	265,197

Table 9: Housing Stock by Year Constructed, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
1939 or earlier	7,375	77,643	334,202
1940-1959	10,024	87,452	331,390
1960-1979	8,925	101,020	402,426
1980-1999	5,763	66,390	304,339
2000 or later	3,081	32,232	121,441

Table 10: Housing Stock by Number of Rooms, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
1-2 rooms	2,251	16,916	68,298
3-5 rooms	16,445	142,425	639,359
6-8 rooms	12,906	138,176	602,493
9 or more rooms	3,566	67,220	183,648

Table 11: Housing Stock by Number of Bedrooms, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
Studio/efficiency	936	8,027	32,489
1-2 bedrooms	15,851	133,152	590,207
3-4 bedrooms	16,856	195,422	802,464
5 or more bedrooms	1,525	28,136	68,638

Table 12: Housing Stock by Year Householder Moved In, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
1979 and earlier	3,412	34,495	146,035
1980 to 1989	2,386	26,481	118,912
1990 to 1999	4,905	55,297	218,381
2000 to 2009	10,615	109,787	438,593
2010 to 2014	10,368	94,935	374,024
2015 or later	1,498	14,214	58,768

Table 13: Value of Owner-Occupied Units, 2016

Source: US Census, American Community Survey Five-Year Estimates, 2012-2016

	Norwalk	Fairfield County	Connecticut
Less than \$100,000	575	9,613	54,046
\$100,000 to \$199,999	1168	23,075	221,137
\$200,000 to \$299,999	2,883	37,008	246,071
\$300,000 to \$499,999	8,662	66,699	233,345
\$500,000 or more	7,002	90,312	145,624

Economic and Employment Analysis

Table 14: Norwalk Employment by Industry

Source: US Census, American Communities Survey, 2012-2016 5-year estimates

Industries	Number of jobs
Educational services & Health care and social assistance	9,867
Professional, scientific, and management & Administrative and waste management	7,969
Retail trade	5,590
Finance and insurance & Real estate and rental and leasing	5,043
Arts, entertainment, and recreation & Accommodation and food services	4,770
Construction	3,990
Manufacturing	2,495
All other industries	8,737

Table 15: Unemployment Rate

Source: State of Connecticut, Department of Labor

Date	Norwalk	Fairfield County	CT	Date	Norwalk	Fairfield County	CT
Jan-11	8.6%	9.0%	9.8%	Sep-14	5.2%	5.8%	6.2%
Feb-11	8.5%	9.0%	9.6%	Oct-14	5.2%	5.7%	6.1%
Mar-11	8.2%	8.7%	9.3%	Nov-14	5.0%	5.5%	5.9%
Apr-11	7.5%	8.1%	8.8%	Dec-14	4.9%	5.2%	5.6%
May-11	7.4%	8.3%	8.9%	Jan-15	5.8%	6.1%	6.7%
Jun-11	7.4%	8.4%	9.0%	Feb-15	5.8%	6.1%	6.5%
Jul-11	7.2%	8.4%	9.1%	Mar-15	5.5%	5.8%	6.2%
Aug-11	7.0%	8.2%	8.9%	Apr-15	4.8%	5.3%	5.7%
Sep-11	6.9%	7.9%	8.4%	May-15	4.7%	5.3%	5.6%
Oct-11	6.9%	7.6%	8.2%	Jun-15	4.7%	5.3%	5.7%
Nov-11	6.6%	7.4%	8.0%	Jul-15	4.8%	5.5%	5.9%
Dec-11	6.5%	7.2%	7.7%	Aug-15	4.7%	5.4%	5.7%
Jan-12	7.5%	8.0%	8.7%	Sep-15	4.6%	5.0%	5.3%
Feb-12	7.5%	8.1%	8.6%	Oct-15	4.5%	4.9%	5.2%
Mar-12	7.3%	8.0%	8.5%	Nov-15	4.5%	4.8%	5.1%
Apr-12	6.8%	7.5%	8.0%	Dec-15	4.6%	4.8%	5.2%
May-12	6.9%	7.8%	8.3%	Jan-16	5.6%	5.8%	6.1%
Jun-12	7.0%	8.0%	8.6%	Feb-16	5.5%	5.7%	6.0%
Jul-12	7.2%	8.3%	8.9%	Mar-16	5.3%	5.5%	5.9%
Aug-12	7.2%	8.2%	8.8%	Apr-16	4.6%	5.0%	5.3%
Sep-12	6.8%	7.7%	8.2%	May-16	4.3%	4.8%	5.1%
Oct-12	6.7%	7.6%	8.1%	Jun-16	4.4%	5.1%	5.4%
Nov-12	6.4%	7.3%	7.8%	Jul-16	4.5%	5.0%	5.4%
Dec-12	6.2%	7.0%	7.6%	Aug-16	4.3%	4.9%	5.2%
Jan-13	7.3%	8.0%	8.6%	Sep-16	3.9%	4.4%	4.6%
Feb-13	7.2%	8.0%	8.5%	Oct-16	3.6%	4.0%	4.2%
Mar-13	6.9%	7.7%	8.2%	Nov-16	3.4%	3.7%	3.9%
Apr-13	6.4%	7.1%	7.6%	Dec-16	3.5%	3.8%	3.9%
May-13	6.5%	7.3%	7.8%	Jan-17	5.1%	5.2%	5.4%
Jun-13	6.5%	7.5%	8.0%	Feb-17	5.2%	5.3%	5.5%
Jul-13	6.5%	7.5%	8.1%	Mar-17	4.8%	4.9%	5.1%
Aug-13	6.4%	7.5%	8.0%	Apr-17	4.0%	4.4%	4.7%
Sep-13	6.1%	7.0%	7.5%	May-17	4.1%	4.6%	4.8%
Oct-13	5.9%	6.8%	7.2%	Jun-17	4.2%	5.0%	5.1%
Nov-13	5.7%	6.4%	6.8%	Jul-17	4.1%	4.8%	5.0%
Dec-13	5.5%	6.2%	6.7%	Aug-17	3.9%	4.3%	4.5%
Jan-14	6.5%	7.0%	7.6%	Sep-17	3.8%	3.8%	4.0%
Feb-14	6.5%	7.1%	7.5%	Oct-17	3.7%	4.1%	4.3%
Mar-14	6.3%	6.8%	7.3%	Nov-17	3.7%	4.1%	4.3%
Apr-14	5.4%	6.0%	6.4%	Dec-17	3.7%	3.7%	3.9%
May-14	5.6%	6.2%	6.6%	Jan-18	5.0%	4.4%	5.3%
Jun-14	5.6%	6.2%	6.6%	Feb-18	5.0%	4.3%	5.1%
Jul-14	5.6%	6.4%	6.8%	Mar-18	4.4%	3.8%	4.7%
Aug-14	5.4%	6.2%	6.7%	Apr-18	3.8%	3.7%	4.3%

Appendix B: Business List by NAICS

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114 Fishing, Hunting and Trapping

Industries in the Fishing, Hunting and Trapping subsector harvest fish and other wild animals from their natural habitats and are dependent upon a continued supply of the natural resource. The harvesting of fish is the predominant economic activity of this subsector and it usually requires specialized vessels that, by the nature of their size, configuration and equipment, are not suitable for any other type of production, such as transportation.

Hunting and trapping activities utilize a wide variety of production processes and are classified in the same subsector as fishing because the availability of resources and the constraints imposed, such as conservation requirements and proper habitat maintenance, are similar.

236 Construction of Buildings

The Construction of Buildings subsector comprises establishments primarily responsible for the construction of buildings. The work performed may include new work, additions, alterations, or maintenance and repairs. The on-site assembly of precut, panelized, and prefabricated buildings and construction of temporary buildings are included in this subsector. Part or all of the production work for which the establishments in this subsector have responsibility may be subcontracted to other construction establishments--usually specialty trade contractors.

Establishments in this subsector are classified based on the types of buildings they construct. This classification reflects variations in the requirements of the underlying production processes.

237 Heavy and Civil Engineering Construction

The Heavy and Civil Engineering Construction subsector comprises establishments whose primary activity is the construction of entire engineering projects (e.g., highways and dams), and specialty trade contractors, whose primary activity is the production of a specific component for such projects. Specialty trade contractors in the Heavy and Civil Engineering Construction subsector generally are performing activities that are specific to heavy and civil engineering construction projects and are not normally performed on buildings. The work performed may include new work, additions, alterations, or maintenance and repairs.

Specialty trade activities are classified in this subsector if the skills and equipment present are specific to heavy or civil engineering construction projects. For example, specialized equipment is needed to paint lines on highways. This equipment is not normally used in building applications, so the activity is classified in this subsector. Traffic signal installation, while specific to highways, uses much of the same skills and equipment that are needed for electrical work in building projects and is therefore classified in Subsector 238, Specialty Trade Contractors.

Construction projects involving water resources (e.g., dredging and land drainage) and projects involving open space improvement (e.g., parks and trails) are included in this subsector. Establishments whose primary activity is the subdivision of land into individual building lots usually perform various additional site-improvement activities (e.g., road building and utility line installation) and are included in this subsector.

Establishments in this subsector are classified based on the types of structures that they construct. This classification reflects variations in the requirements of the underlying production processes.

237130 Power and Communication Line and Related Structures Construction

This industry comprises establishments primarily engaged in the construction of power lines and towers, power plants, and radio, television, and telecommunications transmitting/receiving towers. The work performed may include new work, reconstruction, rehabilitation, and repairs. Specialty trade contractors are included in this industry if they are engaged in activities primarily related to power and communication line and related structures construction. All structures (including buildings) that are integral parts of power and communication networks (e.g., transmitting towers, substations, and power plants) are included.

Illustrative Examples:

- Alternative energy (e.g., geothermal, ocean wave, solar, wind) structure construction
- Power line stringing
- Cellular phone tower construction
- Radio transmitting tower construction
- Co-generation plant construction
- Satellite receiving station construction
- Communication tower construction
- Nuclear power plant construction
- Telephone line stringing
- Electric light and power plant (except hydroelectric) construction
- Transformer station and substation, electric power, construction
- Electric power transmission line and tower construction
- Underground cable (e.g., cable television, electricity, telephone) laying

238 Specialty Trade Contractors

The Specialty Trade Contractors subsector comprises establishments whose primary activity is performing specific activities (e.g., pouring concrete, site preparation, plumbing, painting, and electrical work) involved in building construction or other activities that are similar for all types of construction, but that are not responsible for the entire project. The work performed may include new work, additions, alterations, maintenance, and repairs. The production work performed by establishments in this subsector is usually subcontracted from establishments of the general contractor type or for-sale builders, but

especially in remodeling and repair construction, work also may be done directly for the owner of the property. Specialty trade contractors usually perform most of their work at the construction site, although they may have shops where they perform prefabrication and other work. Establishments primarily engaged in preparing sites for new construction are also included in this subsector.

