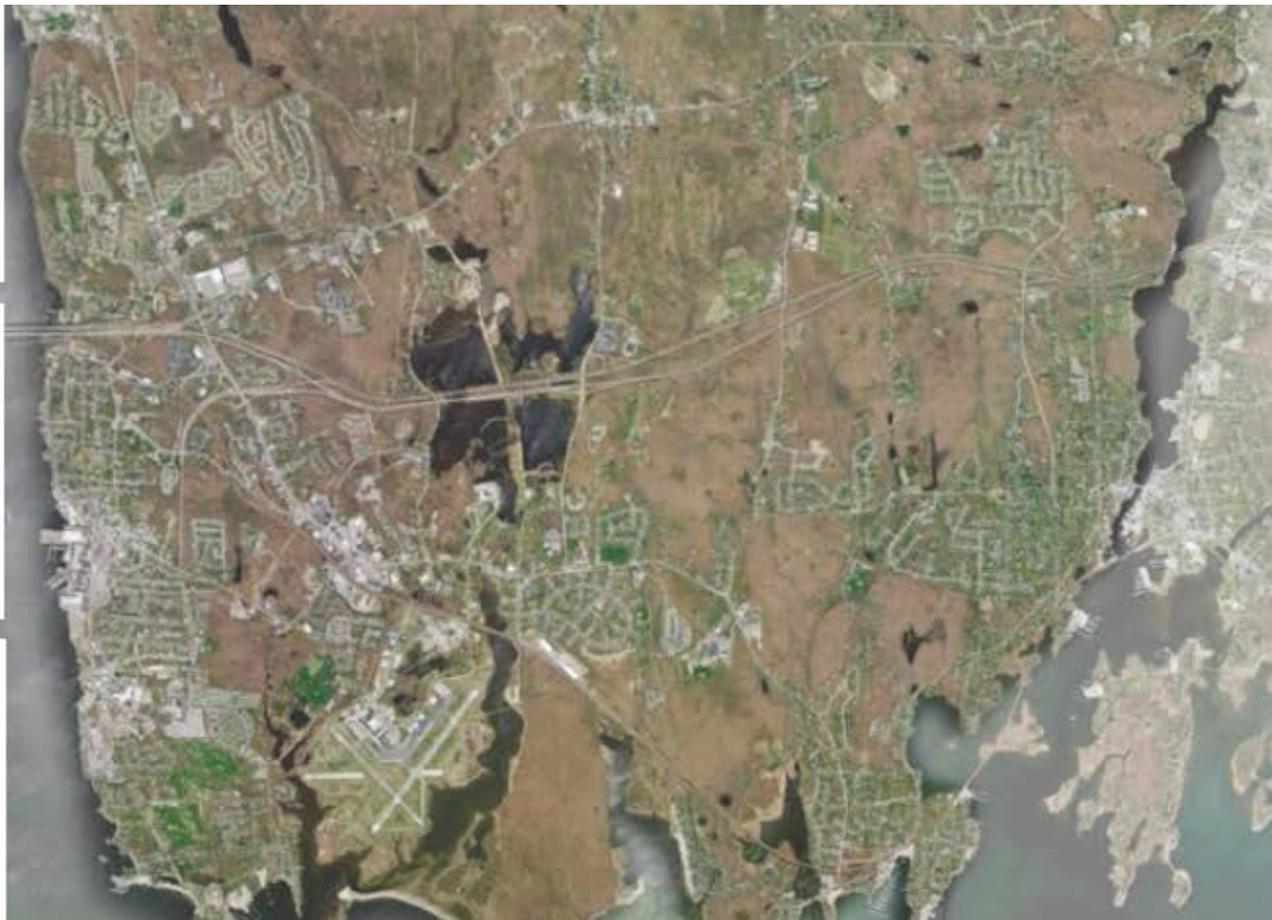


# Town Council Legislative Policy Initiative to Increase Revenues

## REGULATORY REVIEW AND MARKET ANALYSIS

**Kick Off Meeting  
May 27, 2015**



# Meeting Agenda

- **Introduction**
- **Scope of Work**
- **Schedule**
- **Initial Observations**
  - **Regulatory Review**
  - **Market Analysis**
- **Discussion**

