

**PHASE I: DIAGNOSTIC**

*UNION STATION  
NEW HAVEN, CT*

Presentation to New Haven Development Commission

streetsense.



REAL ESTATE  
ADVISORS LIMITED

Wednesday, August 14, 2019

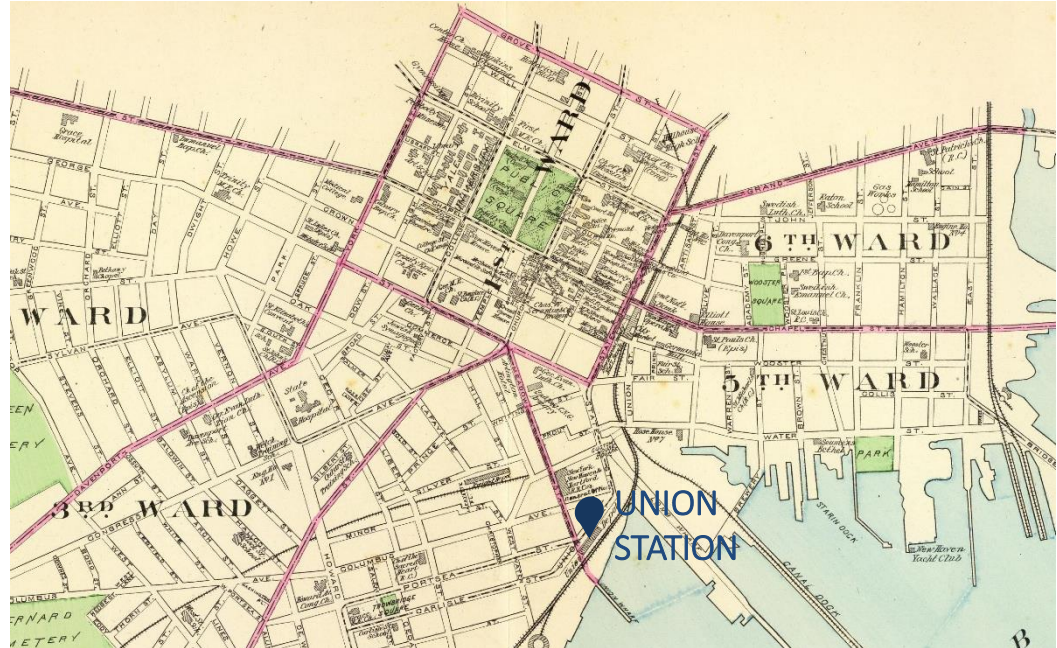
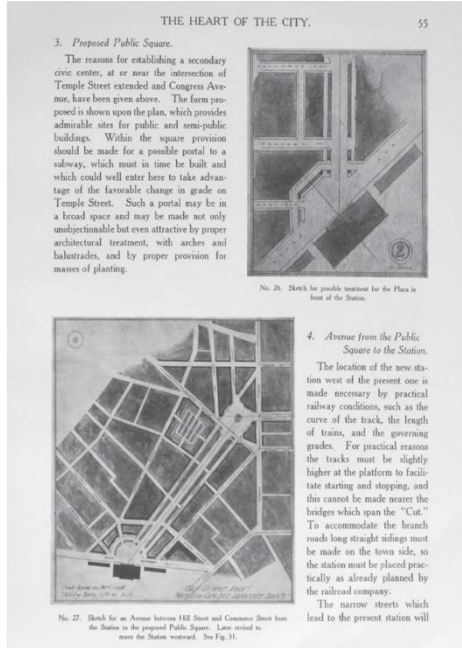
# PROJECT OVERVIEW

The New Haven Union Station Retail & Commercial Attraction Strategy began with a **DIAGNOSTIC OF EXISTING CONDITIONS**. This phase of work was organized into four categories:

- 1 *MARKET DEMAND*
- 2 *EXTERIOR CONDITIONS*
- 3 *INTERIOR CONDITIONS*
- 4 *PROSPECTING*

Confirmation of findings will kick off Phase II, the Re-merchandising Plan

# LOCATION: HISTORICALLY REMOTE





**MARKET  
DEMAND**

# PLANNED FUTURE DEMAND



TOD development will add new residents but also competitive retail offerings, diluting retail demand in Union Station

## UNION STATION TOD

34,000 SF retail (phase 2&3)  
138 residential units

## CHURCH STREET TOD

25,000 SF retail  
1,100 residential units

## TOTAL

59,000 SF retail  
1,238 residential units

# ESTIMATED CAPTURED RETAIL SALES

(RIDERS, RESIDENTS, WORKERS, VISITORS)

	EXISTING CONDITIONS (2019)	FUTURE CONDITIONS (AFTER TOD) *
Neighborhood Goods & Services	\$1,853,900	\$970,000
Food & Beverage	\$2,182,700	\$901,300
General Merchandise, Apparel, Furnishings, & Other	\$405,600	\$416,400
<b>Total</b>	<b>\$4,442,200</b>	<b>\$2,287,700</b>

\* Future TOD Assumptions: an additional 1,238 residential units and 59,000 SF of retail

# SOURCES OF RETAIL DEMAND

## COMMUTER RETAIL DEMAND

- Convenience-oriented
- Not easily captured by nearby competitors
- Features that are not easily replicated elsewhere

Demand Today: YES

Demand After TOD: YES

**LOW RISK**

## DESTINATION RETAIL DEMAND

- Experience-oriented
- Easily captured by future competitors in nearby TOD
- Historic building (pros and cons)

Demand Today: YES

Demand After TOD: UNCERTAIN

**MITIGATION NEEDED TO  
LOWER RISK**

# RETAIL DEMAND: CONSIDERATIONS

- Commuter-based demand is the station's "bread and butter." It serves a built-in, captive audience
- Currently, there is unmet demand for retail:
  - Commuter-based retail (F&B, convenience needs, quick-service)
  - Destination-oriented retail (F&B)
- The following would help mitigate the risk of destination-oriented retail:
  - Unique, experienced operator
  - Improved physical conditions of the site
  - Improved connectivity to downtown (including pedestrian pathways, bike lanes, etc.)
  - Additional captive audience/consumers (on-site hotel, office, etc.)