There are substantial differences in types of equipment, work force skills, and other inputs required by specialty trade contractors. Establishments in this subsector are classified based on the underlying production function for the specialty trade in which they specialize. Throughout the Specialty Trade Contractors subsector, establishments commonly provide both the parts and labor required to complete work. For example, electrical contractors supply the current-carrying and noncurrent-carrying wiring

devices that are required to install a circuit. Plumbing, heating, and air-conditioning contractors also supply the parts required to complete a contract.

Establishments that specialize in activities primarily related to heavy and civil engineering construction that are not normally performed on buildings, such as the painting of lines on highways, are classified in Subsector 237, Heavy and Civil Engineering Construction.

Establishments that are primarily engaged in selling construction materials are classified in Sector 42, Wholesale Trade, or Sector 44-45, Retail Trade, based on the characteristics of the selling unit.

311 Food Manufacturing

Industries in the Food Manufacturing subsector transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products.

The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included.

Establishments primarily engaged in manufacturing beverages are classified in Subsector 312, Beverage and Tobacco Product Manufacturing.

312 Beverage and Tobacco Product Manufacturing

Industries in the Beverage and Tobacco Product Manufacturing subsector manufacture beverages and tobacco products. The Beverage Manufacturing industry group includes three types of establishments: (1) those that manufacture nonalcoholic beverages; (2) those that manufacture alcoholic beverages through the fermentation process; and (3) those that produce distilled alcoholic beverages. Ice manufacturing, while not a beverage, is included with nonalcoholic beverage manufacturing because it uses the same production process as water purification.

In the case of activities related to the manufacture of beverages, the structure follows the defined production processes. Brandy, a distilled beverage, is not placed under distillery product manufacturing, but rather under winery product manufacturing since the production process used in the manufacturing of alcoholic grape-based beverages produces both wines (fermented beverage) and brandies (distilled beverage).

The Tobacco Manufacturing industry group includes two types of establishments: (1) those engaged in re-drying and stemming tobacco and (2) those that manufacture tobacco products, such as cigarettes and cigars.

312230 Tobacco Manufacturing

This industry comprises establishments primarily engaged in (1) stemming and redrying tobacco and/or (2) manufacturing cigarettes or other tobacco products.

Illustrative Examples:

- Chewing tobacco manufacturing
- Cigar manufacturing
- Cigarettes manufacturing (except electronic)
- Snuff manufacturing
- Prepared pipe tobacco manufacturing
- Tobacco leaf processing and aging

Cross-References. Establishments primarily engaged in--

- Manufacturing tobacco pipes or electronic cigarettes--are classified in U.S. Industry 339999, All Other Miscellaneous Manufacturing;
- Manufacturing electronic cigarette vapor refills--are classified in U.S. Industry 325998, All Other Miscellaneous Chemical Product and Preparation Manufacturing;
- Selling leaf tobacco as merchant wholesalers that also engage in stemming tobacco--are classified in Industry 424940, Tobacco and Tobacco Product Merchant Wholesalers; and
- Selling leaf tobacco as agents or brokers that also engage in stemming tobacco--are classified in Industry 425120, Wholesale Trade Agents and Brokers.

312140 Distilleries

This industry comprises establishments primarily engaged in one or more of the following: (1) distilling potable liquors (except brandies); (2) distilling and blending liquors; and (3) blending and mixing liquors and other ingredients.

Cross-References. Establishments primarily engaged in--

- Manufacturing nonpotable ethyl alcohol--are classified in U.S. Industry 325193, Ethyl Alcohol Manufacturing;
- Bottling liquors made elsewhere--are classified in Industry 424820, Wine and Distilled Alcoholic Beverage Merchant Wholesalers; and
- Manufacturing brandies--are classified in Industry 312130, Wineries.

314 Textile Product Mills

Industries in the Textile Product Mills subsector group establishments that make textile products (except apparel). With a few exceptions, processes used by these establishments are generally cut and sew (i.e., purchasing fabric and cutting and sewing to make nonapparel textile products, such as sheets and towels).

315 Apparel Manufacturing

Industries in the Apparel Manufacturing subsector group establishments with two distinct manufacturing processes: (1) cut and sew (i.e., purchasing fabric and cutting and sewing to make a garment) and (2) the manufacture of garments in establishments that first knit fabric and then cut and sew the fabric into a garment. The Apparel Manufacturing subsector includes a diverse range of establishments manufacturing full lines of ready-to-wear apparel and custom apparel: apparel contractors, performing cutting or sewing operations on materials owned by others; jobbers, performing entrepreneurial functions involved in apparel manufacturing; and tailors, manufacturing custom garments for individual clients. Knitting fabric, when done alone, is classified in the Textile Mills subsector, but when knitting is combined with the production of complete garments, the activity is classified in the Apparel Manufacturing subsector.

316 Leather and Allied Product Manufacturing

Establishments in the Leather and Allied Product Manufacturing subsector transform hides into leather by tanning or curing and fabricating the leather into products for final consumption. This subsector also includes the manufacture of similar products from other materials, including products (except apparel) made from "leather substitutes," such as rubber, plastics, or textiles. Rubber footwear, textile luggage, and plastics purses or wallets are examples of "leather substitute" products included in this subsector. The products made from leather substitutes are included in this subsector because they are made in similar ways leather products are made (e.g., luggage). They are made in the same establishments, so it is not practical to separate them.

The inclusion of leather and hide tanning and finishing in this subsector is partly because it is a relatively small industry that has few close neighbors as a production process, partly because leather is an input to some of the other products classified in this subsector, and partly for historical reasons.

316992 Women's Handbag and Purse Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing women's handbags and purses of any material (except precious metal).

Cross-References.

Establishments primarily engaged in manufacturing precious metal handbags and purses are classified in Industry 339910, Jewelry and Silverware Manufacturing.

323 Printing and Related Support Activities

Industries in the Printing and Related Support Activities subsector print products, such as newspapers, books, labels, business cards, stationery, business forms, and other materials, and perform support activities, such as data imaging, platemaking services, and bookbinding. The support activities included here are an integral part of the printing industry, and a product (a printing plate, a bound book, or a computer disk or file) that is an integral part of the printing industry is almost always provided by these operations.

Processes used in printing include a variety of methods used to transfer an image from a plate, screen, film, or computer file to some medium, such as paper, plastics, metal, textile articles, or wood. The

printing processes employed include, but are not limited to, lithographic, gravure, screen, flexographic, digital, and letterpress.

In contrast to many other classification systems that locate publishing of printed materials in manufacturing, NAICS classifies the publishing of printed products in Subsector 511, Publishing Industries (except Internet). Though printing and publishing are often carried out by the same enterprise (a newspaper, for example), it is less and less the case that these distinct activities are carried out in the same establishment. When publishing and printing are done in the same establishment, the establishment is classified in Sector 51, Information, in the appropriate NAICS industry even if the receipts for printing exceed those for publishing.

This subsector includes printing on clothing because the production process for that activity is printing, not clothing manufacturing. For instance, the printing of T-shirts is included in this subsector. In contrast, printing on fabric (or grey goods) is not included. This activity is part of the process of finishing the fabric and is included in the Textile Mills subsector in Industry 31331, Textile and Fabric Finishing Mills.

325199 All Other Basic Organic Chemical Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing basic organic chemical products (except aromatic petrochemicals, industrial gases, synthetic organic dyes and pigments, gum and wood chemicals, cyclic crudes and intermediates, and ethyl alcohol).

Illustrative Examples:

- Biodiesel fuels not made in petroleum refineries and not blended with petroleum
- Calcium organic compounds, not specified elsewhere by process, manufacturing
- Carbon organic compounds, not specified elsewhere by process, manufacturing
- Enzyme proteins (i.e., basic synthetic chemicals) (except pharmaceutical use) manufacturing
- Fatty acids (e.g., margaric, oleic, stearic) manufacturing
- Organo-inorganic compound manufacturing
- Plasticizers (i.e., basic synthetic chemicals) manufacturing
- Silicone (except resins) manufacturing
- Synthetic sweeteners

325193 Ethyl Alcohol Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing nonpotable ethyl alcohol.

Cross-References. Establishments primarily engaged in--

Distilling liquors (except brandy) --are classified in Industry 312140, Distilleries; and

Manufacturing brandies--are classified in Industry 312130, Wineries.

325 Chemical Manufacturing

The Chemical Manufacturing subsector is based on the transformation of organic and inorganic raw materials by a chemical process and the formulation of products. This subsector distinguishes the production of basic chemicals that comprise the first industry group from the production of intermediate and end products produced by further processing of basic chemicals that make up the remaining industry groups.

This subsector does not include all industries transforming raw materials by a chemical process. It is common for some chemical processing to occur during mining operations. These beneficiating operations, such as copper concentrating, are classified in Sector 21, Mining, Quarrying, and Oil and Gas Extraction. Furthermore, the refining of crude petroleum is included in Subsector 324, Petroleum and Coal Products Manufacturing. In addition, the manufacturing of aluminum oxide is included in Subsector 331, Primary Metal Manufacturing; and beverage distilleries are classified in Subsector 312, Beverage and Tobacco Product Manufacturing. As is the case of these two activities, the grouping of industries into subsectors may take into account the association of the activities performed with other activities in the subsector.

325120 Industrial Gas Manufacturing

This industry comprises establishments primarily engaged in manufacturing industrial organic and inorganic gases in compressed, liquid, and solid forms.

Cross-References. Establishments primarily engaged in--

Manufacturing chlorine gas--are classified in Industry 325180, Other Basic Inorganic Chemical Manufacturing; and

Manufacturing ethane and butane gases made from refined petroleum or liquid hydrocarbons--are classified in Industry 325110, Petrochemical Manufacturing.

325412 Pharmaceutical Preparation Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing in-vivo diagnostic substances and pharmaceutical preparations (except biological) intended for internal and external consumption in dose forms, such as ampoules, tablets, capsules, vials, ointments, powders, solutions, and suspensions.

Cross-References. Establishments primarily engaged in--

- Manufacturing uncompounded medicinal chemicals and their derivatives--are classified in U.S. Industry 325411, Medicinal and Botanical Manufacturing;
- Manufacturing in-vitro diagnostic substances--are classified in U.S. Industry 325413, In-Vitro Diagnostic Substance Manufacturing; and
- Manufacturing vaccines, toxoids, blood fractions, and culture media of plant or animal origin (except for diagnostic use)--are classified in U.S. Industry 325414, Biological Product (except Diagnostic) Manufacturing.

325620 Toilet Preparation Manufacturing

This industry comprises establishments primarily engaged in preparing, blending, compounding, and packaging toilet preparations, such as perfumes, shaving preparations, hair preparations, face creams, lotions (including sunscreens), and other cosmetic preparations.

Cross-References.

Establishments primarily engaged in manufacturing toothpaste are classified in U.S. Industry 325611, Soap and Other Detergent Manufacturing.

332114 Custom Roll Forming

This U.S. industry comprises establishments primarily engaged in custom roll forming metal products by use of rotary motion of rolls with various contours to bend or shape the products.

Cross-References.

Establishments primarily engaged in manufacturing and installing roll formed seamless gutters at construction sites are classified in Industry 238170, Siding Contractors.

