Technical Memorandum:
Downtown Mansfield Municipal Development Plan
Market Study

Prepared for:

Mansfield Downtown Partnership

Prepared by:

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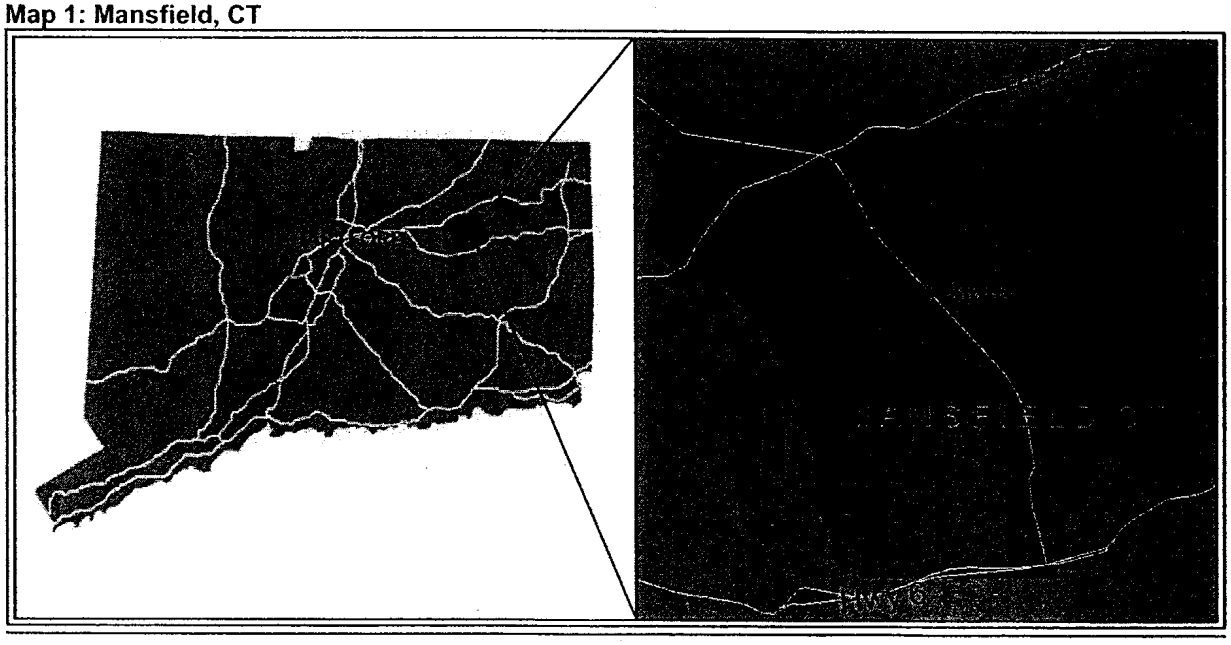
1.0 INTRODUCTION

Located in rural Tolland County, Mansfield is about 30 miles from Hartford and can be accessed by major interstate and state highways, such as interstates I-84, I-384, and I-395 (see **Map 1**). Routes 195, 44, and 32 are other primary arteries leading into Mansfield. The town is home to the main campus of the University of Connecticut at Storrs (the University), which is situated in the center of Mansfield and is the largest employer in the area. As a result of the University presence, commercial and real estate market conditions in Mansfield are affected by the fluctuations that stem from a seasonal college population. Retail activity in Mansfield is concentrated in these locations: (1) near the intersection of Storrs Road (Route 195) and Highway 6 (including the East Brook Mall); (2) near the intersection of 44 and 195, and (3) to a lesser extent, in Storrs.

The Mansfield Downtown Partnership has retained a consultant team led by Looney Ricks Kiss to prepare a Municipal Development Plan for Downtown Mansfield. Urban Partners is the subconsultant for the market analysis and economic development portions of this study. The 44-acre site proposed for the municipal downtown, referred to in this report as Storrs Center, is at the intersection of Dog Lane and Storrs Road (Route 195) and is just eight miles from I-84. The proposed Storrs Center is centrally located in Mansfield where there is already a concentration of retail activity and is adjacent to the post office, town hall, the high school, and the University.

In this technical memorandum, we present a market assessment of housing, retail, commercial, and entertainment uses, which may be appropriate for development in Storrs Center. The trade area for competitive analysis of real estate market conditions in this assessment varies depending on the development type and is determined by the distance that the typical customer is willing to travel for a particular product, as well as the proximity of the competition. For example, we have defined the trade area for senior housing as 15 miles, while the full trade area for retail analysis in this study was determined to be 10 miles. This memorandum includes a full retail, commercial, residential, entertainment, and hospitality market analysis as well as the results of surveys given to students and Mansfield residents.

Map 1: Mansfield, CT



2.0 SUMMARY OF DEVELOPMENT POTENTIAL FOR STORRS CENTER

The overall development capacity of Storrs Center will depend on site constraints, design, development controls, phasing, and sewer capacity limitations. However, the market analysis detailed in this report has identified the potential for Storrs Center to capture a broad range of residential, retail, and commercial market opportunities, the total of which may exceed the physical constraints of the site. The **chief market potential is for residential and retail development,** though this development can be supplemented by a limited amount of office and entertainment uses. Significant residential and retail development opportunities for the first five years of development include:

- **200 to 250 units of sales condominium flats and townhomes.** Most units will be in the 1,200 to 1,600 SF range, though some could be as large as 2,200 SF. Constructed in two- to four-story buildings, these units should sell in the $165 to $180 per SF price range (sales prices of $215,000 to $285,000 at 2003 prices).

- **125 to 150 units of townhome-style duplexes and small lot single-family homes.** Most units will be in the 1,800 to 2,400 SF range, priced at $145 to $175 per SF (sales prices of $315,000 to $350,000 at 2003 prices).

- **225 to 350 rental apartments targeted to non-student and graduate student households,** which could be accommodated in a range of building types–even mid-rise apartment towers–and could be priced at $1.45 to $1.55 per SF per month at 2003 prices.

- **A 100-household Continuing Care Retirement Community** with 70 independent living residential units, 20 assisted living units, and a 60-bed nursing facility.

- **38,000 SF of new convenience retail stores** serving immediately adjacent residents.

- **16,000 SF of full-service restaurants** to create an active evening atmosphere.

- **59,000 SF of apparel stores** creating a niche identity distinct from typical mall offerings.

- **70,000 SF of home furnishings, other shopping goods, and freestanding stores** attracting customers from throughout a 10-mile trade area.

In total, this potential yields **650 to 850 new housing units in the first five years of development and 183,000 SF of new retail space.** This core development program can be supplemented by a limited amount of **professional and service office space.** The area can also support a six-to-eight screen **movie theater,** but this scale of operation is too small to be economic without developer or institutional participation in ownership.

3.0 POPULATION AND HOUSING TRENDS

3.1 Population

As reported in the 2000 Census, Mansfield's population was 20,720, of which 7,433 were students living in dormitories on the UConn campus (see **Table 1**). UConn undergraduate dormitory capacity, however, has grown significantly since 2000; as of September 2003, 10,717 undergraduates resided in University housing. The number of graduate students housed by the University has also increased, adding 150 students. As a result, we believe that the total Mansfield population during the school year has grown to 24,150.

Table 1: Population Trends, 1990-2000

Location	Census 1990	Census 2000	% Change 90-00
Connecticut	3,287,116	3,405,565	4%
Tolland County	128,699	136,364	6%
Mansfield Town	21,103	20,720	-2%
College Dormitory Population	8,605	7,433	-14%
Non-Dormitory Population	12,498	13,287	6%

Source: U.S. Census

Current University enrollment is 14,107 full-time and 374 part-time undergraduates and 2,306 full-time and 329 part-time graduate students. In addition, the University currently employs 3,690 full-time and part-time faculty and staff. The University intends to hold its enrollment, faculty, and staff at current levels for the foreseeable future.

3.2 Housing

The number of housing units in Mansfield increased by 323 in the 1990s, bringing the total number of units to 5,481 in 2000. Occupied-housing units also grew in the last decade with 360 additional occupied units in 2000. This increase brings the total number of occupied units to 5,291 units. As a result of this increased occupancy, the vacancy rate decreased to a negligible 3.5% in 2000 (see **Table 2**).

Table 2: Housing Units, 1990-2000

	Housing Units			Occupied Housing Units			Vacancy	
Location	1990	2000	Change 90-00	1990	2000	Change 90 00	Percent 1990	Percent 2000
Connecticut	1,320,850	1,385,975	65,125	1,230,479	1,301,670	71,191	6.8%	6.1%
Tolland County	46,677	51,570	4,893	44,309	49,431	5,122	5.1%	4.1%
Mansfield Town	5,158	5,481	323	4,931	5,291	360	4.4%	3.5%

Source: U.S. Census

Tolland County grew by 6% during that same time period, adding 7,665 residents. This growth rate outpaced the 4% growth rate of the State of Connecticut. In Tolland County, the number of housing units increased by 4,893 to 51,570 units, while the number of occupied housing units increased by 5,122 to 49,431. As in Mansfield, the growth in demand for housing relative to the slower growth in supply pushed the vacancy rate down 1% to 4.1% in 2000.

Owner-occupied housing in Mansfield represented nearly 62% of the housing market in 2000, which is up from the 60.6% share in 1990. There were 284 more owner-occupied units in 2000, bringing the total to 3,271 (see **Table 3**). Of the owner-occupied housing units, 12% were condominiums.

This is a moderate increase over 1990, with 92 additional condos in supply.

Occupied rental housing units increased by only 76 in the 1990s, bringing the total to 2,020 (see **Table 4**). It is not surprising that the number of renter-occupied units did not increase substantially because there have been virtually no rental units added to the market and vacancy has remained low in the 1990s. This is due, in part, to the lack of a public sewer system, which restricts the potential for new high-density development.

Table 3: Owner-Occupied Housing Units, 1990-2000

	Owner-Occupied Units				
			Change		
Location	1990	2000	90-00	Percent 1990	Percent 2000
Connecticut	807,481	869,729	62,248	66%	67%
Tolland County	31,901	36,309	4,408	72%	73%
Mansfield Town	2,987	3,271	284	61%	62%

Source: U.S. Census

Table 4: Renter-Occupied Housing Units, 1990-2000

	Renter Occupied Units				
			Change		
Location	1990	2000	90-00	Percent 1990	Percent 2000
Connecticut	422,998	431,941	8,943	34%	33%
Tolland County	12,408	13,122	714	28%	27%
Mansfield Town	1,944	2,020	76	39%	38%

Source: U.S. Census

4.0 HOUSING MARKET ANALYSIS

4.1 Sales Housing

The number of homes that sold in Mansfield in 2002 was 136, up from 115 in 2000. More than half of these homes sold for between $100,000 and $200,000. Eighteen percent sold for less than $100,000 and another 18% sold for between $200,000 and $300,000. A higher percentage of homes sold in the lower ranges in 2000 than in 2002, with 81% of sales under $200,000 in 2000 versus 72% in 2002. Conversely, there were a greater number of higher priced homes in 2002, with 13 homes selling for over $300,000 versus 2 homes in 2000 (See **Table 5a**).

In 2002, there were 110 single-family homes that sold in Mansfield, with a median sales price of $170,200. The homes ranged in price from $10,680 to $575,000, with 85% of the home sales falling in the $110,500 to $330,000 range. The period between January to July 2003 experienced a moderate increase in the median sales price. There were 58 single-family homes that sold during this time, generating a median sales price of $178,000 – just a 4.5% increase over the previous year. These homes ranged in price from $67,500 to $410,000, with 85% of the home sales falling in the $125,000 to $295,000 range (see **Table 5b**).

Table 5a: Residential Sales Distribution, 2002

	2000		2002	
Price Range	Number of Sales	Percent of Total Sales	Number of Sales	Percent of Total Sales
Less than $100,000	22	19%	25	18%
$100,000 to $199,999	71	62%	74	54%
$200,000 to $299,999	20	17%	24	18%
$300,000 to $399,999	1	1%	7	5%
$400,000 and greater	1	1%	6	4%
Total	**115**	**100%**	**136**	**100%**

Source: Realist

Table 5b: Sales Housing, 2002 & Jan-July 2003

	Year 2002		Jan-July 2003	
	Total Sales	Median Sales Price:	Total Sales	Median Sales Price:
Condominium	26	$90,000	20	$112,000
Single-Family Homes	110	$170,200	58	$178,000
Total	**136**		**78**	

Source: Realist

Condominiums have been selling at a much faster pace in 2003. There were 26 condominiums that sold in 2002 versus the 20 condos that have sold in just the first seven months of 2003. Prices also escalated, as the median sales price in 2002 was $90,000 and the median sales price between January and July 2003 jumped to $112,000-a 24% increase over the previous year. Most condominiums are flats in low-rise (largely two-story) buildings; a few are townhomes.