# RETAIL DEMAND

## RECOMMENDATIONS & RISK ASSESSMENT

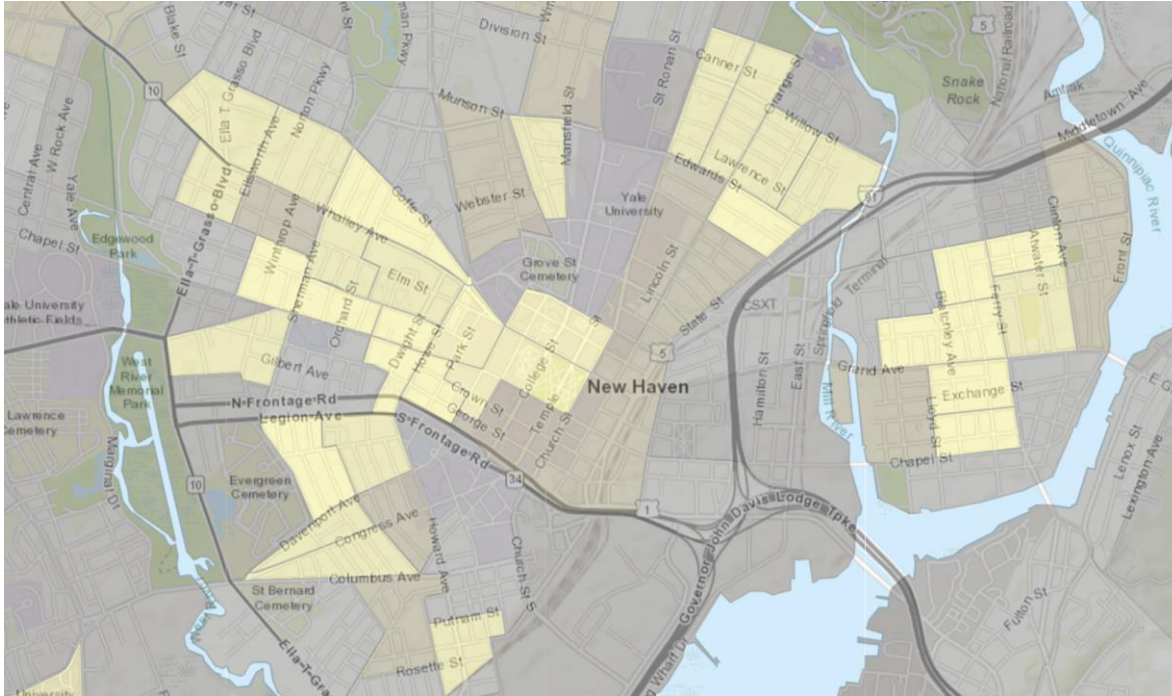
Retail Demand	Retail Type	Demand Conclusion	Space & Parking Considerations	Risk Mitigation	Strategy
Commuter Retail	Fast Food, Quick-Service Restaurant, Convenience Goods	7,000-8,000 SF of possible demand	There are existing retail spaces. Limited parking will not affect the success of this type of retail.	Improve accessibility/visibility of storefronts, station maintenance, seating and tables.	Possibility to expand retail footprint to capture additional unmet demand (and remerchandise existing spaces). Need for improved station maintenance.
Destination Retail	Full Service Restaurant/ Bar, Gift Shops	2,000-3,000 SF of possible demand	Uncertain costs associated with TI, buildout, operations, logistics (waiting on cost breakdown from NHPA design team). Limited parking availability.	Retail demand may be captured by future development. Risk mitigation includes: maintenance and quality of public spaces, seasoned operator with successful track record, captive audience (boutique hotel, office, etc.).	Need for seasoned operator. Upfront subsidies may be required to offset operational costs
Hotel	Boutique (retrofitting of historic space)	Unclear	Uncertain build costs (waiting on cost breakdown). Limited parking availability.	Mitigation includes: unique operator with successful track record critical, feasibility of infrastructure improvements (cost, time).	Build to maintain physical and financial flexibility. Identify seasoned transit-oriented operator.

An aerial photograph of a city campus, likely in the 19th century. The foreground is dominated by a large, green lawn with a complex network of paved walkways forming a grid pattern. In the center of the lawn is a prominent, octagonal stone monument with a tall, thin spire. Surrounding the lawn are numerous buildings, including a large, ornate church with a tall steeple and several multi-story brick buildings. The background shows a dense urban area with more buildings and trees under a cloudy sky.

# EXTERIOR CONDITIONS



# LIMITED CONNECTIVITY



2019 Population Density



Source: ArcGIS Business Analyst

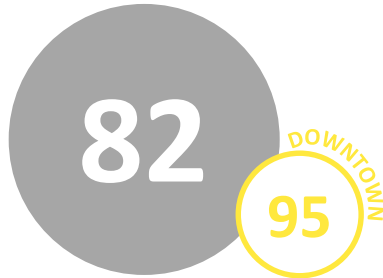
NEW HAVEN UNION STATION – RETAIL ATTRACTION

# TRANSPORTATION & ACCESS

## ON FOOT, BIKE, TRANSIT

With some improvements, Union Station could get closer to the walk and bike scores of Downtown New Haven

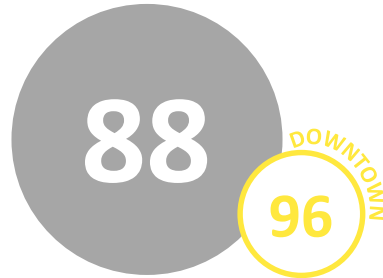
### WALK SCORE



#### Very Walkable

Most errands can be accomplished on foot

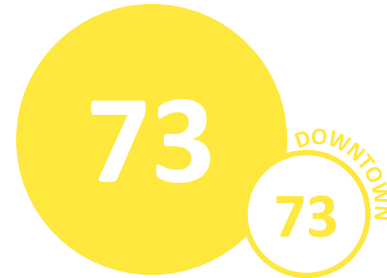
### BIKE SCORE



#### Very Bikeable

Biking is convenient for most trips

### TRANSIT SCORE



#### Excellent Transit

Transit is convenient for most trips

# SIGNAGE & WAYFINDING

## EXTERIOR FACADE

New Haven Union Station



Denver Union Station



# SIGNAGE & WAYFINDING FOR DRIVERS

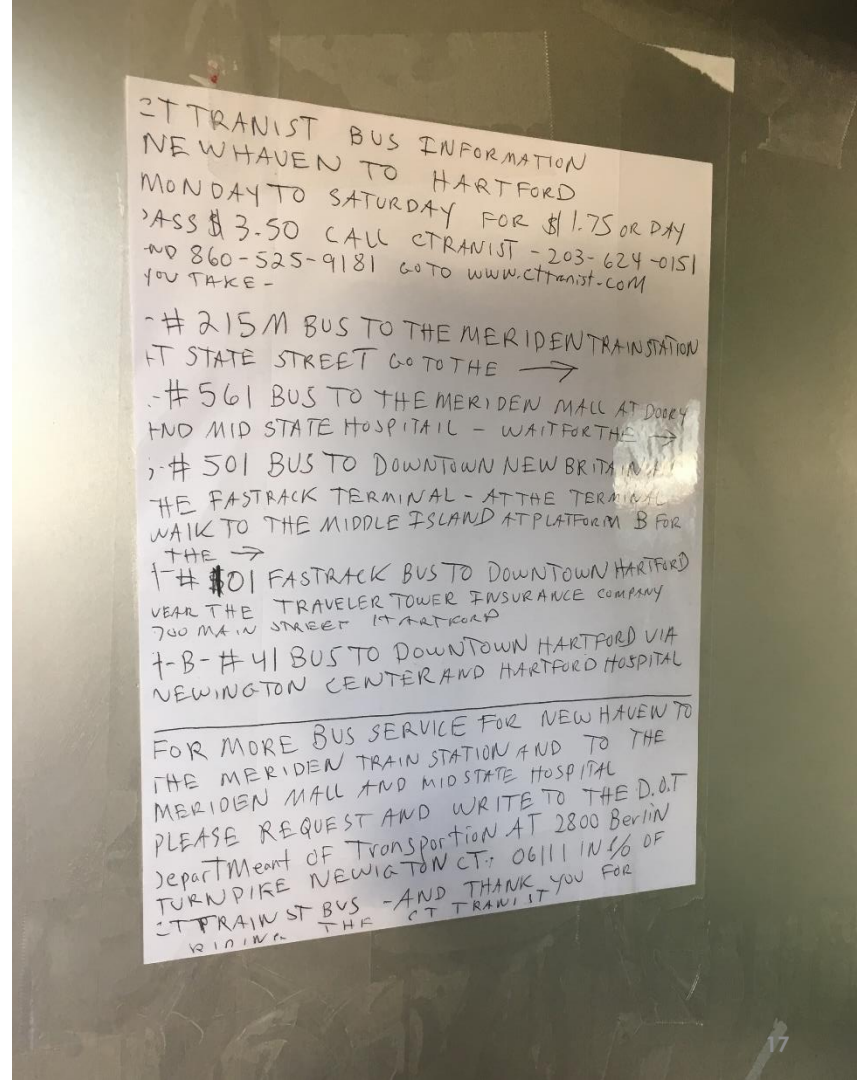
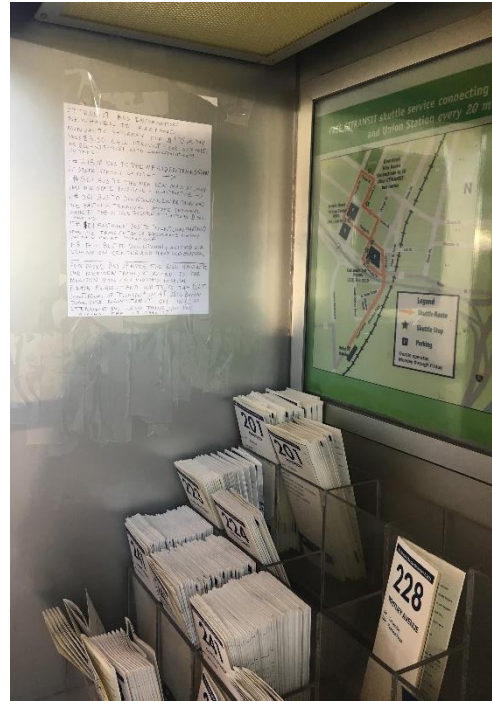


