A Market Study of Hebron Center Hebron, CT

Analysis & Recommendations

November, 2013

Fairweather Consulting

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Introduction

Beginning in February 2013, Fairweather Consulting conducted a study of the market potential for Hebron Center to identify potential commercial uses that could be attracted to (or expanded in) Hebron. This involved an analysis of the existing market potential in Hebron and the surrounding area, and an exercise to "benchmark" Hebron against other downtown centers to better understand the strengths and weaknesses of Hebron Center. The final result of this study identifies the types of uses for which Hebron Center has a competitive advantage and defines an action plan to expand and/or attract those uses to the Center.

The Planning Process

The project steering committee designated by the Town included:

- Vickie Avelis, Chair, Economic Development Commission
- Dottie Moon, Economic Development Commission
- Natalie Wood, Planning and Zoning Commission
- Loretta McDonnell, Planning and Zoning Commission Alternate
- Brian O'Connell, Board of Selectmen
- Randy Anagnostis, Economic Development Coordinator
- Andrew Tierney, Town Manager
- Michael O'Leary, Town Planner

The project steering committee met regularly throughout the planning process to review findings and recommend key interviews/outreach efforts. These outreach efforts included four community meetings. The first two were focus group meetings with representatives of Hebron's business community and real estate industry on March 21st and 22nd in the Douglas Library. The purpose of these meetings was to secure information and insight from Hebron businesses as the marketing study was being developed. In addition, the project was presented to a business breakfast networking meeting held on April 28, 2013 at Gina Marie's Restaurant and questions and comments were solicited from the attendees. Finally, a meeting for the general public was held at the public library on May 8th to provide a general overview of the study and its preliminary results. Attendance at this event was very light (eight people). The draft findings were also shared with the Planning and Zoning Commission and the Economic Development Committee at a meeting on September 12, 2013.

A summary of the outreach meetings is provided on the next page. Detailed descriptions of the stakeholder focus groups can be found in the appendices to this report.

March 21st Stakeholder meeting

Attendees: 9
Key Initiatives Identified:

- Attracting out-of-town shoppers by developing a medical center, community center, or sports center (a "hook" to get people into Hebron)
- Allow for mix-used development and second-story housing in Hebron Center to develop more affordable housing opportunities.
- Convert Route 66 back into a Main Street by decreasing the speed limit through Hebron Center, and extending the sidewalks to allow pedestrians to walk more comfortably and encouraging more downtown shopping.
- Creating Co-Working Spaces for telecommuters in the Center to encourage workers to shop downtown during breaks.

March 22nd Stakeholder meeting

Attendees: 8
Key Initiatives Identified:

- Attracting new businesses by offering incentive packages including tax breaks and infrastructure improvements and marketing Hebron's success stories (CVS and Hartford Health Care Medical Group)
- In-fill development in Hebron Center to make the most use out of the small amount of available land on and near Route 66 (i.e. the lot next to the Fire Department and frontage parcels along Main Street)
- Creating a Full Health Care Facility in Hebron
- Successfully Marketing Hebron in a way that promotes the market potential of its residents and commuters.
- Building on Hebron's trails and recreational assets.

April 28th Business breakfast networking meeting:

Attendees: Approximately 40
A presentation was made to a Hebron business breakfast networking meeting to inform attendees on the purpose and process involved in the strategic planning process. Key issues raised in the discussion by attendees included:

- The importance of outdoor recreation/trails/festivals to Hebron's economic vitality
- The need to get more day time activity in Hebron Center to improve the business climate there
- The importance of creating a distinguishing image or brand for Hebron as a retail/commercial center.

The community input helped set the stage for the economic analyses and recommendations developed for Hebron. This includes an overview of the Hebron-area economy as well as the "benchmarking" of Hebron against eight other communities as selected by the steering committee. The analyses and recommendations are provided in the sections which follow.

Background Analysis

In this background analysis, the Town of Hebron is compared to Tolland County and the State of Connecticut on several demographic, housing, and economic indicators. Overall, the findings indicate that Hebron is a highly educated, affluent community with a population primarily comprised of settled professionals with families. The majority of residents are homeowners whose home values are higher than average values in the County but comparable to average values in the State as a whole. Top industries in Hebron are Health and Social Assistance, Retail Trade, and Other Services, while top occupations include Management, Office and Administrative Support, Sales, and Education and Training.

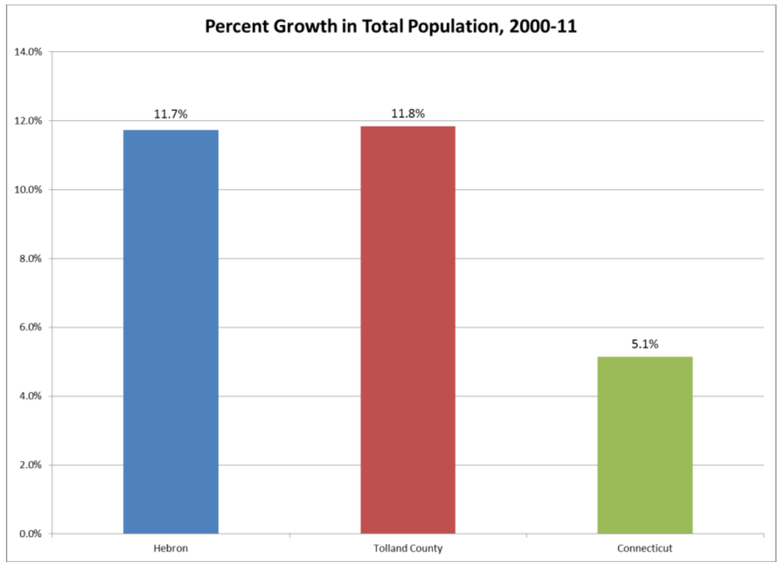


Figure 1: Population Growth

Source: U.S. Census Bureau, 2000, 2011

Population

Population Trends

The population total in Hebron in 2011 was 9,620. Population growth from 2000 to 2011 was 11.7%, comparable to that of the County (11.8%), but 7 percentage points higher than the overall population growth in the State of Connecticut within that same period.

A large percentage of the population of Hebron is comprised of people aged below 19. Nearly 33% of Hebron's population belongs to this age cohort, a concentration higher than that of Tolland County and the State. The young professional population (those aged between 20 and 34), however, only comprises approximately 11% of the population and is low compared to the County and the State. The population in Hebron is most highly concentrated in the 35-54 age group. Hebron's age composition is representative of a community in which established professionals have settled to raise families.

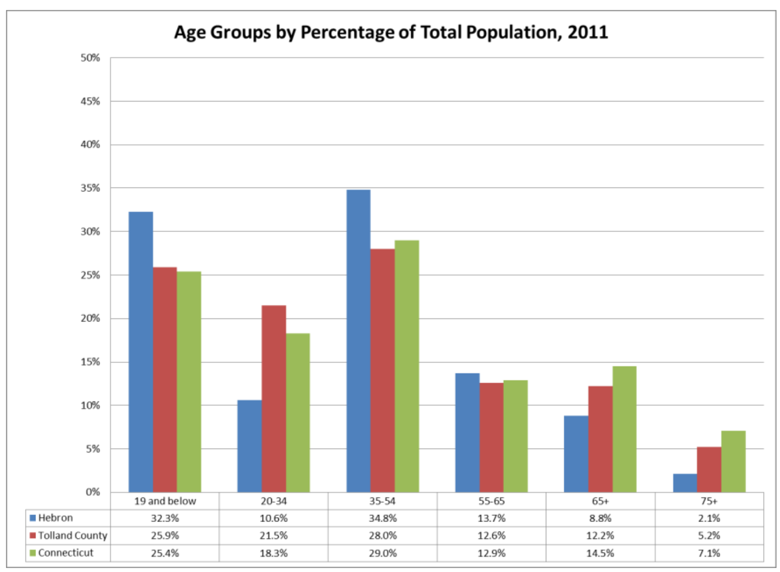


Figure 2: Population Age Groups

Source: U.S. Census Bureau, 2011

The fastest growing age groups are the 55-65 and 65 and over age cohorts. These populations grew 84% and 63% respectively between 2000 and 2011. These age groups grew faster in Hebron than the rest of the County and the State. The 19 and below age group also grew between 2000 and 2011 in Hebron, while this age group declined in both the County and the State.

Educational Attainment

Hebron is a highly educated community. In 2011, nearly 50% of the town's population aged 25 and older had a Bachelor's degree or higher. This is roughly 13 percentage points higher than the population with Bachelor's degrees or higher in both Tolland County and the State of Connecticut. Furthermore, the population with an Associate's Degree is higher in Hebron than in the County or State, while the population with less than an Associate's degree or no high school diploma is relatively low in Hebron.

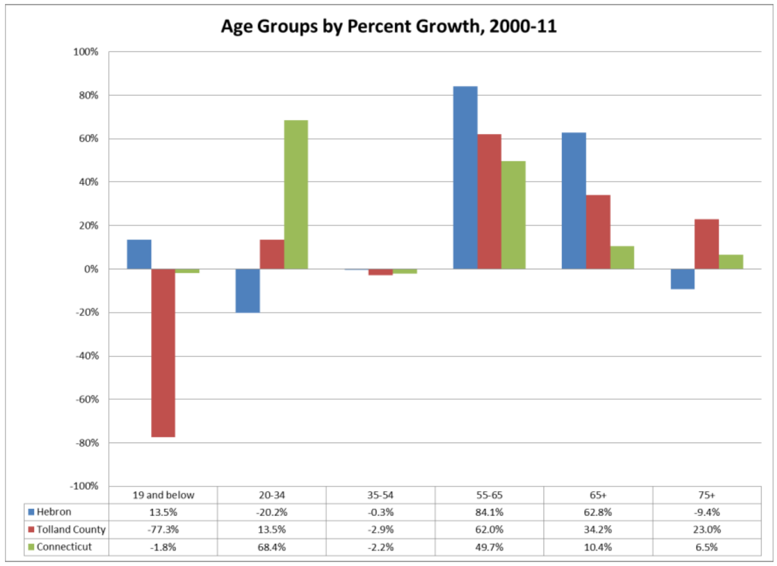


Figure 3: Population Growth by Age Groups

Source: U.S. Census Bureau, 2000, 2011

Income and Poverty

Hebron is a highly affluent community. The median household income in 2011 was $107,807, nearly $30,000 above that of Tolland County, and approximately $42,000 above that of the State. Median household income has increased in Hebron by 43.5% between 2000 and 2011, while the median household income increased by 32.5% in Tolland County and by 22% in Connecticut as a whole.