Residential real estate listings showed 53 homes on the market as of May 5, 2003, including condos and single-family homes. The homes ranged in asking price from $109,900 to $649,900 for a single-family home and $69,900 to $234,000 for a condominium. According to local realtors, there are usually about 35 listings at any given time, and, if priced correctly, tend to sell within a week. Demand for condominiums is especially high, as realtors maintain a list of clients who are waiting for condos to come on the market. Over the last couple of years, sales prices have been increasing at about 5% each year. Sales prices for condominiums have increased dramatically with condos that sold for $139,000 last year now on the market for $169,000. However, the development of

condominiums is restricted due to severe limitations of the town's sewer capacity. The few recently constructed condominiums in Mansfield are reasonably large (1,200-1,600SF) and are selling for prices in the $155 to $160 per SF range.

According to local realtors, buyers usually are associated with UConn and are either first-time homebuyers or are upgrading to a larger home. Realtors noted the fact that there is a shortage of housing in the $250,000 to $350,000 range, despite the high demand for such housing in Mansfield. Buyers are attracted to Mansfield for its nationally ranked, Blue Ribbon school system, which is considered the best in the area, and also for its proximity to the University.

Between 1996 and June 2003, 390 new privately owned residential building permits were granted, almost all of which were single-family homes. The number of building permits issued during this time period reached its peak in 1999 at 74 new permits. According to realtors, many of these new homes are built speculatively and are priced in the $300,000 to $400,000 range and range in size from 2,600 to 2,800 square feet. The price per square foot is between $142 to $152 for a single-family house on approximately a one-acre lot. In the past, these homes would remain on the market for some time. Now, however, the market is catching up to this price range, causing houses to sell quickly and fewer homes built on speculation.

Market Position and Opportunities for Storrs Center

Successful sales housing types in Storrs Center will need to achieve a balance between the density necessary to support an active, walkable community and the ex-urban/village architectural styles that have received market acceptance in the area. This suggests that the appropriate housing types will mostly include townhomes and condominium flats in low- to mid-rise buildings (three or four stories). Site and environmental conditions at the periphery of the municipal downtown may result in certain compact and irregularly shaped development sites that would be appropriate for townhome-style duplexes or very small lot single family homes. Furthermore, the ability of Storrs Center to capture all of the demand will be dependent on site constraints and priorities of development options.

Sources of demand for these housing types are likely to come from four sources:

- **Pent-up condominium/townhome market.** Recent development limitations in Mansfield due to sewer constraints have restricted condominium/townhome development to the point where there is substantial pent-up demand. Overall sales patterns suggest that demand for condominium/townhome units represents 20-25% of the total home purchase market, but condominium/townhomes have been only a small fraction of the 400 new homes constructed in the past seven years. Given these circumstances, we estimate pent-up demand for new condominium/townhomes at 100 to 125 units, almost all of which could be captured in Storrs Center within a two-year period.

- **On-going housing market growth in Mansfield.** Recent patterns show that Mansfield has been absorbing approximately 60 new single family units per year and could probably absorb 15 to 20 additional condominium/town-home units if sewer needs were met. Attractive

development at Storrs Center over the next five years could be expected to capture one-third of the single family market in duplexes and small-lot singles, as well as 60% or more of the condominium/townhome market.

- **Spillover development from the Tolland/I-84 corridor.** Sales housing development has accelerated in Tolland, especially along the I-84 corridor. A dynamic development at Storrs Center could attract a portion of this market, but it is difficult to quantify this demand precisely.

- **College Town Center ambience market.** The development of an attractive Town Center at the UConn campus will attract a additional segment of homebuyers desiring adjacency to the ambience of the college campus. Again, this market opportunity is difficult to quantify precisely, but we expect that it will grow in significance as Storrs Center matures and will be an important market segment by the fifth year of development.

Taken together, we estimate that Storrs Center can attract a total of 325 to 400 home purchasers to a variety of reasonably dense, but village-friendly housing types during the first five years of development.

Unit Mix, Pricing, and Absorption

We anticipate that for the first five years of development, the appropriate unit mix for sales housing in Storrs Center will include 200 to 250 condominium flats and townhomes in two- to four-story structures and 125 to 150 townhome style duplexes and small-lot singles. The market for condominium flats and townhomes is strongest in the 1,200 to 1,600 SF range, though some units could range up to 2,200 SF. Duplexes and small-lot singles will likely be somewhat larger–in the 1,800 to 2,400 SF range.

At 2003 price levels, we anticipate that the condominium/townhomes will sell in the $165 to $180 per SF range (sales prices of $215,000 to $285,000). Larger duplexes and small-lot single family homes will likely be priced in the $145 to $175 per SF range (sales prices of $315,000 to $350,000).

Given the pent-up demand for condominium/townhome units in Mansfield, we anticipate the absorption of 80 to 100 condominium/townhome units per year for the first two years of development, along with 25 to 30 units per year of duplexes and small-lot singles. After the pent-up demand is exhausted, we anticipate that the pace of absorption will slow to 15 to 20 condominium/ townhome units and 25 to 30 duplex/singles annually.

4.2 Rental Housing

Rental housing represents 38.2% of the housing market in Mansfield in 2000. Rental units are provided in low-rise garden apartment buildings, duplexes, and single-family homes. This report concentrates on all but the single-family rental homes.

There are a total of 723 apartment units in Mansfield. Asking rents range from $545 for a 450 SF apartment to $1,500 for a 1,000 SF apartment. The average price per square foot in Mansfield is $1.21. All of the apartment complexes in Mansfield are always or almost always at full occupancy, and many maintain waiting lists. The style and pricing of the apartment complexes in Mansfield are very similar, some of which include:

- **Millbrook Apartments:** This complex is located just over two miles from campus and offers one- and two-bedroom units at 700 and 800 SF, respectively. One bedrooms rent for $650 and two bedrooms rent for $825. The apartment buildings are 1.5 stories (first floor is partially below ground). The complex consists of three residential buildings that contain four apartment units per building.

- **Maplewood Apartments:** Maplewood is located approximately two miles from campus and offers only two-bedroom units of 756 SF that rent for $690. The complex consists of 10 residential buildings that contain four apartment units per building.

- **Oakwood Apartments:** Oakwood is located approximately two miles from campus. The apartment complex rents only one-bedroom units of 450 SF at $545. The apartments are single-story buildings, and the complex consists of five residential buildings that contain two apartment units per building.

- **Knollwood Apartments:** Located less than one mile from campus, Knollwood offers one- and two-bedroom units with 505 SF and 756 SF, respectively. The one bedrooms rent for $611 and the two bedrooms range from $675 to $700, depending on first or second floor occupancy. The first floor units are partially below ground. The complex consists of 34 residential buildings that contain four apartment units per building.

- **Clubhouse Apartments:** Clubhouse is located just over one mile from campus. The apartments include 600 SF one-bedroom units and 756 SF two-bedroom apartments, priced at $625 and $900, respectively. The buildings are two stories. The complex consists of 11 residential buildings that contain four apartment units per building. The property has 17 one-bedroom units and 27 two-bedroom units.

Approximately 2,950 full-time undergraduates live off campus in nearby communities. Because of the low supply of apartments in Mansfield, however, approximately 2,000 students are forced to look in nearby communities like Ashford, Vernon, Willimantic, and Willington. Students even live as far away as Manchester, which has rents between $1.00 and $1.27 per square foot. Ashford apartments rent for $1.28 per square foot, Vernon for $1.00, Willimantic for $.86, and Willington for $1.23 per square foot (see **Table 6**). Each of the apartment complexes outside of Mansfield that were interviewed stated that there was either no vacancy or very little vacancy.

Table 6: Area Apartment Rental Rates

Town	Rent/SF
Willimantic	$0.86
Vernon	$1.00
Mansfield	**$1.21**
Willington	$1.23
Ashford	$1.28

Source: Various

Market Position and Opportunities for Storrs Center

The rental market in Mansfield is extremely tight. Its growth has been limited not by demand but by limitations in the town's sewer capacity. If the new Storrs Center were to accommodate increased sewer usage, there will be strong demand for new rental housing. The rental housing market includes three key segments: (1) undergraduate students; (2) graduate students; and (3) non-students.

- **Undergraduate housing market.** Approximately 2,950 full-time undergraduate students currently live off-campus. Census data indicate that approximately 33% of these students live in Mansfield, but 67% (2,000 students) have needed to find rental housing in more distant, but adjacent communities. We should note, however, that with the physical constraints of the proposed municipal downtown, it will be difficult to provide undergraduate housing without adversely affecting the other housing segments. In particular, other households may find it difficult to reside in the immediate vicinity of a dense concentration of undergraduates.

- **Graduate student housing market.** UConn currently enrolls approximately 2,300 full-time and 300 part-time graduate students, 80% of whom live off-campus. Census data indicate that approximately 1,500 of these full-time students have needed or chosen to find housing in adjacent or more distant communities. We estimate that 40-50% of these 1,500 graduate students would find new rental housing in Storrs Center more attractive than these distant locations. At an average of 1.7 students per unit, this market segment would support 350 to 450 new rental housing units in the Center. This market, however, can be highly sensitive to rent levels, constricting economically effective demand. Development of substantial numbers of graduate student apartments may require University participation in financing. Independent of such participation, economic market demand from these households themselves may limit development to 100 to 200 one- and two-bedroom apartments.

- **Other rental housing market.** Approximately 54% (1,100 units) of rental housing in Mansfield is occupied by non-student households. About 40% of these households live in single-family homes and duplexes, but the remaining 60% occupy apartments. Rental apartment development for the general, non-student population has also been constrained in Mansfield by the absence of a sewer system, suggesting that there is some pent-up demand for new apartments as well as limited on-going growth in this demand. We estimate this pent-up demand at 75 to 100 units of one- and two-bedroom apartments, which could be absorbed immediately. On-going growth in apartment demand for this segment is approximately 10 units per year, providing the opportunity to add another 50 units of apartments four to five years after development of this initial product.

Taking the graduate student and non-student market segments together, we estimate that Storrs Center can absorb 225 to 350 new rental housing units in the first five years of development. These estimates do not assume University participation in the development of graduate student housing.

Unit Mix, Pricing, and Absorption

We anticipate that for the first five years of development, a marketable mix for rental housing in Storrs Center would include 225 to 350 one- and two-bedroom apartments targeted to the graduate student and non-student markets. The apartments will need to be in the 650 SF to 1,000 SF range and include and moderate level of amenities. Rental units could be priced in the range of $1.45 to $1.55 per SF per month at 2003 prices. These units could be accommodated in a range of building types, even mid-rise apartment towers, with urban design considerations being the guiding force in this determination.

The market conditions described above indicate that all but about 50 of these units could be absorbed within the first year or two of initial development. There may be opportunity for additional development of graduate student housing beyond the 100 to 200 unit level suggested here. Testing of the market with this initial product will determine whether the number of rental units produced for this segment can be expanded.

4.3 Age Restricted Housing

The age-restricted communities (also known as active adult) are targeted to people 55 years and older and are not eligible to families with children living at home. These communities offer total independence, and there is an emphasis on recreational amenities, such as golfing and tennis. Health care services, however, are not common. The typical community offers for-sale units of varying sizes, and the scale ranges greatly from 20 to over 1,000 units. Because active adult communities do not provide health care services, they are not regulated.

Active adult communities are difficult to track due to the fact that they are privately developed sales housing. Glen Ridge is an active adult community in Mansfield that has a total of 51 units. The homes are each 1,185 SF and are priced at $189,900. The developer has had difficulty finding enough demand to complete the project. The first phase began in the mid-1980s with 36 units, but the final phase of just 15 units took four years to be absorbed. While absorption accelerated in the last two years, the realtor representing Glen Ridge expects even greater difficulty finding buyers for such communities due to increased competition from an approved age-restricted development in Columbia and the proposed development in Coventry.

Two leading developers of active adult communities are Pulte Homes and Toll Brothers, along with family developer Orvedal Builders. The closest development is in West Hartford, which has 71 units beginning at $379,975. The active adult communities in this area are built in clustered formations and have 38 to 98 units on the site. The homes are either single-family or duplex townhouses and range in size from 1,785 to 2,510 SF. Prices vary depend greatly on location and size, but prices per square foot ranged from $125 to $227 (See **Table 7**).

Table 7: Active Adult Communities, Connecticut

Community Name, Location, Developer	Units	Average Price per SF
Carlson's Ridge New Milford, CT (Pulte Homes)	48	$159
Oxbow Ridge Canton, CT (Pulte Homes)	98	$145
Glen Ridge Mansfield, CT	51	$160
Regency Meadows at Trumbull Trumbull, CT (Toll Brothers)	38	$185
The Villas at the Reservoir West Hartford, CT (Toll Brothers)	71	$201

Market Position and Opportunities for Storrs Center

The housing types that we have recommended for Storrs Center—townhouses, condominiums, and small lot single-family homes—are particularly attractive to aging residents who do not want to worry about maintenance issues. The downtown location, proximity to UConn's classrooms, and nearby walking trails will provide the amenities many active adults desire. The experience of developers of age-restricted housing in the area has not been highly successful. However, Storrs Center housing of the type described above will allow the developer the flexibility to capture a portion of this market segment.