335 Electrical Equipment, Appliance, and Component Manufacturing

Industries in the Electrical Equipment, Appliance, and Component Manufacturing subsector manufacture products that generate, distribute and use electrical power. Electric Lighting Equipment Manufacturing establishments produce electric lamp bulbs, lighting fixtures, and parts. Household Appliance Manufacturing establishments make both small and major electrical appliances and parts. Electrical Equipment Manufacturing establishments make goods, such as electric motors, generators, transformers, and switchgear apparatus. Other Electrical Equipment and Component Manufacturing establishments make devices for storing electrical power (e.g., batteries), for transmitting electricity (e.g., insulated wire), and wiring devices (e.g., electrical outlets, fuse boxes, and light switches).

335110 Electric Lamp Bulb and Part Manufacturing

This industry comprises establishments primarily engaged in manufacturing electric light bulbs and tubes, and parts and components (except glass blanks for electric light bulbs).

Cross-References. Establishments primarily engaged in--

- Manufacturing glass blanks for electric light bulbs--are classified in U.S. Industry 327212, Other Pressed and Blown Glass and Glassware Manufacturing;
- Manufacturing vehicular lighting fixtures--are classified in Industry 336320, Motor Vehicle Electrical and Electronic Equipment Manufacturing;
- Manufacturing light emitting diodes (LEDs)--are classified in U.S. Industry 334413, Semiconductor and Related Device Manufacturing; and
- Manufacturing other lighting fixtures (except vehicular)--are classified in Industry 33512, Lighting Fixture Manufacturing.

336112 Light Truck and Utility Vehicle Manufacturing

This U.S. industry comprises establishments primarily engaged in (1) manufacturing complete light trucks and utility vehicles (i.e., body and chassis) or (2) manufacturing light truck and utility vehicle chassis only. Vehicles made include light duty vans, pick-up trucks, minivans, and sport utility vehicles.

Cross-References.

Establishments primarily engaged in manufacturing truck and bus bodies and assembling vehicles on purchased chassis are classified in U.S. Industry 336211, Motor Vehicle Body Manufacturing.

425 Wholesale Electronic Markets and Agents and Brokers

Industries in the Wholesale Electronic Markets and Agents and Brokers subsector arrange for the sale of goods owned by others, generally on a fee or commission basis. They act on behalf of the buyers and sellers of goods. This subsector contains agents and brokers as well as business-to-business electronic markets that facilitate wholesale trade.

445 Food and Beverage Stores

Industries in the Food and Beverage Stores subsector usually retail food and beverage merchandise from fixed point-of-sale locations. Establishments in this subsector have special equipment (e.g., freezers, refrigerated display cases, refrigerators) for displaying food and beverage goods. They have staff trained in the processing of food products to guarantee the proper storage and sanitary conditions required by regulatory authority.

446 Health and Personal Care Stores

Industries in the Health and Personal Care Stores subsector retail health and personal care merchandise from fixed point-of-sale locations. Establishments in this subsector are characterized principally by the products they retail, and some health and personal care stores may have specialized staff trained in dealing with the products. Staff may include pharmacists, opticians, and other professionals engaged in retailing, advising customers, and/or fitting the product sold to the customer's needs.

448 Clothing and Clothing Accessories Stores

Industries in the Clothing and Clothing Accessories Stores subsector retail new clothing and clothing accessories from fixed point-of-sale locations. Establishments in this subsector have similar display equipment and staff that is knowledgeable regarding fashion trends and the proper match of styles, colors, and combinations of clothing and accessories to the characteristics and tastes of the customer.

452 General Merchandise Stores

Industries in the General Merchandise Stores subsector retail new general merchandise from fixed point-of-sale locations. Establishments in this subsector are unique in that they have the equipment and staff capable of retailing a large variety of goods from a single location. This includes a variety of display equipment and staff trained to provide information on many lines of products.

453 Miscellaneous Store Retailers

Industries in the Miscellaneous Store Retailers subsector retail merchandise from fixed point-of-sale locations (except new or used motor vehicles and parts; new furniture and home furnishings; new appliances and electronic products; new building materials and garden equipment and supplies; food and beverages; health and personal care goods; gasoline; new clothing and accessories; and new sporting goods, hobby goods, books, and music). Establishments in this subsector include stores with unique characteristics, such as florists, used merchandise stores, and pet and pet supply stores.

454 Nonstore Retailers

Industries in the Nonstore Retailers subsector retail merchandise using methods, such as the broadcasting of infomercials, the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, selling from portable stalls, and distribution through vending machines. Establishments in this subsector include mail-order houses, vending machine operators, home delivery sales, door-to-door sales, party plan sales, electronic shopping, and sales through portable stalls (e.g., street vendors, except food). Establishments engaged in the direct sale (i.e., nonstore) of products, such as home heating oil dealers and newspaper delivery service providers, are included in this subsector.

482 Rail Transportation

Industries in the Rail Transportation subsector provide rail transportation of passengers and/or cargo using railroad rolling stock. The railroads in this subsector primarily either operate on networks, with physical facilities, labor force, and equipment spread over an extensive geographic area, or operate over a short distance on a local rail line.

Scenic and sightseeing rail transportation and street railroads, commuter rail, and rapid transit are not included in this subsector but are included in Subsector 487, Scenic and Sightseeing Transportation, and Subsector 485, Transit and Ground Passenger Transportation, respectively. Although these activities use railroad rolling stock, they are different from the activities included in rail transportation. Sightseeing and scenic railroads do not usually involve place-to-place transportation; the passenger's trip typically starts and ends at the same location. Commuter railroads operate in a manner more consistent with local and urban transit and are often part of integrated transit systems.

483 Water Transportation

Industries in the Water Transportation subsector provide water transportation of passengers and cargo using watercraft, such as ships, barges, and boats.

The subsector is composed of two industry groups: (1) one for deep sea, coastal, and Great Lakes; and (2) one for inland water transportation. This split typically reflects the difference in equipment used.

Scenic and sightseeing water transportation services are not included in this subsector but are included in Subsector 487, Scenic and Sightseeing Transportation. Although these activities use watercraft, they are different from the activities included in water transportation. Water sightseeing does not usually involve place-to-place transportation; the passenger's trip starts and ends at the same location.

483111 Deep Sea Freight Transportation

This U.S. industry comprises establishments primarily engaged in providing deep sea transportation of cargo to or from foreign ports.

Cross-References.

Establishments primarily engaged in providing deep sea transportation of cargo to and from domestic ports are classified in U.S. Industry 483113, Coastal and Great Lakes Freight Transportation.

483114 Coastal and Great Lakes Passenger Transportation

This U.S. industry comprises establishments primarily engaged in providing water transportation of passengers in coastal waters, the Great Lakes System, or deep seas between ports of the United States, Puerto Rico, and United States island possessions and protectorates. Marine transportation establishments using the facilities of the St. Lawrence Seaway Authority Commission are considered to be using the Great Lakes Water Transportation System.

Cross-References. Establishments primarily engaged in--

Providing inland water transportation of passengers on lakes, rivers, or intracoastal waterways (except on the Great Lakes System) --are classified in U.S. Industry 483212, Inland Water Passenger Transportation;

Providing scenic and sightseeing water transportation, such as harbor cruises--are classified in Industry 487210, Scenic and Sightseeing Transportation, Water; and

Operating floating casinos (i.e., gambling cruises) --are classified in Industry 713210, Casinos (except Casino Hotels).

485 Transit and Ground Passenger Transportation

Industries in the Transit and Ground Passenger Transportation subsector include a variety of passenger transportation activities, such as urban transit systems; chartered bus, school bus, and interurban bus transportation; and taxis. These activities are distinguished based primarily on such production process factors as vehicle types, routes, and schedules.

In this subsector, the principal splits identify scheduled transportation as separate from nonscheduled transportation. The scheduled transportation industry groups are Urban Transit Systems, Interurban and Rural Bus Transportation, and School and Employee Bus Transportation. The nonscheduled industry groups are the Charter Bus Industry and Taxi and Limousine Service. The Other Transit and Ground Passenger Transportation industry group includes both scheduled and nonscheduled transportation.

Scenic and sightseeing ground transportation services are not included in this subsector but are included in Subsector 487, Scenic and Sightseeing Transportation. Sightseeing does not usually involve place-to-place transportation; the passenger's trip starts and ends at the same location.

486 Pipeline Transportation

Industries in the Pipeline Transportation subsector use transmission pipelines to transport products, such as crude oil, natural gas, refined petroleum products, and slurry. Industries are identified based on

the products transported (i.e., pipeline transportation of crude oil, natural gas, refined petroleum products, and other products).

The Pipeline Transportation of Natural Gas industry includes the storage of natural gas because the storage is usually done by the pipeline establishment and because a pipeline is inherently a network in which all the nodes are interdependent.

487 Scenic and Sightseeing Transportation

Industries in the Scenic and Sightseeing Transportation subsector utilize transportation equipment to provide recreation and entertainment. These activities have a production process distinct from passenger transportation carried out for the purpose of other types of for-hire transportation. This process does not emphasize efficient transportation; in fact, such activities often use obsolete vehicles, such as steam trains, to provide some extra ambience. The activity is local in nature, usually involving a same-day return to the point of departure.

The Scenic and Sightseeing Transportation subsector is separated into three industries based on the mode: land, water, and other.

Activities that are recreational in nature and involve participation by the customer, such as white water rafting, are generally excluded from this subsector, unless they impose an impact on part of the transportation system. Charter boat fishing, for example, is included in the Scenic and Sightseeing Transportation, Water industry.

491 Postal Service

The Postal Service subsector includes the activities of the National Post Office and its subcontractors operating under a universal service obligation to provide mail services, and using the infrastructure required to fulfill that obligation. These services include delivering letters and small parcels. These articles can be described as those that can be handled by one person without using special equipment. This allows the collection, pick-up, and delivery operations to be done with limited labor costs and minimal equipment. Sorting and transportation activities, where necessary, are generally mechanized. The restriction to small parcels distinguishes these establishments from those in the transportation industries. These establishments may also provide express delivery services using the infrastructure established for provision of basic mail services.

The traditional activity of the National Postal Service is described in this subsector. Subcontractors include rural post offices on contract to the Postal Service.

Bulk transportation of mail on contract to the Postal Service is not included here, because it is usually done by transportation establishments that carry other customers' cargo as well. Establishments that provide courier and express delivery services without operating under a universal service obligation are classified in Subsector 492, Couriers and Messengers.

493 Warehousing and Storage

Industries in the Warehousing and Storage subsector are primarily engaged in operating warehousing and storage facilities for general merchandise, refrigerated goods, and other warehouse products. These establishments provide facilities to store goods. They do not sell the goods they handle. These

establishments take responsibility for storing the goods and keeping them secure. They may also provide a range of services, often referred to as logistics services, related to the distribution of goods. Logistics services can include labeling, breaking bulk, inventory control and management, light assembly, order entry and fulfillment, packaging, pick and pack, price marking and ticketing, and transportation arrangement. However, establishments in this industry group always provide warehousing or storage services in addition to any logistic services. Furthermore, the warehousing or storage of goods must be more than incidental to the performance of services, such as price marking.