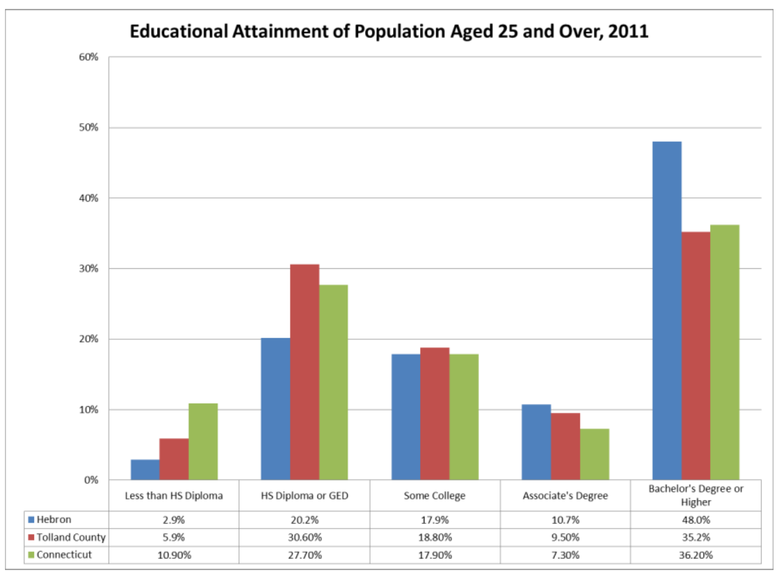


Figure 4: Educational Attainment

Source: U.S. Census Bureau, 2011

Hebron's affluence is further exemplified by its low poverty rate in comparison to Tolland County and the State. Hebron's poverty rate of 2.3% is 6.4 percentage points less than that of the County and 8.6 percentage points below that of the State.

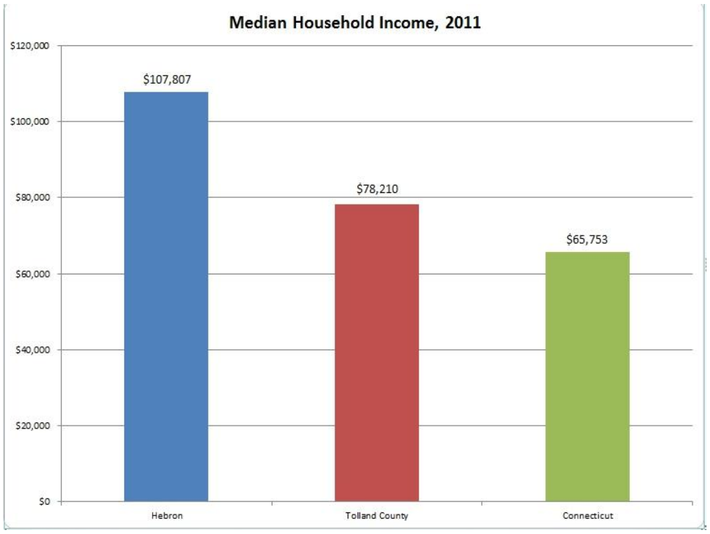


Figure 5: Median Household Income
Source: U.S. Census Bureau, 2011

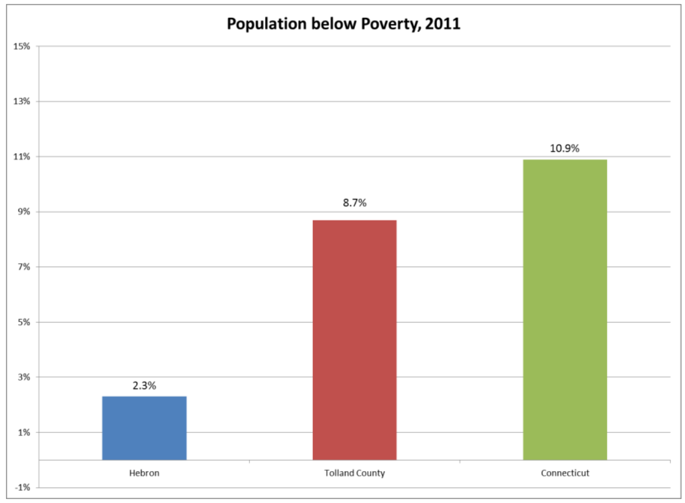


Figure 6: Population below Poverty
Source: U.S. Census Bureau. 2011

Housing

In 2011, Hebron had a total of 3,580 housing units, a 15% increase from 2000. The growth of housing units is slightly above the growth for Tolland County (13%) and nearly double the growth for Connecticut (8%).

The vacancy rate of housing units in Hebron has increased by approximately 3 percentage points from 2000 to 2011, though the vacancy rate is slightly lower in Hebron than in the County and nearly 2 percentage points lower than the overall vacancy rate housing units in Connecticut (See Figure 8).

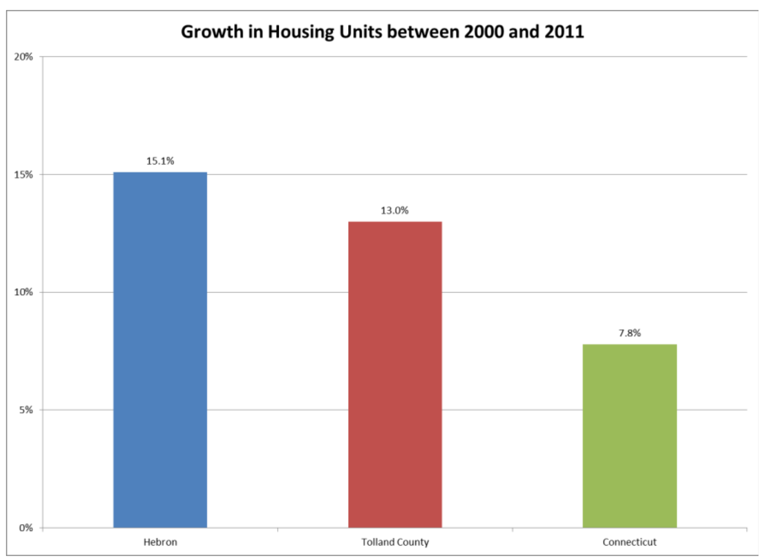
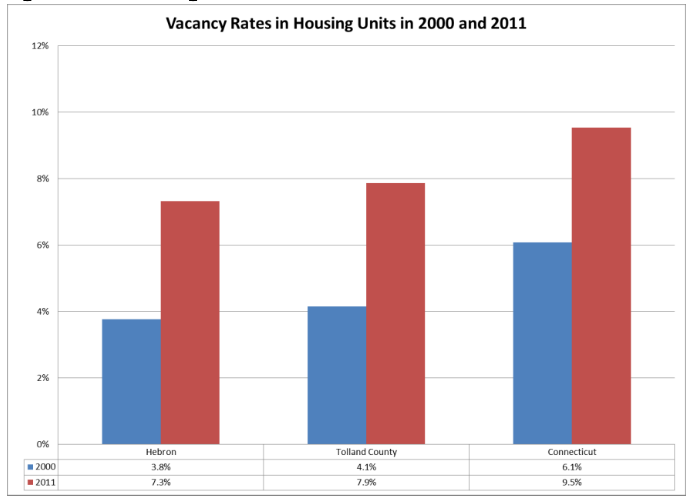


Figure 7.
Source: US Census Bureau, 2011

As seen in Figure 9, the majority of the population in Hebron is comprised of homeowners (94%), while 6% of the tenants are renters. The percentage of homeowners in Hebron is 20 percentage points higher than the percentage of homeowners in Tolland County and nearly 30 percentage points above the percentage of homeowners in Connecticut.

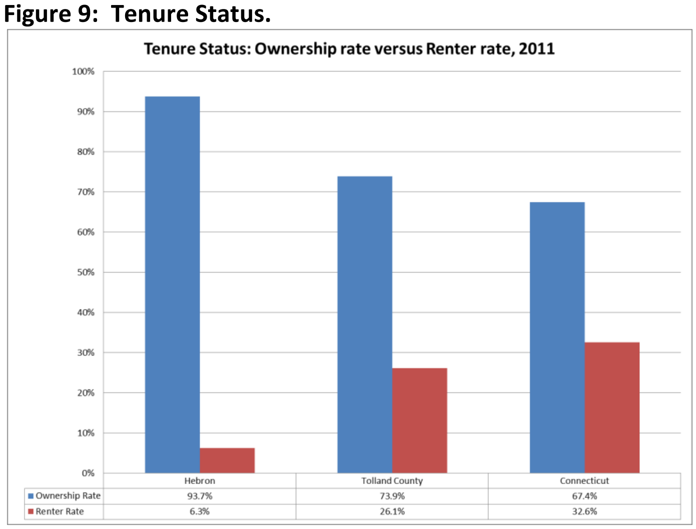
The average home value in Hebron in 2011 was $350,427, which is comparable with the average overall home value in Connecticut of $345,143. The average home value in Hebron is approximately $76,000 more than the average home value in Tolland County. Furthermore, the average home value in Hebron increased by nearly 88% from 2000 to 2011, compared to a growth of 63% and 52% in the County and State respectively.