4.4 Senior Housing

Four different types of retirement communities can fulfill a range of seniors' needs. These communities include:

- Independent living
- Assisted living
- Nursing home
- Continuing Care Retirement Communities (CCRC)

Independent living communities are targeted to people in their 70s and above. Amenities such as transportation, assistance with meals and household tasks are frequently provided. Units in independent living communities are both rental and for-sale with additional charges for services. These communities are not heavily regulated because they do not provide health care services. Typically, projects range in size between 20 and 250 units and are frequently associated with universities.

Assisted living communities target the more frail elderly population and are often mixed with independent living units. There is a greater emphasis on personal and health services, including meals and household tasks. Some facilities offer care for patients with Alzheimers or other forms of dementia and provide limited skilled nursing. Because of this level of health services, these communities are affected by licensing and regulations and are also eligible for financial assistance from government sources. Assisted living communities usually rent units on a monthly basis and often range in size from 50 to 70 units.

Nursing homes provide full-time nursing care for patients with serious medical problems; they are heavily regulated. The number of nursing homes has grown significantly over the years, in part due to shorter hospital stays and a growing number of elderly. Nursing homes may be combined with other types of senior housing.

Continuing Care Retirement Communities offer a combination of the housing types described above. CCRCs are designed to meet the changing needs of residents so that seniors have an opportunity to "age in place." These communities have more than 200 units on average and vary in configuration and density, depending on their location. Residents are charged an entrance fee and pay a monthly service charge. Units are both for-sale and rent. Typically, the smallest quality CCRC

facilities serve 100 households with a mixture of housing types consisting of 70 independent residential units, 20 assisted living units, and a 60-bed nursing facility.

According to the National Investment Center for the Seniors Housing & Care Industries (NIC), there was a total of 46,131 seniors housing properties with supportive services in the United States as of 1999-2000. Together, these properties had capacity to house more than 3.4 million seniors. Fifty percent of these properties were assisted living communities, 34% were nursing facitlities, 7% were independent living communities, 4% were CCRCs, and 5% offered a combination of property types.

There are seven non-subsidized retirement communities in the 15-mile Mansfield trade area that supply a combination of 499 units and beds, of which 367 are nursing care beds, 21 are assisted living units, and 111 are independent living units (see **Table 8**). None are CCRCs. The only facility in Mansfield itself is Mansfield Center for Nursing & Rehabilitation, which has 75 of its 98 beds dedicated to long-term nursing care. There are additional HUD-subsized facilities in the area, but they are not included in this study.

Table 8: Mansfield Area Retirement Communities

		Facility Information			
Company Name	City	Nursing Care Beds	Assisted Living Units	Independent Living Units	Total
Evangelical Baptist Home	Ashford, CT			27	27
Creamery Brook	Brooklyn, CT			84	84
Pierce Memorial Baptist Home	Brooklyn, CT	72	10		82
Regina Pacis Villa	Pomfret Center, CT		11		11
Mansfield Center for Nursing and Rehabilitation	Storrs Mansfield, CT	75			75
Woodlake at Tolland	Tolland, CT	100			100
Saint Joseph's Living Center	Windham, CT	120			120
Total		**367**	**21**	**111**	**499**

Source: American Association of Homes and Services for the Aging (www.aahsa.org)

Sunrise Senior Living, the largest developer of senior housing in the country, recently developed a community outside of the trade area in West Hartford. Its experience and characteristics help to shed light on the Mansfield market. Developed on four acres that it owns, Sunrise opened in early 2001 and has a capacity of 91 rental units. Rooms rent for between $99 and $160 per day, depending on the level of care required. The community offers a range of housing options, including independent living units, assisted living units, and advanced care for Alzheimer's patients. While the lease up period of a typical Sunrise community is 18 months, Sunrise of West Hartford has just 65 residents, leaving a 28% vacancy rate after 30 months. An executive of Sunrise attributed this slow absorption to the highly competitive market and lower population density.

Conversations with non-profit private developers suggest that demand for CCRCs can be estimated loosely by determining the number of income-qualified households (set at $50,000 and higher) with householders aged 65 and older within a 15-mile trade area. These developers also take into consideration total assets, which are unavailable for this study. Non-profit development corporations must sell 75% of these units before they can begin construction.

Within the 15-mile Mansfield trade area, there are 2,211 households that fit these criteria, of which only 653 are 75 or older. Experienced non-profit developers anticipate achieving a 5% penetration rate of age and income qualified households, bringing the estimated demand to 110-115 units. A minimum development of 100 units is considered essential by developers to achieve the appropriate economies of scale.

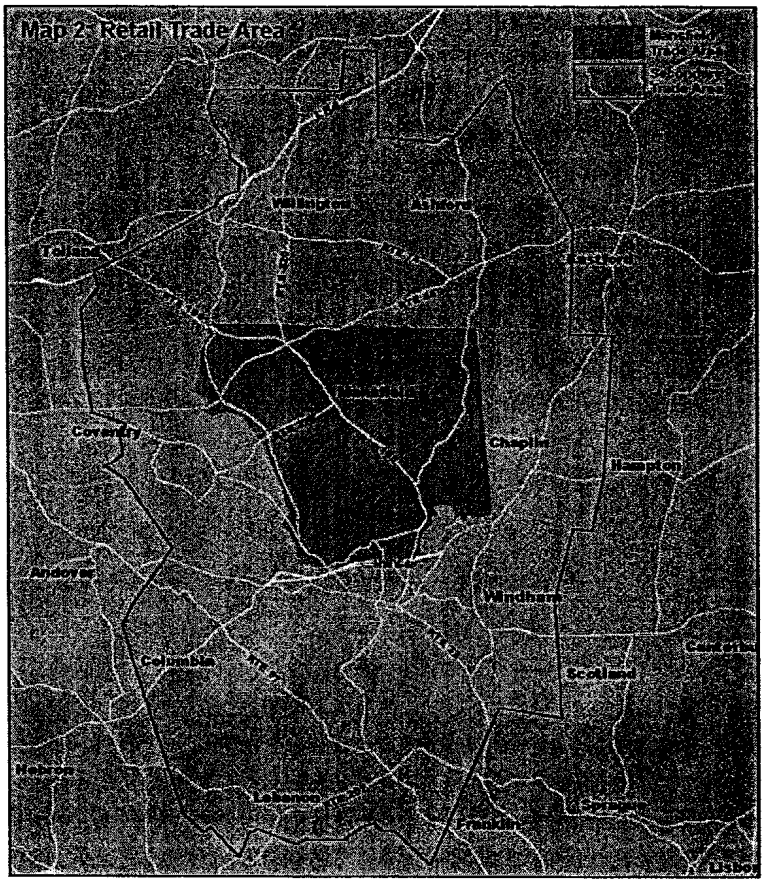
Market Position and Opportunities for Storrs Center

A successful retirement community at Storrs Center would need to include the kind of mixed amenities found in CCRCs, allowing Mansfield residents to "age in place" and take advantage of the downtown location, walking trails, and association with the university. While there is already a 75 bed nursing home in Mansfield, there is likely enough demand to construct a 100-household CCRC with 70 independent residential units, 20 assisted living units, and a 60-bed nursing facility.

5.0 RETAIL MARKET ANALYSIS

5.1 Trade Area Definition

The retail trade area is divided into two market areas: the primary trade area, which is the entire Town of Mansfield, and the secondary trade area, which stretches out to approximately a ten-mile radius following the block group boundaries set by the U.S. Census (see **Map 2**). Portions of Ashford, Chaplin, Columbia, Coventry, Lebanon, Tolland, Willington, and Windham are included in the secondary trade area. The trade area taken as a whole, in this report, is referred to as the Greater Mansfield Trade Area.



5.2 Trade Area Retail Supply

To identify and characterize shopping opportunities available to trade area residents, Urban Partners completed an inventory of all retail business establishments located both within Mansfield and non-convenience type business establishments throughout the Greater Mansfield Trade Area. The results of this inventory, characterized by retail type, location and size of the business, are included as **Appendix 1** to this document.

This study focuses chiefly on retail stores engaged in selling merchandise for personal and/or household consumption and on establishments that render services incidental to the sale of these goods. Selected service establishments are also included, especially those businesses primarily providing personal services to individuals and households, such as hair and nail salons and laundry and dry cleaning establishments.

All retail establishments in the area were classified by type of business according to the principal lines of merchandise sold, the usual trade designation, estimated square footage, and level of sales. All establishments are classified according to the numeric system established for both government and industry practice – the NAICS. Banks and other financial establishments are excluded from this assessment because banking activities – deposits, loans, etc. – cannot be added to sales volume data for other types of retail establishments.

The term "retail store sales" in this analysis includes sales by establishments that are normally found

in pedestrian-oriented retail shopping areas. This definition excludes the sales of automobile dealerships and repair facilities, service stations, fuel oil dealers, and non-store retailing. Unlike many secondary data sources, such as the Bureau of the Census, however, this definition does include the sales of service establishments such as barber shops, beauty salons, and dry cleaners.

Table 9 describes the current range of stores available in Mansfield and the surrounding 10-mile secondary trade area and estimates the current performance of these stores. As of July 2003, Mansfield included 143 operating retail businesses occupying nearly 507,200 square feet of store space and generating nearly $164 million in sales. The secondary trade area included 115 operating non-convenience type retail businesses occupying 621,700 square feet and generating nearly $161 million in sales.

Mansfield provides a broad, but incomplete, array of convenience goods and services, chiefly to residents of the surrounding area. This area includes two supermarkets, 12 convenience stores, one specialty food store, eight liquor stores, three drug stores, one health food supplement store, 24 limited-service restaurants, two optical stores, one video store, two florists, 15 hair salons, and five laundries. In total, 56 businesses sell convenience goods, while an additional 30 sell personal services. Together these 76 stores occupy 39% of all store space and generate more than 47% of all sales. The most important of these businesses are the two supermarkets, three drug stores, 24 limited-service restaurants, and 12 convenience stores.

While the secondary trade area contains many convenience goods stores, it is our assumption that Mansfield residents limit their shopping for such goods to stores within Mansfield. Therefore, the convenience businesses outside of Mansfield have not been included in this analysis. Similarly, residents from surrounding municipalities are not likely to travel all the way to Storrs Center for convenience goods that they can buy within their hometowns.

Full-service restaurants could be an important component of retail development in Storrs Center and these facilities could attract customers from throughout the Greater Mansfield Trade Area. Currently, the Greater Mansfield Trade Area includes 64 full-service restaurants, 23 in Mansfield itself and 41 in the secondary trade area. In Mansfield, full-service restaurants occupy 14% of all store space and generate 11% of all sales.

The retail offerings in the Greater Mansfield Trade Area are completed by a reasonably diverse array of 80 shopping goods and 38 stores classified as "other retailing." These 118 businesses provide products in 34 different categories, including 21 apparel stores, 17 gift shops, 10 antique stores, eight electronics stores, and five each of home centers, bookstores, and nurseries.

Of the 118 shopping and other retail businesses in the Greater Mansfield Trade Area, 44 of them are in Mansfield and 74 are in the secondary trade area. In Mansfield, the retail offerings are spread fairly evenly across 23 different categories, with the greatest concentration of retail businesses in the 12 apparel-type stores and six gift shops. Retail businesses in the secondary trade area are spread across 25 categories, with the greatest concentration in the 11 gift shops, 10 antique stores, nine apparel stores, six electronics stores, and six auto parts stores. Much of the diversity in shopping goods retailing in the secondary trade area comes from independent stores in Willimantic that provide specialized offerings to a customer base from throughout the area. These stores provide such items

Table 9
Estimated Retail Store Performance
Greater Mansfield Area Retailers - 2003

