

# Economic Development Marketing Strategy

## For the Regional Growth Partnership

June 2009



### A. Context

---

As part of its 2008 Comprehensive Economic Development Strategy, the Regional Growth Partnership (RGP) articulated its vision for the South Central Region of Connecticut to function as a global center of innovation with successful businesses, a competitive, welcoming, and business-friendly environment, and an excellent standard of living for everyone, with a high-quality, adaptable, and productive resident workforce base. In order to move the region toward this vision, RGP has decided to focus its initiatives on five areas, one of which is regional marketing and communication. Toward this goal, on behalf of the region, the South Central Regional Council of Governments (SCRCOG) has engaged a set of firms to help develop a regional economic development marketing website. RGP has simultaneously undertaken a process to develop this regional marketing plan.

### B. Process

---

The marketing plan is a product of quantitative data, a survey of business owners in the region, one-on-one interviews with businesses in the region, and marketing theory. The first portion of quantitative data focused on population demographics, including population size, population growth, and demographic trends in race/ethnicity, age, and educational attainment, and household income. The second portion of quantitative data focused on identifying the primary business industries and sectors in the region. These data points include the number of businesses, breakdown by SIC and NAICS code, breakdown by number of employees, and consumer expenditure information. Qualitative data was obtained through market research, an online survey, and individual interviews to identify what types of businesses are growing/contracting, what brings newcomers to the region, what factors are “deal-breakers” that cause businesses to leave the region or not select the region, who are the region’s chief competitors, and what types of businesses are expanding on a national basis. Throughout the planning process, periodic findings were shared with the RGP Strategic Planning Committee for discussion and input.

### C. Mission, Vision, and Regional Marketing Objective

---

RGP mission: To encourage cohesiveness between the public and private sectors in the development of policies and programs designed to make the South Central Connecticut region more competitive in the global economy.

Regional Vision Statement: “The South Central Connecticut Region of 2028 will pride itself on being a global center of innovation with successful businesses, a competitive, welcoming and business-friendly environment, and an excellent standard of living for all. Its residents will constitute a high quality, adaptable and productive workforce.”

Regional marketing objective: The objective of the regional marketing effort is to enhance the region’s image as a desirable location in which to start, locate and operate a business. The regional marketing effort will be conducted by an aggressive, cooperative external and internal marketing program and creation of a credible regional economic development team. This marketing strategy will include both external marketing towards business prospects outside the region, and internal marketing to reach existing businesses, stakeholders and allies within South Central Connecticut.

Toward this end, this marketing plan identifies the ideal businesses to target in the region, develops the messages that will capture their attention, determines how to reach them, and defines the actions that are needed.

## D. Marketing Environment

---

To inform the marketing strategy, the first consideration is the strength of the current brand. Additional considerations include who is involved in marketing efforts within the region, how these ongoing marketing efforts are focused, and where overlaps or gaps exist in marketing efforts.

Due in large part to the town-level focus in Connecticut, the “South-Central Region of Connecticut” lacks a strong identity and has no brand recognition for marketing purposes. When asked what comes to mind when marketing the “South-Central Region of Connecticut”, interviewees consistently had no answer.

A number of marketing efforts are occurring in the region. First, marketing occurs on the State level – through the Department of Economic and Community Development, Connecticut Development Authority, and various entities that are dedicated to business recruitment and retention on the state level (e.g., CERC, CBIA). Second, within the 15-town RGP region, each town has an ongoing economic development and marketing effort. In addition, the 12 different Chambers of Commerce within the region (Branford, Cheshire, Guilford, Hamden, Greater Meriden, Milford, Greater New Haven, Orange, Quinnipiac (North Haven & Wallingford), North Branford, West Haven, and Bethany/Woodbridge) all engage in marketing efforts. Further, certain towns have established collaborative marketing efforts (e.g., some of the shoreline towns). Finally, a set of specialty entities within the region are undertaking significant marketing efforts, such as Market New Haven, and the Economic Development Corporation of New Haven.

While this represents a highly active marketing environment, each of these entities are all working hard to attract new businesses and industries into their catchment area. Each of these entities are all publicizing the greatness of doing business here, but the message is being distributed with more than 30 different websites, sets of collateral material, sets of statistics, and messages. Smaller geographic areas such as towns do tend to rely on regional statistics to show market depth, but no consistent source is recognized to provide the consolidated regional information. While marketing messages are being coordinated to some extent, this coordination often occurs on an informal basis in the region.

## E. Strengths & Weaknesses of the Region

---

The major strengths and weaknesses of the region provide the foundation for the marketing strategy. These were identified and clarified through the data analysis, business survey, and one-on-one interviews.

### E1. STRENGTHS

- ▶ **Deep Ties:** The majority of businesses are located in this region either because they inherited their location or because it is close to their home. Those that inherited the location further report that they are not likely to leave because the switching costs are simply too great to move their equipment, move their employees or retrain new employees, and uproot their families. The region has a group of business owners who have deep personal ties to Connecticut and form a solid and stable base.
- ▶ **Quality of Life:** Business owners recognize that their employees appreciate the quality of life in the region. Specifically, they mentioned the range of housing options (from urban to suburban to rural), the arts and cultural events, the eclectic mix of restaurants, shoreline and beach access, and proximity to both New York City and Boston.
- ▶ **Location:** Business owners identify the location as a strong asset of the region. Its proximity to I-91, I-95, I-691, and Route 15 provide many different location options for different businesses, including one business who relocated from Fairfield to Wallingford and was able to retain employees because of their ability to use Route 15. The rail access in the region is seen as needing improvement, but also is seen as a competitive edge over other areas of Connecticut, with Shoreline East, MetroNorth, and Amtrak service. Further, the region's location on the East Coast was cited by some international companies as a competitive advantage, because a location on the east coast (as opposed to the Midwest or west coast) allows some work-day overlap with European time zones. Finally, the location of the region provides a myriad of venue options for businesses. There are decidedly urban settings, such as downtown New Haven and downtown Meriden. There are strong suburban settings, with easy highway access, inexpensive parking options, and proximity to a highly educated workforce. There are picturesque settings, including the town green areas of many of the smaller towns and the shoreline district of the region. Finally, there are more rural environment options that are well-suited for certain business operations.
- ▶ **Labor Pool:** Business owners agree that the skilled labor pool in this region is strong. This was particularly emphasized by manufacturing sectors, environmental services sectors, and marketing sectors.
- ▶ **Cost of Space:** Many businesses – especially professional services – see the cost of space as less expensive in this region than their other offices (e.g., New York City, Boston, the District of Columbia).
- ▶ **Proximity to Major Industry Leaders:** Many businesses identify that by being located in this region, they enjoy close proximity to major industry leaders. This includes major medical institutions (Yale-New Haven Hospital, St. Raphael's, St. Vincent's, MidState Medical Center), United Technologies / Pratt & Whitney / Sikorsky, Electric Boat, Pfizer, and Yale University.

### E2. WEAKNESSES

- ▶ High cost of utilities (except Wallingford)
- ▶ High taxes
- ▶ Perception of State anti-business practices and over-regulation
- ▶ Lack of regional transit system
- ▶ Lack of business incentives

## F. Target Marketing Opportunities

---

Identifying the target marketing opportunities is the process to define the target audiences. Defining these targets is a three-step process: (1) identify the industries that are economically important to the region; (2) identify the market segments with differentiated product needs; and (3) identify the richest marketing opportunities that exist.

### F1. INDUSTRIES WITH ECONOMIC IMPORTANCE TO THE REGION

The first step is to identify the *industries* that are economically important to the region. This ensures that marketing efforts are not over-spent on industries that are only marginally valuable to the regional economy.

- ▶ **Healthcare:** The healthcare industry accounts for 10% of businesses in this region and 34,900 employees. With major medical institutions including Yale-New Haven Hospital, Hospital of St. Raphael, Connecticut Mental Health Center, Gaylord Hospital, Griffin Hospital, MidState Medical Center, and the VA Hospital, this industry spawns private-practice medical offices as well as medical research and innovation. Further, the healthcare industry is in a state of transition. It is catching up with quick technologic advancements (from medical advancements to electronic health records) and nationwide, the industry is facing pressure for greater numbers of trained workforce.
- ▶ **Manufacturing:** While the general perception is that manufacturing is a dying trade in the region, the reality is quite different: the industry accounts for 4.8% of businesses and more than 29,000 employees. With close proximity to UTC (including Pratt & Whitney and Sikorsky) and Electric Boat and pools of highly qualified labor for the technical manufacturing jobs, the manufacturing sector is quietly strong here in the region. Particular manufacturing niches in this region include high-technology manufacturing and component manufacturing, particularly in the electronics, aerospace, medical devices, and chemical/pharmaceuticals fields. Additionally, repair and operations (MRO) services and avionics electronic equipment are important activities within this industry in the region.
- ▶ **Professional, Scientific & Technical Services, including Biosciences:** Rooted from its highly educated workforce and high quality of life, the professional, scientific and technical services industry is a remarkably stable player in the region. It represents 13% of businesses and more than 20,200 employees in the region, many of which are white-collar jobs with particular niches in legal services, architecture, engineering, marketing & graphic design, biosciences, and financial services. These businesses often tend to feed from the research and innovation ties with higher learning institutions. They also benefit from the high quality of life in the region to attract and retain professional staff. This category includes scientific research & development and biosciences, and often dovetails with other industries including chemical manufacturing (e.g., pharmaceuticals) and healthcare (e.g., clinical research).
- ▶ **Education:** With institutions such as Yale University, Quinnipiac University, Southern Connecticut State University, University of New Haven, Albertus Magnus College, and Paier College of Art, the region produces approximately than 6,000 new college graduates each spring, not even including technical colleges and graduate programs. Producing this educated workforce takes a robust labor pool. The education sector – including both higher education and primary/secondary education – employs more than 19,000 people.
- ▶ **Construction:** While not a primary economic driver in the region, the construction industry cannot be overlooked; it accounts for 11% of businesses and 14,935 employees.