Figure 8: Housing Vacancies.



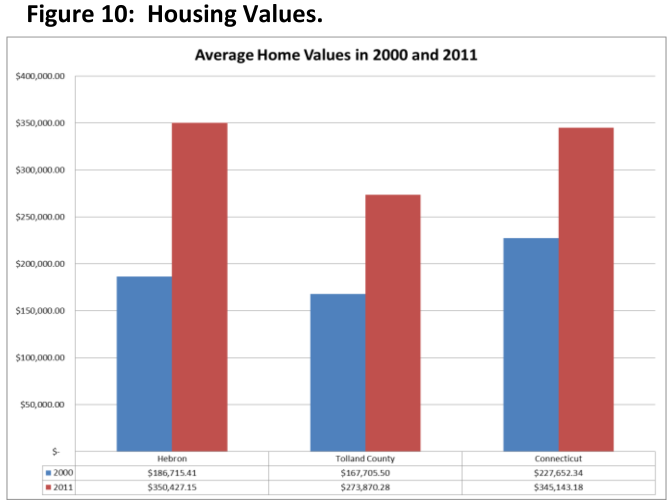
Source: US Census Bureau, 2011

Figure 9: Tenure Status.



Source: US Census Bureau.

Figure 10: Housing Values.



Source: US Census Bureau, 2011

Economy

Top Industries

Important industries have been identified based on the number of establishments and the concentration of employment within each industry. This analysis was conducted using data from the 2010 Census' Zip Business Patterns database. Based on the percentage of total establishments within each industry, top industries in Hebron are Health Care and Social Assistance with a little over 20% of all establishments in this sector (a total of 24 establishments), and Other Services (except public administration) with 16% of all establishments in this sector (a total of 19 establishments) (see Figure 11). These are two industry sectors in which the concentration of establishments is significantly higher than the concentration of establishment within these sectors in Tolland County and the State. Retail trade is also a significant sector in Hebron, with 15% of all establishments within the Town dedicated to Retail trade (a total of 18 establishments). This concentration is comparable to the 15.5% of establishments within Retail trade in Tolland County, and 14.5% of establishments within Retail trade in Connecticut.

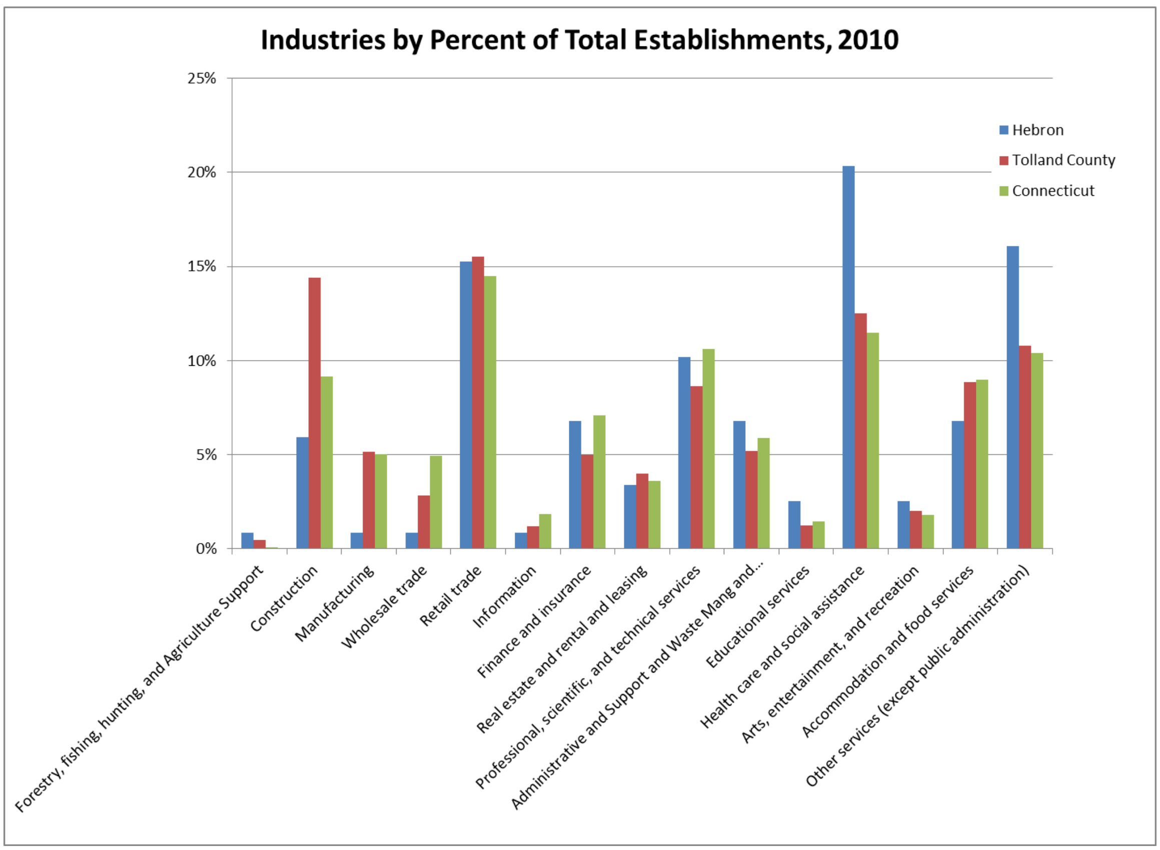


Figure 11: Industries by Percent of Establishments
Source: Zip Business Patterns, Census Bureau, 2010

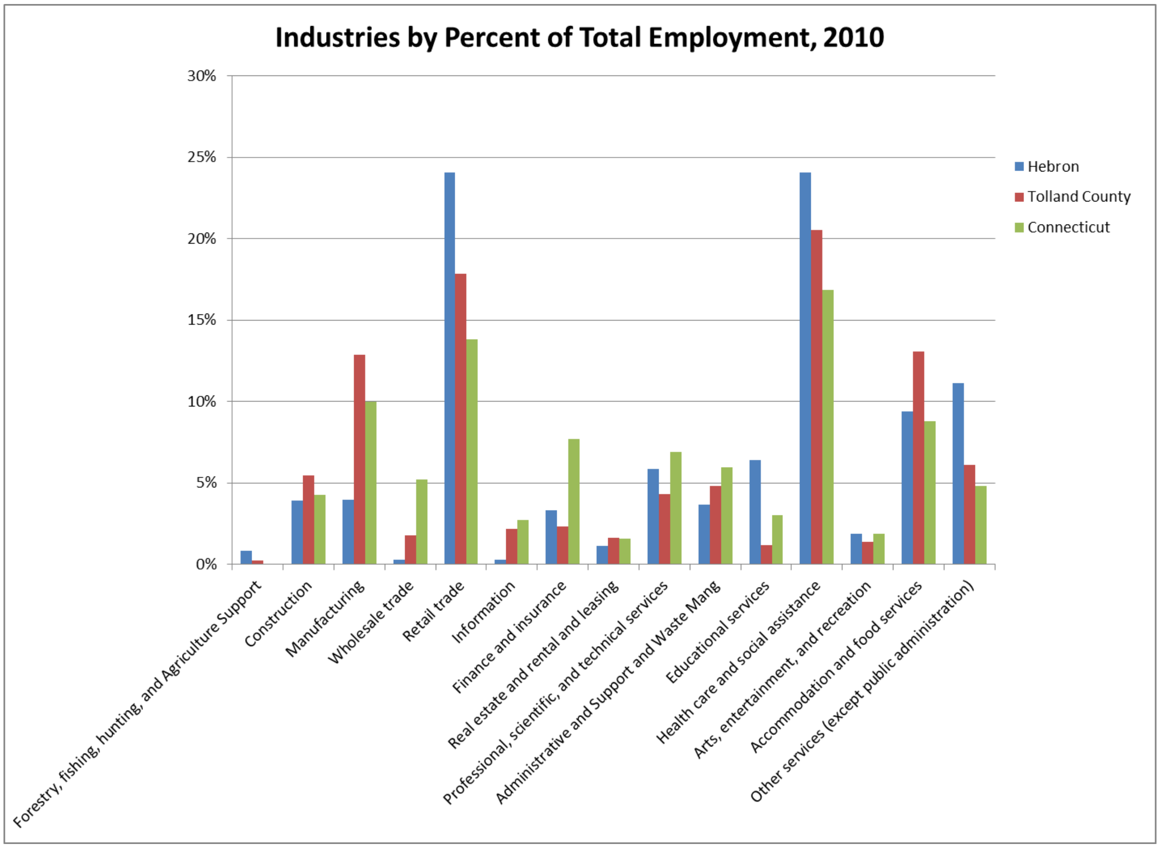


Figure 12: Industries by Percent of Employment
Source: Zip Business Patterns, Census Bureau, 2010

Top industries in Hebron, based on concentrations of employment, are aligned with the industries with the highest concentration of establishments within the Town. Retail Trade and Health Care and Social Assistance hold the highest percentage of employment, both with 24% of all employment (approximately 210 jobs each) (see Figure 12). Employment concentration in Retail Trade in Hebron is approximately 6 percentage points above that of the Tolland County and 10 percentage points above that of the State. Similarly, the concentration of employment in Health Care and Social Assistance is 3 percentage points above that of Tolland County and 7 percentage points above that of the State. Employment in Other Services is also relatively concentrated in Hebron, with 11% of employment in this sector.

Industries by average annual payroll (or salary) per employee are presented in Figure 13. Information on payroll was not available for the Town of Hebron, therefore only data on Tolland County and Connecticut is shown. From this analysis, Tolland County does not appear to have a competitive advantage in salaries for any industry relative to the State as a whole. Annual payroll for the Finance and Insurance sector in particular is significantly below the average in the State.