RETAIL CATEGORY	MANSFIELD			SECONDARY TRADE AREA			GREATER MANSFIELD TRADE AREA		
	No. of Stores	S.F. GLA	Retail Sales ($1000)	No. of Stores	S.F. GLA	Retail Sales ($1000)	No. of Stores	S.F. GLA	Retail Sales ($1000)
TOTAL	143	507,200	$163,940	115	621,700	$160,793	258	1,128,900	$324,733
CONVENIENCE & SERVICE GOODS--TOTAL	76	200,700	$77,684				76	200,700	$77,684
Supermarkets, Grocery Stores	2	68,000	$29,200				2	68,000	$29,200
Convenience Stores	12	22,100	$8,187				12	22,100	$8,187
Meat Stores									
Fish Stores									
Fruit & Vegetables									
Bakeries									
Candy & Nuts									
Other Speciality Foods	1	1,100	$330				1	1,100	$330
Liquor & Beer Distributors	8	18,200	$7,426				8	18,200	$7,426
Drug Stores/Pharmacies	3	21,700	$14,735				3	21,700	$14,735
Cosmetics, Beauty Supplies, & Perfume									
Health Food Supplements	1	1,200	$420				1	1,200	$420
Other Health & Personal Care									
Limited-Service Restaurants	24	34,500	$11,530				24	34,500	$11,530
Bars and Lounges									
Optical Stores	2	2,600	$572				2	2,600	$572
Video Stores	1	3,000	$540				1	3,000	$540
Florists	2	2,700	$663				2	2,700	$663
Hair Salons	15	18,900	$2,974				15	18,900	$2,974
Laundries; Dry Cleaning	5	6,700	$1,107				5	6,700	$1,107
FULL-SERVICE RESTAURANTS	23	70,300	$17,459	41	125,700	$25,828	64	196,000	$43,287
SHOPPING GOODS--TOTAL	34	190,600	$59,284	46	311,800	$91,850	80	502,400	$151,134
Full-Service Department Stores	1	31,000	$9,300				1	31,000	$9,300
Discount Department Stores				2	142,500	$46,050	2	142,500	$46,050
Warehouse Clubs				1	75,000	$26,250	1	75,000	$26,250
Other General Merchandise Stores	2	2,900	$421				2	2,900	$421
Men's Clothing									
Women's Clothing	2	12,000	$2,820	1	800	$176	3	12,800	$2,996
Children's Clothing									
Family Clothing	3	34,100	$8,480	3	8,400	$1,568	6	42,500	$10,048
Clothing Accesories	1	700	$245				1	700	$245
Other Clothing	2	2,400	$530	2	4,600	$848	4	7,000	$1,378
Shoe Stores	3	10,900	$2,976				3	10,900	$2,976
Jewelry Stores	1	2,400	$720	3	3,600	$880	4	6,000	$1,600
Luggage & Leatherwork									
Furniture				2	6,200	$710	2	6,200	$710
Floor Coverings									
Window Treatments									
Other Home Furnishings				2	6,800	$1,560	2	6,800	$1,560
Household Appliances	1	7,200	$1,800				1	7,200	$1,800
Radio/TV/Electronics	2	2,900	$1,145	6	17,000	$4,060	8	19,900	$5,205
Computer & Software Stores	1	2,800	$840	2	2,700	$615	3	5,500	$1,455
Camera, Photo Supply				1	1,900	$418	1	1,900	$418
General-Line Sporting Goods				1	4,300	$1,118	1	4,300	$1,118
Specialty Sporting Goods	1	3,600	$1,008	3	8,800	$1,716	4	12,400	$2,724
Toys & Hobbies	1	3,500	$875	1	800	$160	2	4,300	$1,035
Sewing, Needlework				3	6,900	$1,205	3	6,900	$1,205
Music Stores				1	1,000	$240	1	1,000	$240
Book Stores	4	19,100	$11,518	1	1,000	$150	5	20,100	$11,668
Newsstands									
Record/CD/Tape Stores	1	4,000	$1,400				1	4,000	$1,400
Office Supply/Stationers	2	34,400	$10,320				2	34,400	$10,320
Gift, Novelty, Souvenir Stores	6	16,700	$4,886	11	19,500	$4,126	17	36,200	$9,012
OTHER RETAIL STORES	10	45,600	$9,513	28	184,200	$43,115	38	229,800	$52,628
Home Centers	1	7,500	$1,950	4	101,000	$27,650	5	108,500	$29,600
Paint & Wallpaper Stores				1	3,000	$840	1	3,000	$840
Hardware Stores	1	10,000	$2,700				1	10,000	$2,700
Retail Lumber Yards									
Nursery & Garden Centers	3	14,500	$2,955	2	2,100	$495	5	16,600	$3,450
Auto Parts & Accessories Stores	1	3,000	$720	6	30,000	$7,494	7	33,000	$8,214
Antique Stores				10	42,200	$5,504	10	42,200	$5,504
Other Used Merchandise	3	9,400	$960				3	9,400	$960
Pet Supply Stores									
Art Dealers	1	1,200	$228	3	3,900	$756	4	5,100	$984
Tobacco Stores									
Collectors' Items & Supplies				2	2,000	$376	2	2,000	$376
Other Miscellaneous Retail Stores									

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as musical instruments, sewing equipment, and fabric, framing, cameras, computers, and sporting goods.

Although largely dominated by independent retailers, the Greater Mansfield Trade Area does include 65 outlets of major national and regional retail chains, including 19 of the 25 stores generating the highest estimated gross sales in the area. Twenty of the Greater Mansfield Trade Area's 65 national and regional retail chains are located in the East Brook Mall, which has significant vacancy and shows signs of suffering from competition in Manchester and Vernon and at the new Walmart in Windham.

5.3 Trade Area Retail Demand

Based on 2000 Census data, the Greater Mansfield Trade Area has a population of 81,197. The 2003 per capita income for the area (using 2000 Census income data adjusted for inflation) is estimated at $23,300, and the total income for the area is approximately $1.89 billion (see **Table 10**). The estimated per capita income is misleading, however, as it includes both the year round population and also undergraduate students living on and off campus. Therefore, we have distinguished between the estimated per capita income of Mansfield residents (both graduate students and non-students), undergraduate students living off-campus, undergraduate students who live on campus, and residents of the secondary trade area. The estimated per capita income for Mansfield residents and graduate students is $30,400. Undergraduates living off campus have a per capita income of $6,100, while those living on campus have a per capita income of $5,000. The secondary trade area has an estimated per capita income of $25,400.

In general, consumer shopping patterns vary depending on the types of goods being purchased. For convenience goods purchased frequently, such as groceries, drugs, and prepared foods, shoppers typically make purchases at stores close to their home or place of work. For larger-ticket, rarely purchased items-such as automobiles, electronics and large appliances-shoppers may travel anywhere within the metropolitan area or beyond to obtain the right item at the right price. For apparel, household furnishings, and other shopping goods, consumers generally establish shopping patterns between these two extremes, trading at a number of shopping areas within a 30 minute commute of their homes.

Using information about the retail spending behavior of Hartford area residents as compiled by Sales and Marketing Management, we estimate that Mansfield residents (both students and non-students) spend $200.3 million in 2003 on retail goods and services, while residents of the secondary trade area spend another $613.4 million. Of the purchases by secondary trade area residents, $225.6 million are for convenience goods and services that they are unlikely to purchase at Storrs Center. The remaining $387.8 million in purchases are in categories where these consumers might consider purchases in Storrs Center. Therefore, the effective retail demand in 2003 for goods and services available at Storrs Center is $587 million, including $68.6 million in convenience goods and services purchases by Mansfield residents only, and $518.7 million in demand for full-service restaurants, shopping goods, and other retail products coming from throughout the Greater Mansfield Trade Area.

Table 10
Estimated Retail Store Purchases
Greater Mansfield Trade Area - 2003

	Mansfield/Non-Undergraduate	Mansfield/Off-Campus Undergraduate	Mansfield/Dormitory-Undergraduate	Total Mansfield	Secondary Trade Area	Greater Mansfield Trade Area
TOTAL POPULATION	12,483	950	10,717	24,150	57,047	81,197
TOTAL INCOME ($000)	$379,265	$5,793	$53,232	$438,289	$1,451,616	$1,889,905
TOTAL RETAIL PURCHASES ($000)	$160,264	$3,823	$35,133	$199,220	$613,400	$586,982
CONVENIENCE GOODS & SERVICES	$55,250	$1,952	$11,082	$68,284		$68,284
Supermarkets, Grocery Stores	$18,393	$1,050	$2,369	$21,812		$21,812
Convenience Stores	$3,347	$191	$431	$3,969		$3,969
Meat Stores	$228	$13	$29	$270		$270
Fish Stores	$54	$3	$7	$64		$64
Fruit & Vegetables	$110	$6	$14	$131		$131
Bakeries	$47	$3	$6	$55		$55
Candy & Nuts	$64	$4	$8	$76		$76
Other Speciality Foods	$64	$4	$8	$76		$76
Liquor & Beer Distributors	$1,187	$68	$459	$1,714		$1,714
Drug Stores/Pharmacies	$15,490	$276	$3,548	$19,314		$19,314
Cosmetics, Beauty Supplies, & Perfume	$694	$12	$159	$865		$865
Health Food Supplements	$548	$10	$125	$683		$683
Other Health & Personal Care	$743	$13	$170	$926		$926
Limited-Service Restaurants	$9,858	$176	$2,258	$12,291		$12,291
Bars and Lounges	$1,125	$20	$258	$1,402		$1,402
Optical Stores	$1,010	$18	$231	$1,260		$1,260
Video Stores	$106	$2	$24	$133		$133
Florists	$1,029	$18	$236	$1,284		$1,284
Hair Salons	$631	$36	$406	$1,073		$1,073
Laundries; Dry Cleaning	$522	$30	$336	$887		$887
FULL-SERVICE RESTAURANTS	$10,284	$183	$2,355	$12,822	$37,973	$50,796
SHOPPING GOODS	$66,951	$1,193	$15,333	$83,477	$247,216	$330,693
Full-Service Department Stores	$5,714	$102	$1,309	$7,125	$21,100	$28,224
Discount Department Stores	$7,715	$137	$1,767	$9,620	$28,489	$38,108
Warehouse Clubs	$4,926	$88	$1,128	$6,143	$18,191	$24,333
Other General Merchandise Stores	$1,709	$30	$391	$2,131	$6,311	$8,441
Men's Clothing	$1,549	$28	$355	$1,932	$5,721	$7,653
Women's Clothing	$4,281	$76	$980	$5,338	$15,808	$21,145
Children's Clothing	$728	$13	$167	$908	$2,690	$3,598
Family Clothing	$7,035	$125	$1,611	$8,772	$25,978	$34,750
Clothing Accesories	$335	$6	$77	$417	$1,236	$1,654
Other Clothing	$1,135	$20	$260	$1,416	$4,192	$5,608
Shoe Stores	$3,226	$57	$739	$4,023	$11,913	$15,936
Jewelry Stores	$2,907	$52	$666	$3,625	$10,735	$14,360
Luggage & Leatherwork	$224	$4	$51	$279	$826	$1,105
Furniture	$3,176	$57	$727	$3,960	$11,727	$15,687
Floor Coverings	$1,277	$23	$292	$1,592	$4,715	$6,307
Window Treatments	$71	$1	$16	$88	$262	$350
Other Home Furnishings	$1,034	$18	$237	$1,289	$3,817	$5,106
Household Appliances	$782	$14	$179	$975	$2,886	$3,861
Radio/TV/Electronics	$2,494	$44	$571	$3,109	$9,208	$12,317
Computer & Software Stores	$1,865	$33	$427	$2,325	$6,887	$9,212
Camera, Photo Supply	$175	$3	$40	$218	$645	$862
General-Line Sporting Goods	$1,462	$26	$335	$1,823	$5,400	$7,224
Specialty Sporting Goods	$1,686	$30	$386	$2,102	$6,224	$8,325
Toys & Hobbies	$2,260	$40	$518	$2,817	$8,344	$11,161
Sewing, Needlework	$500	$9	$114	$623	$1,846	$2,469
Music Stores	$597	$11	$137	$744	$2,204	$2,949
Book Stores	$1,944	$35	$445	$2,423	$7,177	$9,600
Newsstands	$134	$2	$31	$167	$495	$662
Record/CD/Tape Stores	$1,051	$19	$241	$1,310	$3,880	$5,190
Office Supply/Stationers	$2,682	$48	$614	$3,344	$9,903	$13,247
Gift, Novelty, Souvenir Stores	$2,277	$41	$521	$2,839	$8,407	$11,246
OTHER RETAIL STORES	$27,779	$495	$6,362	$34,636	$102,573	$137,209
Home Centers	$8,108	$144	$1,857	$10,110	$29,940	$40,050
Paint & Wallpaper Stores	$1,247	$22	$286	$1,555	$4,606	$6,162
Hardware Stores	$2,137	$38	$489	$2,664	$7,890	$10,554
Retail Lumber Yards	$6,572	$117	$1,505	$8,194	$24,267	$32,462
Nursery & Garden Centers	$851	$15	$195	$1,062	$3,144	$4,205
Auto Parts & Accessories Stores	$4,680	$83	$1,072	$5,835	$17,280	$23,115
Antique Stores	$297	$5	$68	$371	$1,098	$1,469
Other Used Merchandise	$652	$12	$149	$812	$2,406	$3,219
Pet Supply Stores	$863	$15	$198	$1,076	$3,186	$4,261
Art Dealers	$471	$8	$108	$588	$1,740	$2,328
Tobacco Stores	$482	$9	$110	$601	$1,779	$2,380
Collectors' Items & Supplies	$193	$3	$44	$241	$713	$953
Other Miscellaneous Retail Stores	$1,225	$22	$281	$1,527	$4,523	$6,050

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5.4 Resident and Student Shopping Patterns

Mansfield residents and UConn students, faculty, and staff who attended community meetings on April 22 and May 1 were encouraged to complete surveys indicating their current shopping patterns (see **Appendix 2** for sample surveys and tallied responses). Thirty-five students and 35 residents, faculty, and staff completed these surveys, which asked where respondents shop for groceries, pharmaceutical goods, and clothes, as well as where they most recently dined and which Storrs Center stores they have frequented over the past year. Students and residents were asked to complete different surveys in order to gain an understanding of the different shopping habits of both groups. Percentage totals add up to greater than 100% in some cases because responses were not limited to one answer.