### F2. TARGET MARKET SEGMENTS

The second step is to identify the *segments* that produce ripe marketing opportunities. A market segment is a group of people or organizations that share one or more characteristics that cause them to have a similar set of needs. Different segments have different needs, the needs within each segment are fairly homogeneous, and the segments respond similarly to market stimuli and are reached by similar types of market interventions. The process of segmentation is distinct from targeting (choosing which segments to address) and positioning (designing

an appropriate marketing mix for each segment). The intent of segmentation is to identify groups of similar customers and potential customers, to prioritize which groups to address, to understand their behavior, and to respond with appropriate strategies that satisfy the preferences of each segment.

In this particular case, segments cut across multiple industries but are critically important for developing an appropriate marketing message, because the right message is often different for different segments. For example, the message for entrepreneurs who have worked in manufacturing, live in the region, and are starting a new company in a new niche is quite different from the message for a firm that has just acquired a local manufacturing firm and has no personal ties to the region. Identifying these major market segments lays the groundwork for their tailored marketing messages.

- ▶ **Wide Eyes, Limited Ties:** This region has a set of businesses with very broad geographic scope and limited personal ties to the area. For these businesses, their operations could occur in any number of places, and they may achieve competitive costs elsewhere. This market segment is particularly sensitive to close connectivity with the rest of the world, workforce quality, containing costs, and ease of travel. An example of this market segment is Covidien, with 45% of sales from outside of the US, 41,000 employees who live in 59 countries, and 60 manufacturing facilities in 16 countries.
- ▶ **New Entrepreneurs:** With 17,000 businesses that have four employees or less, this region is a hotbed for entrepreneurs and small businesses. Surveys and interviews found that, almost always, this group is located in this region either because they inherited the business location or because of their personal ties to the region. For example, many architects who have worked for the renown Pelli Clarke Pelli have since begun independent architecture firms in the region.
- ▶ **Young Growth:** In connection with the entrepreneurial spirit of the region, this region contains a number of businesses in “young growth” mode that, in the next few years, will be making significant decisions that will define where their long-term home will be. Many of these businesses are weighing the costs and benefits of being located elsewhere with their personal ties and networks here, and making long-term decisions about where they want to grow their workforce.
- ▶ **Expanders:** Some businesses are in the region as part of their expansion into different geographic areas or expansions into secondary and tertiary markets. For example, Burns & McDonnell established a program management office in Wallingford, Connecticut to support efforts to upgrade the electrical utility infrastructure in the northeast, and it now is home to more than 80 employees and identified by the company as expanding their presence in the northeast and as one of the fastest-growing offices within the firm.
- ▶ **Institution Affiliates:** With renown colleges, universities, and professional schools in the area and numerous other world-renown healthcare facilities, some businesses choose to be in the region because they thrive near schools, universities, hospitals, and other institutions. Often these institutions are biotech companies, research facilities, professional service firms that specialize in educational sectors, or others that benefit from the proximity to the “meds and eds” institutions. One example is the Pfizer Clinical Research Unit that was built just blocks away from Yale-New Haven Hospital in 2004. Another is Achillion Pharmaceuticals, Inc., which was founded in 2000 as one of the largest biotech start-ups in the country and is located in New Haven, Connecticut. It is reported that the company originally planned to locate in New Jersey, but located in this region to enter into partnerships with Yale University and Yale researchers.
- ▶ **Acquisitions:** This region has a number of companies involved in business acquisitions – both in the position of acquiring and being acquired. With nearly any business acquisition comes an analysis about the most strategic location for services and operations, and this is particularly true involving an acquisition or merger with a business that is larger or has a different geographic scope. This market segment is particularly susceptible to leaving the region, while the goal is to retain and maintain the company presence in this region. One example is the 2005 acquisition of New Haven-based Applied Engineering Products, Inc. (AEP) by the Radiall, a leading global manufacturer of interconnection products in an effort to firm up leadership in the defense and aerospace industries, who is based in France.

### F3. RICHEST MARKETING OPPORTUNITIES

Finally, the third step in developing the targeted marketing opportunities is identifying which industries and which segments produce the *richest marketing opportunities*. For example, some market segments may not pertain to certain industries (e.g., entrepreneur hospitals) and some marketing segments may not provide the greatest “bang for the buck” for marketing efforts. This step identifies the best opportunities around which to focus and prioritize the marketing efforts.

The table below includes columns for each of the economically important industries in the region and rows for each of the major market segments. The matrix, then, is used to distinguish the richest opportunities for marketing efforts. The richest marketing opportunities exist where a strong, well-placed marketing effort could affect a decision. The poorest marketing opportunities exist where marketing is not likely to be a major factor in these business decisions. For example, while education is an important industry for the region, efforts to attract new educational institutions or retain existing institutions are not a high priority for a marketing effort, due to the stationary nature of these institutions and their close proximity to the populations that they serve.

INDUSTRIES➡	Healthcare	Manufacturing	Professional, Scientific & Technical Services	Education	Construction
SEGMENTS ↓					
1. Young Growth	●	●	●	◉	○
2. Wide Eyes, Limited Ties	●	●	●	○	◉
3. New entrepreneurs	◉	●	●	○	○
4. Expanders	◉	◉	●	○	◉
5. Institution Affiliates	●	◉	●	○	◉
6. Acquisitions	◉	◉	◉	○	○

- = Richest opportunities for marketing efforts (strong well-placed marketing effort could affect a decision)
- ◉ = Possibly valuable opportunities for marketing efforts
- = Low opportunities for marketing efforts (marketing is not likely to be a major factor in these decisions)

### G. Marketing Messages

In the most traditional marketing sense, unique selling propositions – otherwise known as marketing messages – are made to the customer to help them see how the product being sold is differentiated from other similar objects. The messages often promise a buyer that that buyer will get a specific result in return for buying this product. Famous examples include FedEx (“When your package absolutely, positively has to get there overnight”), M&M’s (“The milk chocolate melts in your mouth, not in your hand”), and Domino’s Pizza (“You get fresh, hot pizza delivered to your door in 30 minutes or less – or it’s free”).

In this situation, the product is the regional business climate. The unique selling proposition, or the marketing message, needs to be tailored to help businesses see how this region is differentiated from other similar regions, and what specific value they will receive from being located in this region. The chart on the following page identifies, for each major target audience: (1) Marketing message that is most likely to resonate with this audience; (2) Supporting information that provides additional detail to sustain the message; and (3) Primary methods of marketing that fit with the target audience.

While these messages are intended to inform and guide marketing efforts, they are not a replacement for good judgment, particularly in circumstances in which a business may fit more than one target category or may have a unique situation.

## Marketing Messages for Target Groups

TARGET	MESSAGE	SUPPORTING INFORMATION	PRIMARY METHODS
Wide Eyes, Limited Ties	“You get to be everywhere from here”	<ul style="list-style-type: none"> <li>▪ Tremendous telecommunications infrastructure, including SONET rings in Meriden, providing essentially zero downtime</li> <li>▪ Highly skilled workforce, as 33% of our workforce has a college degree and 16% have a graduate degree</li> <li>▪ Close proximity to major international corporations and world-renown institutions (Yale, UTC, Electric Boat)</li> <li>▪ You can reach the entire northeast easily – the Canadian border to the North Carolina border is all within a 500 mile radius</li> <li>▪ Easy international flights from JFK airport</li> <li>▪ Proximity also to Tweed, La Guardia, Bradley, Providence, White Plains, others</li> </ul>	Relationship marketing Public relations marketing
New Entrepreneurs & Young Growth	“It’s the perfect place to grow your business”	<ul style="list-style-type: none"> <li>▪ You get affordable space</li> <li>▪ You can get to NYC and Boston, but don’t have to worry about their prices</li> <li>▪ You get a ready talent pool (colleges, universities, and professional schools creating ready talent, including more than 6,000 new college grads per year)</li> <li>▪ You can swap ideas with fellow entrepreneurs; 90% of businesses in this region have fewer than 20 employees</li> <li>▪ You get nearby institutions that foster innovation and ideas</li> <li>▪ You get a high quality of life while business is growing (beaches, food, culture)</li> </ul>	Drip marketing Experiential marketing Word of mouth marketing
Professional, Scientific & Technical Services (new entrepreneurs, expanders, and institution affiliates)	“You get more for less – more space, more talent, more options, more profit”	<ul style="list-style-type: none"> <li>▪ You get 4,452 other professional firms in your network</li> <li>▪ You get 20,000 professional employees as a ready talent pool, and proximity to about 6,000 new college grads per year</li> <li>▪ You get institutions that need nearby professional services</li> <li>▪ You get proximity to NYC, Boston, and Fairfield County at much better rent</li> <li>▪ You get options about what type of business setting you want – bustling urban center, shoreline, suburban convenience, or rural landscape</li> </ul>	Drip marketing Relationship marketing Public relations marketing Direct marketing (recruit only)
Manufacturing	“We know what lean means”	<ul style="list-style-type: none"> <li>▪ Workforce is skilled &amp; educated</li> <li>▪ Strong base of component manufacturing and collaboration throughout the supply chain</li> </ul>	Public relations marketing Relationship marketing

**Drip marketing:** Providing valuable information and consistently keeping the brand name in front of current and prospective customers (e.g., monthly email notifications, newsletters)

**Direct / intrusion marketing:** Unsolicited communication (mail, email, telemarketing) to prospective client lists, focusing on acquiring new customers

**Experiential marketing:** Creating an experience where the result is an emotional connection to a person, brand, product or idea (e.g., free sample, free trial, on-site events, local business tour)

**Public relations marketing:** Creating favorable public exposure to the product to stimulate a positive perception and demand (e.g., press release, awards)

**Relationship marketing:** Emphasizes customer retention, satisfaction and lifetime customer value, rather than a dominant focus on point-of-sale transactions (e.g., interaction, communication, advocacy, partnership)