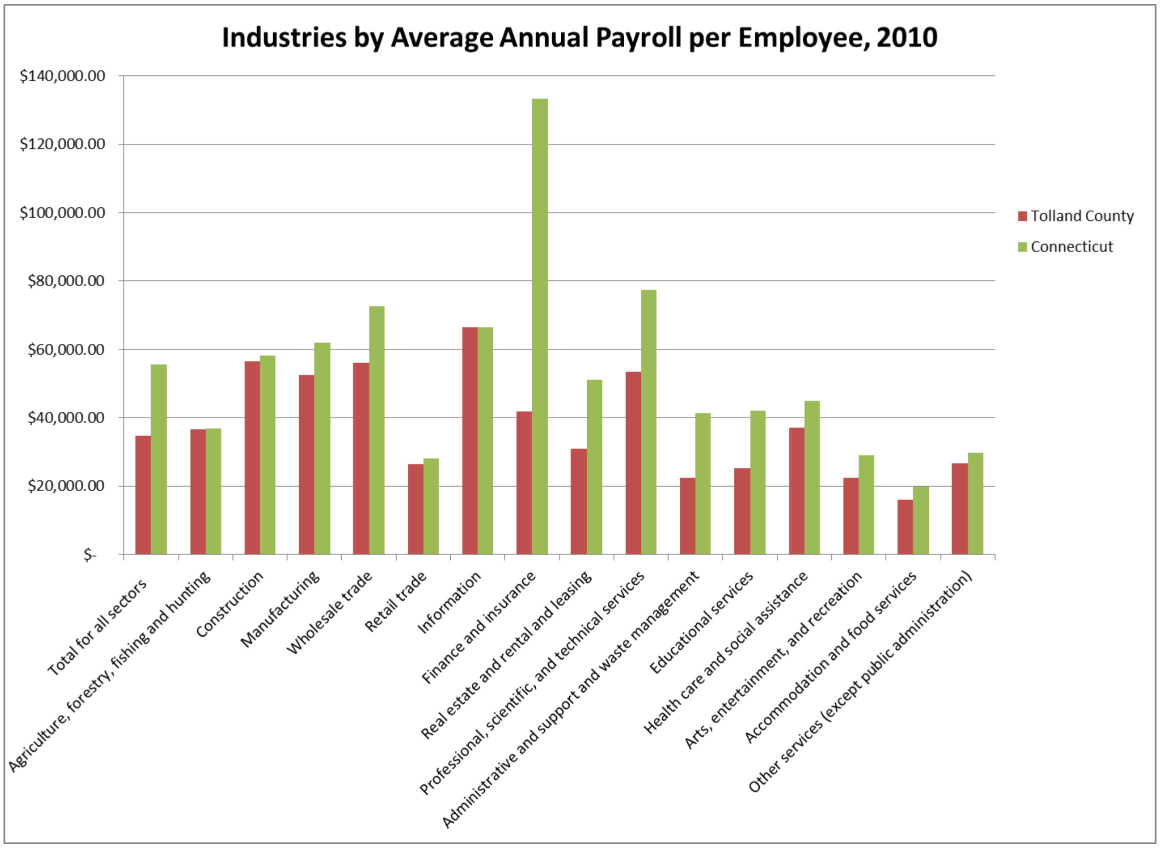


Figure 13: Industries by Average Annual Payroll per Employee
Source: Zip Business Patterns, Census Bureau, 2010

Top Occupations

The highest employing occupation in Hebron was Management in 2011 with nearly 12% of the population being employed in this field. Employment in managerial occupations is higher in Hebron than in the County or State as a whole. Other high employing occupations in Hebron include Office and Administrative Support occupations (10.8%), Sales and related occupations (10.3%), and Education, Training, and Library Occupations (9.7%), though Office and Administrative Support and Sales and Related Occupations have higher concentrations of employment in Tolland County and the State (See Figure 13).

Growth in employment between 2000 and 2011 was most significant in the Arts, Design, Entertainment, Sports & Media occupation, which grew 157% in Hebron (an increase of 88 jobs) and decreased in both the County and the State. Employment in Legal, Protective Service, and Computer and Mathematical occupations also outpaced the County and the State. Other occupations where employment declined include Community and Social Services and Life, Physical, and Social Science occupations.

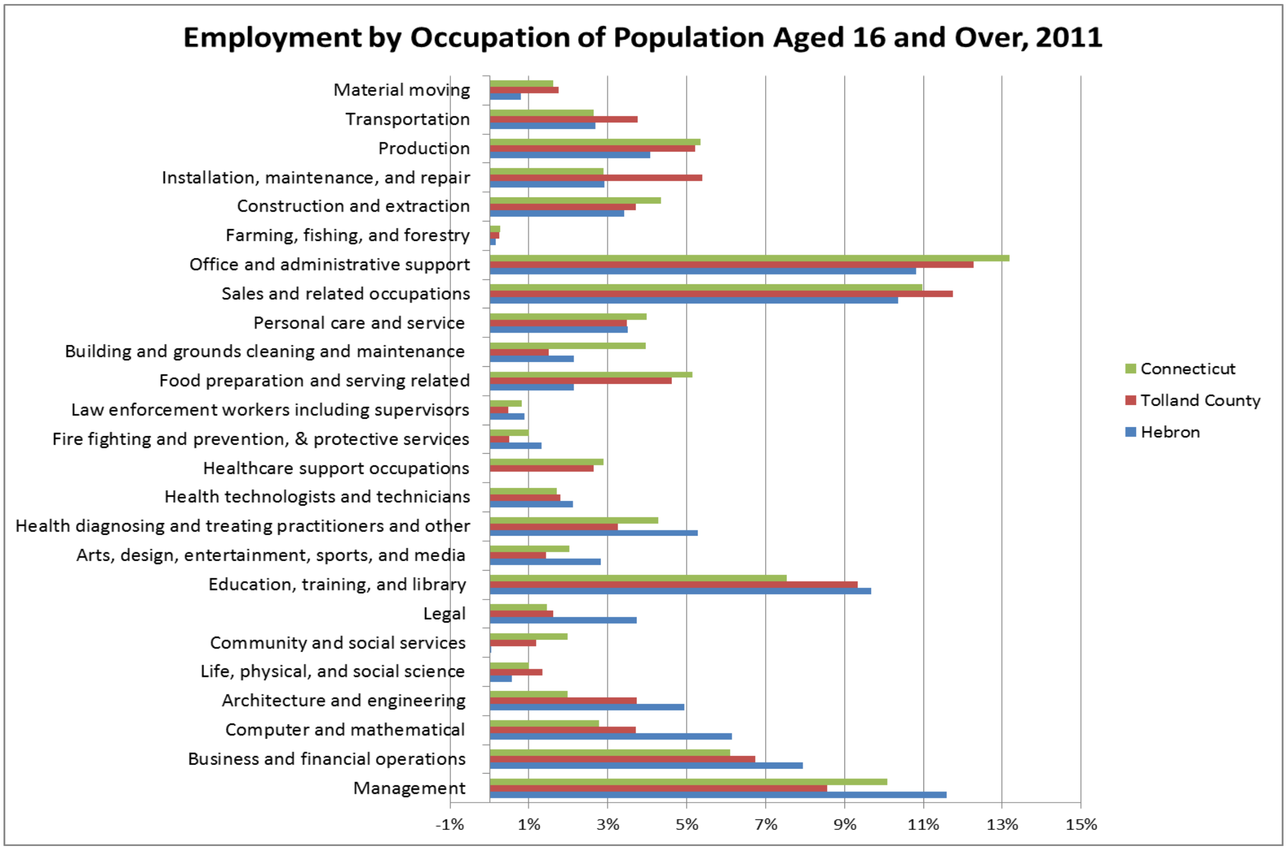


Figure 14: Employment by Occupation
Source: U.S. Census Bureau, 2011

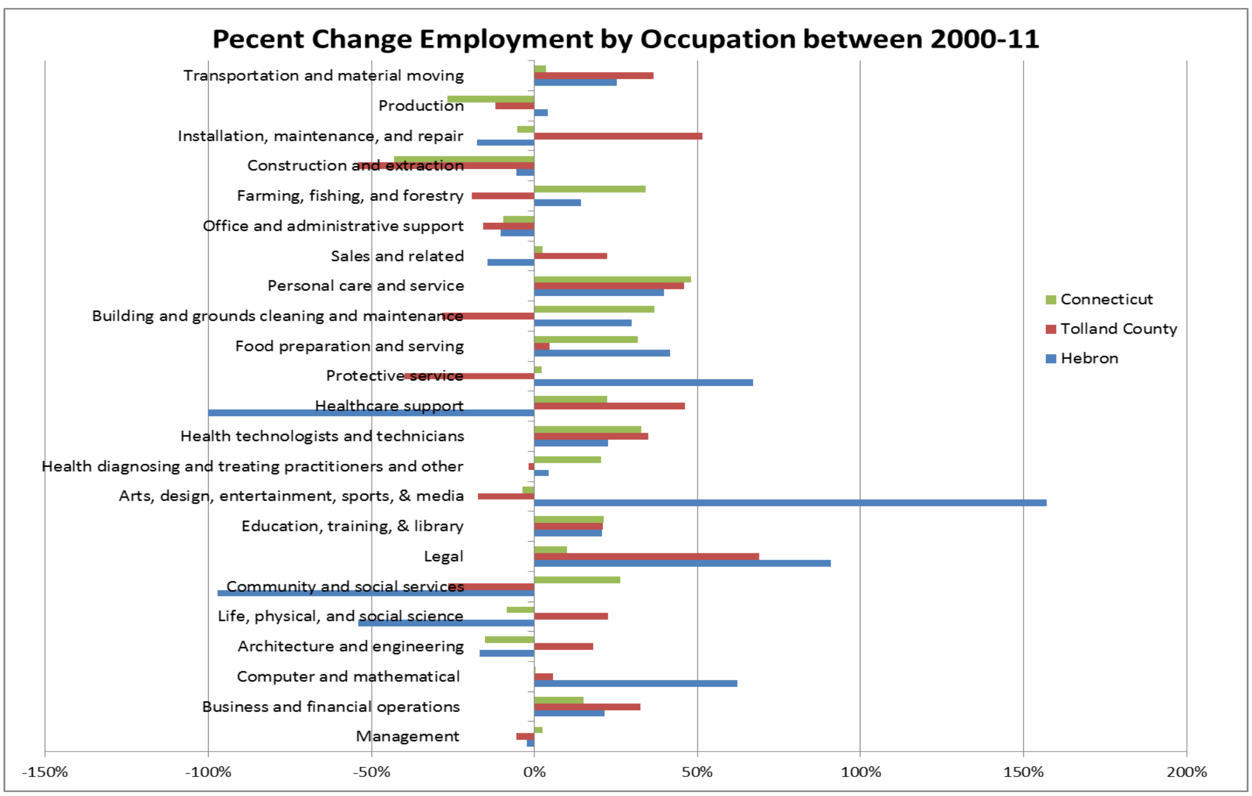


Figure 15: Percent Change in Employment by Occupation
Source: U.S. Census Bureau, 2000, 2011