Among the stores visited at the Storrs Center, the top five visited retail businesses by UConn students are Store 24 (49%), Friendly's (34%), D.P. Dough (29%), Chang's Garden (23%), and Starbucks (14%).

Eighty-five percent of the student respondents stated that they recently have eaten off-campus in Mansfield. Students chose to eat in Mansfield almost three quarters of the time. While preference for dining spots is widely scattered, the most popular restaurants noted in the survey are Friendly's (37%), Chang's Garden (17%), Margarita's (17%), and Wings Over Storrs (17%). Fourteen percent responded that they frequent restaurants in Manchester.

Eighty percent of students fill their prescriptions and drug store needs in Mansfield, while 14% shop at home. A majority of students (54%) shop at the CVS at Four Corners, while 14% stated that they go to the UConn Infirmary and 6% go to Stop & Shop.

Students get their groceries primarily at the Grand Union (46%) and the Big Y (34%). The remainder of students stated that they get their groceries while at home (14%), at Stop & Shop (14%), or at Walmart (9%). Again, percentages total greater than 100% because several students shop at multiple grocery stores.

The increasing trend to purchase music online is evident in the 31% of student respondents who said that they shop for music exclusively on the internet. Twenty-six percent of students buy their music in the Buckland Hills Mall area in Manchester, and 17% buy their music at the UConn Co-op.

Half of all students who responded said that they do their laundry at home, and 47% say they do their laundry in the dorms.

Over half of all respondents said that they get their hair cut at home, as well. Six percent get their hair cut at the Barber Shop, and another 6% get it cut at Campus Cuts.

Not surprisingly, given the rural nature of UConn's campus, three-quarters of all the student respondents stated that they have a car, while 24% do not.

Students were asked to provide information about the types of retail goods they would like to see at the proposed Storrs Center. Half of all students stated that they wanted restaurants, including a 24-

hour diner, ethnic restaurants, restaurants with outdoor dining, and a breakfast/lunch spot that offers salads and wraps. Thirty-one percent sited a need for bars, including those with live entertainment. Another 11% requested a grocery store, with some emphasis on organic food offerings; and 11% would like a music store, such as Sam Goody or FYE. Other top retails goods mentioned were a bookstore, clothing stores, and a dance club, each at 9%. In all, students mentioned 39 different store types that they would prefer to see in Storrs Center (see **Table 11**).

Table11: Top Student Responses for Desired Retail Goods at Storrs Center

51%	18	Restaurant (comment: e.g. John Harvard's)
	2/18	24hr diner
	1/18	Thai or sushi
	2/18	Ethnic
	1/18	Outdoor dining
	1/18	B'fast/lunch w/ salads & wraps
	1/18	Small places to eat, not chains
31%	11	Bars (live entertainment)
11%	4	Groceries (Natural food, Mansfield Coop)
11%	4	Music store (Sam Goody, FYE)
9%	3	Bookstore
9%	3	Clothing stores (comment: e.g. Gap)
9%	3	Dance club (comment: e.g. Husky Blues)
6%	2	Art gallery
6%	2	Coffee shop
6%	2	Community center
6%	2	Dance studio
6%	2	Deli
6%	2	Movie theater
6%	2	Retail
6%	2	Shopping Mall
6%	2	Video store

The 35 Mansfield residents who responded listed 68 distinct stores in Mansfield where they prefer to shop. However, there may be some duplication because some people were specific about the stores they visited and others were vague (e.g., CVS v. pharmacy). Seventy-one percent of residents indicated that they go to restaurants in the area, 51% shop at convenience and personal service stores, 23% shop in stores catagorized as "other retail," such as hardware and florists, and 20% visited shopping goods stores. The most frequently listed stores were Storrs Drug (40%), Store 24 (37%), and CVS (20%).

Of those who indicated that they were a member of UConn's faculty or staff, more than a third leave campus once a week for lunch or errands, while a quarter leave several times a week and another quarter leave daily. Only 12% stated that they leave either rarely or never.

The faculty and staff who stated that they go out to lunch on occasion sited a wide variety of restaurants where they like to eat, with Chang's Garden receiving the highest percentage of 14%. Groceries, however, are more concentrated, with 54% of Mansfield residents stating that they do their grocery shopping at the Big Y on 195 and 23% at the Grand Union.

Mansfield residents also do most of their drug store shopping at just a couple of stores, with Storrs Drug drawing 60% of the respondents, and CVS at Four Corners attracting 26% of the respondents.

Residents were asked which two restaurants they had visited most recently, which resulted in a list of 36 distinct restaurants. Thirty-nine percent of these restaurants are in Mansfield. The four most frequently mentioned restaurants are Chang's Garden (31%), Angellino's (20%), Altnaveigh's (11%), and Zenny's (11%).

Most residents, at least 37%, do their clothing shopping in Manchester at the Buckland Hills Mall,

while another quarter indicated that they shop for clothes outside of the Mansfield area. A quarter of the residents shop at East Brook Mall, and 17% do their clothes shopping through a catalog or online.

Residents were asked to provide their input on the kinds of retail goods they would like to see in the proposed Storrs Center. Thirty-seven percent wanted a grocery store, especially a green grocer type store selling health food and local produce. Another 31% wanted restaurants, and like students, emphasized their desire for a diverse mix of ethnic restaurants and cafés. Twenty-three percent would like clothing stores, and 14% want a movie theater. There were 30 additional categories of retail goods residents listed as appropriate for Storrs Center, including a bakery, art galleries, and a farmer's market (see **Table 12**).

Table 12: Top Resident Responses for Desired Retail Goods at Storrs Center

37%	13 Grocery store
	1/13 Asian and/or international
	2/13 Food coop/local produce
	5/13 Green grocer
	1/13 Health food
31%	11 Restaurant
	1/11 Ethnic
	2/11 Indian
	1/11 Lunch café
	1/11 Mexican
	2/11 Thai
	1/11 Variety
23%	8 Clothing store (Talbots, Land's End, Appleseed, Footprints)
14%	5 Movie theater
9%	3 Bakery
6%	2 Art shows
6%	2 Bike shop
6%	2 Bookstore
6%	2 Boutiques
6%	2 Farmer's market
6%	2 Gift shop
6%	2 Hardware store
6%	2 Live music café (Non-alcoholic)
6%	2 Outdoor café (Phils)
6%	2 Radio Shack
6%	2 Sporting goods (Outdoor products)

5.5 Comparable University Center Retailing

An alternative approach to assessing the potential for retail and commercial development in Storrs Center involves comparing the current pattern of development in Storrs to the patterns found adjacent to other Universities of similar size and location. To assess this potential, Urban Partners conducted a comprehensive search for appropriate comparison town-gown situations. This search identified comparison opportunities based on comparable student population (between 10,000 and 26,000); campus location (between 10 and 50 miles from the center of a metropolitan statistical area); and metropolitan area size (between 950,000 and 1,500,000). (Note: the population of the Hartford MSA is 1,200,000). Campuses in exurban locations such as Mansfield were emphasized. Similarly, campuses in areas with strong non-University employment bases and/or strong tourism activity were excluded. This search process identified five prime comparable town-gown situations (see **Table 13**).

Table 13: List of Comparable Universities

School	Student Enrollment	Number of Faculty & Staff	Location of School	City Population	Center of MSA	Distance of Center of MSA from School	Population of MSA
University of Connecticut	**18,525**	**3,690**	**Mansfield, CT**	**20,720**	**Hartford, CT**	**30 miles**	**1,183,110**
Clemson University	16,876	4,547	Clemson SC	11,939	Greenville, SC	35 miles	962,441
Oklahoma State University	22,992	3,810	Stillwater, OK	39,065	Oklahoma City, OK	50 miles	1,083,346
Southwest Texas State University	25,025	2,607	San Marcos, TX	34,733	Austin, TX	30 miles	1,249,763
University of Delaware	19,609	3,320	Newark, DE	28,547	Wilmington, DE	15 miles	6,188,463*
University of North Carolina--Chapel Hill	26,028	10,481	Chapel Hill, NC	48,715	Durham, NC	12 miles	1,187,941

*MSA includes Philadelphia and Atlantic City

Retail establishments adjacent to these universities were identified to determine the extent of retail activity in these university towns. Only restaurants, clothing stores, bookstores, shoe stores, music/ video stores, and gift/novelty shops were included in the search.

Within these categories, the area immediately surrounding the University has 31 retail establishments, including 20 restaurants (see **Table 14**). Three of the five identified comparables have significantly more establishments in these categories (from 54 to 80), while the other two have a more diverse array of stores. Based on these comparables, we would expect Storrs to include approximately 50 to 60 stores in these categories. To achieve the scale and balance of retailing seen in these comparables, Storrs would need to add:

- 10 to 15 more restaurants, including several full-service restaurants;
- six to eight clothing and shoe stores;
- two to four music and/or video stores; and
- two to four more gift and novelty shops.

Table 14: University Affiliated Retail

School	Restaurants	Clothing	Book Stores	Shoe Stores	Music/Video	Gifts/Novelty	Non-Classified Establishments	TOTAL
University of Connecticut	20	1	2	0	0	1	7	31
University of North Carolina	49	8	3	2	4	3	11	80
University of Delaware	36	5	2	0	3	5	3	54
Southwest Texas State University	31	7	1	2	5	5	8	59
Oklahoma State University	14	7	1	1	0	2	5	30
Clemson University	19	7	2	0	0	3	5	36

Source: Superpages.com

5.6 Retail Development Opportunities

Table 15 compares the retail purchases made by the 81,000 Greater Mansfield Trade Area residents with the current level of retail sales in the area. This comparison identifies a total of $298.3 million in unmet sales potential lost to stores outside the trade area. Of the unmet demand, $10.7 million is lost convenience goods sales, most significantly $4.6 million in lost sales by drug stores. In addition, $7.5 million in full-service restaurant sales are leaving the trade area.

The more significant "lost sales" are in shopping goods categories (apparel, home furnishings, etc.) and in freestanding "other retail stores." More than $280 million of these sales are leaving the area, largely to the concentration of modern shopping centers and malls in Manchester and Vernon.

In some cases, the level of lost retail sales is insufficient to support another modern, successful store within the trade area. Examples of such inadequate levels of demand are specialty food stores, office supply businesses, and home improvement centers. On the other hand, the lost sales in 46 different retail categories are sufficient to support a viable store within the trade area. As shown on Table 15, these lost sales are supporting 1.1 million square feet of retail space outside the trade area.

What portion of this lost development potential is reasonable to target for Storrs Center? This

Table 15
Potential for Retail Development
Greater Mansfield Trade Area - 2003

RETAIL CATEGORY	Total Unmet Sales Potential ($000)	Unmet Demand for Convenience Goods & Services In Mansfield	Unmet Demand for Full-Service Restaurants, Shopping Goods, Etc. In Greater Mansfield Trade Area	Lost Development Potential (in SF)	Appropriate for Storrs Center Development?	Reasonable Capture Percent For Storrs Center	Development Potential For Storrs Center (in SF)
TOTAL	**$298,311**			1,109,000			183,000
CONVENIENCE GOODS & SERVICES		$10,701		31,000			18,000
Supermarkets, Grocery Stores							
Convenience Stores							
Meat Stores		$270		Insufficient To Support A Store			
Fish Stores		$64		Insufficient To Support A Store			
Fruit & Vegetables		$131		Insufficient To Support A Store			
Bakeries		$55		Insufficient To Support A Store			
Candy & Nuts		$76		Insufficient To Support A Store			
Other Speciality Foods							
Liquor & Beer Distributors							
Drug Stores/Pharmacies		$4,579		8,000	Yes	100%	8,000
Cosmetics, Beauty Supplies, & Perfume		$865		3,000	Yes	40%	1,000
Health Food Supplements		$263		1,000	Yes	40%	1,000
Other Health & Personal Care		$926		4,000	Yes	40%	2,000
Limited-Service Restaurants		$761		3,000	Yes	40%	1,000
Bars and Lounges		$1,402		7,000	Yes	40%	3,000
Optical Stores		$688		3,000	Yes	40%	1,000
Video Stores							
Florists		$621		2,000	Yes	40%	1,000
Hair Salons							
Laundries; Dry Cleaning							
FULL-SERVICE RESTAURANTS			$7,509	27,000	Yes	60%	16,000
SHOPPING GOODS			$191,486	711,000			127,000
Full-Service Department Stores			$18,924	67,000	No		
Discount Department Stores							
Warehouse Clubs							
Other General Merchandise Stores			$8,020	40,000	Yes	20%	8,000
Men's Clothing			$7,653	25,000	Yes	20%	5,000
Women's Clothing			$18,149	65,000	Yes	20%	13,000
Children's Clothing			$3,598	12,000	Yes	20%	2,000
Family Clothing			$24,702	88,000	Yes	20%	18,000
Clothing Accesories			$1,409	5,000	Yes	20%	1,000
Other Clothing			$4,230	15,000	Yes	20%	3,000
Shoe Stores			$12,960	46,000	Yes	20%	9,000
Jewelry Stores			$12,760	40,000	Yes	20%	8,000
Luggage & Leatherwork			$1,105	4,000	Yes	20%	1,000
Furniture			$14,977	83,000	Yes	20%	17,000
Floor Coverings			$6,307	31,000	Yes	20%	6,000
Window Treatments			$350	2,000	Yes	20%	Insufficient To Support A Store
Other Home Furnishings			$3,546	13,000	Yes	20%	3,000
Household Appliances			$2,061	7,000	Yes	20%	Insufficient To Support A Store
Radio/TV/Electronics			$7,112	23,000	Yes	20%	5,000
Computer & Software Stores			$7,757	25,000	Yes	20%	5,000
Camera, Photo Supply			$444	2,000	Yes	40%	1,000
General-Line Sporting Goods			$6,106	21,000	Yes	20%	Insufficient To Support A Store
Specialty Sporting Goods			$5,601	20,000	Yes	20%	4,000
Toys & Hobbies			$10,126	35,000	Yes	20%	7,000
Sewing, Needlework			$1,264	6,000	Yes	20%	1,000
Music Stores			$2,709	12,000	Yes	20%	2,000
Book Stores							
Newsstands			$662	2,000	Yes	40%	1,000
Record/CD/Tape Stores			$3,790	13,000	Yes	20%	3,000
Office Supply/Stationers			$2,927	Insufficient To Support A Store			
Gift, Novelty, Souvenir Stores			$2,234	9,000	Yes	40%	4,000
OTHER RETAIL STORES			$88,615	340,000			22,000
Home Centers			$10,450	Insufficient To Support A Store			
Paint & Wallpaper Stores			$5,322	18,000	Yes	20%	4,000
Hardware Stores			$7,854	27,000	Yes	20%	5,000
Retail Lumber Yards			$32,462	170,000	No		
Nursery & Garden Centers			$755	3,000	No		
Auto Parts & Accessories Stores			$14,901	53,000	No		
Antique Stores							
Other Used Merchandise			$2,259	13,000	No		
Pet Supply Stores			$4,261	15,000	Yes	20%	3,000
Art Dealers			$1,344	6,000	Yes	30%	2,000
Tobacco Stores			$2,380	8,000	Yes	20%	2,000
Collectors' Items & Supplies			$577	3,000	Yes	20%	1,000
Other Miscellaneous Retail Stores			$6,050	24,000	Yes	20%	5,000