**Word of mouth marketing:** Creates a chain-reaction of communication (e.g., refer-a-friend programs, testimonials)

## H. Marketing Plan

---

- 1. Agree on how to coordinate marketing efforts.** Each of the 15 towns is working on individual marketing efforts. Each of the Chambers is marketing. There are collaborative marketing efforts underway between towns. There are many websites (EDC, City of New Haven, RGP, Chambers, Shoreline) all providing information about the region and areas within. In order for this marketing plan to be effective, the messages that are delivered to businesses must be clear and consistent. The first step is to agree on how the different marketing efforts will be coordinated and can be used to complement – rather than contradict – the other ongoing efforts. This includes coordination of print material, websites, working together to retain existing businesses, and coordinating approaches to leads.
- 2. Develop a marketable name for the region.** Fairfield County has a brand; when someone mentions it, it conjures up an image in people’s mind of Westport and Greenwich and New York City suburbs. Similarly, Litchfield County has a brand. When someone says they are spending the day in Litchfield County, the image is a bucolic, peaceful and rural experience, perhaps hopping from antique shop to boutique. But the “South-Central Region of Connecticut” does not have a brand association. The phrase is too long to be catchy, and it references geography which is difficult since many are not aware that Connecticut’s waterfront is on the south side of the state. New Haven County – while a larger geography than the RGP area – is a likely prospect for developing a brand image, as is Greater New Haven. The county focus de-emphasizes New Haven as a core focus (e.g., in Fairfield County, the brand focus is not on Fairfield). Both options provide an immediate point of recognition for people who are less familiar with Connecticut geography.
- 3. Develop collateral material for the region.** Before any conversations occur with potential businesses, marketing material is needed to provide basic information about the region. The collateral material should include regional demographics, business statistics, information about vibrant/growing sectors and a spotlight on the different types of locations that exist within the region (e.g., shoreline properties, rural properties, urban properties). The collateral should be professionally designed and printed. It should include the key marketing messages to resonate with the different target populations.
- 4. Create a buzz around business successes in the region.** Because of how many towns exist and how many regional marketing efforts exist, there is an absence of collective stories about successes in the region. However, supporting businesses that are growing in the region is an essential retention strategy and building the sense that businesses *can* be successful in this region is a vital part of this effort. For example, two different companies on Fortune’s Top 100 Companies to work for are located in this region (Griffin Hospital in Derby, Burns & McDonnell in Wallingford). As another example, even during this economic downturn, Covidien has ten different engineering jobs currently posted for its North Haven location. Ideas for creating this buzz include:
  - Create a “Regional Growth Flash” email news brief that provides regular region-wide updates about business successes – whether its honors, major contract awards, expansion plans, new partnerships. The news briefs would heighten the visibility of businesses who are doing well, create a buzz around success stories in the region, and make these success stories available to everyone who is involved in marketing within the region.
  - Develop a list of business successes on a regional website, so when towns are getting ready to make a pitch, there is a resource available to help them articulate concrete examples of business success.
  - Develop relationship with broad-audience media (Boston Globe, New York Times, New Haven Register, Hartford Courant) and create periodic stories about growth and success in the region
  - Honor businesses that are successful.
- 5. Educate entrepreneurs with personal ties to the region about the business climate.** While relocation costs create significant challenges to recruiting businesses to the region, entrepreneurs are just beginning to decide where their company will be located. It is the right time to help them see what type of business climate exists here, and sway their decision to locate in this region. The best opportunities exist for entrepreneurs who already have personal ties to the region – maybe they grew up here, maybe they went to school in the region,

maybe their son or daughter is attending college here, or maybe they have a relative that they need to see more often. Ideas for reaching these entrepreneurs include:

- a. Host a regional business expo at alumni weekend for local colleges (Yale, Quinnipiac, UNH); bill it as an activity for business-minded alumni to meet & reconnect with fellow alumni who are in the business sector and learn about what innovative business growth is occurring in this region.
  - b. Host a regional business expo at freshman parents weekend for local colleges. Again, bill it as an activity for business-minded parents to connect with fellow business-minded parents and learn about what innovative business growth is occurring in this region.
  - c. Work together with partner organizations to host a simple event for entrepreneur-minded individuals in the region. Allow the breakfast to be open to anyone who has started a business or is thinking about starting a business, since quite often mid-level employees at one company are gaining experience and simultaneously considering opportunities to start their own company. Publicize the event as an opportunity to meet other like-minded individuals, hear about some of the region's greatest innovations, and get to know what the region has to offer for its entrepreneurs. Advertise the event through all Chambers of Commerce in the region, CT Innovations, CT Technology Council, CT Small Business Development Center, Yale Entrepreneurial Institute, and business classes at local colleges and universities. Evaluate the event by asking participants: (1) have you started a business; (2) if so, where is that business located; (3) are you thinking about starting a business; (4) estimated timeframe for starting a new business; (5) what they learned during this workshop that they did not know about this region; (6) current thinking about best location to start this business and why.
- 6. Focus on business retention.** Existing businesses are important to the region and its economy. Not only do existing businesses generate job growth (an estimated 40% to 80% of net job growth in localities across the country are estimated to come from existing local businesses), but these businesses make investments into the region already. They invest in facilities, train labor, pay taxes, contribute to social activities, and generate demand for their suppliers and service providers. Further, existing businesses are some of the best ambassadors for recruiting new firms to the area. Finally, if a business is growing, it may be targeted by another community's recruitment efforts. For business retention, drip, public relations, and strong relationship marketing are essential. Continuing business visitation and other forms of one-on-one conversations to gauge satisfaction and learn about this business needs. Following up with specific actions to meet their needs – including advocating for local businesses and forming partnerships – is vital to produce concrete results for the existing business base.
- 7. Create formal avenues of communication to more systematically connect with new businesses that are interested in the region.** Currently, the only way that anyone learns that a business is interested in the region is through informal conversation channels. A broker may place a call inquiring about space in one town, and another town may hear third-hand that this company is looking for space. By creating partnerships that establish regular communication about new business leads, a more systematic and strategic approach can be put into place. This could take the form of notification agreements (when one entity learns that a business is considering the region, they agree to tell RGP), or information dissemination agreements (when one entity learns that a business is considering the region, they agree to distribute the RGP collateral information about the region).
- 8. Follow up on every lead to recruit a business.** Business recruitment is a highly opportunistic event. The businesses that are considering a move provide the absolute richest opportunities, and marketing efforts focused in this way have a much, much higher probability of generating impact than a cold-call to a business that is not considering relocation at all. Leads will generally come from a direct inquiry, information from a partner, or through interviews and one-on-one conversations with existing businesses in the area. Following up on every single opportunity is crucial. Follow-up can be an in-person meeting, a telephone call or email, sharing information with the partner to distribute to the lead, or sending information directly to the lead about the region and offering to be of assistance in connecting them with the right portion of the region and with partners that fit their needs.

**9. Contact growing businesses not currently located in the region and educate them about this region.**

Identifying and contacting businesses that are growing and may benefit from a location in the region is a common component of any economic development marketing effort. The challenge is that while this is the most difficult , most expensive, and most time-intensive component of a regional marketing effort, it is also likely to yield the fewest results. However, it presents opportunities to speak with growing businesses in growing sectors, promote the region, and will ripple into “word of mouth” marketing for the region. A review of businesses in growth mode that position themselves in markets akin to this region has been conducted and a list of possible candidates to approach is included in Appendix E.

## APPENDIX A: DEMOGRAPHIC DATA

Geography: Bethany town, Branford town, East Haven town, Guilford town, Hamden town, Madison town, Meriden town, Milford town, New Haven town, North Branford town, North Haven town, Orange town, Wallingford town, West Haven town, Woodbridge town

Source: Demographics Now (2/3/09)

	1990 Census		2000 Census		2008 Estimate		2013 Projection		% Change 1990 to 2000	% Change 2000 to 2008
<b>Demographics</b>										
Total Population	536,758		546,644		569,649		583,919		1.8%	4.2%
Population Density (Pop/Sq Mi)	1,426		1,452		1,513		1,551		1.8%	4.2%
Total Households	203,780		212,810		214,595		215,909		4.4%	0.8%
Male	256,727	47.8%	261,498	47.8%	274,212	48.1%	282,053	48.3%	1.9%	4.9%
Female	280,032	52.2%	285,146	52.2%	295,437	51.9%	301,866	51.7%	1.8%	3.6%
<b>Race/Ethnicity</b>										
White	449,067	83.7%	424,408	77.6%	423,316	74.3%	423,067	72.5%	-5.5%	-0.3%
Black	63,823	11.9%	70,796	13.0%	79,453	14.0%	84,918	14.5%	10.9%	12.2%
American Indian or Alaska Native	949	0.2%	1,255	0.2%	1,045	0.2%	899	0.2%	32.3%	-16.7%
Asian or Pac. Islander	8,299	1.6%	15,227	2.8%	24,165	4.2%	29,632	5.1%	83.5%	58.7%
Some Other Race	14,619	2.7%	23,251	4.3%	26,092	4.6%	29,422	5.0%	59.0%	12.2%
Two or More Races			11,707	2.1%	15,578	2.7%	15,981	2.7%		
Hispanic Ethnicity	32,937	6.1%	53,388	9.8%	72,534	12.7%	84,963	14.6%	62.1%	35.9%
Not Hispanic or Latino	503,815	93.9%	493,256	90.2%	497,116	87.3%	498,957	85.5%	-2.1%	0.8%
<b>Population by Age</b>										
0 to 4	37,006	6.9%	34,340	6.3%	32,728	5.8%	36,904	6.3%	-7.2%	-4.7%
5 to 14	64,675	12.0%	75,459	13.8%	70,744	12.4%	67,716	11.6%	16.7%	-6.2%
15 to 19	34,663	6.5%	36,652	6.7%	39,607	7.0%	37,443	6.4%	5.7%	8.1%
20 to 24	43,790	8.2%	35,367	6.5%	41,943	7.4%	42,126	7.2%	-19.2%	18.6%
25 to 34	96,432	18.0%	75,176	13.8%	72,607	12.7%	76,865	13.2%	-22.0%	-3.4%
35 to 44	81,737	15.2%	87,788	16.1%	80,278	14.1%	72,893	12.5%	7.4%	-8.6%
45 to 54	54,356	10.1%	75,495	13.8%	86,791	15.2%	87,164	14.9%	38.9%	15.0%
55 to 64	47,352	8.8%	47,938	8.8%	65,956	11.6%	76,128	13.0%	1.2%	37.6%
65 to 74	44,150	8.2%	37,681	6.9%	38,638	6.8%	48,263	8.3%	-14.7%	2.5%
75 to 84	24,461	4.6%	29,878	5.5%	26,866	4.7%	26,231	4.5%	22.1%	-10.1%
85+	8,123	1.5%	10,871	2.0%	13,489	2.4%	12,203	2.1%	33.8%	24.1%
Median Age:	34.1		36.9		38.6		39.46		8.1%	4.6%
<b>Households by Income</b>										
\$0 - \$15,000	36,496	17.9%	30,936	14.5%	23,015	10.7%	21,151	9.8%	-15.2%	-25.6%
\$15,000 - \$24,999	25,709	12.6%	22,608	10.6%	19,322	9.0%	16,523	7.7%	-12.1%	-14.5%
\$25,000 - \$34,999	28,719	14.1%	22,052	10.4%	18,112	8.4%	17,150	7.9%	-23.2%	-17.9%
\$35,000 - \$49,999	40,029	19.6%	31,672	14.9%	27,771	12.9%	24,718	11.4%	-20.9%	-12.3%
\$50,000 - \$74,999	42,342	20.8%	42,992	20.2%	38,662	18.0%	37,688	17.5%	101.5%	-10.1%
\$75,000 - \$99,999	16,715	8.2%	27,731	13.0%	29,981	14.0%	29,146	13.5%	65.9%	8.1%
\$100,000 - \$149,999	9,349	4.6%	22,319	10.5%	34,021	15.9%	38,151	17.7%	138.7%	52.4%
\$150,000 +	4,402	2.2%	12,500	5.9%	23,710	11.0%	31,383	14.5%	183.9%	89.7%
Average Hhld Income	\$46,795		\$63,417		\$78,104		\$88,477		35.5%	23.2%
Median Hhld Income	\$38,774		\$49,538		\$61,532		\$68,116		27.8%	24.2%
Per Capita Income	\$17,962		\$24,688		\$30,398		\$33,776		37.4%	23.1%