# Scope of Work

## **Task 1: Land Use and Regulatory Review**

- Review existing zoning and subdivision regulations
- Site reconnaissance and stakeholder interviews
- Perform zoning and subdivision regulation audit

# Scope of Work

## Task 2: Market Analysis and Review

- Site reconnaissance
- Review existing materials
- Demographic and socioeconomic trends
- Economic trends analysis
  - Economic base analysis
  - Workforce analysis
  - Stakeholder and Business/Industry interviews
  - Leading industry analysis
- Real estate market analysis
  - Residential
  - Retail and restaurant
  - Real estate interviews
- Action Plan
- Draft and final report

# Scope of Work

## **Task 3: Analysis of Opportunity Areas**

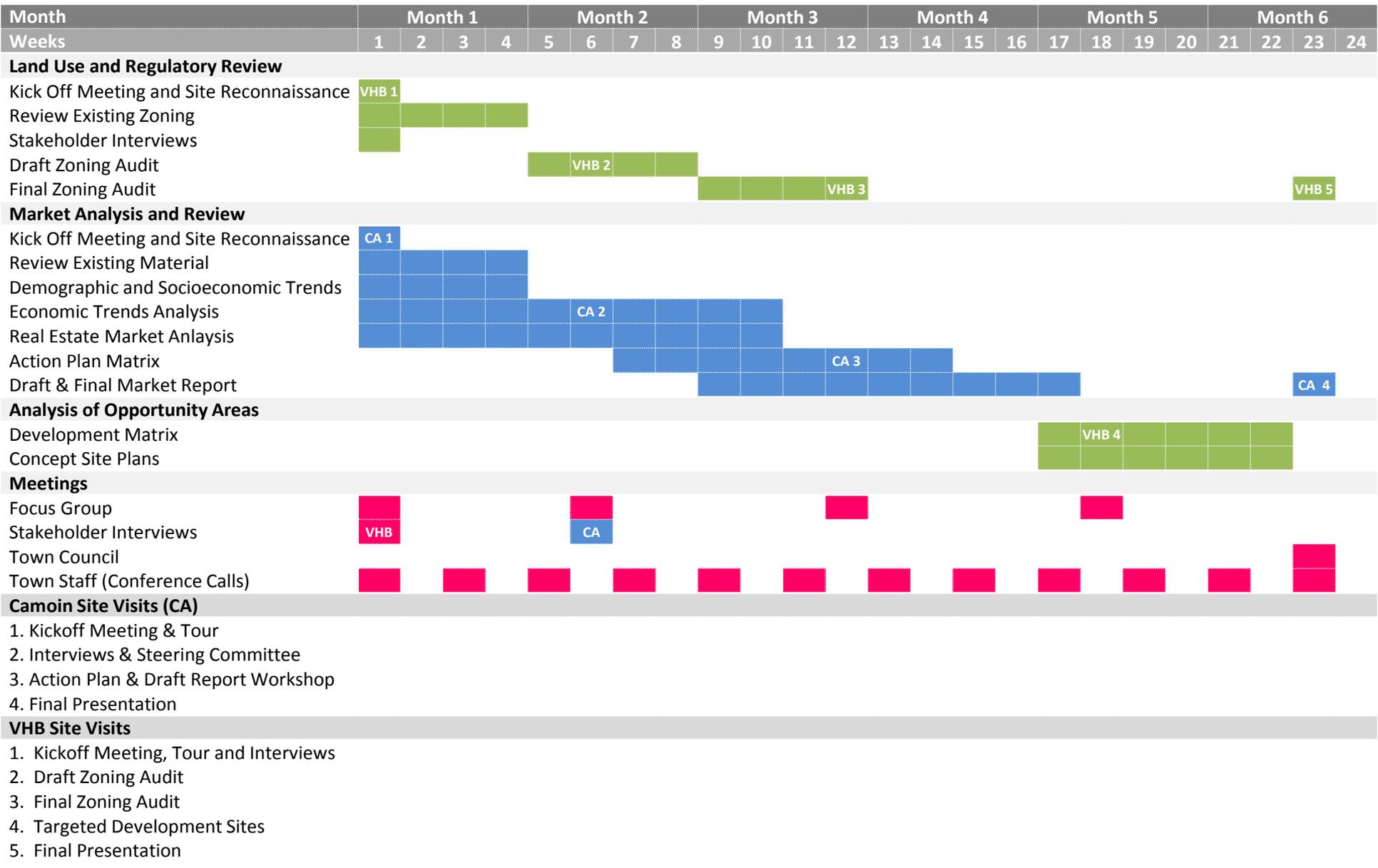
- Targeted economic development areas
  - Route 184
  - Route 117/I-95/Exit 88
  - US Naval Base Area
  - Groton-New London Airport Area
  - City of Groton, Thames Street Area and Eastern Point Business District
  - Downtown Groton
  - Route 12 and I-95/Exist 86
  - Mystic
- Evaluation matrix
- Conceptual site plans