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question leads to two others: What store types are physically compatible with the development of a mixed use Storrs Center? What is the portion of the unmet demand that can be reasonably captured by stores that would choose a location such as Storrs Center?

Regarding physical compatibility, Storrs Center will be appropriate for most store types, but not for large format stores, such as department stores; for lower sales value businesses, such as used merchandise stores; or for stores requiring significant truck and vehicle access, such as lumber yards, nurseries, or auto parts stores.

Among the remaining store categories, we believe it is reasonable for Storrs Center to target a capture of 20% to 40% of lost sales potential. The key exceptions to this target sales capture are drug store sales, where we target capture of the full 100% of lost potential, because the shortage of existing drug store space in Mansfield is concentrated near Storrs; and full-service restaurant sales, where we target capture of 60% of lost potential, because of the attraction of a University-adjacent environment for destination dining.

In total, we have identified 183,000 SF of new store space as a priority for development in Storrs Center. This 183,000 SF of space includes stores pursuing four different market opportunities:

- 18,000 SF of convenience goods stores and 20,000 SF of other retail stores are serving the unmet needs of the immediately adjacent portions of Mansfield;

- 16,000 SF of full-service restaurants are creating a destination dining location near the University and expanding the range of restaurant offerings in Storrs to be similar to the patterns found above in comparable university-adjacent shopping districts;

- 59,000 SF of apparel stores are establishing a niche apparel shopping location with an identity distinct from typical mall apparel offerings; and

- 70,000 SF of home furnishings, other shopping goods, and freestanding stores are independently attracting customers from throughout the trade area to a convenient location with significant shopping ambience.

The 38,000 SF of stores serving the immediately adjacent residents include:

- 8,000 SF of new drug store space, perhaps facilitating a significant expansion of the current drug store;

- 10,000 SF of other convenience goods serving the immediately adjacent portions of Mansfield. Potential new stores include a modest increase in limited-service restaurants and bars; beauty supply, health food supplement, and other health products stores; an optical store; and an expanded florist;

- 20,000 SF of freestanding stores such as a dollar/general merchandise store, a paint store, a hardware store, and a pet supply store.

The 16,000 SF of new full-service restaurants will add five to eight new dining destinations to create an active evening atmosphere for Storrs Center, to expand the range of dining options to levels similar to those found in comparable university-adjacent shopping districts, and to attract non-student customers to Storrs Center for a varied retail shopping experience.

The 59,000 SF of apparel stores includes a variety of smaller men's, women's, children's, and family clothing boutiques, as well as shoe stores and jewelers. These stores should be successful by serving two roles–first, by creating a niche apparel shopping location for residents of Mansfield and surrounding towns that is more convenient than the mall concentrations in Manchester and Vernon and which provides a much more interesting and relaxed atmosphere; secondly, by providing for the UConn student and staff community the cluster of apparel and shoe stores identified above as typical of the shopping districts in comparable University communities.

Finally, the retail offerings in Storrs Center will be diversified by adding 70,000 SF of shopping goods and other retail stores that will draw their customer bases independently from throughout the trade area, but will collectively create a varied shopping experience in Storrs. These stores could include:

- 28,000 SF of home furnishings and decoration stores (furniture, floor coverings, miscellaneous home furnishings, art dealers);
- 10,000 SF of electronics and computer stores;
- two additional gift shops (4,000 SF), a 2,000 SF music store, and a 3,000 SF CD store, again creating the level of shopping opportunities found in comparable University communities;
- 14,000 SF of specialty interest shopping goods stores (specialty sporting goods, toys and hobbies, sewing/needlework, photography, collectors items); and
- other stores such as a newsstand, a tobacconist, and a leather goods store.

Taken together, these 183,000 SF of retail stores will nearly triple the 106,000 SF of retail offerings currently available in Storrs Center, including on-campus facilities (see **Table 16**). When added to the current stores, the total retail availability in Storrs will reach 289,000 SF. The pattern of shopping available will rival the mix found in comparable University-adjacent shopping districts.

The mix of stores suggested for addition to Storrs Center meets most of the needs identified by students and residents in surveys reported above. The five to eight new full-service restaurants suggested here will likely meet requests for a 24-hour diner, ethnic restaurants, restaurants with outdoor dining, cafes, and a breakfast/lunch spot that offers salads and wraps. The recommended additional bar could readily respond to student requests for a live entertainment venue. Other requested stores included in on Tables 12 and 13 are a CD store, clothing stores, and art galleries.

The one significant request that does not appear to have economic support as a freestanding business is the desire for additional specialty foods, especially a bakery and a small grocery store, green grocer (such as the Wild Scallion Market), or farmer's market emphasizing organic food offerings. Such a facility, however, could be an important draw of customers to Storrs Center and might be considered by a developer as a feature for the retail program, either as a business venture with subsidized rent levels or as a seasonal marketplace of vendors.

Table 16
Retail Development Program
Storrs Center -- 2003

RETAIL CATEGORY	Current Retail Stores (SF)	Targeted New Retail Stores (SF)	Total Retail Development Program (SF)
TOTAL	106,000	183,000	289,000
CONVENIENCE GOODS & SERVICES	51,600	18,000	69,600
Convenience Stores	7,500		7,500
Liquor & Beer Distributors	1,100		1,100
Drug Stores/Pharmacies	4,200	8,000	12,200
Cosmetics, Beauty Supplies, & Perfume		1,000	1,000
Health Food Supplements		1,000	1,000
Other Health & Personal Care		2,000	2,000
Limited-Service Restaurants	25,200	1,000	26,200
Bars and Lounges		3,000	3,000
Optical Stores		1,000	1,000
Florists	1,200	1,000	2,200
Hair Salons	8,100		8,100
Laundries; Dry Cleaning	4,300		4,300
FULL-SERVICE RESTAURANTS	19,100	16,000	35,100
SHOPPING GOODS	34,300	127,000	161,300
Other General Merchandise Stores	1,100	8,000	9,100
Men's Clothing		5,000	5,000
Women's Clothing		13,000	13,000
Children's Clothing		2,000	2,000
Family Clothing	5,100	18,000	23,100
Clothing Accesories		1,000	1,000
Other Clothing	1,000	3,000	4,000
Shoe Stores		9,000	9,000
Jewelry Stores		8,000	8,000
Luggage & Leatherwork		1,000	1,000
Furniture		17,000	17,000
Floor Coverings		6,000	6,000
Other Home Furnishings		3,000	3,000
Radio/TV/Electronics		5,000	5,000
Computer & Software Stores	2,800	5,000	7,800
Camera, Photo Supply		1,000	1,000
Specialty Sporting Goods		4,000	4,000
Toys & Hobbies		7,000	7,000
Sewing, Needlework		1,000	1,000
Music Stores		2,000	2,000
Book Stores	21,500		21,500
Newsstands		1,000	1,000
Record/CD/Tape Stores		3,000	3,000
Gift, Novelty, Souvenir Stores	2,800	4,000	6,800
OTHER RETAIL STORES	1,000	22,000	23,000
Paint & Wallpaper Stores		4,000	4,000
Hardware Stores		5,000	5,000
Other Used Merchandise	1,000		1,000
Pet Supply Stores		3,000	3,000
Art Dealers		2,000	2,000
Tobacco Stores		2,000	2,000
Collectors' Items & Supplies		1,000	1,000
Other Miscellaneous Retail Stores		5,000	5,000

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6.0 OFFICE MARKET ANALYSIS

The primary users of office space in the area are medical, professional, and psychiatric offices. According to the 2001 Business Profile of the Connecticut Department of Economic and Community Development, 62.5% of the town's 576 businesses are in the Services sector, followed by 17.8% in the Trade sector, and 9.2% in Government.

According to data supplied by the Town of Mansfield for the HyettPalma study completed in 2000, there were 23 office businesses occupying 65,775 SF in Mansfield at that time. General government users, filling 26,000 SF or 40% of total office space, occupies the largest share of office space. Health Services follows at a distance, occupying 13% of office space or 9,650 SF distributed among 5 users. Other non-governmental users include business services (5,050 SF), educational services (5,000 SF), depository institutions (3,700 SF), and engineering/management services (2,925 SF). At the time this data was prepared, there was only one vacant office space recorded, leaving 3,100 SF of space available (see **Table 17**).

Realtors describe the Mansfield area office market as soft to fair. One lot zoned for office has been standing undeveloped for two years because the owner cannot find tenants for his building. Several buildings throughout the area run consistent vacancies. Class A space in Windham has had vacancies for three years. One realtor, which represents three office buildings in Mansfield with a total of 13,700 SF, reported 3,500 SF vacant. In Tolland, the same realtor has two buildings that total 35,000 SF, of which 5,500 SF is vacant. Asking rents in the area are a little less than $15 per square foot.

A 50,000 SF office building in Willimantic is asking half its previous rental rate, in part because of the new Windham Mills project, which is said to have over-saturated the office market in the area. Asking rents in this area are typically $8 per square foot, but go as low as $4 per square foot.

There has been no new commercial development in Mansfield since 1988. All new development is severely limited due to the lack of a public sewer system in Mansfield. Realtors suspect that there would be some interest in relocating to a central location near UConn should office space be developed.

Market Position and Opportunities for Storrs Center

Considering the current economic climate and existing supply of office space, there likely will not be sufficient demand to support significant new commercial office space at this time. Once Storrs Center is more firmly established as a commercial and residential center, it may be possible to develop a limited amount of professional and service office space.

Table 17: Downtown Mansfield Office Businesses by Standard Industrial Classification

Business Type	# Bus.	% of Total Bus.	Total SF	% of Occupied SF
Post Office		4%		12%
Post Office	1		8,000	
Transportation Services		4%		1%
Passenger Trans. Arrangement	1		900	
Depository Institutions		9%		6%
Commercial Banks	1		2,000	
Credit Unions	1		1,700	
Insurance		9%		3%
Life Insurance	1		850	
Insurance Agents/Brokers	1		1,200	
Business Services		9%		8%
Mailing/Reproduction/Comm. Art/Photography/Steno Servs.	2		5,050	
Health Services		22%		13%
Offices/Clinics of Dentists	1		950	
Offices of Other Medical	4		7,700	
Educational Services		13%		8%
College	3		5,000	
Social Services		4%		1%
Individual/Family Services	1		800	
Membership Organizations		4%		2%
Labor Unions/Organizations	1		1,500	
Engineering/Management Services		13%		4%
Engineering/Architecture	1		1,000	
Mgt. And Public Relations	2		1,925	
Services Not Elsewhere Classified		4%		2%
Services	1		1,200	
General Government		4%		40%
General Government	1		26,000	
Total Number of Office Businesses	23			
Total Square Feet of Occupied Office Business Space			65,775	
Total Number of Vacant Office Spaces	1			
Total Square Feet of Vacant Office Business Space			3,100	

Source: Town of Mansfield, HyettPalma Mansfield Downtown Action Agenda 2000

7.0 HOTEL MARKET ANALYSIS

Hotel accommodations in Mansfield are limited to the 88-room Best Western Regent Inn and the 100-room Nathan Hale Inn, which opened on the UConn campus in 2001. Most other nearby hotels are located in the Manchester/Vernon/East Hartford area. Other recent additions are the Super 8 in Manchester as of December 2001 with 80 rooms; and the EconoLodge in East Hartford as of July 2002 with 85 rooms. Within this larger area, 26 properties provide 2,511 rooms (see **Table 18**).