	1990 Census		2000 Census		2008 Estimate		2013 Projection		% Change 1990 to 2000	% Change 2000 to 2008
<b>Employment</b>										
Age 16 + Population	429,061		429,669		458,607		472,090		0.1%	6.7%
In Labor Force	291,777	68.0%	283,363	66.0%	311,296	67.9%	320,311	67.9%	-2.9%	9.9%
Employed	274,940	94.2%	265,919	93.8%	288,051	62.8%	296,425	62.8%	-3.3%	8.3%
Unemployed	16,293	5.6%	17,204	6.1%	22,801	5.0%	23,422	5.0%	5.6%	32.5%
In Armed Forces	535	0.1%	239	0.1%	444	0.1%	464	0.1%	-55.3%	85.8%
Not In Labor Force	137,285	32.0%	146,306	34.1%	147,311	32.1%	151,779	32.2%	6.6%	0.7%
# Employees (Daytime Pop)					320,673					
# of Establishments					27,158					
Emp in Blue Collar Occupations			90,498	34.0%						
Emp in White Collar Occupations			175,421	66.0%						
<b>Housing Units</b>										
Total Housing Units	219,048		227,556		234,479		238,998		3.9%	3.0%
Owner Occupied	126,690	57.8%	132,595	58.3%	142,675	60.9%	148,524	62.1%	4.7%	7.6%
Renter Occupied	77,091	35.2%	80,215	35.3%	71,919	30.7%	67,385	28.2%	4.1%	-10.3%
Vacant	15,267	7.0%	14,746	6.5%	19,884	8.5%	23,089	9.7%	-3.4%	34.8%
<b>Vehicles Available</b>										
Average Vehicles Per Hhld	1.6		1.5		1.8		2.0		-9.5%	20.0%
0 Vehicles Available	25,581	11.7%	26,754	12.6%	21,446	10.0%	18,850	8.7%	4.6%	-19.8%
1 Vehicle Available	69,213	31.7%	76,687	36.0%	71,927	33.5%	68,946	31.9%	10.8%	-6.2%
2+ Vehicles Available	123,687	56.6%	109,369	51.4%	121,222	56.5%	128,113	59.3%	-11.6%	10.8%
<b>Marital Status</b>										
Age 15+ Population	435,065		436,845		466,175		479,336		0.4%	6.7%
Married, Sp Present	222,611	51.2%	212,697	48.7%	228,213	49.0%	234,782	49.0%	-4.5%	7.3%
Married, Sp Absent	8,167	1.9%	20,313	4.7%	21,239	4.6%	21,639	4.5%	148.7%	4.6%
Divorced	34,662	8.0%	40,647	9.3%	43,188	9.3%	44,453	9.3%	17.3%	6.3%
Widowed	34,099	7.8%	32,470	7.4%	34,039	7.3%	34,986	7.3%	-4.8%	4.8%
Never Married	135,533	31.2%	130,718	29.9%	139,496	29.9%	143,476	29.9%	-3.6%	6.7%
<b>Educational Attainment</b>										
Age 25+ Population	356,612		364,826		384,625		399,748		2.3%	5.4%
Grade K - 8	28,755	8.1%	16,713	4.6%	15,114	3.9%	12,832	3.2%	-41.9%	-9.6%
Grade 9 - 12	46,520	13%	38,779	10.6%	24,613	6.4%	18,557	4.6%	-16.6%	-36.5%
High School Grad	110,628	31.0%	109,373	30.0%	126,303	32.8%	136,923	34.3%	-1.1%	15.5%
Some College, No Degree	54,756	15.4%	65,388	17.9%	65,586	17.1%	65,357	16.4%	19.4%	0.3%
Associates Degree	22,148	6.2%	21,832	6.0%	24,689	6.4%	26,447	6.6%	-1.4%	13.1%
Bachelor's Degree	51,591	14.5%	58,437	16.0%	68,392	17.8%	74,488	18.6%	13.3%	17.0%
Graduate Degree	42,226	11.8%	51,367	14.1%	59,927	15.6%	65,143	16.3%	21.6%	16.7%
No Schooling Compl.			2,937	0.8%						

## APPENDIX B: BUSINESS DATA

Geography: Bethany town, Branford town, East Haven town, Guilford town, Hamden town, Madison town, Meriden town, Milford town, New Haven town, North Branford town, North Haven town, Orange town, Wallingford town, West Haven town, Woodbridge town

Source: Demographics Now

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est	Employees	% of Total Emp
11	Agriculture, Forestry, Fishing and Hunting(11)	136	0.4%	479	0.2%
21	Mining(21)	8	0.0%	53	0.0%
22	Utilities(22)	33	0.1%	693	0.3%
23	Construction(23)	3707	11.0%	14935	5.6%
31	Manufacturing(31)	210	0.6%	2642	1.0%
32	Manufacturing(32)	459	1.4%	6511	2.4%
33	Manufacturing(33)	952	2.8%	20161	7.6%
42	Wholesale Trade(42)	1417	4.2%	12772	4.8%
44	Retail Trade(44)	2773	8.3%	23193	8.7%
45	Retail Trade(45)	1280	3.8%	10337	3.9%
48	Transportation and Warehousing(48)	480	1.4%	5011	1.9%
49	Transportation and Warehousing(49)	88	0.3%	2725	1.0%
51	Information(51)	650	1.9%	12560	4.7%
52	Finance and Insurance(52)	1299	3.9%	7390	2.8%
53	Real Estate and Rental and Leasing(53)	1492	4.4%	7799	2.9%
54	Professional, Scientific, and Technical Services(54)	4452	13.3%	20208	7.6%
55	Management of Companies and Enterprises(55)	59	0.2%	253	0.1%
56	Administrative / Support / Waste Management / Remediation (56)	3992	11.9%	17819	6.7%
61	Educational Services(61)	853	2.5%	19725	7.4%
62	Health Care and Social Assistance(62)	3219	9.6%	34900	13.1%
71	Arts, Entertainment, and Recreation(71)	602	1.8%	4117	1.5%
72	Accommodation and Food Services(72)	1584	4.7%	14213	5.3%
81	Other Services (except Public Administration)(81)	3534	10.5%	14572	5.5%
92	Public Administration(92)	293	0.9%	13874	5.2%
----	Total	33583	100.0%	266942	100.0%

\* Note: Wholesale Trade (42) and Chemical Products are 2009 Data

## ADDITIONAL DETAIL ON EACH CATEGORY

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
11	Agriculture, Forestry, Fishing and Hunting(11)	136	0.4%	479	0.2%
1111	Oilseed and Grain Farming(1111)	3	0.0%	4	0.0%
1112	Vegetable and Melon Farming(1112)	7	0.0%	25	0.0%
1113	Fruit and Tree Nut Farming(1113)	7	0.0%	30	0.0%
1114	Greenhouse, Nursery, and Floriculture Production(1114)	17	0.1%	141	0.1%
1119	Other Crop Farming(1119)	27	0.1%	60	0.0%
1121	Cattle Ranching and Farming(1121)	8	0.0%	14	0.0%
1122	Hog and Pig Farming(1122)	0	0.0%	0	0.0%
1123	Poultry and Egg Production(1123)	2	0.0%	6	0.0%
1124	Sheep and Goat Farming(1124)	0	0.0%	0	0.0%
1125	Animal Aquaculture(1125)	0	0.0%	0	0.0%
1129	Other Animal Production(1129)	9	0.0%	21	0.0%
1131	Timber Tract Operations(1131)	2	0.0%	3	0.0%
1132	Forest Nurseries and Gathering of Forest Products(1132)	2	0.0%	41	0.0%
1133	Logging(1133)	3	0.0%	5	0.0%
1141	Fishing(1141)	5	0.0%	10	0.0%
1142	Hunting and Trapping(1142)	4	0.0%	20	0.0%
1151	Support Activities for Crop Production(1151)	3	0.0%	8	0.0%
1152	Support Activities for Animal Production(1152)	35	0.1%	89	0.0%
1153	Support Activities for Forestry(1153)	2	0.0%	2	0.0%
21	Mining(21)	8	0.0%	53	0.0%
2111	Oil and Gas Extraction(2111)	0	0.0%	0	0.0%
2121	Coal Mining(2121)	0	0.0%	0	0.0%
2122	Metal Ore Mining(2122)	0	0.0%	0	0.0%
2123	Nonmetallic Mineral Mining and Quarrying(2123)	3	0.0%	27	0.0%
2131	Support Activities for Mining(2131)	5	0.0%	26	0.0%
22	Utilities(22)	33	0.1%	693	0.3%
2211	Electric Power Generation, Transmission and Distribution(2211)	15	0.0%	301	0.1%
2212	Natural Gas Distribution(2212)	3	0.0%	4	0.0%
2213	Water, Sewage and Other Systems(2213)	15	0.0%	388	0.1%
23	Construction(23)	3707	11.0%	14935	5.6%
2361	Residential Building Construction(2361)	1159	3.5%	2765	1.0%
2362	Nonresidential Building Construction(2362)	158	0.5%	1649	0.6%
2371	Utility System Construction(2371)	23	0.1%	71	0.0%
2372	Land Subdivision(2372)	78	0.2%	363	0.1%
2373	Highway, Street, and Bridge Construction(2373)	52	0.2%	781	0.3%
2379	Other Heavy and Civil Engineering Construction(2379)	1	0.0%	2	0.0%
2381	Foundation, Structure, and Building Exterior Contractors(2381)	387	1.2%	1595	0.6%
2382	Building Equipment Contractors(2382)	934	2.8%	4079	1.5%
2383	Building Finishing Contractors(2383)	529	1.6%	1802	0.7%
2389	Other Specialty Trade Contractors(2389)	386	1.1%	1828	0.7%