# Scope of Work

## **Additional Service Tasks**

- Economic development marketing materials
- Downtown Mystic parking study
- Financial feasibility analysis
- Economic and fiscal impact analysis of uses and zoning types
- Targeted industry attraction strategy
- Marketing Strategy Implementation

# Schedule



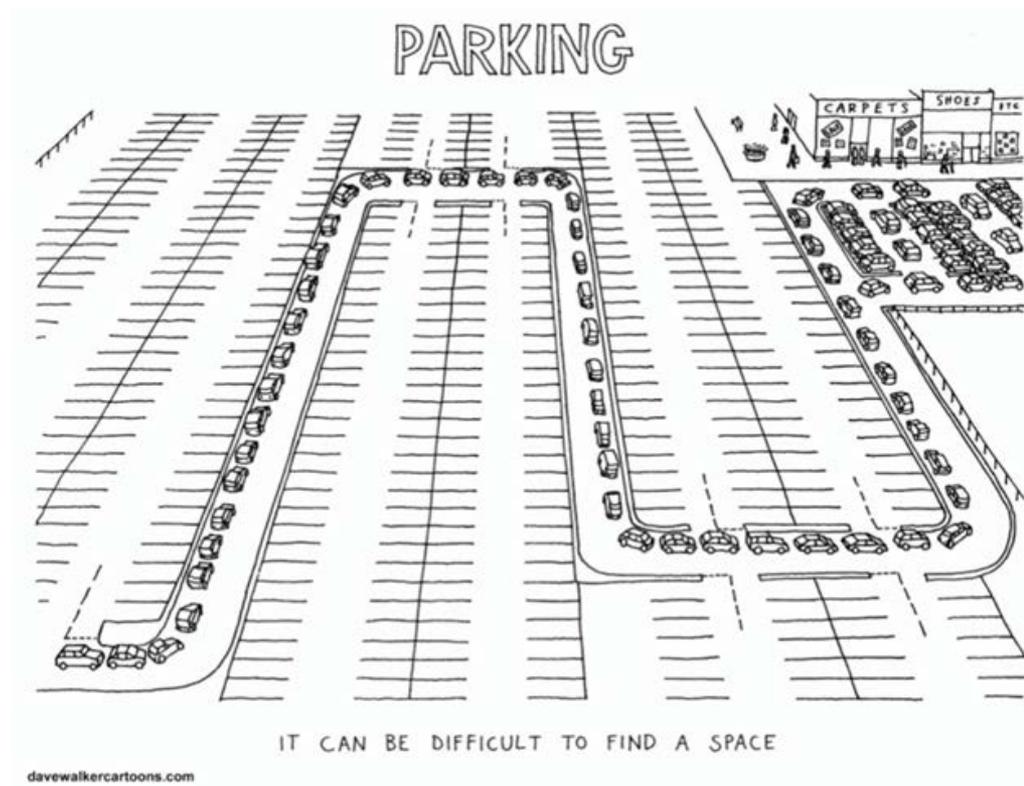
# Zoning



*"Like the concept. Like the whole thing. But take out the arches."*



# Zoning



# Regulatory Review

## Areas of Concern

- Inconsistencies
- Confusing/vague language
- Out-of-date provisions
- Best practices
- Consistency with policy objectives
- Areas of concern
- Barriers to efficient permitting