Table 18: Hotel Market Analysis, January 1997 - April 2003

	Occupancy		Room Rate	
Year	Percent	% Chg	$	% Chg
1997	62.7	4.5	59.44	10.6
1998	67.2	7.2	62.23	4.7
1999	65.7	-2.2	67.08	7.8
2000	67.9	3.3	78.17	16.5
2001	64.2	-5.4	81.00	3.6
2002	59.6	-7.2	77.64	-4.1
2003 Current YTD	49.8	-7.4	74.29	-2.6

Source: Smith Travel Research

Hotel room demand within this larger area grew from 450,000 room-nights in 1997 to 534,500 room-nights in 2000, a total growth of 18.8% in three years. Room supply only grew modestly during this period from 717,300 room-nights to 787,500 room-nights. As a result, occupancy increased from 62.7% to 67.9%, and the average room rate grew from $59.44 to $78.17.

During 2001 and 2002, four new properties with a total of 369 rooms came on line, increasing supply to 906,900 room-nights in 2002, a gain of 15.1% since 2000. At the same time, room demand stayed essentially flat, growing to only 540,100 in 2002–a mere 1% increase over 2000 levels of demand. As a result, occupancy dropped back to 59.6% in 2002 and average room rates stagnated, dropping slightly to $77.64 in 2002. The first four months of 2003 suggest that occupancy this year will drop even further, with year-to-date occupancy at 49.8%-down from 53.8% during the same period last year.

The Nathan Hale Inn & Conference Center year-to-date occupancy is about 60%, with its lowest season in the winter at 25-40% and its peak season in the summer at 75-85%. Since opening, it continues to struggle to reach its annual occupancy goal of 65%. Its most immediate competitor, the Best Western on 195, is facing very difficult times, with year-to-date occupancy at about 49% and no days during the year where they were at full occupancy, including graduation. The Nathan Hale has an agreement with University that no other hotel can be built on University owned land for five years since its opening. The Inn is attempting to increase occupancy to 75% by marketing to conference exhibitors, at which point, it will expand to 150 rooms. The hotel is expecting the expansion to occur in 2006/7.

Market Position and Opportunities for Storrs Center

Based on these circumstances, a new hotel in Storrs Center is not a viable development option, at least through 2009.

8.0 ENTERTAINMENT MARKET ANALYSIS

There are currently seven movie screens in the 10-mile Mansfield trade area, including a three-screen drive-in theater in Mansfield and a six-screen theater in Willimantic. According to Mansfield sources, the theater in Willimantic has not been attractive enough to draw significantly from Mansfield. The University of Connecticut has plans to build a single-screen theater on campus to show second-run movies at a discount to students and at full price to non-students. Applying the national standard for screens per capita, the 10-mile Mansfield trade area population of 81,334 suggests that there is enough demand to support 10 screens in the area.

Market Position and Opportunities for Storrs Center

According to current business models, new movie theaters occupy 50,000 to 75,000 SF and include 12 to 18 movie screens. Theaters of this size necessitate parking for approximately 1,200 to 1,500 cars. Current demand will not support such development in Storrs Center. However, in some circumstances, institutions and community organization have underwritten smaller movie complexes as anchors for town center development. For instance, a six screen movie theater was constructed near the University of Pennsylvania with financial backing and guarantees from the university. The movie theater also has a full-service restaurant and offers discounts to students.

A similar arrangement at Storrs Center would be feasible if the Storrs Center developer or UConn were to partner with a movie theater developer to construct a six to eight screen, 15,000 to 25,000 SF theater facility.

APPENDIX 1: Storrs Center Retail Supply Study

Mansfield Retail Supply

Store Name	Address		City
Bagelz	9	Dog Lane	Mansfield
Gentlemen's Choice	10	Dog Lane	Mansfield
Tailoring By Tima	10	Dog Lane	Mansfield
Husky Greek Shop	10	Dog Lane	Mansfield
The Skeleton's Closet	10	Dog Lane	Mansfield
Ted's Restaurant	16	King Hill Road	Mansfield
Huskies Restaurant & Bar	28	King Hill Road	Mansfield
Hideaway Roadhouse	12	Merrow Road	Mansfield
Thompsons Store	54	Middle Turnpike	Mansfield
Thompson & Sons	54	Middle Turnpike	Mansfield
New York Pizza Company	495	Middle Turnpike	Mansfield
Villa Spirit Shoppe	583	Middle Turnpike	Mansfield
Columbia Cleaning Centre	587	Middle Turnpike	Mansfield
Princess Nails	589	Middle Turnpike	Mansfield
Acme Auto Supply	591	Middle Turnpike	Mansfield
Red Rock Pizza Café/Restaurant	593	Middle Turnpike	Mansfield
Interi Yours	595	Middle Turnpike	Mansfield
Dr. Allen Goldstein, Optometrist	597	Middle Turnpike	Mansfield
Grand Union	599	Middle Turnpike	Mansfield
Wild Scallion Market	603	Middle Turnpike	Mansfield
Shear Jazz Hair Salon	605	Middle Turnpike	Mansfield
Mobil Stop 'N' Save	607	Middle Turnpike	Mansfield
Zenny's Restaurant	625	Middle Turnpike	Mansfield
Kathy-John's Food & Ice Cream	643	Middle Turnpike	Mansfield
PA Convenience Store	700	Middle Turnpike	Mansfield
Dunkin' Donuts	134	N. Eagleville Road	Mansfield
Blimpie's Subs & Salads	134	N. Eagleville Road	Mansfield
Wings Express Restaurant	134	N. Eagleville Road	Mansfield
Sgt. Pepperoni	134	N. Eagleville Road	Mansfield
Tin Tsin Chinese Restaurant II	134	N. Eagleville Road	Mansfield
Civic Pub Restaurant	134	N. Eagleville Road	Mansfield
DB Mart	135	N. Eagleville Road	Mansfield
Ted's Spirit Shop	135	N. Eagleville Road	Mansfield
Subway Subs	135	N. Eagleville Road	Mansfield
North Campus Barber Stylists	153	N. Eagleville Road	Mansfield
Champions General Store	482	S. Eagleville Road	Mansfield
Gibbs Self Serve	32	Stafford Road	Mansfield
Country Hair Design	112	Stafford Road	Mansfield
Tom's Liquor Shop	232	Stafford Road	Mansfield
Cider Mill Eye Care	241	Stafford Road	Mansfield
Mansfield Art Center, Tea Room & Crafts	285	Stafford Road	Mansfield
Jodi's Place	450	Stafford Road	Mansfield
Serenity Greenhouses	469	Stafford Road	Mansfield
Schmedley's Pub	847	Stafford Road	Mansfield
Eagleville Food Mart	878	Stafford Road	Mansfield
Bird Dog Liquors	1021	Stafford Road	Mansfield
Chuck's Steak House & Margarita's Mexican Restaurant	1498	Stafford Road	Mansfield
Mobil Snack Shop	7	Storrs Road	Mansfield
Sears Appliances & Electronics	82	Storrs Road	Mansfield

Salvation Army Thrift Store	84	Storrs Road	Mansfield
Staples	86	Storrs Road	Mansfield
CVS	91	Storrs Road	Mansfield
GNC	91	Storrs Road	Mansfield
Papa Gino's	91	Storrs Road	Mansfield
Subway Subs	91	Storrs Road	Mansfield
The Whistle Stop	91	Storrs Road	Mansfield
Cutting Crew	91	Storrs Road	Mansfield
A.T. Nails	91	Storrs Road	Mansfield
Applebees	91	Storrs Road	Mansfield
Tin Tsin Chinese Restaurant III	91	Storrs Road	Mansfield
JC Penney	91	Storrs Road	Mansfield
Fashion Bug	91	Storrs Road	Mansfield
J Silver	91	Storrs Road	Mansfield
TJ Maxx	91	Storrs Road	Mansfield
Eblen's	91	Storrs Road	Mansfield
Claire's Accessories	91	Storrs Road	Mansfield
Olympia Sports	91	Storrs Road	Mansfield
Payless Shoes	91	Storrs Road	Mansfield
Westies	91	Storrs Road	Mansfield
Smith Keon Jewelers	91	Storrs Road	Mansfield
Radio Shack	91	Storrs Road	Mansfield
Cingular Wireless	91	Storrs Road	Mansfield
K-B Toys	91	Storrs Road	Mansfield
Waldenbooks	91	Storrs Road	Mansfield
FYE	91	Storrs Road	Mansfield
The Hoot	91	Storrs Road	Mansfield
Hallmark	91	Storrs Road	Mansfield
Hartford Cleaners	119	Storrs Road	Mansfield
McDonald's	120	Storrs Road	Mansfield
Flowers By Nina	127	Storrs Road	Mansfield
RK Hair Design	129	Storrs Road	Mansfield
Spirit Shoppe	135	Storrs Road	Mansfield
Cost Cutters	135	Storrs Road	Mansfield
Fashion Nails	135	Storrs Road	Mansfield
Angellino's Restaurant	135	Storrs Road	Mansfield
China East	135	Storrs Road	Mansfield
99 Cent Store	135	Storrs Road	Mansfield
PRN Uniforms	135	Storrs Road	Mansfield
Big Y Supermarkets	141	Storrs Road	Mansfield
Waterworks	165	Storrs Road	Mansfield
The Dam Skillet	452	Storrs Road	Mansfield
Centre Spirit Shoppe	454	Storrs Road	Mansfield
Roma Restaurant	472	Storrs Road	Mansfield
Illuminarium	476	Storrs Road	Mansfield
A Farther Hill	501	Storrs Road	Mansfield
Mansfield Centre General Store	544	Storrs Road	Mansfield
Altnaveigh Inn	955	Storrs Road	Mansfield
Ledgecrest Garden Center	1029	Storrs Road	Mansfield
Designers Loft Hair Salon	1140	Storrs Road	Mansfield
Storrs Drug	1232	Storrs Road	Mansfield
D.P. Dough	1232	Storrs Road	Mansfield
Visual Hair Designs	1232	Storrs Road	Mansfield

Storrs Laundromat	1232	Storrs Road	Mansfield
Friendly's	1232	Storrs Road	Mansfield
Husky Bean Café	1232	Storrs Road	Mansfield
Starbucks Coffee	1244	Storrs Road	Mansfield
Blimpie's Subs & Salads	1244	Storrs Road	Mansfield
Domino's Pizza	1244	Storrs Road	Mansfield
Storrs Commons Laundromat	1244	Storrs Road	Mansfield
Chang's Garden	1244	Storrs Road	Mansfield
Store 24	1254	Storrs Road	Mansfield
Paul's Pizza	1254	Storrs Road	Mansfield
Campus Florist	1254	Storrs Road	Mansfield
Skora's Styling Shop	1254	Storrs Road	Mansfield
Campus Cuts	1254	Storrs Road	Mansfield
c.o. jones Mexican Restaurant	1254	Storrs Road	Mansfield
Student's Discount Center	1254	Storrs Road	Mansfield
Husky Books	1254	Storrs Road	Mansfield
Paperback Trader	1254	Storrs Road	Mansfield
The Basket Case	1254	Storrs Road	Mansfield
Wings Over Storrs	1254	Storrs Road	Mansfield
Mansfield Supply	1527	Storrs Road	Mansfield
BD Package Store	1650	Storrs Road	Mansfield
CVS	1651	Storrs Road	Mansfield
Self Expresshuns Salon	1729	Storrs Road	Mansfield
Holiday Spirits	1733	Storrs Road	Mansfield
Video Visions of Storrs	1733	Storrs Road	Mansfield
O. L. Willard Co.	1753	Storrs Road	Mansfield
Mobil Xtra Mart	1801	Storrs Road	Mansfield
The Coop-Convenience		UConn Campus	Mansfield
The Coop-Café		UConn Campus	Mansfield
Student Union Food Vendor 1		UConn Campus	Mansfield
Student Union Food Vendor 2		UConn Campus	Mansfield
Student Union Food Vendor 3		UConn Campus	Mansfield
Bookworms		UConn Campus	Mansfield
Up & Atom		UConn Campus	Mansfield
Chem Cafe		UConn Campus	Mansfield
Student Union Restaurant		UConn Campus	Mansfield
The Coop-Clothing, Insignias		UConn Campus	Mansfield
The Coop-Computers		UConn Campus	Mansfield
The Coop-Books		UConn Campus	Mansfield
The Coop-Supplies		UConn Campus	Mansfield
The Coop-Gifts & Cards		UConn Campus	Mansfield