Overview of the Benchmark Towns

At its February 6, 2013, meeting, the project steering committee identified eight towns in Connecticut to serve as “benchmarks” for Hebron. The intention was to compare various aspects of the demographics and economics of these towns to Hebron to better understand the ways in which Hebron is (and is not) comparable to these other towns in terms of its ability to sustain and/or attract economic activity. The towns included in this benchmark analysis are:

- **Canton**, particularly because of downtown retail activity associated with Canton Village
- **Colchester**, whose stores the committee felt may be a direct competitor for Hebron for stores and businesses
- **Glastonbury**, which was felt to have patterns of income and growth to Hebron
- **Granby**, seen by the committee as similar to Hebron demographically and economically
- **Mansfield** which has had an active downtown revitalization effort, including a recently initiated Downtown Partnership
- **Marlborough**, which shares regional High School with Hebron
- **Simsbury**, a high-income community that has a strong Main Street program
- **Somers**, on the MA border, which the committee felt could be a similar “pass through” community in the same way Hebron has much through traffic that could be a potential target for local retailers.

This section provides an overview of the demographics and economics of the benchmark communities compared to Hebron. Subsequent sections of will examine retail in particular and then provide an overview of how these communities’ overall economic base compares to Hebron’s.

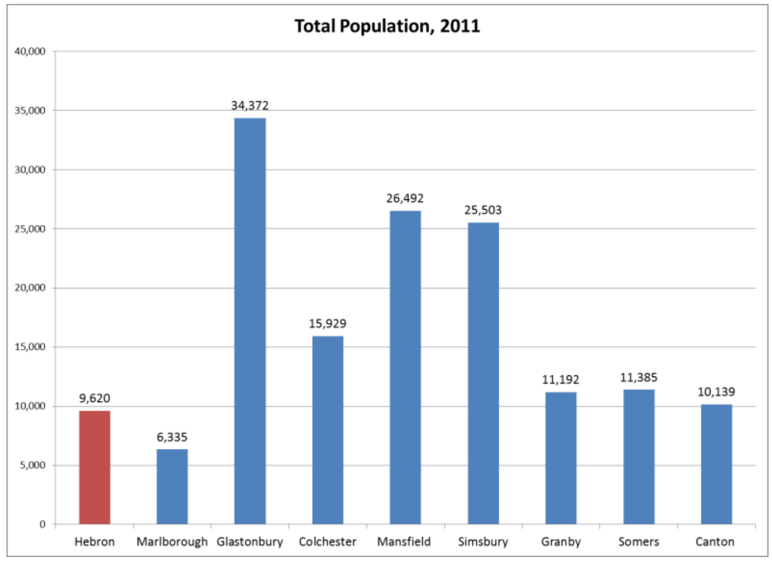
In summary, compared to the benchmark towns, Hebron has a smaller population than most and is more rural in character, with moderate population growth from 2000 to 2010. Hebron has a slightly higher concentration of its population under 35 compared to the benchmark communities. Like those communities, Hebron’s population is relatively well-educated, with approximately half of the adult population possessing a bachelor’s degree or higher.

The benchmark analysis revealed two important but paradoxical trends regarding Hebron. First, it is an affluent community, with a median household income of $107,000, exceeded only by Marlborough and Simsbury among the benchmark communities. This suggests that, despite its relatively small population, the town could support additional retail activity. On the other hand, in what may be the most important finding from the benchmark analysis, the data revealed that Hebron has a relatively small daytime population due to outcommuting with relatively few in commuters or resident workers. This is associated with relatively low sales by businesses in town compared to the spending by households (i.e., much of the spending by Hebron’s households takes place outside of town). The implications of this will be discussed in the recommendations section.

The detailed results of the benchmark analysis are provided below.

Figure 16 displays the total population for Hebron – and the benchmark towns of Marlborough, Glastonbury, Colchester, Mansfield, Simsbury, Granby, Somers and Canton. Hebron, with 9,620 residents, has a lower total population than the majority of the benchmarks; only Marlborough, with 6,335 residents, has fewer. Figure 17 examines the percent growth in total population for these towns from 2000-2011. With a population growth of 11.7%, Hebron is slightly above the average of most of its benchmarks, excluding Mansfield and Canton.

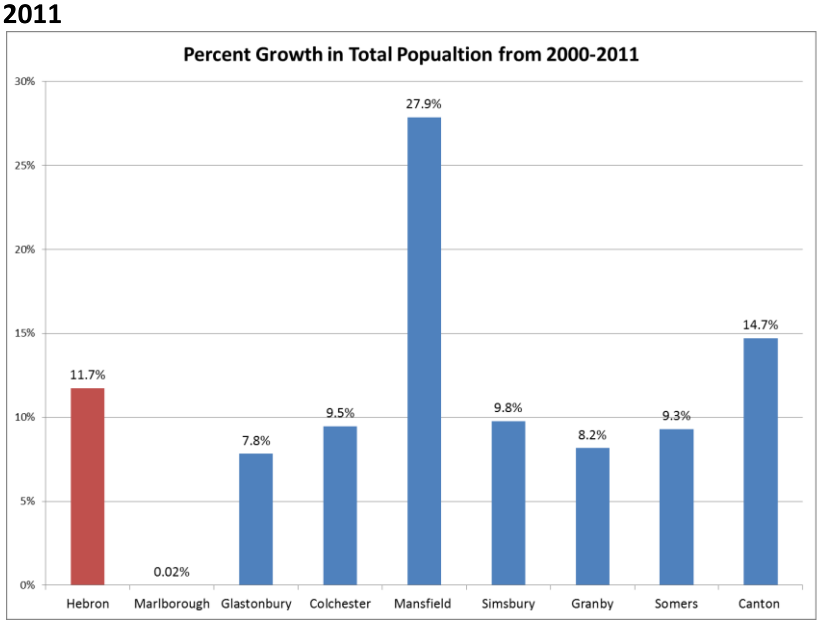
Figure 16: Total Population of Hebron and Benchmark Towns, 2011



Source: US Census Bureau, American Community Survey; 2011

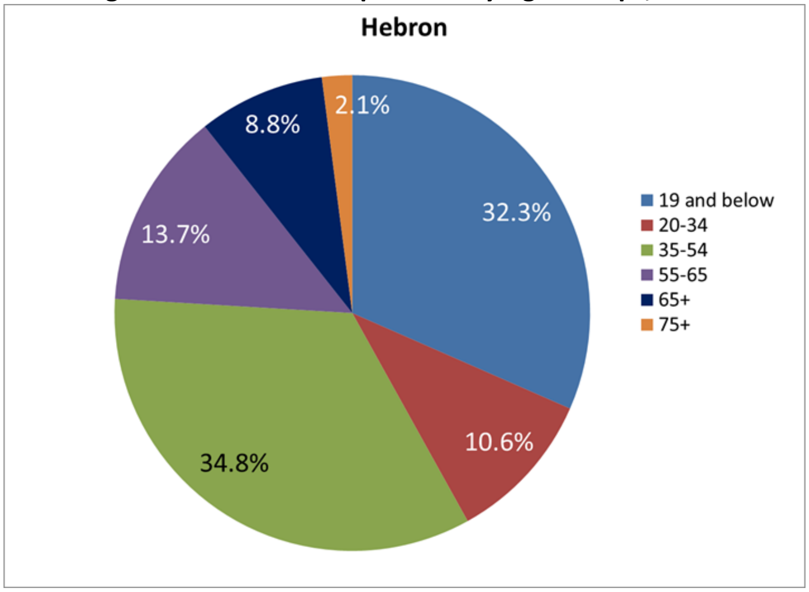
Figure 18 looks at Hebron's population by age groups for 2011. Like its benchmarks, the majority of Hebron's population falls into the categories of 19 and below and between the ages of 35 and 54. Figure 19 features this data for the towns of Canton, Marlborough, Glastonbury and Colchester. Each of those towns exhibits the same trend, with the majority of their respective populations falling into the categories of 19 and below and between 35 and 54. Figure 20 includes this data for Mansfield, Simsbury, Granby and Somers. Simsbury, Granby and Somers follow this exact pattern, with the majority of their residents being under 19 or between 35 and 54. The exception is Mansfield, for which the greatest age range category is the 20-34 "young professional" group. This can be attributed to the presence of the University of Connecticut at Storrs, which is within Mansfield.