Bonded warehousing and storage services and warehouses located in free trade zones are included in the industries of this subsector.

511 Publishing Industries (except Internet)

Industries in the Publishing Industries (except Internet) subsector group establishments engaged in the publishing of newspapers, magazines, other periodicals, and books, as well as directory and mailing list and software publishing. In general, these establishments, which are known as publishers, issue copies of works for which they usually possess copyright. Works may be in one or more formats including traditional print form, CD-ROM, or proprietary electronic networks. Publishers may publish works originally created by others for which they have obtained the rights and/or works that they have created in-house. Software publishing is included here because the activity, creation of a copyrighted product and bringing it to market, is equivalent to the creation process for other types of intellectual products.

In NAICS, publishing--the reporting, writing, editing, and other processes that are required to create an edition of a newspaper--is treated as a major economic activity in its own right, rather than as a subsidiary activity to a manufacturing activity, printing. Thus, publishing is classified in the Information sector; whereas, printing remains in the Manufacturing sector. In part, the NAICS classification reflects the fact that publishing increasingly takes place in establishments that are physically separate from the associated printing establishments. More crucially, the NAICS classification of book and newspaper publishing is intended to portray their roles in a modern economy, in which they do not resemble manufacturing activities.

Music publishers are not included in the Publishing Industries (except Internet) subsector, but are included in the Motion Picture and Sound Recording Industries subsector. Reproduction of prepackaged software is treated in NAICS as a manufacturing activity; on-line distribution of software products is in the Information sector; and custom design of software to client specifications is included in the Professional, Scientific, and Technical Services sector. These distinctions arise because of the different ways that software is created, reproduced, and distributed.

The Publishing Industries (except Internet) subsector includes establishments that publish software exclusively on the Internet but excludes establishments that publish other content exclusively on the Internet. Establishments publishing content other than software exclusively on the Internet are included in Subsector 519, Other Information Services. The Publishing Industries (except Internet) subsector also excludes products, such as manifold business forms and appointment books. Information is not the essential component of these items. Establishments producing these items are included in Subsector 323, Printing and Related Support Activities.

512 Motion Picture and Sound Recording Industries

Industries in the Motion Picture and Sound Recording Industries subsector group establishments involved in the production and distribution of motion pictures and sound recordings. While producers and distributors of motion pictures and sound recordings issue works for sale as traditional publishers do, the processes are sufficiently different to warrant placing establishments engaged in these activities in a separate subsector. Production is typically a complex process that involves several distinct types of establishments that are engaged in activities, such as contracting with performers, creating the film or sound content, and providing technical postproduction services. Film distribution is often to exhibitors, such as theaters and broadcasters, rather than through the wholesale and retail distribution chain. When the product is in a mass-produced form, NAICS treats production and distribution as the major economic activity as it does in the Publishing Industries (except Internet) subsector, rather than as a subsidiary activity to the manufacture of such products.

This subsector does not include establishments primarily engaged in the wholesale distribution of video and sound recordings, such as compact discs and audio tapes; these establishments are included in the Wholesale Trade sector. Reproduction of video and sound recordings that is carried out separately from establishments engaged in production and distribution is treated in NAICS as a manufacturing activity.

515 Broadcasting (except Internet)

Industries in the Broadcasting (except Internet) subsector include establishments that create content or acquire the right to distribute content and subsequently broadcast the content. The industry groups (Radio and Television Broadcasting and Cable and Other Subscription Programming) are based on differences in the methods of communication and the nature of services provided. The Radio and Television Broadcasting industry group includes establishments that operate broadcasting studios and facilities for over-the-air or satellite delivery of radio and television programs of entertainment, news, talk, and the like. These establishments are often engaged in the production and purchase of programs and generating revenues from the sale of air time to advertisers and from donations, subsidies, and/or the sale of programs. The Cable and Other Subscription Programming industry group includes establishments operating studios and facilities for the broadcasting of programs that are typically narrowcast in nature (limited format, such as news, sports, education, and youth-oriented programming) on a subscription or fee basis.

The distribution of cable and other subscription programming is included in Subsector 517, Telecommunications. Establishments that broadcast exclusively on the Internet are included in Subsector 519, Other Information Services.

515210 Cable and Other Subscription Programming

This industry comprises establishments primarily engaged in operating studios and facilities for the broadcasting of programs on a subscription or fee basis. The broadcast programming is typically narrowcast in nature (e.g., limited format, such as news, sports, education, or youth-oriented). These establishments produce programming in their own facilities or acquire programming from external sources. The programming material is usually delivered to a third party, such as cable systems or direct-to-home satellite systems, for transmission to viewers.

Cross-References. Establishments primarily engaged in--

Producing taped television program materials--are classified in Industry 512110, Motion Picture and Video Production;

Producing and transmitting television programs to affiliated stations--are classified in Industry 515120, Television Broadcasting;

Furnishing cable and other pay television services--are classified in U.S. Industry 517311, Wired Telecommunications Carriers; and

Retailing merchandise by electronic media, such as television--are classified in Industry 454110, Electronic Shopping and Mail-Order Houses.

517 Telecommunications

Industries in the Telecommunications subsector group establishments that provide telecommunications and the services related to that activity (e.g., telephony, including Voice over Internet Protocol (VoIP); cable and satellite television distribution services; Internet access; telecommunications reselling services). The Telecommunications subsector is primarily engaged in operating and/or providing access to facilities for the transmission of voice, data, text, sound, and video. Transmission facilities may be based on a single technology or a combination of technologies. Establishments in the Telecommunications subsector are grouped into three industry groups. The first two are comprised of establishments that operate transmission facilities and infrastructure that they own and/or lease, and provide telecommunications services using those facilities. The distinction between the first two industry groups is the type of infrastructure operated (i.e., wired and/or wireless or satellite). The third industry group is comprised of establishments that provide support activities, telecommunications reselling services, or many of the same services provided by establishments in the first two industry groups, but do not operate as telecommunications carriers. Establishments primarily engaged as independent contractors in the installation and maintenance of broadcasting and telecommunications systems are classified in Sector 23, Construction. Establishments known as Internet cafes, primarily engaged in offering limited Internet connectivity in combination with other services such as facsimile services, training, rental of on-site personal computers, game rooms, or food services are classified in Subsector 561, Administrative and Support Services, or Subsector 722, Food Services and Drinking Places, depending on the primary activity.

517312 Wireless Telecommunications Carriers (except Satellite)

This U.S. industry comprises establishments primarily engaged in operating and maintaining switching and transmission facilities to provide communications via the airwaves. Establishments in this industry have spectrum licenses and provide services using that spectrum, such as cellular phone services, paging services, wireless Internet access, and wireless video services.

Illustrative Examples:

Cellular telephone services

Paging services, except satellite

Wireless Internet service providers, except satellite

Wireless telephone communications carriers, except satellite

Cross-References. Establishments primarily engaged in--

Operating and maintaining wired telecommunications networks--are classified in U.S. Industry 517311, Wired Telecommunications Carriers;

Operating and maintaining satellite networks--are classified in Industry 517410, Satellite Telecommunications;

Providing satellite television distribution services--are classified in U.S. Industry 517311, Wired Telecommunications Carriers; and

Operating as mobile virtual network operations (MVNO)--are classified in U.S. Industry 517911, Telecommunications Resellers.

518210 Data Processing, Hosting, and Related Services

This industry comprises establishments primarily engaged in providing infrastructure for hosting or data processing services. These establishments may provide specialized hosting activities, such as Web hosting, streaming services, or application hosting (except software publishing), or they may provide general time-share mainframe facilities to clients. Data processing establishments provide complete processing and specialized reports from data supplied by clients or provide automated data processing and data entry services.

Illustrative Examples:

- Application hosting
- Optical scanning services
- Web hosting
- Computer data storage services
- Video and audio streaming services
- Computer input preparation services
- Microfilm imaging services
- Computer time rental

Cross-References. Establishments primarily engaged in--

- Providing text processing and related document preparation activities--are classified in Industry 561410, Document Preparation Services;
- Providing on-site management and operation of a client's data processing facilities--are classified in U.S. Industry 541513, Computer Facilities Management Services;
- Software design, development, and publishing, or software publishing only--are classified in Industry 511210, Software Publishers;
- Providing wired broadband Internet access services using own operated telecommunications infrastructure, in combination with Web hosting--are classified in U.S. Industry 517311, Wired Telecommunications Carriers;
- Providing Internet access via client-supplied telecommunications connections in combination with Web hosting--are classified in U.S. Industry 517919, All Other Telecommunications;

- Operating Web search portals--are classified in Industry 519130, Internet Publishing and Broadcasting and Web Search Portals;
- Providing access to computers and office equipment, as well as other office support services--are classified in Industry 56143, Business Service Centers;
- Processing financial transactions, such as credit card transactions--are classified in Industry 522320, Financial Transactions Processing, Reserve, and Clearinghouse Activities; and
- Providing payroll processing services--are classified in U.S. Industry 541214, Payroll Services.

519 Other Information Services

Industries in the Other Information Services subsector group establishments supplying information, storing and providing access to information, searching and retrieving information, operating Web sites that use search engines to allow for searching information on the Internet, or publishing and/or broadcasting content exclusively on the Internet. The main components of the subsector are news syndicates, libraries, archives, exclusive Internet publishing and/or broadcasting, and Web search portals.

521 Monetary Authorities-Central Bank

The Monetary Authorities-Central Bank subsector groups establishments that engage in performing central banking functions, such as issuing currency, managing the Nation's money supply and international reserves, holding deposits that represent the reserves of other banks and other central banks, and acting as a fiscal agent for the central government.

522 Credit Intermediation and Related Activities

Industries in the Credit Intermediation and Related Activities subsector group establishments that (1) lend funds raised from depositors; (2) lend funds raised from credit market borrowing; or (3) facilitate the lending of funds or issuance of credit by engaging in such activities as mortgage and loan brokerage, clearinghouse and reserve services, and check cashing services.

522210 Credit Card Issuing

This industry comprises establishments primarily engaged in providing credit by issuing credit cards. Credit card issuance provides the funds required to purchase goods and services in return for payment of the full balance or payments on an installment basis. Credit card banks are included in this industry.

Cross-References.

Establishments primarily engaged in issuing cards that contain a stored pre-paid value are classified with the industry providing the service represented by the cards, such as transit fare cards in Subsector 482, Rail Transportation, and long-distance telephone cards in Subsector 517, Telecommunications.

523 Securities, Commodity Contracts, and Other Financial Investments and Related Activities

Industries in the Securities, Commodity Contracts, and Other Financial Investments and Related Activities subsector group establishments that are primarily engaged in one of the following: (1) underwriting securities issues and/or making markets for securities and commodities; (2) acting as

agents (i.e., brokers) between buyers and sellers of securities and commodities; (3) providing securities and commodity exchange services; and (4) providing other services, such as managing portfolios of assets; providing investment advice; and trust, fiduciary, and custody services.