# SIGNAGE & WAYFINDING FOR DRIVERS





# SIGNAGE & WAYFINDING FOR PUBLIC TRANSIT RIDERS



# SIGNAGE & WAYFINDING FOR PEDESTRIANS

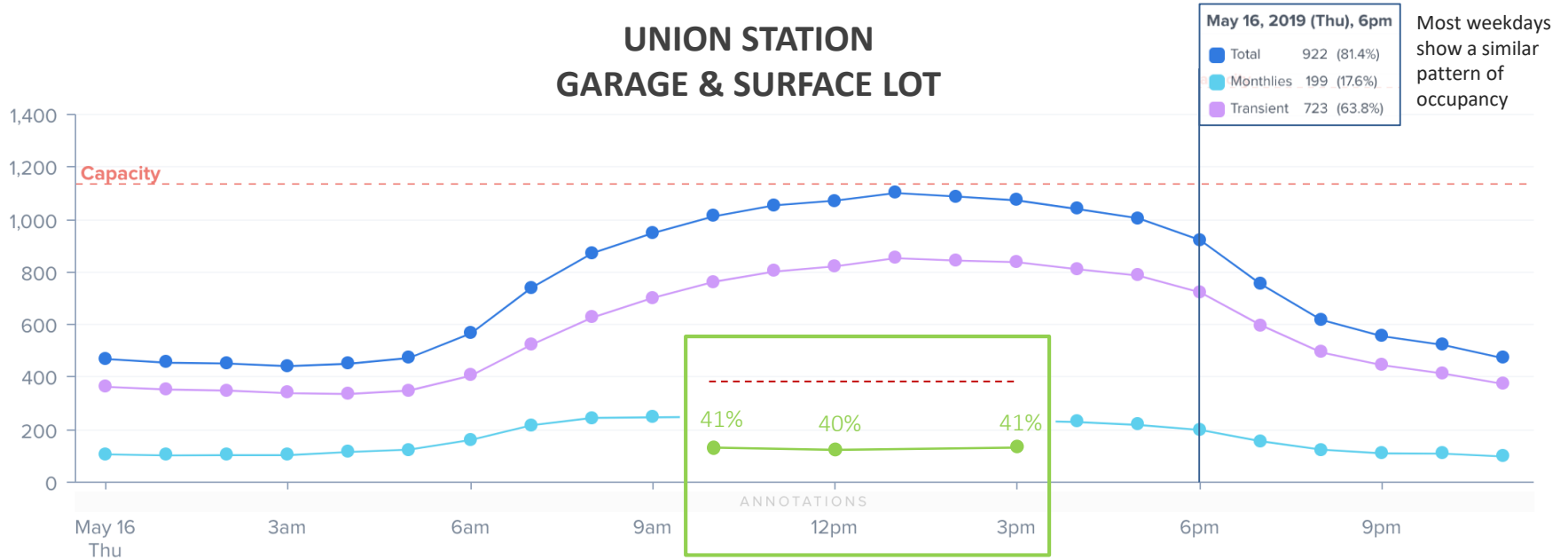


# EXTERIOR CONDITIONS

# PARKING

## OCCUPANCY BY HOUR

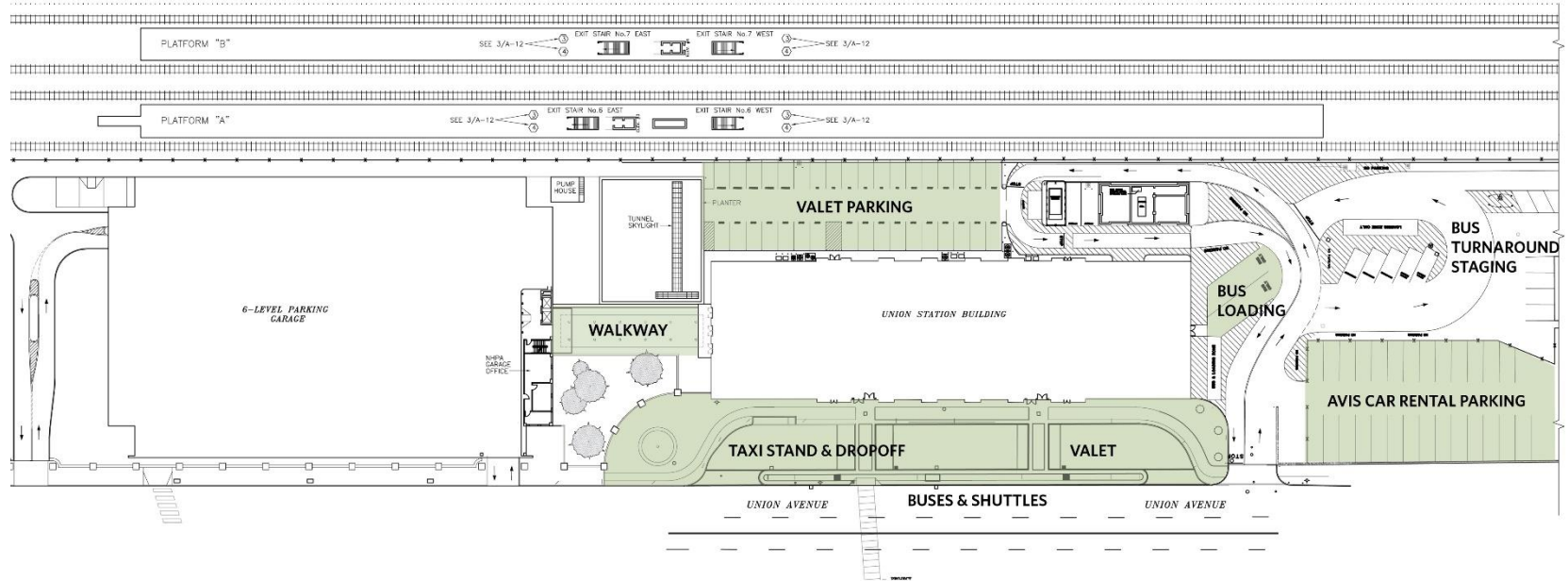
### UNION STATION GARAGE & SURFACE LOT



### GATEWAY GARAGE

# EXTERIOR LAYOUT

## NEED: CLARIFICATION OF SPACES



# EXTERIOR SITE CONDITIONS

## QUALITY, CLEANLINESS & SAFETY

Exterior conditions, cleanliness, and lighting will have to be improved in order to attract a full-service restaurant and/or boutique hotel operator (and attract/retain the types of clientele they would need to be successful)



The image shows the interior of a large, historic train station. The space is filled with rows of long, curved wooden benches. People are scattered throughout, some sitting and some standing. The architecture features high ceilings with several large, spherical pendant lights. Large, arched windows line the upper level, allowing natural light to enter. On the right side, there is a newsstand labeled "Union News of New Haven". In the background, an American flag is visible on the left wall. The overall atmosphere is one of a busy, well-maintained public space.