Figure 17: Population Growth in Hebron and Benchmark Town, 2000-2011



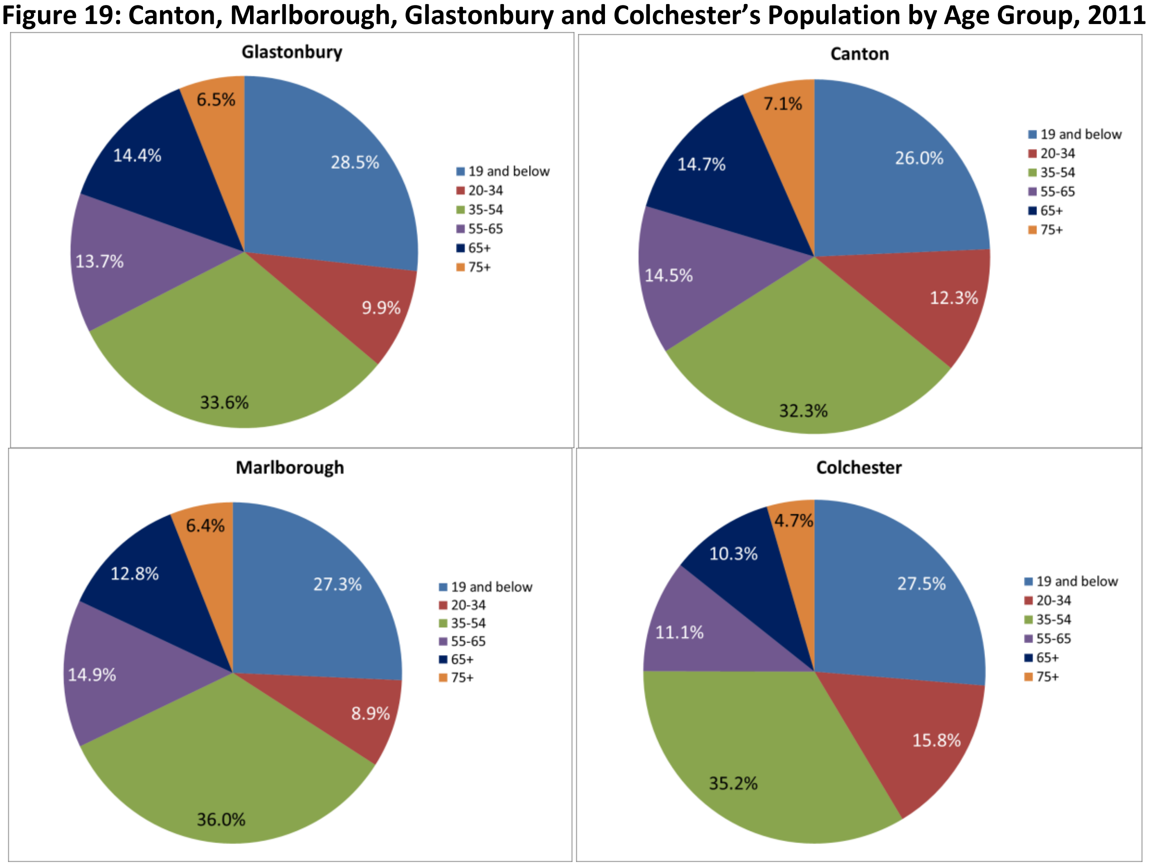
Source: US Census Bureau, American Community Survey; 2011

Figure 18: Hebron's Population by Age Groups, 2011



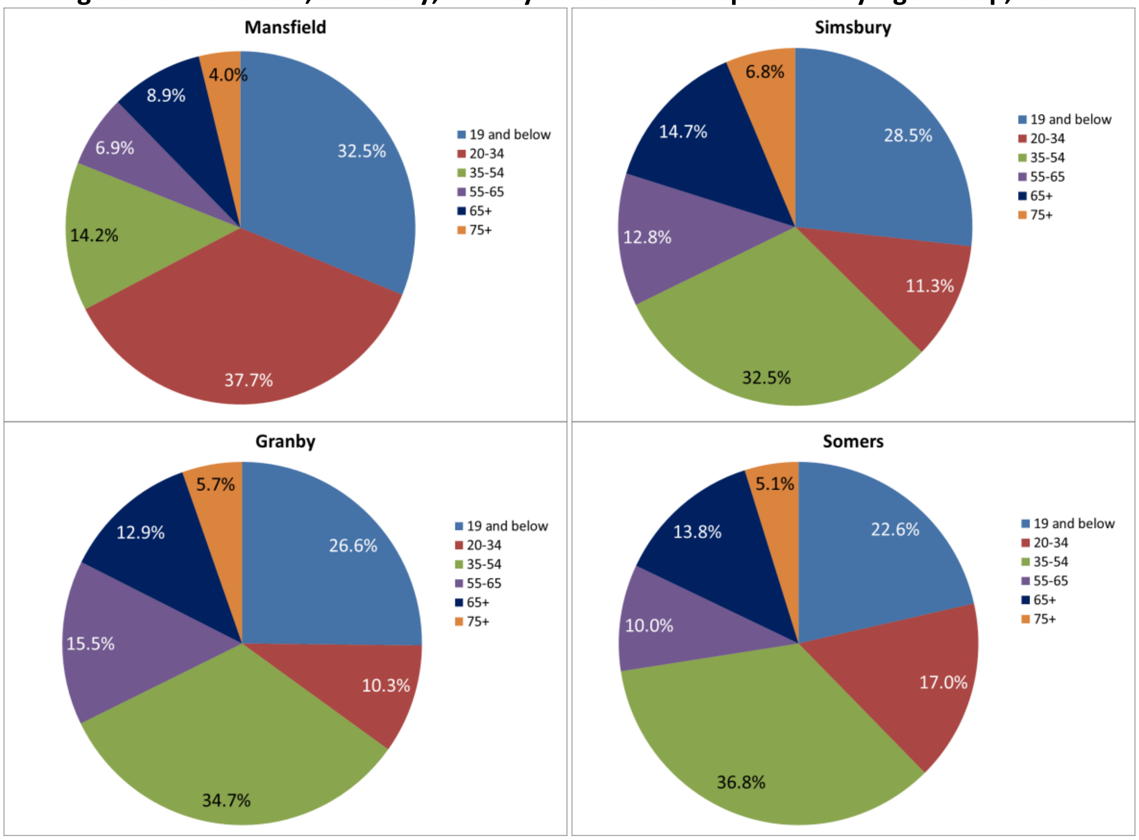
Source: US Census Bureau, American Community Survey; 2011

Figure 19: Canton, Marlborough, Glastonbury and Colchester's Population by Age Group, 2011



Source: US Census Bureau, American Community Survey; 2011

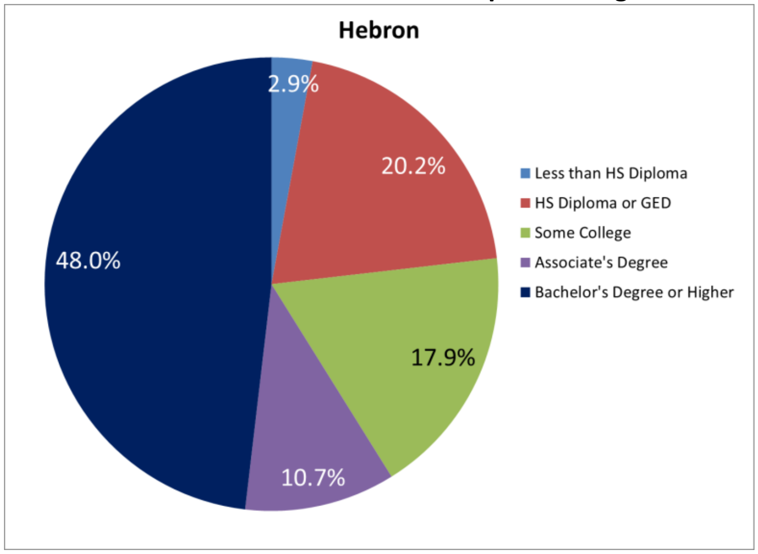
Figure 20: Mansfield, Simsbury, Granby and Somers' Population by Age Group, 2011