523110 Investment Banking and Securities Dealing

This industry comprises establishments primarily engaged in underwriting, originating, and/or maintaining markets for issues of securities. Investment bankers act as principals (i.e., investors who buy or sell on their own account) in firm commitment transactions or act as agents in best effort and standby commitments. This industry also includes establishments acting as principals in buying or selling securities generally on a spread basis, such as securities dealers or stock option dealers.

Illustrative Examples:

Bond dealing (i.e., acting as a principal in dealing securities to investors)

Stock options dealing

Securities underwriting

Cross-References.

Establishments primarily engaged in acting as agents (i.e., brokers) in buying or selling securities on a commission or transaction fee basis are classified in Industry 523120, Securities Brokerage; and

Investment clubs or individual investors primarily engaged in buying or selling financial contracts (e.g., securities) on their own account are classified in Industry 523910, Miscellaneous Intermediation.

523120 Securities Brokerage

This industry comprises establishments primarily engaged in acting as agents (i.e., brokers) between buyers and sellers in buying or selling securities on a commission or transaction fee basis.

Illustrative Examples:

- Mutual fund agencies (i.e., brokerages)
- Stock brokerages
- Securities brokerages
- Cross-References.

Establishments primarily engaged in investment banking and securities dealing (i.e., buying or selling securities on their own account) are classified in Industry 523110, Investment Banking and Securities Dealing.

524 Insurance Carriers and Related Activities

Industries in the Insurance Carriers and Related Activities subsector group establishments that are primarily engaged in one of the following: (1) underwriting (assuming the risk, assigning premiums, and so forth) annuities and insurance policies or (2) facilitating such underwriting by selling insurance policies and by providing other insurance and employee benefit related services.

525 Funds, Trusts, and Other Financial Vehicles

Industries in the Funds, Trusts, and Other Financial Vehicles subsector group legal entities (i.e., funds, plans, and/or programs) organized to pool securities or other assets on behalf of shareholders or beneficiaries of employee benefit or other trust funds. The portfolios are customized to achieve specific investment characteristics, such as diversification, risk, rate of return, and price volatility. These entities earn interest, dividends, and other investment income, but have little or no employment and no revenue from the sale of services. Establishments with employees devoted to the management of funds are classified in Industry Group 5239, Other Financial Investment Activities.

Establishments primarily engaged in holding the securities of (or other equity interests in) other firms are classified in Sector 55, Management of Companies and Enterprises. Equity real estate investment trusts (REITs) that are primarily engaged in leasing buildings, dwellings, or other real estate property to others are classified in Subsector 531, Real Estate.

525920 Trusts, Estates, and Agency Accounts

This industry comprises legal entities, trusts, estates, or agency accounts, administered on behalf of the beneficiaries under the terms of a trust agreement, will, or agency agreement.

Illustrative Examples:

- Bankruptcy estates
- Private estates (i.e., administering on behalf of beneficiaries)
- Personal investment trusts
- Testamentary trusts

Cross-References. Establishments primarily engaged in--

- Managing portfolios of trusts--are classified in Industry 523920, Portfolio Management;
- Administering personal estates--are classified in U.S. Industry 523991, Trust, Fiduciary, and Custody Activities; and
- Operating businesses of trusts and bankruptcy estates--are classified according to the kind of business operated.

525990 Other Financial Vehicles

This industry comprises legal entities (i.e., funds (except insurance and employee benefit funds; open-end investment funds; trusts, estates, and agency accounts)). Included in this industry are mortgage real estate investment trusts (REITs).

Illustrative Examples:

- Closed-end investment funds
- Special purpose financial vehicles
- Collateralized mortgage obligations (CMOs)
- Unit investment trust funds
- Face-amount certificate funds
- Mortgage real estate investment trusts (REITs)
- Real estate mortgage investment conduits (REMICs)

Cross-References.

- Legal entities (i.e., funds, plans, and programs) that provide insurance and employee benefits exclusively for the sponsor, firm, or its employees or members are classified in Industry Group 5251, Insurance and Employee Benefit Funds;
- Legal entities (i.e., open-end investment funds) organized to pool assets that consist of securities or other financial instruments, where the pools are offered to the public in an initial offering with additional shares offered continuously and perpetually at a specific price determined by the net asset value, are classified in Industry 525910, Open-End Investment Funds;
- Legal entities (i.e., trusts, estates, or agency accounts) administered on behalf of the beneficiaries under the terms of a trust agreement, will, or agency agreement are classified in Industry 525920, Trusts, Estates, and Agency Accounts; and
- Equity real estate investment trusts (REITs) that are primarily engaged in leasing buildings, dwellings, or other real estate property to others are classified in Industry Group 5311, Lessors of Real Estate, based on primary type of real estate property leased.

531 Real Estate

Industries in the Real Estate subsector group establishments primarily engaged in renting or leasing real estate to others; managing real estate for others; selling, buying, or renting real estate for others; and providing other real estate related services, such as appraisal services.

This subsector includes equity real estate investment trusts (REITs) primarily engaged in leasing buildings, dwellings, or other real estate property to others. Mortgage REITs are classified in Subsector 525, Funds, Trusts, and Other Financial Vehicles.

Establishments primarily engaged in subdividing and developing unimproved real estate and constructing buildings for sale are classified in Subsector 236, Construction of Buildings. Establishments primarily engaged in subdividing and improving raw land for subsequent sale to builders are classified in Subsector 237, Heavy and Civil Engineering Construction.

531190 Lessors of Other Real Estate Property

This industry comprises establishments primarily engaged in acting as lessors of real estate (except buildings), such as manufactured home (i.e., mobile home) sites, vacant lots, and grazing land.

Cross-References. Establishments primarily engaged in--

- Acting as lessors of buildings used as residences or dwellings, including on-site manufactured (mobile) homes--are classified in Industry 531110, Lessors of Residential Buildings and Dwellings;
- Acting as lessors of buildings (except miniwarehouses and self-storage units) that are not used as residences or dwellings--are classified in Industry 531120, Lessors of Nonresidential Buildings (except Miniwarehouses); and
- Renting or leasing space for self-storage--are classified in Industry 531130, Lessors of Miniwarehouses and Self-Storage Units.

533 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)

Industries in the Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) subsector include establishments primarily engaged in assigning rights to assets, such as patents, trademarks, brand names, and/or franchise agreements, for which a royalty payment or licensing fee is paid to the asset holder. Establishments in this subsector own the patents, trademarks, and/or franchise agreements that they allow others to use or reproduce for a fee and may or may not have created those assets.

Establishments that allow franchisees the use of the franchise name, contingent on the franchisee buying products or services from the franchisor, are classified elsewhere.

Excluded from this subsector are establishments primarily engaged in leasing real property and establishments primarily engaged in leasing tangible assets, such as automobiles, computers, consumer goods, and industrial machinery and equipment. These establishments are classified in Subsector 531, Real Estate, and Subsector 532, Rental and Leasing Services, respectively.

541 Professional, Scientific, and Technical Services

Industries in the Professional, Scientific, and Technical Services subsector group establishments engaged in processes where human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client. The individual industries of this subsector are defined on the basis of the particular expertise and training of the services provider.

The distinguishing feature of the Professional, Scientific, and Technical Services subsector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance, unlike health care, for example, where "high-tech" machines and materials are important collaborating inputs to labor skills in the production of health care. Thus, the establishments classified in this subsector sell expertise. Much of the expertise requires degrees, though not in every case.

551 Management of Companies and Enterprises

Industries in the Management of Companies and Enterprises subsector include three main types of establishments: (1) those that hold the securities of (or other equity interests in) companies and enterprises; (2) those (except government establishments) that administer, oversee, and manage other establishments of the company or enterprise but do not hold the securities of these establishments; and (3) those that both administer, oversee, and manage other establishments of the company or enterprise and hold the securities of (or other equity interests in) these establishments. Those establishments that administer, oversee, and manage normally undertake the strategic or organizational planning and decision-making role of the company or enterprise.

551111 Offices of Bank Holding Companies

This U.S. industry comprises legal entities known as bank holding companies primarily engaged in holding the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing the management decisions of these firms. The holding

companies in this industry do not administer, oversee, and manage other establishments of the company or enterprise whose securities they hold.

Cross-References. Establishments primarily engaged in--

- Holding the securities of (or other equity interests in) a company or enterprise and administering, overseeing, and managing establishments of the company or enterprise whose securities they hold--are classified in U.S. Industry 551114, Corporate, Subsidiary, and Regional Managing Offices; and
- Holding the securities of depository banks and operating these entities--are classified in Industry Group 5221, Depository Credit Intermediation.

551112 Offices of Other Holding Companies

This U.S. industry comprises legal entities known as holding companies (except bank holding) primarily engaged in holding the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing the management decisions of these firms. The holding companies in this industry do not administer, oversee, and manage other establishments of the company or enterprise whose securities they hold.

Cross-References. Establishments primarily engaged in--

- Holding the securities of (or other equity interests in) depository banks for the purpose of owning a controlling interest or influencing the management decisions of these firms--are classified in U.S. Industry 551111, Offices of Bank Holding Companies;
- Holding the securities of (or other equity interests in) a company or enterprise and administering, overseeing, and managing establishments of the company or enterprise whose securities they hold--are classified in U.S. Industry 551114, Corporate, Subsidiary, and Regional Managing Offices; and
- Holding the securities of companies or enterprises and operating these entities--are classified according to the business operated.

561 Administrative and Support Services

Industries in the Administrative and Support Services subsector group establishments engaged in activities that support the day-to-day operations of other organizations. The processes employed in this sector (e.g., general management, personnel administration, clerical activities, cleaning activities) are often integral parts of the activities of establishments found in all sectors of the economy. The establishments classified in this subsector have specialization in one or more of these activities and can, therefore, provide services to clients in a variety of industries and, in some cases, to households. The individual industries of this subsector are defined on the basis of the particular process that they are engaged in and the particular services they provide.

Many of the activities performed in this subsector are ongoing routine support functions that all businesses and organizations must do and that they have traditionally done for themselves. Recent trends, however, are to contract or purchase such services from businesses that specialize in such activities and can, therefore, provide the services more efficiently.

The industries in this subsector cannot be viewed as strictly "support." The Travel Arrangement and Reservation Services industry group includes travel agents, tour operators, and providers of other travel arrangement services, such as hotel and restaurant reservations and arranging the purchase of tickets, serving many types of clients, including individual consumers. This group was placed in this subsector because the services are often of the "support" nature (e.g., travel arrangement), and businesses and other organizations increasingly purchase such services.

The administrative and management activities performed by establishments in this sector are typically on a contract or fee basis. These activities may also be performed by establishments that are part of the company or enterprise. However, establishments involved in administering, overseeing, and managing other establishments of the company or enterprise are classified in Sector 55, Management of Companies and Enterprises. Establishments in Sector 55, Management of Companies and Enterprises, normally undertake the strategic and organizational planning and decision-making role of the company or enterprise. Government establishments engaged in administering, overseeing, and managing governmental programs are classified in Sector 92, Public Administration.