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
31	Manufacturing(31)	210	0.6%	2642	1.0%
3111	Animal Food Manufacturing(3111)	2	0.0%	15	0.0%
3112	Grain and Oilseed Milling(3112)	0	0.0%	0	0.0%
3113	Sugar and Confectionery Product Manufacturing(3113)	8	0.0%	390	0.1%
3114	Fruit & Vegetable Preserving / Specialty Food Manufacturing(3114)	3	0.0%	40	0.0%
3115	Dairy Product Manufacturing(3115)	10	0.0%	65	0.0%
3116	Animal Slaughtering and Processing(3116)	3	0.0%	71	0.0%
3117	Seafood Product Preparation and Packaging(3117)	0	0.0%	0	0.0%
3118	Bakeries and Tortilla Manufacturing(3118)	78	0.2%	775	0.3%
3119	Other Food Manufacturing(3119)	10	0.0%	194	0.1%
3121	Beverage Manufacturing(3121)	14	0.0%	257	0.1%
3122	Tobacco Manufacturing(3122)	2	0.0%	8	0.0%
3131	Fiber, Yarn, and Thread Mills(3131)	0	0.0%	0	0.0%
3132	Fabric Mills(3132)	6	0.0%	24	0.0%
3133	Textile and Fabric Finishing and Fabric Coating Mills(3133)	2	0.0%	280	0.1%
3141	Textile Furnishings Mills(3141)	2	0.0%	3	0.0%
3149	Other Textile Product Mills(3149)	35	0.1%	321	0.1%
3151	Apparel Knitting Mills(3151)	2	0.0%	4	0.0%
3152	Cut and Sew Apparel Manufacturing(3152)	24	0.1%	162	0.1%
3159	Apparel Accessories and Other Apparel Manufacturing(3159)	6	0.0%	25	0.0%
3161	Leather and Hide Tanning and Finishing(3161)	0	0.0%	0	0.0%
3162	Footwear Manufacturing(3162)	0	0.0%	0	0.0%
3169	Other Leather and Allied Product Manufacturing(3169)	3	0.0%	8	0.0%
32	Manufacturing(32)	459	1.4%	6511	2.4%
3211	Sawmills and Wood Preservation(3211)	5	0.0%	24	0.0%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing(3212)	2	0.0%	45	0.0%
3219	Other Wood Product Manufacturing(3219)	60	0.2%	323	0.1%
3221	Pulp, Paper, and Paperboard Mills(3221)	7	0.0%	26	0.0%
3222	Converted Paper Product Manufacturing(3222)	23	0.1%	773	0.2%
3231	Printing and Related Support Activities(3231)	179	0.5%	2434	0.8%
3241	Petroleum and Coal Products Manufacturing(3241)	11	0.0%	57	0.0%
3251	Basic Chemical Manufacturing(3251)	7	0.0%	85	0.0%
3252	Resin, Synthetic Rubber, Artificial Synthetic Fibers and Filaments Manufacturing(3252)	5	0.0%	83	0.0%
3253	Pesticide, Fertilizer, & Other Agricultural Chemical Manufacturing(3253)	3	0.0%	12	0.0%
3254	Pharmaceutical and Medicine Manufacturing(3254)	26	0.1%	316	0.1%
3255	Paint, Coating, and Adhesive Manufacturing(3255)	5	0.0%	115	0.0%
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing(3256)	10	0.0%	148	0.0%
3259	Other Chemical Product and Preparation Manufacturing(3259)	15	0.0%	480	0.2%
3261	Plastics Product Manufacturing(3261)	44	0.1%	787	0.2%
3262	Rubber Product Manufacturing(3262)	7	0.0%	77	0.0%
3271	Clay Product and Refractory Manufacturing(3271)	3	0.0%	9	0.0%
3272	Glass and Glass Product Manufacturing(3272)	11	0.0%	106	0.0%
3273	Cement and Concrete Product Manufacturing(3273)	23	0.1%	409	0.1%
3274	Lime and Gypsum Product Manufacturing(3274)	3	0.0%	3	0.0%
3279	Other Nonmetallic Mineral Product Manufacturing(3279)	10	0.0%	199	0.1%

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
33	Manufacturing(33)	952	2.8%	20161	7.6%
3311	Iron and Steel Mills and Ferroalloy Manufacturing(3311)	6	0.0%	374	0.1%
3312	Steel Product Manufacturing from Purchased Steel(3312)	13	0.0%	940	0.4%
3313	Alumina and Aluminum Production and Processing(3313)	1	0.0%	85	0.0%
3314	Nonferrous Metal (except Aluminum) Production & Processing(3314)	7	0.0%	855	0.3%
3315	Foundries(3315)	7	0.0%	42	0.0%
3321	Forging and Stamping(3321)	22	0.1%	653	0.2%
3322	Cutlery and Handtool Manufacturing(3322)	10	0.0%	123	0.0%
3323	Architectural and Structural Metals Manufacturing(3323)	62	0.2%	720	0.3%
3324	Boiler, Tank, and Shipping Container Manufacturing(3324)	2	0.0%	4	0.0%
3325	Hardware Manufacturing(3325)	13	0.0%	953	0.4%
3326	Spring and Wire Product Manufacturing(3326)	7	0.0%	60	0.0%
3327	Machine Shops; Turned Product; Screw, Nut, and Bolt Manufacturing(3327)	94	0.3%	843	0.3%
3328	Coating, Engraving, Heat Treating, and Allied Activities(3328)	23	0.1%	389	0.1%
3329	Other Fabricated Metal Product Manufacturing(3329)	25	0.1%	523	0.2%
3331	Agriculture, Construction, & Mining Machinery Manufacturing (3331)	9	0.0%	96	0.0%
3332	Industrial Machinery Manufacturing(3332)	22	0.1%	373	0.1%
3333	Commercial and Service Industry Machinery Manufacturing(3333)	19	0.1%	541	0.2%
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing(3334)	11	0.0%	152	0.1%
3335	Metalworking Machinery Manufacturing(3335)	51	0.2%	867	0.3%
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing(3336)	1	0.0%	18	0.0%
3339	Other General Purpose Machinery Manufacturing(3339)	31	0.1%	501	0.2%
3341	Computer and Peripheral Equipment Manufacturing(3341)	11	0.0%	215	0.1%
3342	Communications Equipment Manufacturing(3342)	17	0.1%	1100	0.4%
3343	Audio and Video Equipment Manufacturing(3343)	6	0.0%	92	0.0%
3344	Semiconductor & Electronic Component Manufacturing(3344)	40	0.1%	1216	0.5%
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing(3345)	63	0.2%	1552	0.6%
3346	Manufacturing & Reproducing Magnetic and Optical Media(3346)	16	0.0%	50	0.0%
3351	Electric Lighting Equipment Manufacturing(3351)	11	0.0%	725	0.3%
3352	Household Appliance Manufacturing(3352)	2	0.0%	3	0.0%
3353	Electrical Equipment Manufacturing(3353)	16	0.0%	192	0.1%
3359	Other Electrical Equipment and Component Manufacturing(3359)	34	0.1%	644	0.2%
3361	Motor Vehicle Manufacturing(3361)	1	0.0%	20	0.0%
3362	Motor Vehicle Body and Trailer Manufacturing(3362)	3	0.0%	35	0.0%
3363	Motor Vehicle Parts Manufacturing(3363)	18	0.1%	930	0.3%
3364	Aerospace Product and Parts Manufacturing(3364)	22	0.1%	1431	0.5%
3365	Railroad Rolling Stock Manufacturing(3365)	1	0.0%	6	0.0%
3366	Ship and Boat Building(3366)	7	0.0%	106	0.0%
3369	Other Transportation Equipment Manufacturing(3369)	1	0.0%	3	0.0%
3371	Household & Institutional Furniture / Kitchen Cabinet Manufacturing(3371)	42	0.1%	220	0.1%
3372	Office Furniture (including Fixtures) Manufacturing(3372)	7	0.0%	120	0.0%
3379	Other Furniture Related Product Manufacturing(3379)	5	0.0%	31	0.0%
3391	Medical Equipment and Supplies Manufacturing(3391)	65	0.2%	1334	0.5%
3399	Other Miscellaneous Manufacturing(3399)	129	0.4%	1024	0.4%