# INTERIOR CONDITIONS

# FOOT TRAFFIC

## LEAVING NEW HAVEN

OPPORTUNITIES TO  
REDISTRIBUTE FOOT  
TRAFFIC



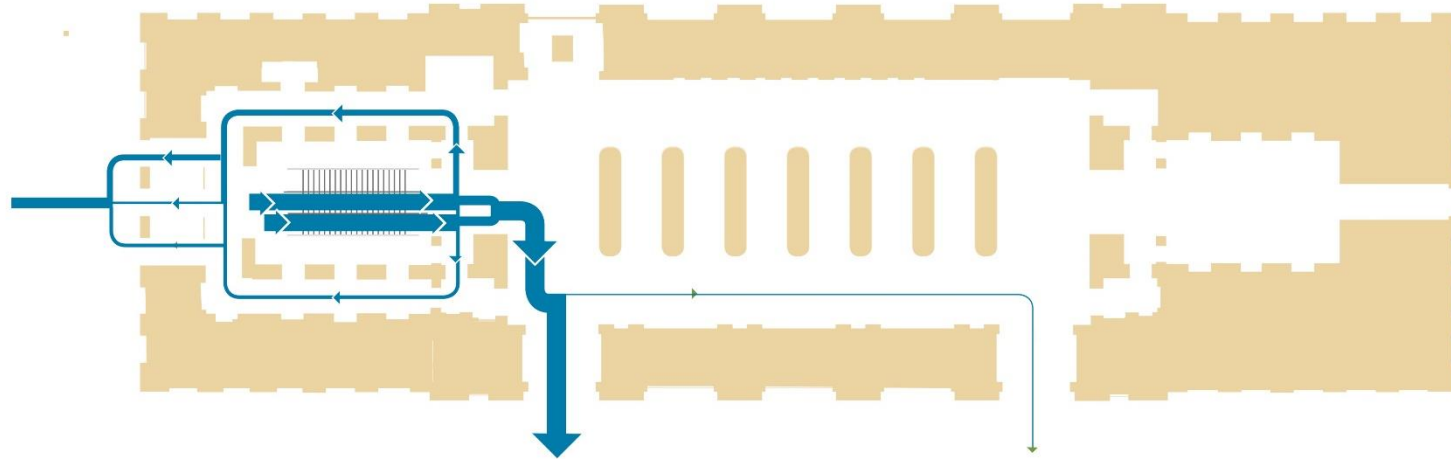
NEW HAVEN UNION STATION  
*Outbound Commuter Traffic Flow: 5am - 9am*



# FOOT TRAFFIC

## GOING TO NEW HAVEN

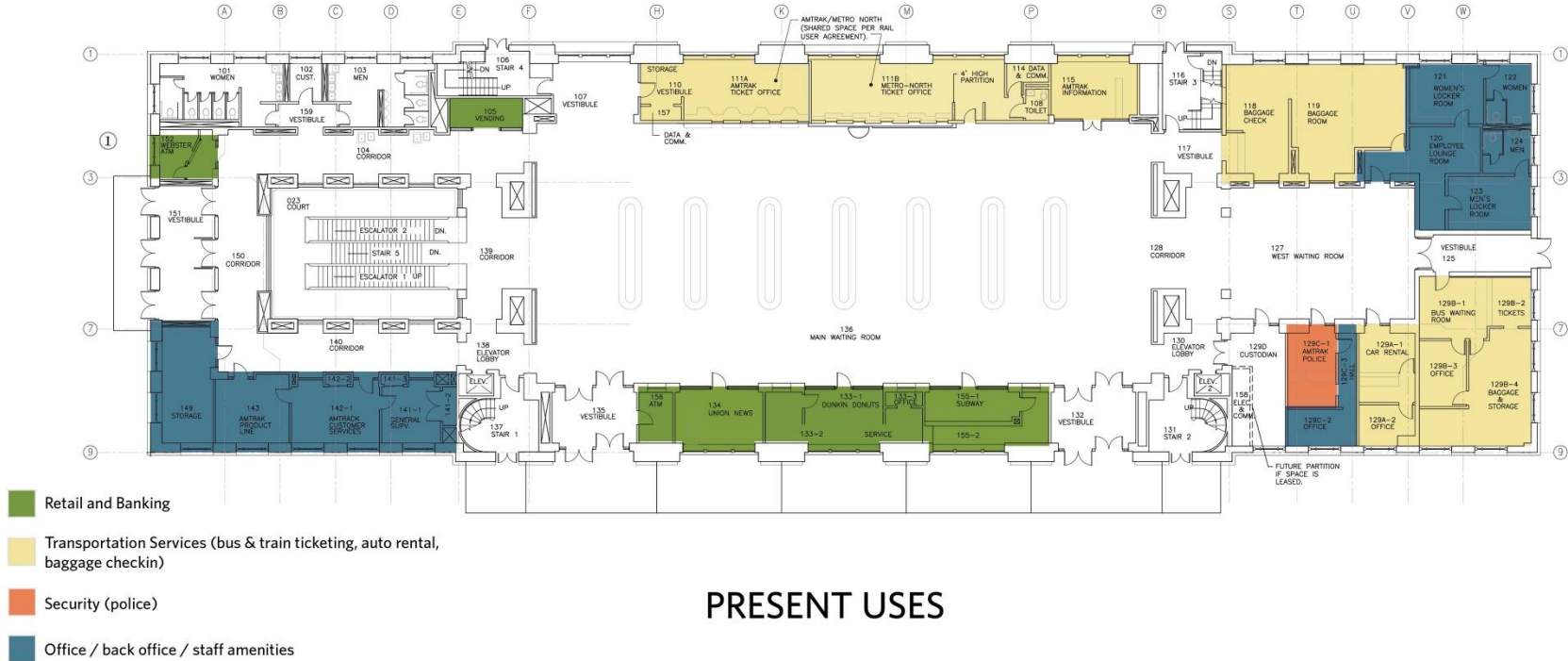
OPPORTUNITIES TO  
REDISTRIBUTE FOOT  
TRAFFIC