562 Waste Management and Remediation Services

Industries in the Waste Management and Remediation Services subsector group establishments engaged in the collection, treatment, and disposal of waste materials. This includes establishments engaged in local hauling of waste materials; operating materials recovery facilities (i.e., those that sort recyclable materials from the trash stream); providing remediation services (i.e., those that provide for the cleanup of contaminated buildings, mine sites, soil, or ground water); and providing septic pumping and other miscellaneous waste management services. There are three industry groups within the subsector that separate these activities into waste collection, waste treatment and disposal, and remediation and other waste management.

Excluded from this subsector are establishments primarily engaged in collecting, treating, and disposing waste through sewer systems or sewage treatment facilities that are classified in Industry 22132, Sewage Treatment Facilities, and establishments primarily engaged in long-distance hauling of waste materials that are classified in Industry 48423, Specialized Freight (except Used Goods) Trucking, Long-Distance. Also, there are some activities that appear to be related to waste management, but that are not included in this subsector. For example, establishments primarily engaged in providing waste management consulting services are classified in Industry 54162, Environmental Consulting Services.

611 Educational Services

Industries in the Educational Services subsector provide instruction and training in a wide variety of subjects. The instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers.

The subsector is structured according to level and type of educational services. Elementary and secondary schools, junior colleges and colleges, universities, and professional schools correspond to a recognized series of formal levels of education designated by diplomas, associate degrees (including equivalent certificates), and degrees. The remaining industry groups are based more on the type of instruction or training offered, and the levels are not always as formally defined. The establishments are often highly specialized, many offering instruction in a very limited subject matter, for example ski

lessons or one specific computer software package. Within the subsector, the level and types of training that are required of the instructors and teachers vary depending on the industry.

Establishments that manage schools and other educational establishments on a contractual basis are classified in this subsector if they both manage the operation and provide the operating staff. Such establishments are classified in the Educational Services subsector based on the type of facility managed and operated.

621 Ambulatory Health Care Services

Industries in the Ambulatory Health Care Services subsector provide health care services directly or indirectly to ambulatory patients and do not usually provide inpatient services. Health practitioners in this subsector provide outpatient services, with the facilities and equipment not usually being the most significant part of the production process.

623 Nursing and Residential Care Facilities

Industries in the Nursing and Residential Care Facilities subsector provide residential care combined with either nursing, supervisory, or other types of care as required by the residents. In this subsector, the facilities are a significant part of the production process, and the care provided is a mix of health and social services with the health services being largely some level of nursing services.

624 Social Assistance

Industries in the Social Assistance subsector provide a wide variety of social assistance services directly to their clients. These services do not include residential or accommodation services, except on a short-stay basis.

711 Performing Arts, Spectator Sports, and Related Industries

Industries in the Performing Arts, Spectator Sports, and Related Industries subsector group establishments that produce or organize and promote live presentations involving the performances of actors and actresses, singers, dancers, musical groups and artists, athletes, and other entertainers, including independent (i.e., freelance) entertainers and the establishments that manage their careers. The classification recognizes four basic processes: (1) producing (i.e., presenting) events; (2) organizing, managing, and/or promoting events; (3) managing and representing entertainers; and (4) providing the artistic, creative and technical skills necessary to the production of these live events. Also, this subsector contains four industries for performing arts companies. Each is defined on the basis of the particular skills of the entertainers involved in the presentations.

The industry structure for this subsector makes a clear distinction between performing arts companies and performing artists (i.e., independent or freelance). Although not unique to arts and entertainment, freelancing is a particularly important phenomenon in this Performing Arts, Spectator Sports, and Related Industries subsector. Distinguishing this activity from the production activity is a meaningful process differentiation. This approach, however, is difficult to implement in the case of musical groups (i.e., companies) and artists, especially pop groups. These establishments tend to be more loosely organized and it can be difficult to distinguish companies from freelancers. For this reason, NAICS includes one industry that covers both musical groups and musical artists.

This subsector contains two industries for Industry Group 7113, Promoters of Performing Arts, Sports, and Similar Events, one for those that operate facilities and another for those that do not. This is because there are significant differences in cost structures between those promoters that manage and provide the staff to operate facilities and those that do not. In addition to promoters without facilities, other industries in this subsector include establishments that may operate without permanent facilities. These types of establishments include performing arts companies; musical groups and artists; spectator sports; and independent (i.e., freelance) artists, writers, and performers.

Excluded from this subsector are nightclubs. Some nightclubs promote live entertainment on a regular basis and it can be argued that they could be classified in Industry Group 7113, Promoters of Performing Arts, Sports, and Similar Events. However, since most of these establishments function as any other drinking place when they do not promote entertainment and because most of their revenue is derived from sale of food and beverages, they are classified in Subsector 722, Food Services and Drinking Places.

712 Museums, Historical Sites, and Similar Institutions

Industries in the Museums, Historical Sites, and Similar Institutions subsector engage in the preservation and exhibition of objects, sites, and natural wonders of historical, cultural, and/or educational value.

713 Amusement, Gambling, and Recreation Industries

Industries in the Amusement, Gambling, and Recreation Industries subsector (1) operate facilities where patrons can primarily engage in sports, recreation, amusement, or gambling activities and/or (2) provide other amusement and recreation services, such as supplying and servicing amusement devices in places of business operated by others; operating sports teams, clubs, or leagues engaged in playing games for recreational purposes; and guiding tours without using transportation equipment.

This subsector does not cover all establishments providing recreational services. Other sectors of NAICS also provide recreational services. Providers of recreational services are often engaged in processes classified in other sectors of NAICS. For example, operators of resorts and hunting and fishing camps provide both accommodation and recreational facilities and services. These establishments are classified in Subsector 721, Accommodation, partly to reflect the significant costs associated with the provision of accommodation services and partly to ensure consistency with international standards. Likewise, establishments using transportation equipment to provide recreational and entertainment services, such as those operating sightseeing buses, dinner cruises, or helicopter rides, are classified in Sector 48-49, Transportation and Warehousing.

The industry groups in this subsector highlight particular types of activities: amusement parks and arcades, gambling industries, and other amusement and recreation industries. The groups, however, are not all-inclusive of the activity. The Gambling Industries industry group does not provide for full coverage of gambling activities. For example, casino hotels are classified in Subsector 721, Accommodation; and horse and dog racing tracks are classified in Industry Group 7112, Spectator Sports.

721 Accommodation

Industries in the Accommodation subsector provide lodging or short-term accommodations for travelers, vacationers, and others. There is a wide range of establishments in these industries. Some

provide lodging only, while others provide meals, laundry services, and recreational facilities, as well as lodging. Lodging establishments are classified in this subsector even if the provision of complementary services generates more revenue. The types of complementary services provided vary from establishment to establishment.

The subsector is organized into three groups: (1) traveler accommodation, (2) recreational accommodation, and (3) rooming and boarding houses, dormitories, and workers' camps. The Traveler Accommodation industry group includes establishments that primarily provide traditional types of lodging services. This group includes hotels, motels, and bed-and-breakfast inns. In addition to lodging, these establishments may provide a range of other services to their guests. The RV (Recreational Vehicle) Parks and Recreational Camps industry group includes establishments that operate lodging facilities primarily designed to accommodate outdoor enthusiasts. Included are travel trailer campsites, recreational vehicle parks, and outdoor adventure retreats. The Rooming and Boarding Houses, Dormitories, and Workers' Camps industry group includes establishments providing temporary or longer-term accommodations, that for the period of occupancy, may serve as a principal residence. Board (i.e., meals) may be provided but is not essential.

Establishments that manage short-stay accommodation establishments (e.g., hotels and motels) on a contractual basis are classified in this subsector if they both manage the operation and provide the operating staff. Such establishments are classified based on the type of facility managed and operated.

722 Food Services and Drinking Places

Industries in the Food Services and Drinking Places subsector prepare meals, snacks, and beverages to customer order for immediate on-premises and off-premises consumption. There is a wide range of establishments in these industries. Some provide food and drink only, while others provide various combinations of seating space, waiter/waitress services, and incidental amenities, such as limited entertainment. The industries in the subsector are grouped based on the type and level of services provided. The industry groups are Special Food Services, such as food service contractors, caterers, and mobile food services; Drinking Places (Alcoholic Beverages); and Restaurants and Other Eating Places.

Food and beverage services at hotels and motels, amusement parks, theaters, casinos, country clubs, similar recreational facilities, and civic and social organizations are included in this subsector only if these services are provided by a separate establishment primarily engaged in providing food and beverage services.

Excluded from this subsector are establishments operating dinner cruises. These establishments are classified in Subsector 487, Scenic and Sightseeing Transportation, because they utilize transportation equipment to provide scenic recreational entertainment.

812 Personal and Laundry Services

Industries in the Personal and Laundry Services subsector group establishments that provide personal and laundry services to individuals, households, and businesses. Services performed include: personal care services; death care services; laundry and drycleaning services; and a wide range of other personal services, such as pet care (except veterinary) services, photofinishing services, temporary parking services, and dating services.

The Personal and Laundry Services subsector is by no means all-inclusive of the services that could be termed personal services (i.e., those provided to individuals rather than businesses). There are many other subsectors, as well as sectors, that provide services to persons. Establishments providing legal, accounting, tax preparation, architectural, portrait photography, and similar professional services are classified in Sector 54, Professional, Scientific, and Technical Services; those providing job placement, travel arrangement, home security, interior and exterior house cleaning, exterminating, lawn and garden care, and similar support services are classified in Sector 56, Administrative and Support and Waste Management and Remediation Services; those providing health and social services are classified in Sector 62, Health Care and Social Assistance; those providing amusement and recreation services are classified in Sector 71, Arts, Entertainment, and Recreation; those providing educational instruction are classified in Sector 61, Educational Services; those providing repair services are classified in Subsector 811, Repair and Maintenance; and those providing spiritual, civic, and advocacy services are classified in Subsector 813, Religious, Grantmaking, Civic, Professional, and Similar Organizations.

813 Religious, Grantmaking, Civic, Professional, and Similar Organizations

Industries in the Religious, Grantmaking, Civic, Professional, and Similar Organizations subsector group establishments that organize and promote religious activities; support various causes through grantmaking; advocate various social and political causes; and promote and defend the interests of their members.

The industry groups within the subsector are defined in terms of their activities, such as establishments that provide funding for specific causes or for a variety of charitable causes; establishments that advocate and actively promote causes and beliefs for the public good; and establishments that have an active membership structure to promote causes and represent the interests of their members. Establishments in this subsector may publish newsletters, books, and periodicals for distribution to their members.

814 Private Households

Industries in the Private Households subsector include private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household. These private households may employ individuals, such as cooks, maids, butlers, and outside workers, such as gardeners, caretakers, and other maintenance workers.