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
42	Wholesale Trade(42)	1417	4.2%	11980	4.5%
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers(4231)	76	0.2%	794	0.3%
4232	Furniture and Home Furnishing Merchant Wholesalers(4232)	56	0.2%	349	0.1%
4233	Lumber and Other Construction Materials Merchant Wholesalers(4233)	89	0.3%	773	0.3%
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers(4234)	136	0.4%	1186	0.4%
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers(4235)	53	0.2%	535	0.2%
4236	Electrical and Electronic Goods Merchant Wholesalers(4236)	138	0.4%	1626	0.6%
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers(4237)	52	0.2%	407	0.2%
4238	Machinery, Equipment, and Supplies Merchant Wholesalers(4238)	243	0.7%	1368	0.5%
4239	Miscellaneous Durable Goods Merchant Wholesalers(4239)	130	0.4%	435	0.2%
4241	Paper and Paper Product Merchant Wholesalers(4241)	40	0.1%	442	0.2%
4242	Drugs and Druggists' Sundries Merchant Wholesalers(4242)	21	0.1%	405	0.2%
4243	Apparel, Piece Goods, and Notions Merchant Wholesalers(4243)	43	0.1%	224	0.1%
4244	Grocery and Related Product Wholesalers(4244)	115	0.3%	1232	0.5%
4245	Farm Product Raw Material Merchant Wholesalers(4245)	8	0.0%	20	0.0%
4246	Chemical and Allied Products Merchant Wholesalers(4246)	34	0.1%	243	0.1%
4247	Petroleum and Petroleum Products Merchant Wholesalers(4247)	28	0.1%	322	0.1%
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers(4248)	27	0.1%	1023	0.4%
4249	Miscellaneous Nondurable Goods Merchant Wholesalers(4249)	130	0.4%	596	0.2%
4251	Wholesale Electronic Markets and Agents and Brokers(4251)	0	0.0%	0	0.0%
44	Retail Trade(44)	2773	8.3%	23193	8.7%
4411	Automobile Dealers(4411)	195	0.6%	3452	1.3%
4412	Other Motor Vehicle Dealers(4412)	60	0.2%	250	0.1%
4413	Automotive Parts, Accessories, and Tire Stores(4413)	103	0.3%	654	0.2%
4421	Furniture Stores(4421)	101	0.3%	454	0.2%
4422	Home Furnishings Stores(4422)	131	0.4%	503	0.2%
4431	Electronics and Appliance Stores(4431)	210	0.6%	1265	0.5%
4441	Building Material and Supplies Dealers(4441)	196	0.6%	2670	1.0%
4442	Lawn and Garden Equipment and Supplies Stores(4442)	42	0.1%	243	0.1%
4451	Grocery Stores(4451)	413	1.2%	5578	2.1%
4452	Specialty Food Stores(4452)	171	0.5%	950	0.4%
4453	Beer, Wine, and Liquor Stores(4453)	185	0.6%	512	0.2%
4461	Health and Personal Care Stores(4461)	258	0.8%	2176	0.8%
4471	Gasoline Stations(4471)	182	0.5%	950	0.4%
4481	Clothing Stores(4481)	365	1.1%	2478	0.9%
4482	Shoe Stores(4482)	67	0.2%	358	0.1%
4483	Jewelry, Luggage, and Leather Goods Stores(4483)	95	0.3%	700	0.3%

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
45	Retail Trade(45)	1280	3.8%	10337	3.9%
4511	Sporting Goods, Hobby, and Musical Instrument Stores(4511)	200	0.6%	961	0.4%
4512	Book, Periodical, and Music Stores(4512)	106	0.3%	616	0.2%
4521	Department Stores(4521)	53	0.2%	4575	1.7%
4529	Other General Merchandise Stores(4529)	52	0.2%	800	0.3%
4531	Florists(4531)	88	0.3%	328	0.1%
4532	Office Supplies, Stationery, and Gift Stores(4532)	206	0.6%	705	0.3%
4533	Used Merchandise Stores(4533)	126	0.4%	308	0.1%
4539	Other Miscellaneous Store Retailers(4539)	279	0.8%	961	0.4%
4541	Electronic Shopping and Mail-Order Houses(4541)	34	0.1%	190	0.1%
4542	Vending Machine Operators(4542)	27	0.1%	123	0.0%
4543	Direct Selling Establishments(4543)	110	0.3%	770	0.3%
48	Transportation and Warehousing(48)	480	1.4%	5011	1.9%
4811	Scheduled Air Transportation(4811)	1	0.0%	15	0.0%
4812	Nonscheduled Air Transportation(4812)	4	0.0%	19	0.0%
4821	Rail Transportation(4821)	3	0.0%	6	0.0%
4831	Deep Sea, Coastal, and Great Lakes Water Transportation(4831)	1	0.0%	5	0.0%
4832	Inland Water Transportation(4832)	4	0.0%	13	0.0%
4841	General Freight Trucking(4841)	206	0.6%	1235	0.5%
4842	Specialized Freight Trucking(4842)	50	0.1%	334	0.1%
4851	Urban Transit Systems(4851)	4	0.0%	627	0.2%
4852	Interurban and Rural Bus Transportation(4852)	4	0.0%	53	0.0%
4853	Taxi and Limousine Service(4853)	56	0.2%	479	0.2%
4854	School and Employee Bus Transportation(4854)	7	0.0%	480	0.2%
4855	Charter Bus Industry(4855)	8	0.0%	416	0.2%
4859	Other Transit and Ground Passenger Transportation(4859)	14	0.0%	628	0.2%
4861	Pipeline Transportation of Crude Oil(4861)	1	0.0%	5	0.0%
4862	Pipeline Transportation of Natural Gas(4862)	1	0.0%	2	0.0%
4869	Other Pipeline Transportation(4869)	1	0.0%	0	0.0%
4871	Scenic and Sightseeing Transportation, Land(4871)	0	0.0%	0	0.0%
4872	Scenic and Sightseeing Transportation, Water(4872)	1	0.0%	181	0.1%
4879	Scenic and Sightseeing Transportation, Other(4879)	0	0.0%	0	0.0%
4881	Support Activities for Air Transportation(4881)	12	0.0%	82	0.0%
4882	Support Activities for Rail Transportation(4882)	8	0.0%	34	0.0%
4883	Support Activities for Water Transportation(4883)	9	0.0%	30	0.0%
4884	Support Activities for Road Transportation(4884)	26	0.1%	135	0.1%
4885	Freight Transportation Arrangement(4885)	15	0.0%	99	0.0%
4889	Other Support Activities for Transportation(4889)	45	0.1%	132	0.0%
49	Transportation and Warehousing(49)	88	0.3%	2725	1.0%
4911	Postal Service(4911)	26	0.1%	1884	0.7%
4921	Couriers(4921)	13	0.0%	230	0.1%
4922	Local Messengers and Local Delivery(4922)	3	0.0%	313	0.1%
4931	Warehousing and Storage(4931)	46	0.1%	298	0.1%

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
51	Information(51)	650	1.9%	12560	4.7%
5111	Newspaper, Periodical, Book, and Directory Publishers(5111)	116	0.3%	1749	0.7%
5112	Software Publishers(5112)	42	0.1%	188	0.1%
5121	Motion Picture and Video Industries(5121)	101	0.3%	283	0.1%
5122	Sound Recording Industries(5122)	34	0.1%	121	0.0%
5151	Radio and Television Broadcasting(5151)	26	0.1%	865	0.3%
5152	Cable and Other Subscription Programming(5152)	11	0.0%	231	0.1%
5171	Wired Telecommunications Carriers(5171)	48	0.1%	172	0.1%
5172	Wireless Telecommunications Carriers (except Satellite)(5172)	47	0.1%	134	0.1%
5174	Satellite Telecommunications(5174)	0	0.0%	0	0.0%
5179	Other Telecommunications(5179)	138	0.4%	7920	3.0%
5182	Data Processing, Hosting, and Related Services(5182)	43	0.1%	373	0.1%
5191	Other Information Services(5191)	45	0.1%	525	0.2%
52	Finance and Insurance(52)	1299	3.9%	7390	2.8%
5211	Monetary Authorities - Central Bank(5211)	0	0.0%	0	0.0%
5221	Depository Credit Intermediation(5221)	198	0.6%	1845	0.7%
5222	Nondepository Credit Intermediation(5222)	60	0.2%	549	0.2%
5223	Activities Related to Credit Intermediation(5223)	181	0.5%	714	0.3%
5231	Securities & Commodity Contracts Intermediation/Brokerage(5231)	71	0.2%	486	0.2%
5232	Securities and Commodity Exchanges(5232)	2	0.0%	10	0.0%
5239	Other Financial Investment Activities(5239)	238	0.7%	657	0.2%
5241	Insurance Carriers(5241)	87	0.3%	931	0.3%
5242	Agencies, Brokerages, and Other Insurance Related Activities(5242)	426	1.3%	1995	0.7%
5251	Insurance and Employee Benefit Funds(5251)	6	0.0%	83	0.0%
5259	Other Investment Pools and Funds(5259)	31	0.1%	119	0.0%
53	Real Estate and Rental and Leasing(53)	1492	4.4%	7799	2.9%
5311	Lessors of Real Estate(5311)	500	1.5%	2367	0.9%
5312	Offices of Real Estate Agents and Brokers(5312)	655	2.0%	3409	1.3%
5313	Activities Related to Real Estate(5313)	106	0.3%	289	0.1%
5321	Automotive Equipment Rental and Leasing(5321)	77	0.2%	410	0.2%
5322	Consumer Goods Rental(5322)	98	0.3%	526	0.2%
5323	General Rental Centers(5323)	0	0.0%	0	0.0%
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing(5324)	50	0.1%	220	0.1%
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)(5331)	7	0.0%	578	0.2%
54	Professional, Scientific, and Technical Services(54)	4452	13.3%	20208	7.6%
5411	Legal Services(5411)	952	2.8%	4052	1.5%
5412	Accounting, Tax Preparation, Bookkeeping, Payroll Services(5412)	386	1.1%	1806	0.7%
5413	Architectural, Engineering, and Related Services(5413)	741	2.2%	3558	1.3%
5414	Specialized Design Services(5414)	233	0.7%	521	0.2%
5415	Computer Systems Design and Related Services(5415)	281	0.8%	1855	0.7%
5416	Management, Scientific, and Technical Consulting Services(5416)	919	2.7%	3922	1.5%
5417	Scientific Research and Development Services(5417)	149	0.4%	1704	0.6%
5418	Advertising and Related Services(5418)	150	0.4%	1189	0.4%
5419	Other Professional, Scientific, and Technical Services(5419)	642	1.9%	1602	0.6%