NEW HAVEN UNION STATION  
*Inbound Commuter Traffic Flow: 2pm - 7pm*

# INTERIOR LAYOUT

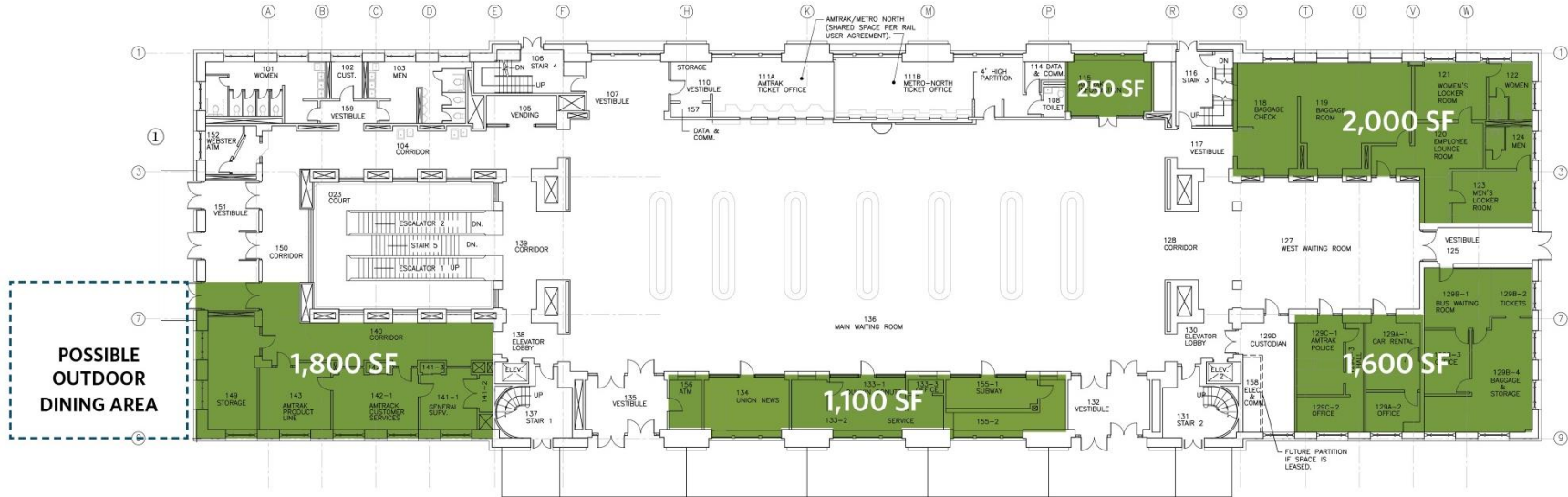
## GROUND FLOOR - EXISTING



## PRESENT USES

# INTERIOR LAYOUT

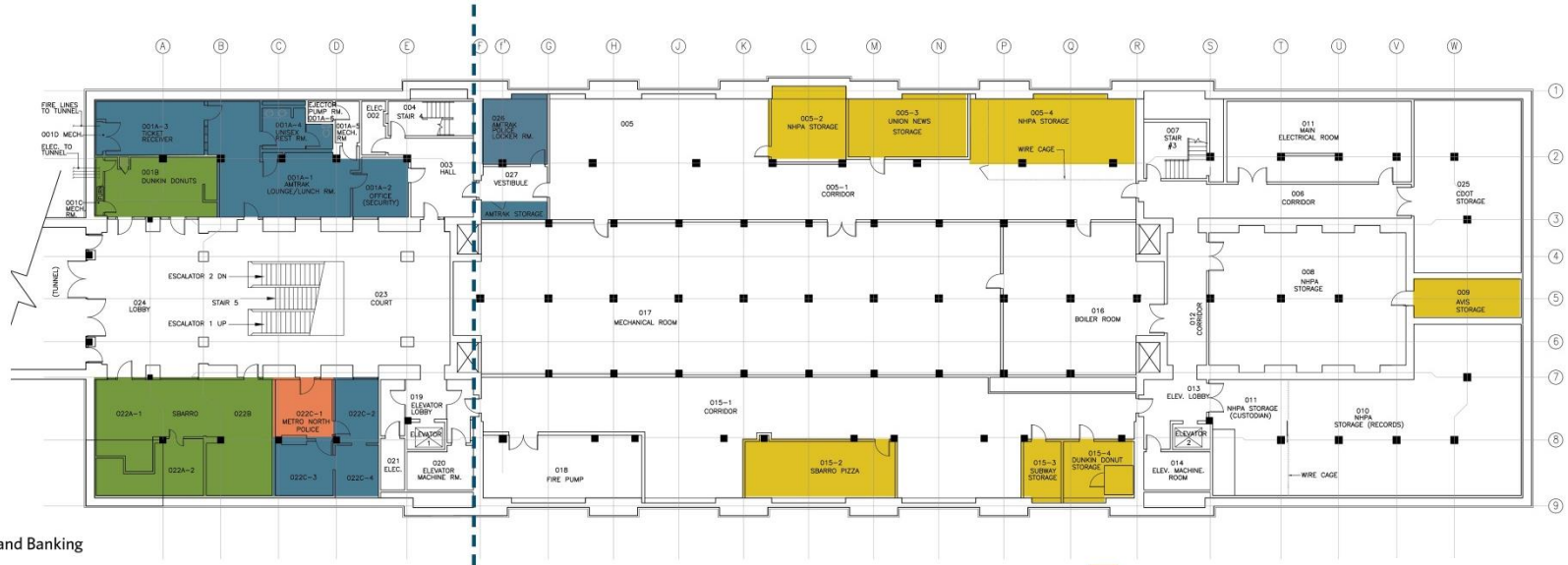
## GROUND FLOOR - POTENTIAL



AVAILABLE TO LEASE FOR RETAIL  
6,750 SF

# INTERIOR LAYOUT

## BASEMENT - EXISTING



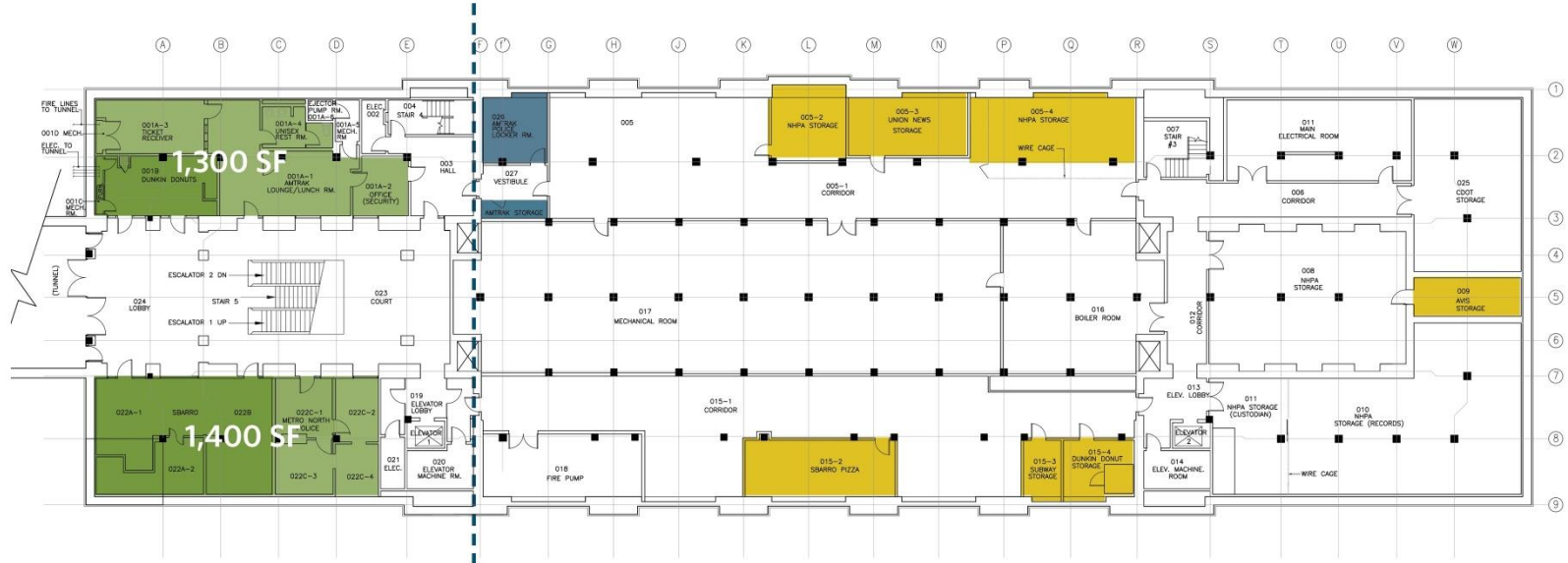
- Retail and Banking
- Transportation Services (bus & train ticketing, auto rental, baggage checkin)
- Security (police)
- Office / back office / staff amenities