999 Unclassified Industry (Classification from data vendor)

Businesses not reporting their

Appendix C: Industry Segmentation Results, Fairfield County

NAICS	Description	2017 Jobs	2017 Location Quotient	Segmentation
425	Wholesale Electronic Markets and Agents and Brokers	2,949	1.13	Current Strength
446	Health and Personal Care Stores	3,659	1.17	Current Strength
453	Miscellaneous Store Retailers	2,758	1.13	Current Strength
485	Transit and Ground Passenger Transportation	3,980	2.85	Current Strength
511	Publishing Industries (except Internet)	3,782	1.78	Current Strength
512	Motion Picture and Sound Recording Industries	2,790	2.19	Current Strength
517	Telecommunications	3,381	1.47	Current Strength
611	Educational Services	11,491	1.40	Current Strength
713	Amusement, Gambling, and Recreation Industries	8,615	1.79	Current Strength
812	Personal and Laundry Services	7,128	1.66	Current Strength
814	Private Households	4,397	5.25	Current Strength
237	Heavy and Civil Engineering Construction	1,074	0.38	Emerging Strength
311	Food Manufacturing	1,724	0.37	Emerging Strength
323	Printing and Related Support Activities	1,409	1.09	Emerging Strength
452	General Merchandise Stores	6,287	0.68	Emerging Strength
711	Performing Arts, Spectator Sports, and Related Industries	1,130	0.80	Emerging Strength
721	Accommodation	3,007	0.52	Emerging Strength
722	Food Services and Drinking Places	29,596	0.87	Emerging Strength
445	Food and Beverage Stores	12,324	1.36	Priority Retention Target
519	Other Information Services	1,632	2.00	Priority Retention Target
541	Professional, Scientific, and Technical Services	29,919	1.14	Priority Retention Target
562	Waste Management and Remediation Services	1,577	1.31	Priority Retention Target
621	Ambulatory Health Care Services	23,434	1.11	Priority Retention Target
623	Nursing and Residential Care Facilities	12,869	1.32	Priority Retention Target
624	Social Assistance	14,541	1.34	Priority Retention Target
111	Crop Production	135	0.08	
112	Animal Production and Aquaculture	189	0.25	
113	Forestry and Logging	0	0.00	
114	Fishing, Hunting and Trapping	30	1.25	
115	Support Activities for Agriculture and Forestry	52	0.05	
211	Oil and Gas Extraction	0	0.00	
212	Mining (except Oil and Gas)	30	0.06	
213	Support Activities for Mining	5	0.01	
221	Utilities	1,232	0.76	

236	Construction of Buildings	2,835	0.63	
238	Specialty Trade Contractors	9,160	0.72	
312	Beverage and Tobacco Product Manufacturing	322	0.42	
313	Textile Mills	13	0.04	
314	Textile Product Mills	390	1.15	
315	Apparel Manufacturing	5	0.01	
316	Leather and Allied Product Manufacturing	175	2.09	
321	Wood Product Manufacturing	247	0.21	
322	Paper Manufacturing	526	0.49	
324	Petroleum and Coal Products Manufacturing	93	0.28	
325	Chemical Manufacturing	1,665	0.69	
326	Plastics and Rubber Products Manufacturing	1,018	0.49	
327	Nonmetallic Mineral Product Manufacturing	340	0.28	
331	Primary Metal Manufacturing	329	0.30	
332	Fabricated Metal Product Manufacturing	3,255	0.78	
333	Machinery Manufacturing	3,970	1.27	
334	Computer and Electronic Product Manufacturing	3,132	1.03	
335	Electrical Equipment, Appliance, and Component Manufacturing	2,275	2.02	
336	Transportation Equipment Manufacturing	7,622	1.59	
337	Furniture and Related Product Manufacturing	524	0.46	
339	Miscellaneous Manufacturing	1,948	1.12	
423	Merchant Wholesalers, Durable Goods	6,824	0.79	
424	Merchant Wholesalers, Nondurable Goods	4,599	0.77	
441	Motor Vehicle and Parts Dealers	5,032	0.86	
442	Furniture and Home Furnishings Stores	2,178	1.57	
443	Electronics and Appliance Stores	1,662	1.12	
444	Building Material and Garden Equipment and Supplies Dealers	3,866	1.03	
447	Gasoline Stations	1,510	0.55	
448	Clothing and Clothing Accessories Stores	5,446	1.35	
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	1,853	1.05	
454	Nonstore Retailers	3,121	1.88	
481	Air Transportation	276	0.19	
482	Rail Transportation	0	0.00	
483	Water Transportation	152	0.80	
484	Truck Transportation	889	0.21	
486	Pipeline Transportation	69	0.48	
487	Scenic and Sightseeing Transportation	14	0.14	
488	Support Activities for Transportation	1,177	0.59	
491	Postal Service	0	0.00	

492	Couriers and Messengers	1,856	0.96	
493	Warehousing and Storage	580	0.20	
515	Broadcasting (except Internet)	953	1.20	
518	Data Processing, Hosting, and Related Services	334	0.37	
521	Monetary Authorities-Central Bank	0	0.00	
522	Credit Intermediation and Related Activities	8,980	1.16	
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	17,403	6.43	
524	Insurance Carriers and Related Activities	7,317	1.08	
525	Funds, Trusts, and Other Financial Vehicles	0	0.00	
531	Real Estate	4,427	0.95	
532	Rental and Leasing Services	1,003	0.62	
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	23	0.33	
551	Management of Companies and Enterprises	12,525	1.88	
561	Administrative and Support Services	22,998	0.91	
622	Hospitals	13,422	0.91	
712	Museums, Historical Sites, and Similar Institutions	741	1.56	
811	Repair and Maintenance	3,461	0.91	
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	3,957	0.99	
901	Federal Government	2,822	0.34	
902	State Government	6,046	0.45	
903	Local Government	36,005	0.87	
999	Unclassified Industry	177	0.21	

Appendix D: Industry Segmentation Results, New York and Fairfield Counties

NAICS	Description	2017 Jobs	2017 Location Quotient	Segmentation
446	Health and Personal Care Stores	23,765	1.11	Current Strength
448	Clothing and Clothing Accessories Stores	52,897	1.93	Current Strength
512	Motion Picture and Sound Recording Industries	45,649	5.24	Current Strength
515	Broadcasting (except Internet)	25,258	4.68	Current Strength
518	Data Processing, Hosting, and Related Services	8,247	1.32	Current Strength
519	Other Information Services	37,156	6.68	Current Strength
522	Credit Intermediation and Related Activities	79,803	1.51	Current Strength
541	Professional, Scientific, and Technical Services	380,177	2.12	Current Strength
611	Educational Services	126,064	2.25	Current Strength
721	Accommodation	48,421	1.23	Current Strength
812	Personal and Laundry Services	38,282	1.31	Current Strength
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	58,815	2.15	Current Strength
814	Private Households	19,337	3.39	Current Strength
999	Unclassified Industry	10,081	1.76	Current Strength
236	Construction of Buildings	20,988	0.69	Emerging Strength
238	Specialty Trade Contractors	29,423	0.34	Emerging Strength
311	Food Manufacturing	6,662	0.21	Emerging Strength
425	Wholesale Electronic Markets and Agents and Brokers	13,051	0.73	Emerging Strength
445	Food and Beverage Stores	39,585	0.64	Emerging Strength
452	General Merchandise Stores	23,629	0.37	Emerging Strength
453	Miscellaneous Store Retailers	15,590	0.94	Emerging Strength
485	Transit and Ground Passenger Transportation	5,553	0.58	Emerging Strength
561	Administrative and Support Services	178,932	1.04	Emerging Strength
621	Ambulatory Health Care Services	106,228	0.74	Emerging Strength
713	Amusement, Gambling, and Recreation Industries	29,794	0.91	Emerging Strength
722	Food Services and Drinking Places	218,479	0.94	Emerging Strength
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	186,369	10.11	Priority Retention Target

524	Insurance Carriers and Related Activities	51,737	1.12	Priority Retention Target
531	Real Estate	84,434	2.66	Priority Retention Target
551	Management of Companies and Enterprises	74,571	1.64	Priority Retention Target
711	Performing Arts, Spectator Sports, and Related Industries	35,727	3.73	Priority Retention Target
712	Museums, Historical Sites, and Similar Institutions	10,363	3.20	Priority Retention Target
111	Crop Production	165	0.01	
112	Animal Production and Aquaculture	202	0.04	
113	Forestry and Logging	0	0.00	
114	Fishing, Hunting and Trapping	30	0.18	
115	Support Activities for Agriculture and Forestry	178	0.02	
211	Oil and Gas Extraction	5	0.00	
212	Mining (except Oil and Gas)	43	0.01	
213	Support Activities for Mining	11	0.00	
221	Utilities	7,101	0.64	
237	Heavy and Civil Engineering Construction	3,385	0.17	
312	Beverage and Tobacco Product Manufacturing	698	0.13	
313	Textile Mills	749	0.33	
314	Textile Product Mills	727	0.32	
315	Apparel Manufacturing	8,011	3.28	
316	Leather and Allied Product Manufacturing	441	0.77	
321	Wood Product Manufacturing	293	0.04	
322	Paper Manufacturing	600	0.08	
323	Printing and Related Support Activities	4,132	0.47	
324	Petroleum and Coal Products Manufacturing	93	0.04	
325	Chemical Manufacturing	2,269	0.14	
326	Plastics and Rubber Products Manufacturing	1,106	0.08	
327	Nonmetallic Mineral Product Manufacturing	437	0.05	
331	Primary Metal Manufacturing	403	0.05	
332	Fabricated Metal Product Manufacturing	3,600	0.13	
333	Machinery Manufacturing	4,080	0.19	
334	Computer and Electronic Product Manufacturing	5,123	0.25	
335	Electrical Equipment, Appliance, and Component Manufacturing	2,391	0.31	
336	Transportation Equipment Manufacturing	7,631	0.23	
337	Furniture and Related Product Manufacturing	1,013	0.13	
339	Miscellaneous Manufacturing	6,192	0.52	
423	Merchant Wholesalers, Durable Goods	33,444	0.57	
424	Merchant Wholesalers, Nondurable Goods	42,062	1.03	
441	Motor Vehicle and Parts Dealers	6,561	0.16	
442	Furniture and Home Furnishings Stores	7,462	0.79	
443	Electronics and Appliance Stores	11,142	1.10	
444	Building Material and Garden Equipment and Supplies Dealers	6,950	0.27	
447	Gasoline Stations	1,754	0.09	

451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	8,099	0.67	
454	Nonstore Retailers	10,169	0.90	
481	Air Transportation	1,342	0.14	
482	Rail Transportation	10	0.75	
483	Water Transportation	364	0.28	
484	Truck Transportation	1,991	0.07	
486	Pipeline Transportation	69	0.07	
487	Scenic and Sightseeing Transportation	1,524	2.28	
488	Support Activities for Transportation	3,477	0.26	
491	Postal Service	47	0.34	
492	Couriers and Messengers	9,980	0.76	
493	Warehousing and Storage	1,502	0.08	
511	Publishing Industries (except Internet)	45,203	3.12	
517	Telecommunications	13,967	0.89	
521	Monetary Authorities-Central Bank	2,673	6.98	
525	Funds, Trusts, and Other Financial Vehicles	934	3.92	
532	Rental and Leasing Services	3,787	0.34	
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	1,871	3.93	
562	Waste Management and Remediation Services	2,081	0.25	
622	Hospitals	90,024	0.90	
623	Nursing and Residential Care Facilities	26,142	0.39	
624	Social Assistance	72,508	0.98	
811	Repair and Maintenance	5,599	0.22	
901	Federal Government	25,754	0.46	
902	State Government	20,479	0.22	
903	Local Government	263,375	0.94	