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
55	Management of Companies and Enterprises(55)	59	0.2%	253	0.1%
5511	Management of Companies and Enterprises(5511)	59	0.2%	253	0.1%
56	Administrative and Support and Waste Management and Remediation Services(56)	3992	11.9%	17819	6.7%
5611	Office Administrative Services(5611)	172	0.5%	1921	0.7%
5612	Facilities Support Services(5612)	9	0.0%	189	0.1%
5613	Employment Services(5613)	139	0.4%	982	0.4%
5614	Business Support Services(5614)	1005	3.0%	4909	1.8%
5615	Travel Arrangement and Reservation Services(5615)	124	0.4%	548	0.2%
5616	Investigation and Security Services(5616)	419	1.2%	864	0.3%
5617	Services to Buildings and Dwellings(5617)	688	2.0%	4625	1.7%
5619	Other Support Services(5619)	1293	3.9%	2630	1.0%
5621	Waste Collection(5621)	13	0.0%	48	0.0%
5622	Waste Treatment and Disposal(5622)	54	0.2%	495	0.2%
5629	Remediation and Other Waste Management Services(5629)	76	0.2%	607	0.2%
61	Educational Services(61)	853	2.5%	19725	7.4%
6111	Elementary and Secondary Schools(6111)	314	0.9%	10983	4.1%
6112	Junior Colleges(6112)	10	0.0%	770	0.3%
6113	Colleges, Universities, and Professional Schools(6113)	142	0.4%	6205	2.3%
6114	Business Schools and Computer and Management Training(6114)	12	0.0%	77	0.0%
6115	Technical and Trade Schools(6115)	27	0.1%	242	0.1%
6116	Other Schools and Instruction(6116)	323	1.0%	1407	0.5%
6117	Educational Support Services(6117)	25	0.1%	41	0.0%
62	Health Care and Social Assistance(62)	3219	9.6%	34900	13.1%
6211	Offices of Physicians(6211)	1202	3.6%	7231	2.7%
6212	Offices of Dentists(6212)	312	0.9%	1832	0.7%
6213	Offices of Other Health Practitioners(6213)	523	1.6%	1501	0.6%
6214	Outpatient Care Centers(6214)	59	0.2%	737	0.3%
6215	Medical and Diagnostic Laboratories(6215)	42	0.1%	695	0.3%
6216	Home Health Care Services(6216)	63	0.2%	2990	1.1%
6219	Other Ambulatory Health Care Services(6219)	101	0.3%	832	0.3%
6221	General Medical and Surgical Hospitals(6221)	21	0.1%	5220	2.0%
6222	Psychiatric and Substance Abuse Hospitals(6222)	16	0.0%	88	0.0%
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals(6223)	5	0.0%	111	0.0%
6231	Nursing Care Facilities(6231)	55	0.2%	3881	1.5%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities(6232)	39	0.1%	1243	0.5%
6233	Community Care Facilities for the Elderly(6233)	30	0.1%	1455	0.5%
6239	Other Residential Care Facilities(6239)	28	0.1%	769	0.3%
6241	Individual and Family Services(6241)	389	1.2%	3911	1.5%
6242	Community Food and Housing, and Emergency and Other Relief Services(6242)	11	0.0%	99	0.0%
6243	Vocational Rehabilitation Services(6243)	30	0.1%	226	0.1%
6244	Child Day Care Services(6244)	293	0.9%	2080	0.8%

NAICS Code	Business Summary 2008: Establishments by NAICS	Establishments	% of Total Est.	Employees	% of Total Emp.
71	Arts, Entertainment, and Recreation(71)	602	1.8%	4117	1.5%
7111	Performing Arts Companies(7111)	83	0.2%	769	0.3%
7112	Spectator Sports(7112)	28	0.1%	101	0.0%
7113	Promoters of Performing Arts, Sports, and Similar Events(7113)	16	0.0%	73	0.0%
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures(7114)	12	0.0%	36	0.0%
7115	Independent Artists, Writers, and Performers(7115)	87	0.3%	170	0.1%
7121	Museums, Historical Sites, and Similar Institutions(7121)	49	0.1%	414	0.2%
7131	Amusement Parks and Arcades(7131)	5	0.0%	34	0.0%
7132	Gambling Industries(7132)	1	0.0%	75	0.0%
7139	Other Amusement and Recreation Industries(7139)	321	1.0%	2446	0.8%
72	Accommodation and Food Services(72)	1584	4.7%	14213	5.3%
7211	Traveler Accommodation(7211)	101	0.3%	1333	0.5%
7212	RV (Recreational Vehicle) Parks and Recreational Camps(7212)	15	0.0%	121	0.0%
7213	Rooming and Boarding Houses(7213)	4	0.0%	30	0.0%
7221	Full-Service Restaurants(7221)	772	2.3%	6676	2.5%
7222	Limited-Service Eating Places(7222)	512	1.5%	4730	1.8%
7223	Special Food Services(7223)	104	0.3%	897	0.3%
7224	Drinking Places (Alcoholic Beverages)(7224)	76	0.2%	425	0.2%
81	Other Services (except Public Administration)(81)	3534	10.5%	14572	5.5%
8111	Automotive Repair and Maintenance(8111)	585	1.7%	2161	0.8%
8112	Electronic and Precision Equipment Repair and Maintenance(8112)	126	0.4%	452	0.2%
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and M(8113)	47	0.1%	123	0.0%
8114	Personal and Household Goods Repair and Maintenance(8114)	213	0.6%	406	0.2%
8121	Personal Care Services(8121)	953	2.8%	2514	0.9%
8122	Death Care Services(8122)	72	0.2%	326	0.1%
8123	Drycleaning and Laundry Services(8123)	161	0.5%	604	0.2%
8129	Other Personal Services(8129)	201	0.6%	615	0.2%
8131	Religious Organizations(8131)	603	1.8%	2435	0.9%
8132	Grantmaking and Giving Services(8132)	22	0.1%	249	0.1%
8133	Social Advocacy Organizations(8133)	55	0.2%	487	0.2%
8134	Civic and Social Organizations(8134)	194	0.6%	2356	0.9%
8139	Business, Professional, Labor, Political, and Similar Organizations(8139)	303	0.9%	1843	0.7%
92	Public Administration(92)	293	0.9%	13874	5.2%
9211	Executive, Legislative, and Other General Government Support(9211)	76	0.2%	4678	1.8%
9221	Justice, Public Order, and Safety Activities(9221)	116	0.3%	3387	1.3%
9231	Administration of Human Resource Programs(9231)	31	0.1%	4250	1.6%
9241	Administration of Environmental Quality Programs(9241)	16	0.0%	206	0.1%
9251	Administration of Housing Programs, Urban Planning, and Community Development(9251)	9	0.0%	60	0.0%
9261	Administration of Economic Programs(9261)	28	0.1%	779	0.3%
9271	Space Research and Technology(9271)	0	0.0%	0	0.0%
9281	National Security and International Affairs(9281)	17	0.1%	514	0.2%

## APPENDIX C: SUMMARY OF ONLINE SURVEY RESULTS

### Responses:

- ▶ 287 responses from 29 towns including high representation from New Haven, Milford, Branford, West Haven, North Haven, Orange, Woodbridge, and Hamden, as well as businesses with multiple locations in the region
- ▶ Wide range of respondents including 25 real estate companies, 22 manufacturing, 18 banking/financial services, 11 marketing/communications, 9 retail, 9 healthcare, 8 hospitality/lodging, 7 insurance, 7 law firms, and many others
- ▶ Responses represent employment of about 8,700 full-time staff and an additional 2,800 part-time staff, not including the two companies responding with over 40,000 employees each
- ▶ Wide range of different types of companies responding, including 26 publicly traded companies, 94 family owned companies, 59 non-profit companies, 51 woman-owned companies, 13 franchises, and 19 home-based businesses

### Major Findings:

- ▶ Major factors why businesses are located here are (1) close to home; (2) inherited the location; and (3) close to their customers; (4) close to transportation routes; (5) close to business partners or potential partners; (6) cost of space was right; (7) labor pool was right. Nearly no business located in this region for the business incentives.
- ▶ Those finding the labor pool right for their needs included manufacturing (7), marketing (3), environmental services (2)
- ▶ Being located close to home was a strong concern of family-owned businesses or franchises. Of the 111 that cited this as an important factor, 53 were from family-owned businesses and sole proprietors, 5 from franchises, 2 from non-profits, 2 from publicly traded companies (51 were left blank)
- ▶ More than three quarters of respondent businesses (78%) have all business operations here
- ▶ More than three-quarters of respondent businesses (77%) predict either stable or increasing revenues in the next three years
- ▶ 93% of respondent businesses say they will either absolutely or probably be in this location three years from now. Those that responded “doubtful” are in construction, consulting, employment services, non-profits, manufacturing, mortgage, law firm, environmental firm, home health care, and personal services). Only three say that it is unlikely – a hair salon, an architecture firm, and a community college -- and the college e is because they anticipate a new location within the region.
- ▶ The respondent businesses anticipate expanding their full-time labor force by 36% in the next three years. The respondent businesses with the greatest plans for expansion are consulting (142%), construction (50%), printing (50%), marketing (44%), environmental services (36%), architecture (36%), insurance (22%), real estate (21%), accounting (17%), legal (14%), social services (13%) and manufacturing (11%).
- ▶ Competitive cities in CT include New London, Fairfield, Hartford and Danbury/Shelton
- ▶ Competitive cities outside of CT but nearby include Providence, New York City
- ▶ Competitive places nationwide include The South, Seattle, Portland, San Francisco
- ▶ Perception of high quality of life in the region with transportation, beaches, culture, close to both NY and Boston
- ▶ Perception of too much traffic & suburban sprawl, lack of regional transit system
- ▶ Perception that State is anti-business, including too much regulation & too high taxes
- ▶ Perception that cost of business is too high in CT (utility costs, healthcare costs)
- ▶ Perception of too many competitors in certain industries (e.g., medical industry)
- ▶ Main messages that may resonate with certain sectors include:
  - For manufacturers: labor pool
  - For professional services (e.g., legal): cost of space
  - For health-related: close to medical institutions
  - For family-owned: close to home with high quality of life

## ADDITIONAL DETAIL ON CERTAIN QUESTIONS

### Why is their business located here?

- ▶ For nearly one-half of respondents (45%), it is close to home
- ▶ For about a third (33%), they inherited the location
- ▶ For about a third (35%), they are close to their customers
- ▶ For 41 businesses (17%), it is close to transportation routes
- ▶ For 38 businesses (15%), it is close to business partners or potential partners
- ▶ For 33 businesses (13%), it has the cost of space that is right for their needs
- ▶ For 27 businesses (11%), the labor pool is right for their needs
- ▶ For 21 businesses (8%), it is close to educational institutions
- ▶ For 17 businesses (7%), it is close to medical institutions and known for certain sectors
- ▶ Only 2 businesses (1%) said because of incentive programs
- ▶ Write-ins: Franchisor demographic studies; Less traffic than Fairfield County; Quality of life; Assigned area by parent company; Funded from Yale