# Zoning

## Priority Issues

- Timeline/Flow Chart for approvals
- Streamlining – levels of approvals required, consolidation of board/commission review
- Tiered system of allowable uses
- Innovative parking standards
- Special permit requirements
- Water Resource Protection District - best management practices and best available technologies
- Incentives to redevelop underutilized areas
- Consistency – subdivision regulations and zoning
- Updating for consistency with state statutes

# Zoning - Initial Observations

- General
  - Reorganized to make it more user-friendly
  - Definition section needs to be updated – mixed use not defined
  - Land use terms need to be consistent
- Table of Permitted Uses
  - Can be simplified by combining uses that have the same designation across the zoning district
  - Land uses need to be updated to reflect current land use types
  - Why are some types of office uses allowed in the WF district, but not others?

# Zoning - Initial Observations

- Dimensional Regulations
  - 40,000 SF minimum lot size in Downtown Design District – way too large
  - Setback requirements are not consistent with new development patterns and types
- Design Districts
  - Special permit thresholds could be a barrier to development.
  - Some seem fairly insignificant and do not appear to rise to the level of requiring a special permit review

# Zoning - Initial Observations

- Mixed Use Zones
  - Lengthy and cumbersome process discourages development interests – how many mixed use developments have been proposed and approved?
  - Mixed Use zones do not appear to encourage mixed-use structures
  - Do allowed uses make sense for what you are looking to achieve (i.e. single family homes)?
  - Update design guidelines, including illustrative graphics

# Zoning - Initial Observations

- WF Zone
  - Many uses that would enrich this district are not allowed
  - Restrictive height
- Office/Multi-Family District
  - Restrictive height
  - Excessive setback requirements – more suburban than urban
- Parking
  - Parking standards are over 25 years old

# Subdivision Regulations – Initial Observations

- Update to reflect current planning standards (Complete Streets)
- Age of regulations – can still submit plans on “IBM formatted 3.5” 1.44 MB floppy diskette”



# Market Analysis: National & Regional Trends

*Driving economic change and market demand.*

- Workforce: Major challenge everywhere and across all industries!
  - Both in soft skills and technical skills
  - Drives locational decision-making, often price is secondary
- Lots of space available in the northeast, heavy competition
- Growing opportunities for smaller scale projects: 5,000-20,000 SF
- Millennials driving market demand, gaining on boomers
- Regional reliance on defense and government contracts as well as bio (CT, MA, RI)
- Different types of uses/demand, harder to categorize and evaluate
- Emerging from recession:
  - Tighter lending
  - Conservative investments
  - More conscious consumers



# Market Analysis: National & Regional Trends

*Driving economic change and market demand.*

## ■ Retail/Service

- Big-box to small box
- Niche opportunities
- E-commerce, e-fulfilment
- Cross-channel selling, app development to bridge online vs. in-person
- Growing importance of consumer experience, about the story

*(Also a notable trend in tourism)*

## ■ Makers: live-design-create-sell

## ■ Office

- Past few years downtown focus, suburbs/parks picking up
- Workforce talent vs. price
- Growth of startups, free lancers
- Flex space, co-working space
- Diversifying use types across sectors
- Increasingly difficult to quantify

## ■ Housing

- Rising prices, limited affordable options
- Tighter lending, high student loan debt
- Low-maintenance, smaller space
- Urban to suburban
- Rent vs. own



# Groton Context

*Local economic issues and questions to address.*

- Need for diversification
  - Downsizing of Pfizer
  - Heavy reliance on defense
  
- Understand demographic market trends
  - Military personnel and civilian population
  - Youth, workforce, and aging populations
  
- Multiple sites that have potential and need prioritization
  - Diversify housing stock to accommodate growing markets
  - Capitalize on emerging retail/service opportunities
  - Future role of historic downtown

**Our Goal:** *Provide critical information and knowledge for sound decision-making to address issues.*

# Emerging Economic Trends

- ???

Local  
Regional  
Statewide  
Competitors

Housing  
Retail  
Office  
Industrial  
Mixed Use  
Shared Space  
New Types of Spaces

Workforce  
Aging  
Youth

Business/Industry  
Investment  
Utilities

# Challenges & Opportunities for Groton

## Challenges

- ??

## Opportunities

- ??

# Discussion