Tenant Storage

### PRESENT USES

# INTERIOR LAYOUT

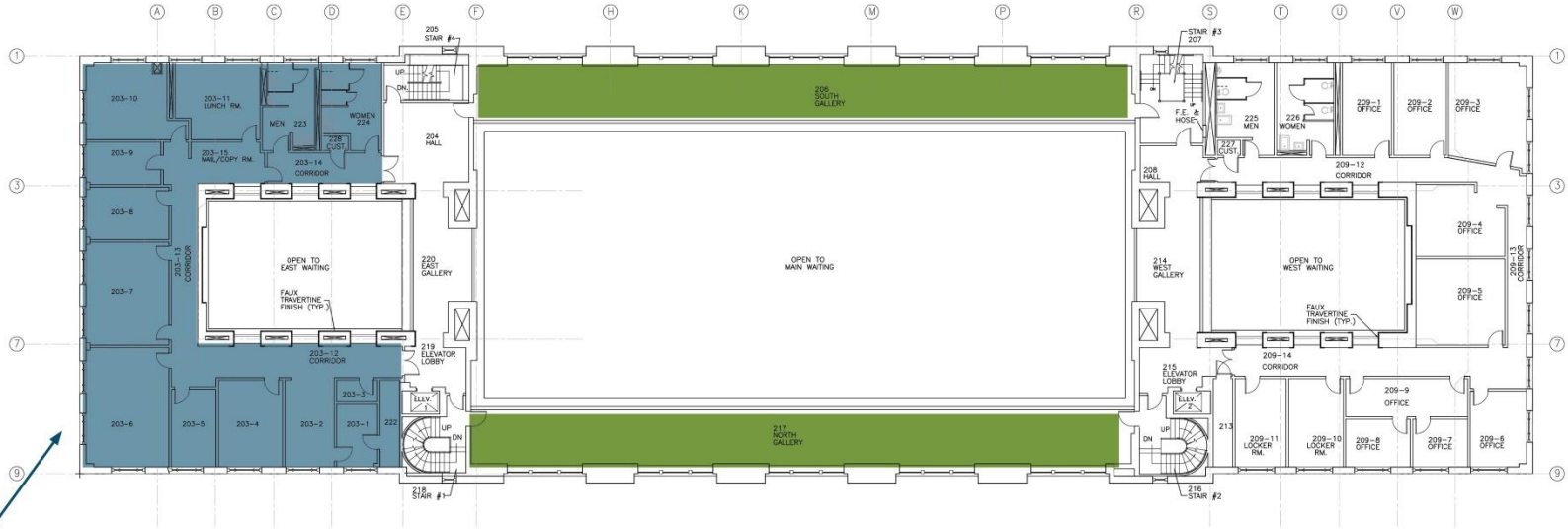
## BASEMENT - POTENTIAL



AVAILABLE TO LEASE FOR RETAIL  
2,700 SF

# INTERIOR LAYOUT

## SECOND FLOOR / MEZZANINE - POTENTIAL



(AVAILABLE FOR  
GROUND FLOOR OFFICE  
RELOCATION  
3,800 SF)

AVAILABLE TO LEASE FOR EVENTS  
3,000 SF

# SUMMARY

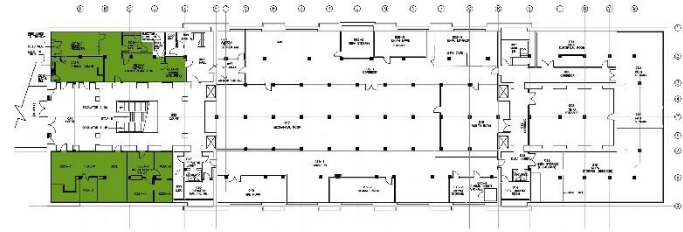
## RETAIL DIAGNOSTIC

### RETAIL SPACE CONSIDERATIONS

- Available for retail use (excluding mezzanine): 9,450 SF
- Current supportable SF: 9,800 SF

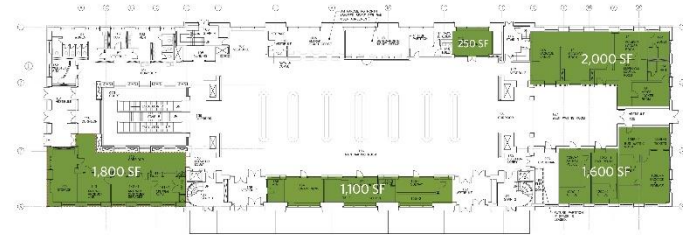
### OTHER AMENITIES/USES TO CONSIDER

- Acela lounge
- Baggage check
- Additional restrooms
- Additional elevator(s)



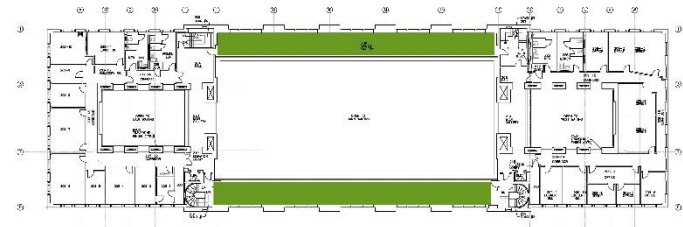
AVAILABLE TO LEASE FOR RETAIL  
2,700 SF

**B**



AVAILABLE TO LEASE FOR RETAIL  
6,750 SF

**1**



AVAILABLE TO LEASE FOR EVENTS  
3,000 SF

**2**

# SUMMARY

## HOTEL DIAGNOSTIC

### HOTEL ROOMS

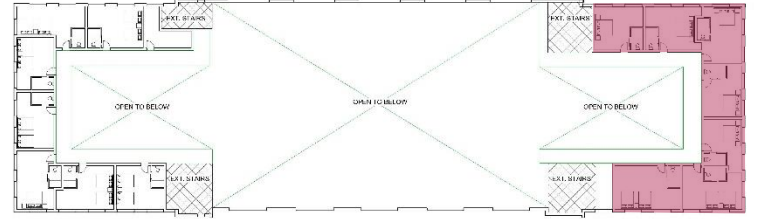
- 2<sup>nd</sup> Floor: 7
- 3<sup>rd</sup> Floor: 7
- 4<sup>th</sup> Floor: 37

### TOTAL ROOMS

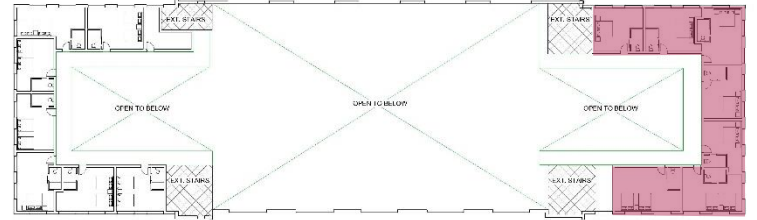
- With ground floor lobby: 51
- With 2<sup>nd</sup> floor lobby: 44

### CONSIDERATIONS

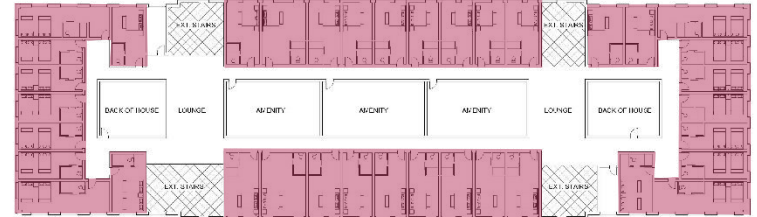
- Need operators comfortable with scale & active station environment
- Need/cost of building upgrades
  - Electric
  - Plumbing
  - HVAC
  - Insulation (noise, climate)



2



3



4



An aerial photograph of a university campus at dusk. The scene is dominated by numerous stone buildings with dark, gabled roofs. Many windows are illuminated from within, casting a warm glow. In the background, a city skyline is visible against a darkening sky, with several tall buildings and a prominent spire. The overall atmosphere is quiet and scholarly. The word "PROSPECTING" is overlaid in the center in a bold, yellow, sans-serif font.

# PROSPECTING

# SAMPLE MERCHANDISE MIX

The "merchandise mix" will be carefully curated to contribute to the overall experience of visiting Union Station.