	Inherited location	Close to home	Close to customers	Close to partners	Close to ed. institutions	Close to med. institutions	Close to transportation routes	Labor pool is right	Cost of space	Area known for certain sectors	Incentive programs
Publicly Traded (26)	23%	8%	31%	12%	4%	4%	4%	8%	0%	4%	0%
Family-Owned (89)	39%	57%	34%	12%	4%	3%	17%	13%	16%	2%	1%
Marketing (11)	9%	55%	27%	27%	0%	0%	18%	27%	9%	0%	0%
Health (12)	33%	25%	42%	17%	8%	33%	17%	8%	8%	0%	0%
Real Estate (26)	15%	50%	35%	15%	8%	4%	12%	4%	4%	4%	4%
Banking (12)	42%	17%	25%	8%	8%	0%	8%	0%	0%	0%	0%
Law (7)	29%	71%	71%	14%	0%	0%	14%	0%	71%	29%	0%
Manufacturing (22)	50%	50%	14%	5%	5%	9%	14%	36%	14%	5%	5%

### Why do you stay?

- ▶ 135 (60%) say local customer/client base
- ▶ 102 (46%) say personal reasons
- ▶ 76 (34%) say local professional network
- ▶ 69 (31%) say quality of life
- ▶ 48 (21%) say cost of space
- ▶ 47 (21%) say cost of staying put is less than cost of moving
- ▶ 44 (20%) say proximity to transportation routes
- ▶ 26 (12%) say hard to move equipment & systems
- ▶ 23 (10%) say cache of having a business in this region
- ▶ 20 (9%) say labor pool

### What would cause you to go?

- ▶ 61 (31%) personal reasons
- ▶ 57 (29%) new business partnerships
- ▶ 52 (27%) lower taxes
- ▶ 41 (21%) business acquisition with property elsewhere
- ▶ 42 (21%) cheaper rent or building costs
- ▶ 38 (19%) cheaper cost of living
- ▶ 34 (17%) higher quality of life
- ▶ 28 (14%) more convenient location)
- ▶ 25 (13%) less regulation
- ▶ 18 (9%) cheaper labor
- ▶ 15 (8%) consolidation of operations
- ▶ Write-ins: Move to a business friendly state; Sale of company; Too much competition from government subsidized projects; Need bldg with more exposure; To get closer to customers; Lower electricity rates; Better employee pool

**To where would you move?**

- ▶ 13 - Other Connecticut location including Danbury, Shelton, Hartford, Fairfield, Bridgeport, and New London (2 manufacturing (Danbury), employment services, restaurant, 2 law firms, 1 restaurant, 1 home improvement, 2 other)
- ▶ 10 – North Carolina or South Carolina
- ▶ 6 – South (4-manufacturing, 1 banking, 1 finance, 1 mortgage, 1 personal service, 1 business development)
- ▶ 5 – New England including Boston, Vermont
- ▶ 3 – Stay within the region
- ▶ 3 – New York
- ▶ 2 – Florida
- ▶ 2 - Abroad
- ▶ 7 – Others (Idaho, Montana, Hawaii, New Mexico, Portland, New Jersey, Michigan, Atlanta)

**What types of businesses would you like to see establish a local presence:**

- ▶ Website development & management (3)
- ▶ Insurance brokerage
- ▶ Locally owned & operated banking,
- ▶ Raw materials
- ▶ Paper supplies
- ▶ Metal, Plastics, Circuit Boards, Films,
- ▶ All liquids (i.e., shampoo, styling products)
- ▶ Essential Oils Massage Equipment & Supplies
- ▶ Dry cleaning supplies come from NY or MA including equipment sales
- ▶ Inventory required for fabrication – no local suppliers; must go out of the region
- ▶ Public Relations support
- ▶ Financial Support
- ▶ Carrying cases, cardboard boxes
- ▶ Drilling and laboratory services
- ▶ Vaccines
- ▶ Operating supplies
- ▶ Marketing materials such as brochures, signs
- ▶ Food Equipment
- ▶ Hair equipment, products, and education
- ▶ Retail consumer electronics.
- ▶ Injection molding but the US can't beat the Australian price for same quality
- ▶ CAD design & site specifications, transportation and disposal of contaminated soils
- ▶ Signs, specialized flags, etc.
- ▶ Flooring materials
- ▶ Federal Government
- ▶ Innovative health programs like NY and CA

**What else should we know:**

- ▶ High cost of doing business (24) including rent, real estate, labor, healthcare benefit costs & utility rates
- ▶ High taxes (20)
- ▶ Unfriendly to businesses – both local & state level (9)
- ▶ Over-regulated business environment (8) increasing costs involved with compliance
- ▶ Traffic / transportation (8) including lack of mass transit and growing congestion
- ▶ Competitive environment (3) including balanced competition vs. over-abundance of competition
- ▶ Quality of life (3) “Nice place to visit AND a nice place to live.”
- ▶ Political environment (2)
- ▶ Need for technical training, incubation of small businesses, and demonstration - exhibits of new technologies
- ▶ Convenient location
- ▶ Culture!
- ▶ Yale New Haven Hospital and Yale University are the major attractions for businesses

## APPENDIX D: SUMMARY OF ONE-ON-ONE INTERVIEWS

As part of this project, one-on-one interviews were conducted to learn more about the industry trends in the different areas of the region and to inform development of the target audiences, marketing messages, and marketing methods. This information summarizes the major findings of these interviews.

Strong industries are:

- Healthcare & biomedical / life sciences
- Assisted living / healthcare
- Education
- Aerospace
- Medical devices
- Pharmaceuticals
- Chemical manufacturing
- Lean manufacturers that supply the primes
- Manufacturers that are involved in sub-assembly & integration
- Manufacturers that are more technical and require more engineering (not commodities)
- Manufacturers that are involved in M&O (maintenance & overhaul), for example for Sikorsky
- Manufacturers with a market either local or abroad (Bilco is example of where market was elsewhere)
- Small businesses with a differentiated product
- Small businesses whose owners have strong business skills & are likeable
- Small businesses whose owners have experience in the area
- Medical manufacturing
- Telecommunications
- Wire cluster/technology cluster

Recent industry trends in parts of the region

- Rising office vacancy rates
- Even though many companies are having a tough time, some companies are hiring (Component Engineers, Verizon Wireless, Covidian, Edible arrangements)
- Organizations with strong balance sheets – no matter what sector - are doing alright; those that had too little cash or need credit lines are suffering
- Decline of pharmaceutical industry presence
- Decline of overpriced boutique retail stores in suburban parts of region
- More people are seeking assistance in starting small businesses, largely b/c they were downsized and want more control & independence and the chance to make money
- This year contracting is slow, aeronautics are pushed out

Why businesses are attracted to or stay in this part of the region:

- Manufacturers - Lots of family businesses with trained workforce, lots are third generation, etc.
- Manufacturers - Proximity to major industry drivers (EB, UTC, Sikorsky), who benefit from limited transit time
- Manufacturers - Critical mass of manufacturing to allow for sub-assembly options and allow for integration
- Manufacturers - Dedicated workforce 12 months of the year (in the south, a serious concern is that they lose workforce for hunting season)
- Manufacturers - Capability of the work force
- Manufacturers - Costs too much to move
- Small businesses - Lots of family businesses, so its close to home
- Quality of life (the sound, culture, food options)
- Proximity to NYC and Boston
- Businesses that fit well in a 'bedroom community' atmosphere
- Central location makes telecommuting possible
- Wallingford - 2<sup>nd</sup> lowest electric rate in the northeast; lowest in CT
- Intersection of major highways; being on Route 15 lets some draw from Fairfield County without the traffic issues
- Affordable housing

- Wallingford/Meriden - Extremely strong telecommunications infrastructure with SONET ring
- Wallingford/Meriden - Have an Enterprise Zone and an IT zone
- Wallingford/Meriden - Ability for
- Wallingford/Meriden - Anticipation of 2013 completion of part of the rail line
- Wallingford/Meriden - Lots of hotels
- Foreign-owned – East Coast provides overlapping workday with Europe

Competition is:

- Places where costs & taxes are lower (especially for manufacturing)
- Places where startup costs are lower, taxes are lower & there is more coordination & less regulation on the state level
- Places that are less parochial in how they handle business
- Fairfield County
- Hartford – one business that was thinking about the region chose Hartford b/c of the younger & more youthful workforce
- Towns that have more land (some towns in this region feel they are getting land poor)

What are the major considerations for marketing here?

- The world is pretty small now - “You can design & conceive from anyplace”
- For start-ups, the message is that they should stick to the region that they know, where their contacts are, where their network is located, and don’t burn a bridge with their former boss
- Play up greater New Haven as a great place for young educated people to live
- Having a good labor market is a self-perpetuating cycle – if you get it, then it’s easy to attract people to keep it
- Public transport to Tweed and Kennedy is important for global companies
- Economic viability of a location is what businesses make their decisions on
- Trade journals are one possible avenue – especially for those that supply some of the bigger companies
- For start-ups, find the people who want to go out on their own, through organizations like CT Innovations, the Connecticut Technology Council, or the people in a company who may be thinking about starting their own company (e.g., foremen and middle management layers).

Other comments:

- Focus on retention, instead of recruitment (“no manufacturer is going to move here”)
- Recognize that manufacturing is a huge economic driver
- With the fallout of the financial services sector, hope that manufacturing will come back into vogue, or at least a “return to the manufacturing ethic”
- Consider making the region the “foundation of the knowledge corridor”
- Competition is a big issue for small businesses, that’s why the niche is so important
- Idea to have New Haven be a major cruise ship stop
- Branford/Guilford - Best industries that would be suited for this area would include corporate headquarters, organic farming, gourmet food industries, the film industry, professional/scientific industries, a conference center, and green industries
- Branford/Guilford - See themselves as part of a different marketing region (the CT Shoreline)
- Outer areas of the region would like to cultivate some spillover effects from arts & restaurant scene in New Haven
- Outer areas of the region would like to be included on the site tour
- Marketing effort may not be needed to help retain good small businesses
- Marketing effort to boost business activity in the region overall will help all of the businesses in the region