Source: US Census Bureau, American Community Survey; 2011

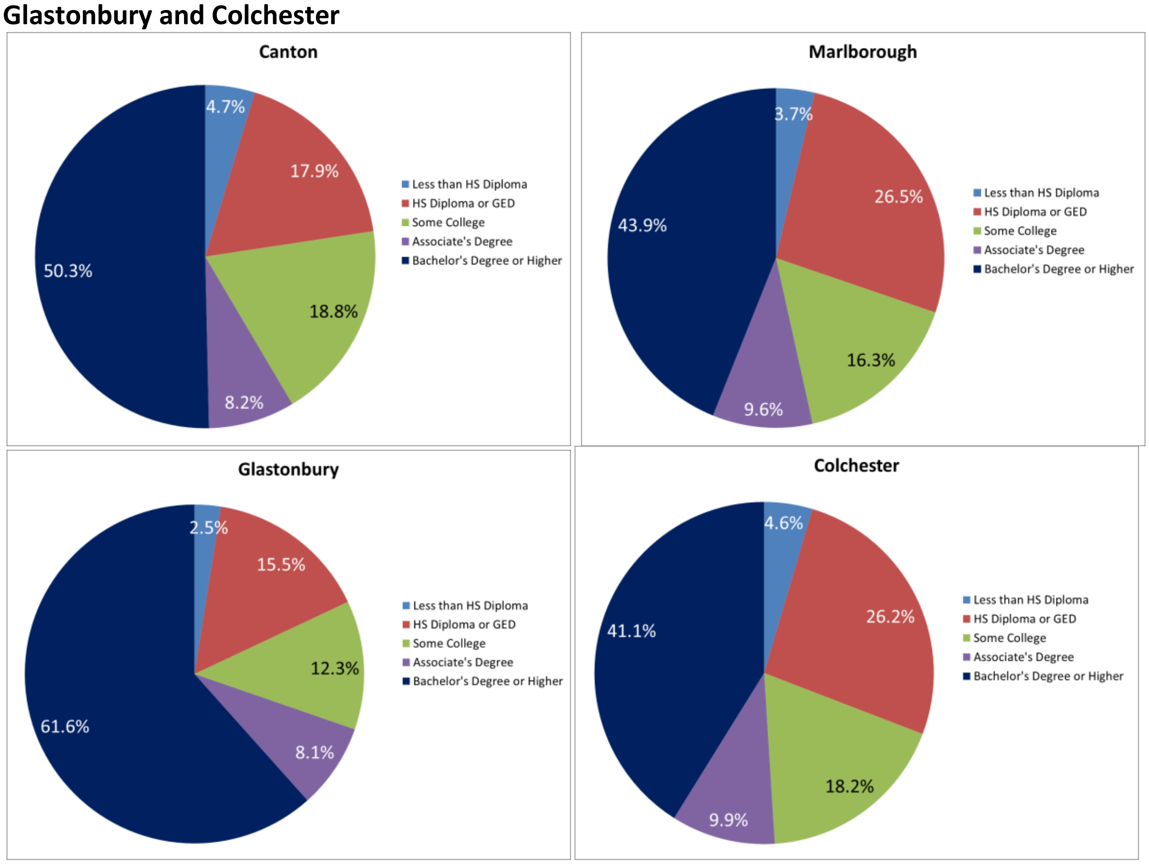
Figure 21 displays information on the educational attainment levels for Hebron residents age 25 and over. Figure 22 features this information for Canton, Marlborough, Glastonbury and Colchester; figure 8, for Mansfield, Simsbury, Granby and Somers. Like its benchmark towns, Hebron is highly educated. Nearly half of the 25 and over population in most towns has a Bachelor's Degree or higher. 48% of Hebron's 25 and over population has attained this level of education. Glastonbury (figure 22) and Simsbury (figure 23) are the most highly educated among Hebron's benchmark towns, with their populations at this education level coming in at 61.6% and 65.6%, respectively. The lowest percentage of residents over 25 with a Bachelor's Degree is Somers, at 30.1%.

Figure 21: Educational Attainment for Hebron Population Aged 25 and Over



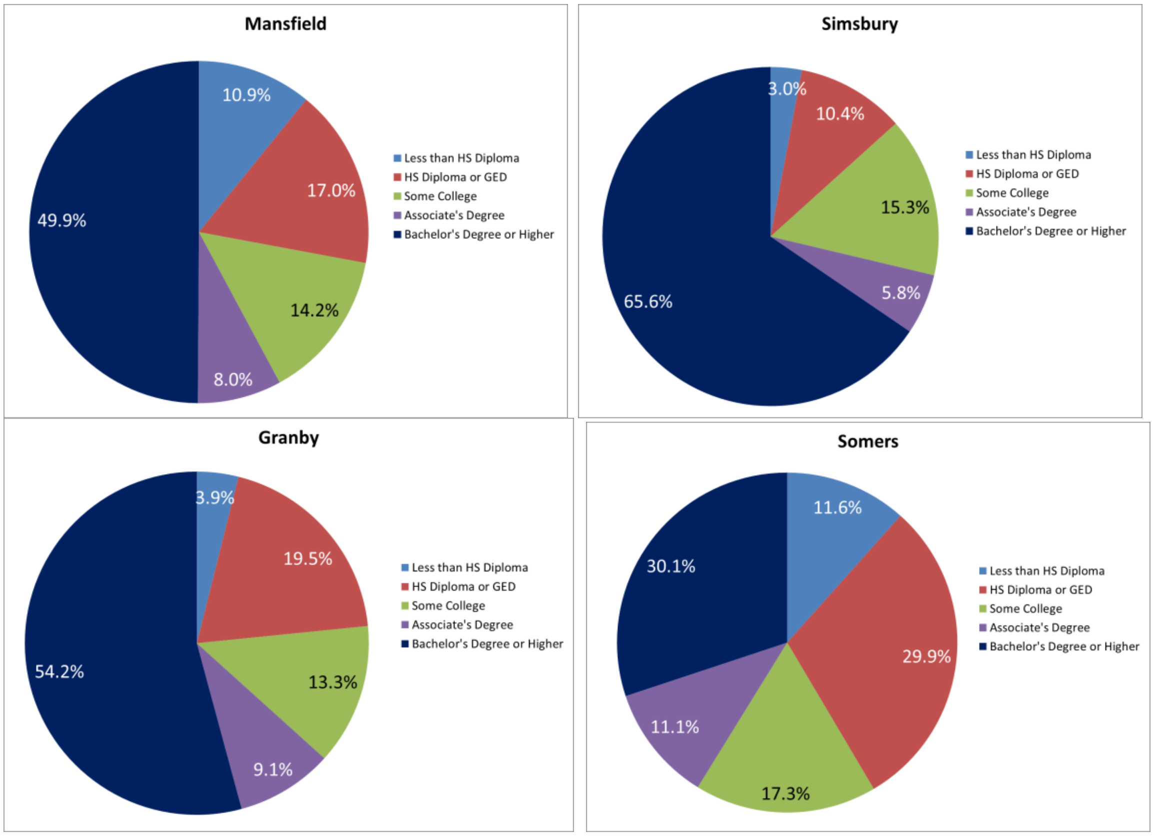
Source: US Census Bureau, American Community Survey; 2011

Figure 22: Educational Attainment for Population Over 25 in Canton, Marlborough, Glastonbury and Colchester



Source: US Census Bureau, American Community Survey; 2011

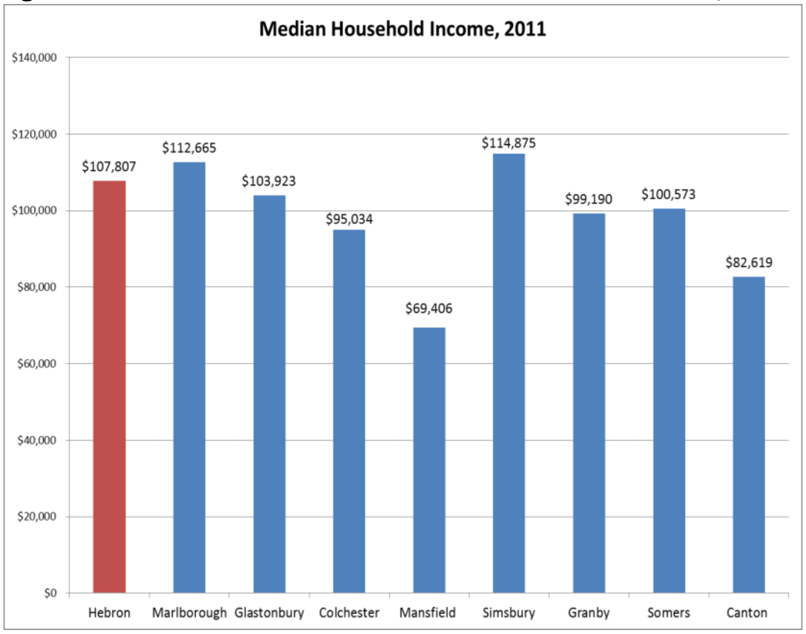
Figure 23: Educational Attainment for Population Over 25 in Mansfield, Simsbury, Granby and Somers



Source: US Census Bureau, American Community Survey; 2011

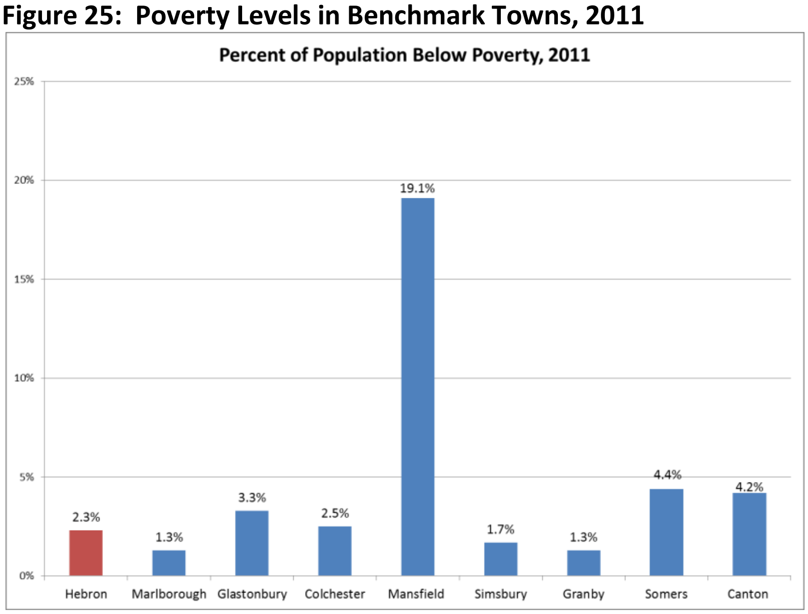
Figures 24 and 25 present data on the income and poverty levels for each benchmark town. Figure 24 ranks each town by median household income in 2011. Like many of its benchmark towns, Hebron is highly affluent. With the exception of Mansfield and Canton, median household incomes are near or above $100,000. Hebron weighs in at $107,807, surpassed only by Marlborough at $112,665 and Simsbury at $114,875. Figure 25 looks at the 2011 data regarding the population percentage of each town below the poverty level. The poverty rate is low in the majority of benchmark towns, with the exception of Mansfield. This is due to the presence of college students in the town, who are counted in the resident population but who typically are supported by savings or parental contributions and therefore report little or no income of their own. 2.3% of Hebron's population fell under the poverty level in 2011; only Marlborough, Simsbury and Granby had lower populations in this income range. By comparison, 19.1% of Mansfield's population was below the poverty level.