USE	POTENTIAL TENANT	EST. SQUARE FEET	TYPE
Café / Restaurant	Atticus Café	500-600	Inline
Café / Creperie	Chouquette Creperie & Café		Cart
Baked Goods	Lyman Orchard's Apple Barrel		Kiosk
Dine-in Restaurant	55 Wine Bar	2200	Inline
Retail Merchandise	Campus Customs		Kiosk
Bike rental	Bike New Haven		Rental Station
Juice Bar / Ice Cream	Arethusa Farms	300	Inline
Healthy Grab and Go	Yalla Organic		Kiosk
Retail Merchandise	Sunglass Paradise		Cart
Gallery	Funky Stuff The Collective	400	Inline/Carts
CT Retail Merchandise	The Two Oh Three		Cart
Hotel	TBD	50 rooms	Inline

# POTENTIAL TENANT

## 55 WINE BAR (INTERIOR)



# POTENTIAL TENANT

55 WINE BAR (EXTERIOR/PATIO)



# POTENTIAL TENANTS

Apple Barrel



Atticus Café



Chouquette Crêperie



Arethusa Farms



# POTENTIAL TENANTS

Campus  
Customs



Sunglass  
Paradise



Bike  
New Haven



Yalla  
Organic



# POTENTIAL TENANTS

## TWO OH THREE



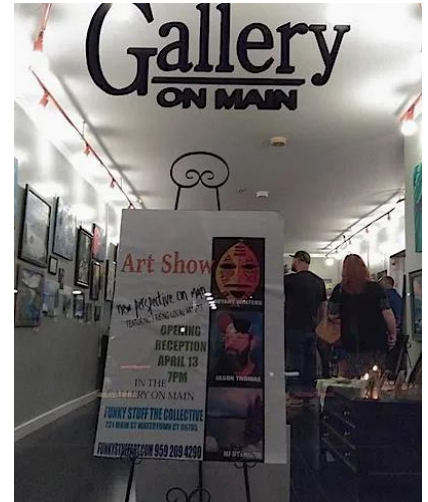
**WE ARE PASSIONATE ABOUT CELEBRATING OUR COMMUNITY, SHOPPING SMALL, EATING LOCAL & EMBRACING EVERYTHING THAT CONNECTICUT HAS TO OFFER.**

**NICE TO MEET YOU!** “  
**OUR NAMES ARE TORY & ROSCOE BROWN, AND WE ARE THE BROTHER-SISTER DUO BEHIND THE 203.**



We sell **Connecticut-themed merchandise** to provide a tangible way for customers to rock their state pride. All of our products celebrate CT & embody the lifestyle of our active & vibrant community. We thrive to make our customers happy by providing them with the highest quality apparel— which are all locally designed, embroidered & printed right here in CT. ”

## FUNKY STUFF



# SAMPLE CARTS & KIOSKS





# SAMPLE PROGRAMMING FOR MEZZANINE

## HOTEL LOBBY, BAR, AND/OR EVENT SPACE



# SAMPLE HOTEL ROOM

2<sup>ND</sup>, 3<sup>RD</sup>, AND 4<sup>TH</sup> FLOORS





# SUMMARY & NEXT STEPS

# SUMMARY

## MARKET DEMAND

- There is approximately 10,000 SF of supportable retail (under existing conditions)
- Current demand is driven primarily by riders and daytime employees

## EXTERIOR CONDITIONS

- Need to address connectivity to downtown
- Need to improve quality of exterior appearance

## INTERIOR BUILDING CONDITIONS

- Need to improve quality/maintenance of interior space
- Need to improve storefronts to facilitate ease of purchase
- Possibility to implement trial interventions (tables and chairs), events, pop-ups, etc.
- Additional financial feasibility assessment required for hotel

## TENANT MIX

- Tenanting should remain focused on meeting the needs of commuters
- Remerchandising of existing tenants should focus on uniquely Connecticut operators that diversifies mix
- Outreach is ongoing to potential retail and hotel operators

# NEEDS

## CURRENTLY BEING ADDRESSED

A number of issues may have an impact on the proposed re-tenanting of Union Station

- Floor loads
- Plumbing
- Electrical
- HVAC
- Ingress/egress & vertical circulation
- Restrooms
- Ventilation for restaurant
- Exterior signage

# NEXT STEPS

## ACTION ITEMS

- Cost estimates for proposed infrastructure improvements
- Detailed financial analysis for retail spaces
- Identification of users likely to submit to Bid Document
- Possible trial interventions, events, pop-ups, etc.

## DELIVERABLE MILESTONES

- Lease template (Sep 2019)
- Merchandizing plan (Oct 2019)





# APPENDIX

# RESIDENTS

(that are not riders)

The Primary Trade Area captures the residents most likely to visit/shop at Union Station (excluding riders). The Secondary Trade area captures residents who might visit the station, but less often (excluding riders).

Trade Areas are bounded by physical and/or perceptual barriers that consumers are unlikely to cross to shop (highway, river, railroad, etc.)





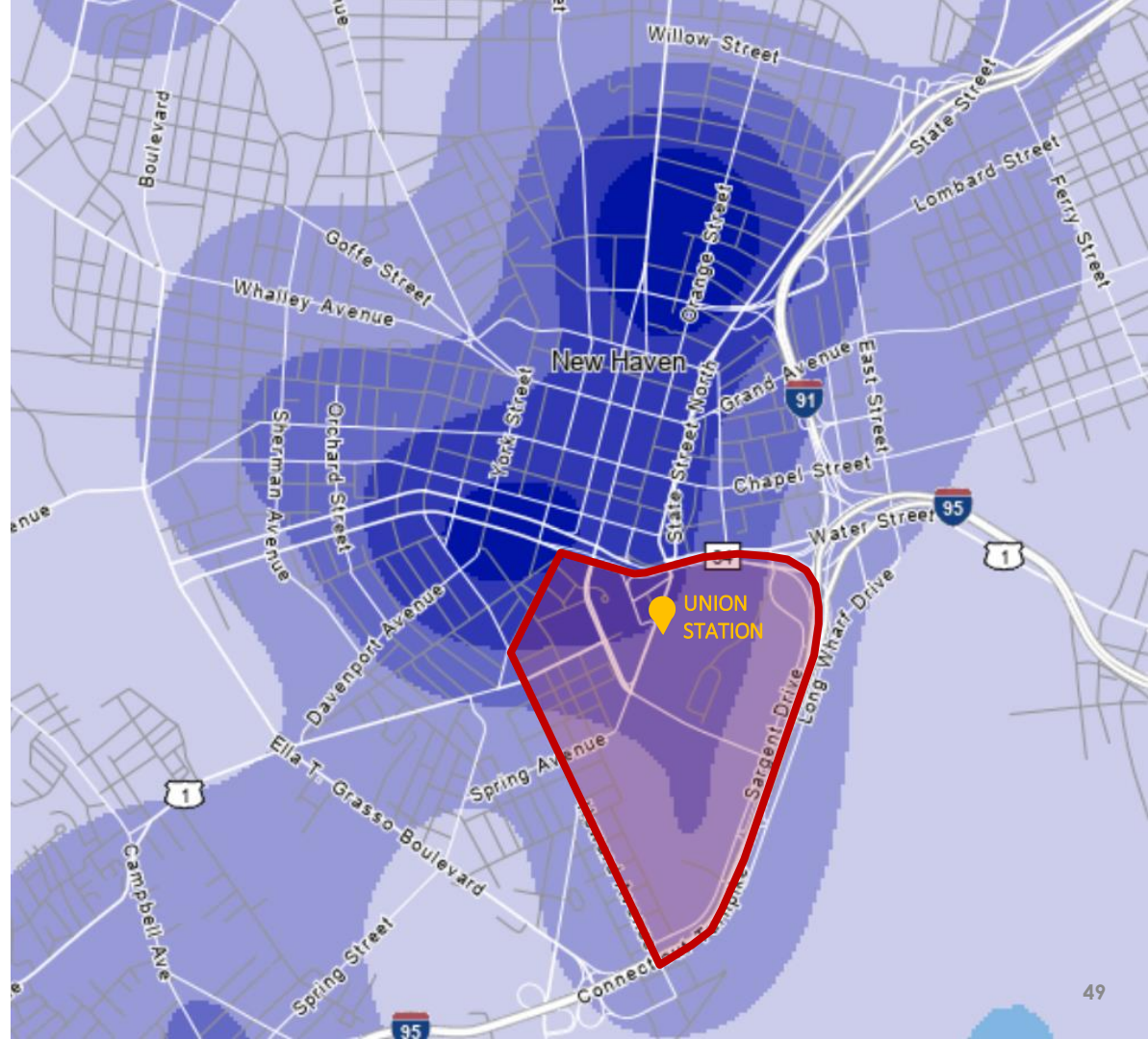
# WORKERS

(that are not riders)

Only the primary trade area is used to capture worker spending

because workers are unlikely to travel more than 400 ft to make a purchase (purchases are most often made during a small window of time for lunch and/or during the commute to/from work).