Appendix E: Industry Analysis Results, Fairfield County

NAICS	Description	If 2017 LQ>1.1	Segmentation	If Empl Mult > Average	If Income Mult > Average	If Industry Wage > Regional Average	FC as share of U.S. Increase	If Recent U.S. Industry Growth > U.S total increase in employment	Total score
512	Motion Picture and Sound Recording Industries	1	1	1	1	1	1	1	7
425	Wholesale Electronic Markets and Agents and Brokers	1	1	1	1	1	1		6
511	Publishing Industries (except Internet)	1	1	1	1	1	1		6
517	Telecommunications	1	1	1	1	1	1		6
519	Other Information Services	1	1	1	1	1		1	6
312	Beverage and Tobacco Product Manufacturing			1	1	1	1	1	5
454	Nonstore Retailers	1		1	1	1		1	5
515	Broadcasting (except Internet)	1		1	1	1	1		5
518	Data Processing, Hosting, and Related Services			1	1	1	1	1	5
713	Amusement, Gambling, and Recreation Industries	1	1		1		1	1	5
237	Heavy and Civil Engineering Construction		1			1	1	1	4
314	Textile Product Mills	1		1		1	1		4
316	Leather and Allied Product Manufacturing	1		1	1	1			4
336	Transportation Equipment Manufacturing	1		1		1		1	4
446	Health and Personal Care Stores	1	1		1		1		4
453	Miscellaneous Store Retailers	1	1		1		1		4
485	Transit and Ground Passenger Transportation	1	1				1	1	4
486	Pipeline Transportation			1	1	1		1	4
522	Credit Intermediation and Related Activities	1		1	1	1			4
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	1		1		1		1	4
524	Insurance Carriers and Related Activities			1	1	1		1	4
531	Real Estate			1	1	1		1	4
541	Professional, Scientific, and Technical Services	1	1			1		1	4
551	Management of Companies and Enterprises	1		1		1		1	4
562	Waste Management and Remediation Services	1	1		1			1	4
611	Educational Services	1	1				1	1	4
711	Performing Arts, Spectator Sports, and Related Industries		1		1		1	1	4

721	Accommodation		1		1		1	1	4
812	Personal and Laundry Services	1	1				1	1	4
112	Animal Production and Aquaculture				1		1	1	3
221	Utilities			1	1	1			3
311	Food Manufacturing		1		1		1		3
313	Textile Mills				1	1	1		3
321	Wood Product Manufacturing				1		1	1	3
324	Petroleum and Coal Products Manufacturing			1	1		1		3
325	Chemical Manufacturing			1	1	1			3
326	Plastics and Rubber Products Manufacturing			1	1			1	3
333	Machinery Manufacturing	1		1			1		3
335	Electrical Equipment, Appliance, and Component Manufacturing	1		1			1		3
423	Merchant Wholesalers, Durable Goods			1	1		1		3
424	Merchant Wholesalers, Nondurable Goods			1	1		1		3
452	General Merchandise Stores		1		1		1		3
482	Rail Transportation			1	1			1	3
483	Water Transportation			1	1	1			3
488	Support Activities for Transportation			1			1	1	3
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)			1	1	1			3
621	Ambulatory Health Care Services	1	1					1	3
624	Social Assistance	1	1					1	3
712	Museums, Historical Sites, and Similar Institutions	1			1			1	3
722	Food Services and Drinking Places		1				1	1	3
814	Private Households	1	1				1		3
999	Unclassified Industry					1	1	1	3
114	Fishing, Hunting and Trapping	1					1		2
212	Mining (except Oil and Gas)			1	1				2
323	Printing and Related Support Activities		1				1		2
327	Nonmetallic Mineral Product Manufacturing				1		1		2
331	Primary Metal Manufacturing			1	1				2
442	Furniture and Home Furnishings Stores	1			1				2
443	Electronics and Appliance Stores	1			1				2
445	Food and Beverage Stores	1	1						2
447	Gasoline Stations				1			1	2
448	Clothing and Clothing Accessories Stores	1			1				2
525	Funds, Trusts, and Other Financial Vehicles			1	1				2

532	Rental and Leasing Services			1	1				2
623	Nursing and Residential Care Facilities	1	1						2
902	State Government			1	1				2
903	Local Government			1	1				2
111	Crop Production				1				1
115	Support Activities for Agriculture and Forestry							1	1
211	Oil and Gas Extraction			1					1
213	Support Activities for Mining						1		1
236	Construction of Buildings							1	1
238	Specialty Trade Contractors							1	1
315	Apparel Manufacturing				1				1
322	Paper Manufacturing				1				1
334	Computer and Electronic Product Manufacturing					1			1
339	Miscellaneous Manufacturing	1							1
441	Motor Vehicle and Parts Dealers							1	1
444	Building Material and Garden Equipment and Supplies Dealers				1				1
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores				1				1
481	Air Transportation			1					1
484	Truck Transportation							1	1
487	Scenic and Sightseeing Transportation							1	1
491	Postal Service							1	1
492	Couriers and Messengers							1	1
493	Warehousing and Storage							1	1
561	Administrative and Support Services							1	1
622	Hospitals			1					1
811	Repair and Maintenance							1	1
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations				1				1
901	Federal Government				1				1
113	Forestry and Logging								0
332	Fabricated Metal Product Manufacturing								0
337	Furniture and Related Product Manufacturing								0
521	Monetary Authorities-Central Bank								0

Appendix F: Industry Analysis Results, New York and Fairfield Counties

NAICS	Description	If 2017 LQ >1.1	Segmentation	Empl Mult > Average	Income Mult > Average	If Industry Wage > Regional Average	Region as share of U.S. Increase	If Recent U.S. Industry Growth > U.S total increase in employment	Total Score
518	Data Processing, Hosting, and Related Services	1	1	1	1	1	1	1	7
519	Other Information Services	1	1	1	1	1	1	1	7
512	Motion Picture and Sound Recording Industries	1	1	1	1		1	1	6
515	Broadcasting (except Internet)	1	1	1	1	1	1		6
522	Credit Intermediation and Related Activities	1	1	1	1	1	1		6
524	Insurance Carriers and Related Activities	1	1	1	1	1		1	6
425	Wholesale Electronic Markets and Agents and Brokers		1	1	1	1	1		5
511	Publishing Industries (except Internet)	1		1	1	1	1		5
521	Monetary Authorities-Central Bank	1		1	1	1	1		5
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	1	1	1		1		1	5
525	Funds, Trusts, and Other Financial Vehicles	1		1	1	1	1		5
531	Real Estate	1	1	1	1			1	5
541	Professional, Scientific, and Technical Services	1	1			1	1	1	5
551	Management of Companies and Enterprises	1	1	1		1		1	5
721	Accommodation	1	1		1		1	1	5
999	Unclassified Industry	1	1				1	1	4
312	Beverage and Tobacco Product Manufacturing			1	1	1		1	4
446	Health and Personal Care Stores	1	1		1		1		4
448	Clothing and Clothing Accessories Stores	1	1		1		1		4
486	Pipeline Transportation			1	1	1		1	4
517	Telecommunications			1	1	1	1		4
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	1		1	1	1			4
611	Educational Services	1	1				1	1	4
711	Performing Arts, Spectator Sports, and Related Industries	1	1		1			1	4
713	Amusement, Gambling, and Recreation Industries		1		1		1	1	4
812	Personal and Laundry Services	1	1				1	1	4
212	Mining (except Oil and Gas)			1	1		1		3
221	Utilities			1	1	1			3
236	Construction of Buildings		1				1	1	3

238	Specialty Trade Contractors		1				1	1	3
311	Food Manufacturing		1		1		1		3
313	Textile Mills			1	1	1			3
315	Apparel Manufacturing	1		1	1				3
316	Leather and Allied Product Manufacturing			1	1	1			3
321	Wood Product Manufacturing				1		1	1	3
324	Petroleum and Coal Products Manufacturing			1	1		1		3
325	Chemical Manufacturing			1	1	1			3
326	Plastics and Rubber Products Manufacturing			1	1			1	3
336	Transportation Equipment Manufacturing			1		1		1	3
424	Merchant Wholesalers, Nondurable Goods			1	1	1			3
452	General Merchandise Stores		1		1		1		3
453	Miscellaneous Store Retailers		1		1		1		3
482	Rail Transportation				1		1	1	3
483	Water Transportation			1	1	1			3
485	Transit and Ground Passenger Transportation		1				1	1	3
487	Scenic and Sightseeing Transportation	1					1	1	3
561	Administrative and Support Services		1				1	1	3
621	Ambulatory Health Care Services		1				1	1	3
712	Museums, Historical Sites, and Similar Institutions	1	1					1	3
722	Food Services and Drinking Places		1				1	1	3
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	1	1				1		3
814	Private Households	1	1				1		3
111	Crop Production				1		1		2
112	Animal Production and Aquaculture						1	1	2
237	Heavy and Civil Engineering Construction					1		1	2
331	Primary Metal Manufacturing			1	1				2
333	Machinery Manufacturing			1	1				2
334	Computer and Electronic Product Manufacturing					1	1		2
423	Merchant Wholesalers, Durable Goods			1	1				2
445	Food and Beverage Stores		1				1		2
447	Gasoline Stations				1			1	2
454	Nonstore Retailers				1			1	2
491	Postal Service						1	1	2
532	Rental and Leasing Services			1	1				2
562	Waste Management and Remediation Services				1			1	2
902	State Government			1	1				2
114	Fishing, Hunting and Trapping						1		1
115	Support Activities for Agriculture and Forestry							1	1

213	Support Activities for Mining					1			1
314	Textile Product Mills						1		1
322	Paper Manufacturing				1				1
323	Printing and Related Support Activities						1		1
327	Nonmetallic Mineral Product Manufacturing				1				1
441	Motor Vehicle and Parts Dealers							1	1
442	Furniture and Home Furnishings Stores				1				1
443	Electronics and Appliance Stores				1				1
444	Building Material and Garden Equipment and Supplies Dealers				1				1
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores				1				1
484	Truck Transportation							1	1
488	Support Activities for Transportation							1	1
492	Couriers and Messengers							1	1
493	Warehousing and Storage							1	1
624	Social Assistance							1	1
811	Repair and Maintenance							1	1
901	Federal Government				1				1
113	Forestry and Logging								0
211	Oil and Gas Extraction								0
332	Fabricated Metal Product Manufacturing								0
335	Electrical Equipment, Appliance, and Component Manufacturing								0
337	Furniture and Related Product Manufacturing								0
339	Miscellaneous Manufacturing								0
481	Air Transportation								0
622	Hospitals								0
623	Nursing and Residential Care Facilities								0
903	Local Government								0