Secondary Trade Area Retail Supply

Store Name	Address		City
Midway Restaurant Lounge	174	Ashford Center Road	Ashford
Sneakers Sports Bar	55	Nott Hwy	Ashford
Pipe Dream Hearth & Patio	141	Nott Hwy	Ashford
Fenton River Gallery	211	Nott Hwy	Ashford
Wooden Spoon		Route 44	Ashford
Antiques		Route 44	Ashford
Rocking Horse	117	Willimantic Road	Chaplin
Pine Acres Restaurant	250	Willimantic Road	Chaplin
Bach Dor Café		Willimantic Road	Chaplin
Michael's Penalty Box	11	Daly Road	Coventry
Lakeside Cafe & Lounge	50	Lake Road	Coventry
Hall's Farm Greenhouses	386	Main Street	Coventry
Studio at Maple Brook Frame Shop	940	Main Street	Coventry
Bea's Country Kitchen	1011	Main Street	Coventry
Bumper to Bumper Sanborn's Auto Parts	1046	Main Street	Coventry
Worn Yesterday Shoppe	1129	Main Street	Coventry
J.M. Sarnik & Sons Antiques	1140	Main Street	Coventry
Treasures in Coventry Antiques	1141	Main Street	Coventry
Main Street Gaming & Gifts	1201	Main Street	Coventry
Phoenix Chinese Restaurant	1205	Main Street	Coventry
Bidwell Tavern Café	1260	Main Street	Coventry
Coventry Village Antiques	1340	Main Street	Coventry
Dimitri's Pizza Restaurant	3444	Main Street	Coventry
Things Remembered	3466	Main Street	Coventry
Special Joys Doll Shop & Museum	41	North River Road	Coventry
Herb Shop	140	S. River Road	Coventry
Still Waters Antiques	2	Pomfret Road	Eastford
Arch Pizza & Restaurant	385	Beaumont Hwy	Lebanon
Country Barn Antiques	225	Trumbull Hwy	Lebanon
Uncle D's Log Cabin Restaurant	375	Trumbull Hwy	Lebanon
Promise Land Gifts	95	West Town Road	Lebanon
Heart of Gold	12	Goose Lane	Tolland
Lee's Garden	200	Merrow Road	Tolland
Meeting House Café	200	Merrow Road	Tolland
Tolland Pizza & Family Restaurant	225	Merrow Road	Tolland
Sunoco Mart	404	Storrs Road	Tolland
Mama's Pizza Restaurant	277	Ash Street	Willimantic
Jonathan's Pub	75	Bridge Street	Willimantic
Nasprint Custom	75	Bridge Street	Willimantic
Cardinal's T V & Appliance	75	Bridge Street	Willimantic
Evolve Computers	75	Bridge Street	Willimantic
Botanica San Lazaro & Novelty Shop	31	Church Street	Willimantic
Willimantic Interior Design Gallery	59	Church Street	Willimantic
El Criollo Restaurant	71	Church Street	Willimantic
Olympic Family Restaurant	10	Main Street	Willimantic
Napa Auto Parts	51	Main Street	Willimantic
Tony's Pizza	117	Main Street	Willimantic
Leonard's Café	118	Main Street	Willimantic
Shoes & Stuff	501	Main Street	Willimantic
T & M Billiards	560	Main Street	Willimantic
Cafe Downtown	713	Main Street	Willimantic

Jee Kays	721	Main Street	Willimantic
Jewels Verne Jewelers	723	Main Street	Willimantic
Rajean's Gifts & Fashions	744	Main Street	Willimantic
Nassiff's	749	Main Street	Willimantic
Willimantic Camera & Video	750	Main Street	Willimantic
Thread City Music	754	Main Street	Willimantic
Bench Shop	786	Main Street	Willimantic
Hall of Frames	798	Main Street	Willimantic
Curtiss Coins & Jewelry	798	Main Street	Willimantic
Sparkles	850	Main Street	Willimantic
Windham Arts Center & Gallery	870	Main Street	Willimantic
Victorian Lady Restaurant	877	Main Street	Willimantic
Willimantic Sportswear	920	Main Street	Willimantic
Thread City Cafe	931	Main Street	Willimantic
Main Street Café & Willimantic Brewing Company	967	Main Street	Willimantic
Benny's Auto Supply	1049	Main Street	Willimantic
Acme Auto Supply	1050	Main Street	Willimantic
Schiller's Sewing Supplies	1074	Main Street	Willimantic
J & S Radio Sales	1147	Main Street	Willimantic
Quilters Dream	1158	Main Street	Willimantic
Scott's Cyclery	1171	Main Street	Willimantic
El Palenque Restaurant	1172	Main Street	Willimantic
Adams Rental Purchase	1197	Main Street	Willimantic
Fiesta 5 DeMayo Restaurant	1228	Main Street	Willimantic
Royal Buffet Chinese Restaurant	1230	Main Street	Willimantic
Friendly's	1300	Main Street	Willimantic
Sherwin Williams Paints	1300	Main Street	Willimantic
Auto Zone	1326	Main Street	Willimantic
Rent A Center	1548	Main Street	Willimantic
Cingular Wireless	1548	Main Street	Willimantic
Papa's Pizza & Roast Beef	1555	Main Street	Willimantic
True Value Home Center	1561	Main Street	Willimantic
Mr. Lucky's Café	1591	Main Street	Willimantic
Old Mill Furniture	1599	Main Street	Willimantic
Rivers Edge	201	Pleasant Street	Willimantic
Greg's Pizza Restaurant	109	Valley Street	Willimantic
Peter Nesovich Antiques	129	Valley Street	Willimantic
Ridges Manufacturers Outlet	146	Valley Street	Willimantic
O. L. Willard Co.	196	Valley Street	Willimantic
Teggiano Family Restaurant	39	Adamec Road	Willington
American Eagle	15	River Road	Willington
Willington Pizza House	25	River Road	Willington
River Road Antiques	333	River Road	Willington
Robin's Nest Antiques	335	River Road	Willington
Queen Anne Station Country Gift Store	8	Tolland Turnpike	Willington
Track Nine Diner	12	Tolland Turnpike	Willington
Jewelry Repair & Design	16	Tolland Turnpike	Willington
Chace Building Supply	16	Tolland Turnpike	Willington
Antiques of North Windham	462	Boston Post Road	Windham
Ruby Tuesday	474	Boston Post Road	Windham
Walmart Super Center	474	Boston Post Road	Windham
Sears Hardware	474	Boston Post Road	Windham
G & L Christmas and Gift Barn	181	Brick Top Road	Windham

Ocean State Job Lot	1600	Main Street	Windham
BJ's	1600	Main Street	Windham
Family Dollar	1600	Main Street	Windham
Rent Way	1600	Main Street	Windham
Peking House Restaurant	1601	Main Street	Windham
Plum Tomato	1681	Main Street	Windham
Georgia's Hometown Grill & Bar		North Windham Plaza	Windham
Roy Jewelers		North Windham Plaza	Windham
Wireless Zone		North Windham Plaza	Windham
Kaplan Computers		North Windham Plaza	Windham
Asian Treasures		North Windham Plaza	Windham
Western Auto		North Windham Plaza	Windham

University of Connecticut Student Survey on the Municipal Development Plan for Storrs Center

Urban Partners is working with the Mansfield Downtown Partnership to create a Municipal Development Plan for Storrs Center, which is adjacent to the University of Connecticut main campus along Route 195. We would appreciate your assistance in completing the following brief and confidential survey that queries how you currently use retail stores and services in the area and asks for your ideas about how the area might be made more attractive to your needs.

Thank you for your participation in this project. Please return this survey by e-mail to cblackwell@urbanpartners.us. If you have any questions, please call Carolyn Blackwell at (215) 829-1906.

1. Do you live on or off campus? If off campus, where?

2. Are you an undergraduate or graduate student (circle one)?

3. How long have you been studying at UConn? 1yr 2yrs 3yrs 4+yrs

4. What retail and service establishments in the Storrs Center have you patronized in the past year?

5. When you eat off campus, what restaurants and other food establishments do you patronize? (both in Mansfield and elsewhere)

6. Where do you have prescriptions filled and buy drug store items?

7. Where do you purchase grocery items?

8. Where do you purchase CDs, magazines, and computer supplies?

9. Where do you do your laundry?

10. Where do you have your hair cut?

11. Do you have a car or regularly have access to a car?

12. Which retail goods and services would make the Storrs Center more attractive to your needs, if available?

13. Do you have any other comments concerning the Storrs Center about which you would like us to be aware?

Thank you very much for input.

Mansfield Resident and University of Connecticut Faculty and Staff Survey on the Municipal Development Plan for Storrs Center

Urban Partners is working with the Mansfield Downtown Partnership to create a Municipal Development Plan for Storrs Center, which is adjacent to the University of Connecticut main campus along Route 195. We would appreciate your assistance in completing the following brief and confidential survey that queries how you currently use retail stores and services in the area and asks for your ideas about how the area might be made more attractive to your needs.

Thank you for your participation in this project. If you have any questions, please call Carolyn Blackwell at (215) 829-1906 or e-mail cblackwell@urbanpartners.us .

1. Where do you live?

   ☐ Mansfield ☐ Willimantic

   ☐ Willington ☐ Tolland

   ☐ Coventry ☐ Other (Name): _____

2. What retail stores and services in the Storrs Center or elsewhere in Mansfield do you patronize during the day or after work?

3. If applicable, how frequently do you leave campus to get lunch, run errands, etc.?

4. If you are affiliated with UConn and eat lunch off campus, where do you go? (both in Mansfield and surrounding area)

5. At what store do you most often buy groceries? (Name the store and where it is locate.)

   _____ on _____

6. What pharmacy do you most frequently use?

   _____ on _____

7. Name the last two restaurants where you had dinner with members of your household:

8. Where do you and other members of your household most frequently buy clothing?

9. Are there retail goods and services that, if available within the Storrs Center, would make the commercial district more attractive to your needs?

10. Do you have any other comments concerning the Storrs Center of which you would like us to be aware?

Thank you very much for input.

Student Responses for Desired Retail Goods at Storrs Center

51%	18	Restaurant (comment: e.g. John Harvard's)
	2/18	24hr diner
	1/18	Thai or sushi
	2/18	Ethnic
	1/18	Outdoor dining
	1/18	B'fast/lunch w/ salads & wraps
	1/18	Small places to eat; not chains
31%	11	Bars (live entertainment)
11%	4	Groceries (Natural food, Mansfield Coop)
11%	4	Music store (Sam Goody, FYE)
9%	3	Bookstore
9%	3	Clothing stores (comment: e.g. Gap)
9%	3	Dance club (comment: e.g. Husky Blues)
6%	2	Art gallery
6%	2	Coffee shop
6%	2	Community center
6%	2	Dance studio
6%	2	Deli
6%	2	Movie theater
6%	2	Retail
6%	2	Shopping Mall
6%	2	Video store
3%	1	Amusement Park
3%	1	Appliances
3%	1	Art supply store
3%	1	Bakery
3%	1	Banks
3%	1	Bike shop
3%	1	Comedy show
3%	1	Cultural Center
3%	1	Drugstore (24hr CVS)
3%	1	EBX
3%	1	Electronics
3%	1	Gas station
3%	1	Gift shops (comment: e.g. Hallmark)
3%	1	Gym
3%	1	Magic Store
3%	1	Nail salon
3%	1	Newsstand
3%	1	None-I think 195 is too congested as it is
3%	1	Salons
3%	1	Specialty shops
3%	1	Sports stores
3%	1	The Disc
3%	1	Walmart

Resident Responses for Desired Retail Goods at Storrs Center

37%	13	Grocery store
	1/13	Asian and/or international
	2/13	Food coop/local produce
	5/13	Green grocer
	1/13	Health food
31%	11	Restaurant
	1/11	Ethnic
	2/11	Indian
	1/11	Lunch café
	1/11	Mexican
	2/11	Thai
	1/11	Variety
23%	8	Clothing store (Talbots, Land's End, Appleseed, Footprints)
14%	5	Movie theater
9%	3	Bakery
6%	2	Art shows
6%	2	Bike shop
6%	2	Bookstore
6%	2	Boutiques
6%	2	Farmer's market
6%	2	Gift shop
6%	2	Hardware store
6%	2	Live music café (Non-alcoholic)
6%	2	Outdoor café (Phils)
6%	2	Radio Shack
6%	2	Sporting goods (Outdoor products)
3%	1	Antique shows
3%	1	Art supplies
3%	1	Bar
3%	1	Cafés
3%	1	Card shop
3%	1	Deli
3%	1	Everything
3%	1	Home Depot
3%	1	Knitting/needlework
3%	1	Museum shops
3%	1	Newsstand
3%	1	Playscape
3%	1	Shoe repair
3%	1	Small arts cinema
3%	1	Storrs automotive
3%	1	Supermarket
3%	1	Tea Room
3%	1	Walmart