There are 21,083 daytime workers inside the Primary Trade area.



# HOTEL VISITORS

(that are not riders)

While there are two hotels within the trade area, both have inconvenient/difficult paths to Union Station; therefore, spending by hotel visitors (excluding that captured from riders) did not figure highly into the market analysis.

- 1 New Haven Village Suites (112)
- 2 La Quinta Inn & Suites (152)



# RETAIL DEMAND BY CUSTOMER TYPE (EXISTING)

Customer Type	NG&S Demand *	F&B Demand *	GAFO Demand*	Total Demand*
Commuters	2,200 – 3,000 SF	970 – 1,350 SF	1,070 – 1,270 SF	4,270 – 5,610 SF
Residents (Primary + Secondary)	110 – 150 SF	480 – 660 SF	20 – 25 SF	600 – 840 SF
Employees (Primary Only)	2,000 – 2,700 SF	2,850 – 3,940 SF	0 SF	4,850 – 6,640 SF
Visitors (Primary Only)	0 SF	50 – 70 SF	75 – 90 SF	130 – 160 SF
<b>Total Demand</b>	<b>4,300 – 5,900 SF</b>	<b>4,300 – 6,000 SF</b>	<b>1,200 – 1,400 SF</b>	<b>9,800 – 13,300 SF</b>

\* Range indicates high and low productivity sales per square foot

# RETAIL DEMAND BY CUSTOMER TYPE (FUTURE)

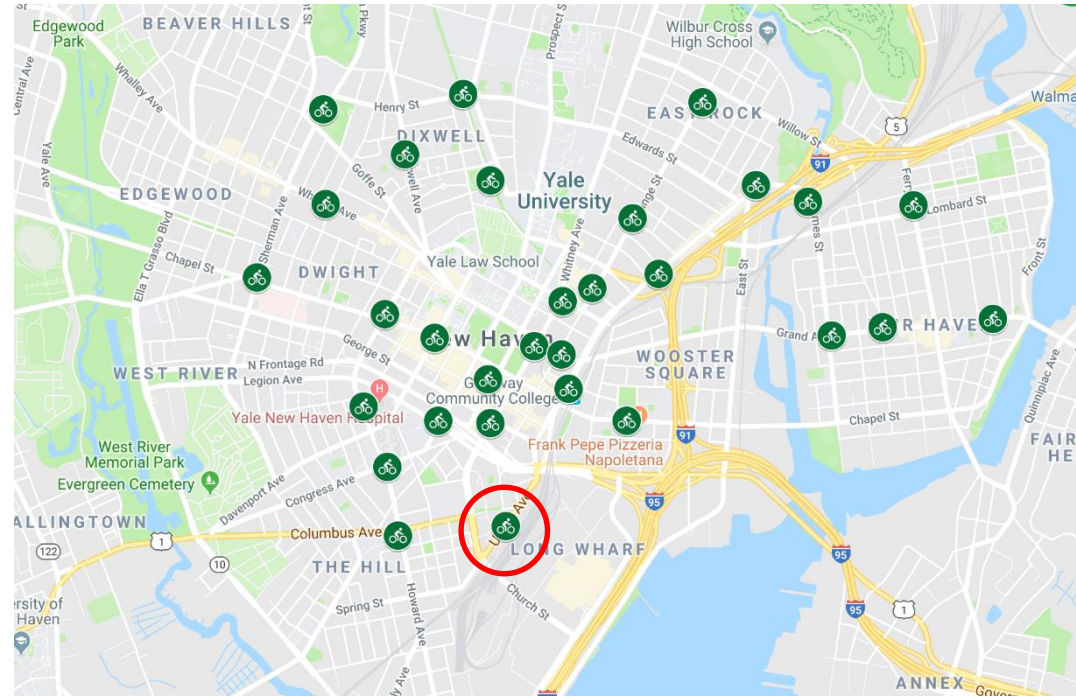
Customer Type	NG&S Demand	F&B Demand	GAFO Demand	Total Demand
Commuters	2,200 – 3,000 SF	970 – 1,350 SF	1,070 – 1,270 SF	4,270 – 5,610 SF
Residents (Primary + Secondary)	55 – 75 SF	190 – 270 SF	50 – 60 SF	300 – 400 SF
Employees (Primary Only)	0 SF	570 – 790 SF	0 SF	570 – 790 SF
Visitors (Primary Only)	0 SF	50 – 70 SF	75 – 90 SF	130 – 160 SF
<b>Total Demand</b>	<b>2,300 – 3,100 SF</b>	<b>1,800 – 2,500 SF</b>	<b>1,200 – 1,400 SF</b>	<b>5,300 – 7,000 SF</b>

\* Range indicates high and low productivity sales per square foot

# TRANSPORTATION & ACCESS

## BY BIKE

The New Haven area is well served by the Bike New Haven bike share program, with a dock located at New Haven Union Station



Source: Bike New Haven

NEW HAVEN UNION STATION – RETAIL ATTRACTION

# TRANSPORTATION & ACCESS

## BY BIKE

Despite having bike share on site and ample bike storage, there are no bike lanes leading to/from the station. With very wide streets, bikes must compete with cars

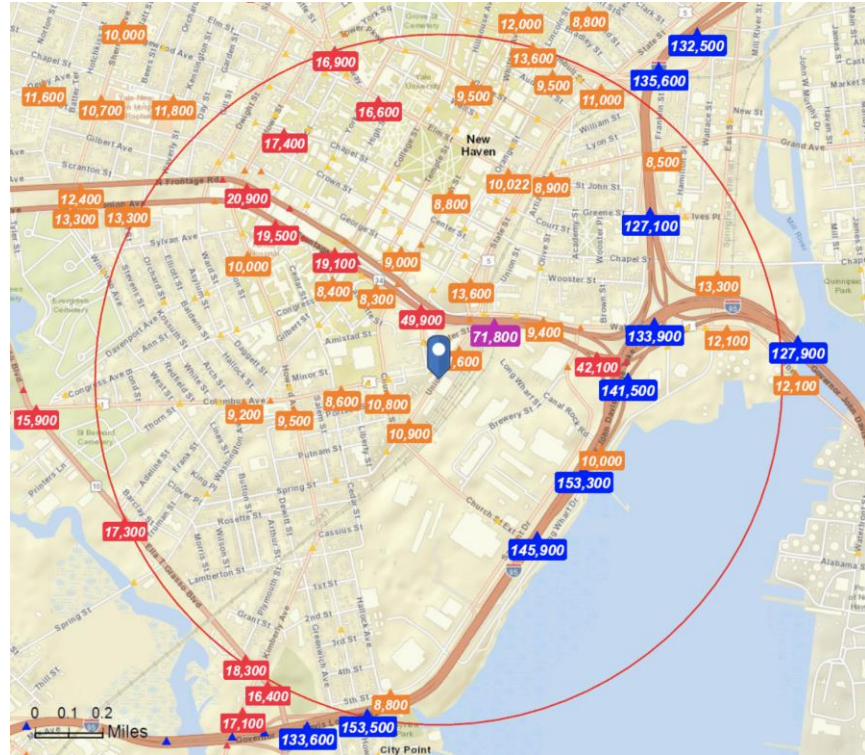


# TRANSPORTATION & ACCESS

## BY CAR

Traffic counts are highest on the highways surrounding Union Station. Signage should reflect that, clearly guiding drivers from major junctures to the station.

- Average Daily Traffic Volume**
- ▲ Up to 6,000 vehicles per day
  - ▲ 6,001 - 15,000
  - ▲ 15,001 - 30,000
  - ▲ 30,001 - 50,000
  - ▲ 50,001 - 100,000
  - ▲ More than 100,000 per day



# TRANSPORTATION & ACCESS

## ON FOOT

Union Station is walkable to Downtown New Haven; however, the pedestrian experience is not enjoyable, with limited street-tree cover, poor crosswalks, and dim lighting at night (only overhead lighting on one side of the street - opposite side of the station)