Figure 24: Median Household Income of Benchmark Towns, 2011



Source: US Census Bureau, American Community Survey; 2011

Figure 25: Poverty Levels in Benchmark Towns, 2011



Source: US Census Bureau, American Community Survey; 2011

Benchmarking Retail Trade

Table 1 contains data comparing total retail sales and retail sales by sector for Hebron against the combined average of those of its benchmark towns. The first column ranks Hebron against the rest of the benchmark towns by average yearly sales per household in a number of selected retail sectors. In this regard, Hebron stands out as an anomaly: while the retail sales per household for the benchmark towns averages $30,970, Hebron has significantly lower sales per household, at $9,360. The second column in table 1 looks at the average yearly retail sales per establishment. For the benchmark towns overall, the total average spending for all sectors is $51,020; for Hebron, this average is $46,720. While the figure for Hebron is lower than the benchmark communities, it is roughly comparable. So, if spending by Hebron households is more or less the same as the benchmark communities, why are the per-household sales by Hebron businesses so far below the comparable average for the benchmark communities? The answer appears to lie in the difference between Hebron and the town benchmarks in terms of the size of the daytime population in each community. The daytime population of a community consists of nonworking residents, residents who work in the town and nonresidents who commute into town for work. As shown in the figure below, Hebron's daytime population is 65 percent of its total population, lower than all benchmark communities. This fact, coupled with Hebron's relatively low population suggests that the Town is at a marked disadvantage in generating retail activity compared to these other benchmark communities. Simply put, because of its low daytime population, there are fewer "feet on the street" during the day to support retail in Hebron.

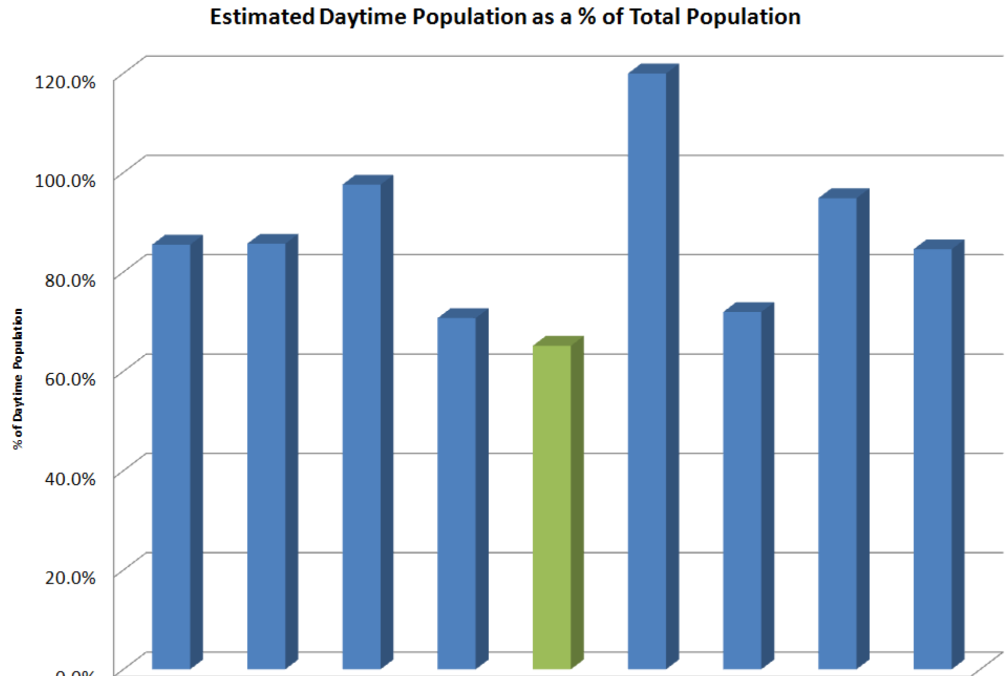
Table 1: Sales by Household and Establishment in Top Retail Sectors

	Sales (000s)/HH		Demand(000s)/HH	
Industry Summary	Average, All Benchmark Communities	Hebron	Average, All Benchmark Communities	Hebron
Total Retail Trade and Food & Drink	$ 30.98	$ 9.36	$ 51.02	$ 46.72
Total Retail Trade	$ 28.19	$ 8.02	$ 45.94	$ 42.09
Total Food & Drink	$ 2.78	$ 1.34	$ 5.08	$ 4.62

Source: Compiled by Fairweather Consulting using data from ESRI Business Analyst Online.

This is an important distinction (and potential disadvantage) for Hebron that will be addressed in the recommendations section of this report.

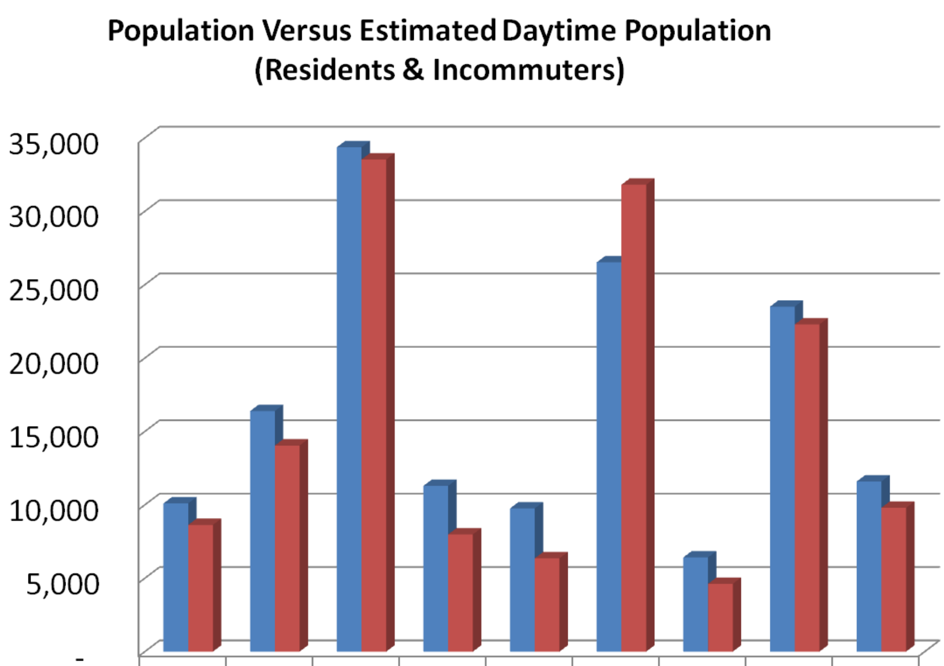
Figure 26: Total Estimated Daytime Population for Hebron and Its Benchmarks



	Canton	Colchester	Glaston-bury	Granby	Hebron	Mansfield	Marlbor-ough	Simsbury	Somers
Series1	85.5%	85.7%	97.6%	70.7%	65.1%	120.0%	71.9%	94.9%	84.6%

Source: US Census Bureau, American Community Survey; 2011

Figure 27: Total Population Versus Daytime Weekday Population for Hebron and Benchmarks



	Canton	Colches-ter	Glaston-bury	Granby	Hebron	Mans-field	Marlbor-ough	Sims-bury	Somers
Total Population	10,096	16,384	34,358	11,287	9,754	26,517	6,416	23,500	11,585
Est. Daytime Wkday Pop:	8,630	14,038	33,526	7,981	6,354	31,808	4,616	22,291	9,798

Source: US Census Bureau, American Community Survey; 2011

Retail Opportunities: Leakage/Surplus Analysis

Retail *Leakage/Surplus* analysis quantifies the potential market opportunities by retail sector for a particular geographic area and highlights potential opportunities for new establishments. For a given geographic area, the analysis compares spending by households in that area with the selling by retail establishments in that same sectors for that geographic area. A surplus occurs when retailers are selling more than consumers are spending in the region, indicating that retailers are selling to non-local consumers and money is coming into the area. Conversely, leakage occurs when sales are lower than consumer spending within an area, indicating that consumers are shopping outside of the local area and money is leaking out.

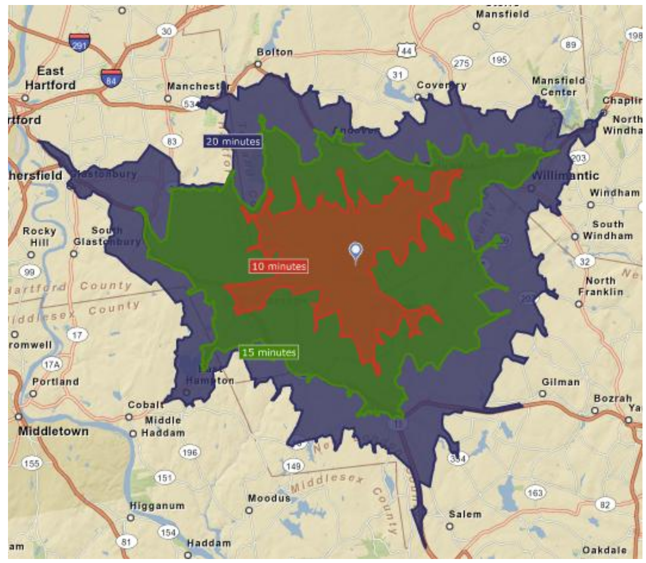


Figure 28: 10, 15, 20 Minute Drive Time Map

Using data from ESRI's Business Analyst On-line, the following analysis compared retail surpluses and leakages within 10, 15, 20, 30, and 60 minute drive times from the Town of Hebron (see Figures 28 and 29). Figures 30 through 34 show the leakage/surplus results for each driving time for each detailed industry sector. Green bars indicate leakage within that industry, while the red bars indicate surplus. Surpluses run from a scale of 0 to -100 (-100 indicating the highest amount of surplus), while leakages run from 0 to 100 (100 being the highest amount of leakage).

As seen in Figure 30, the 10-minute drive time from Hebron shows retail surpluses in three sectors: Beer, Wine & Liquor Stores; Furniture Stores; and Automobile Dealers. As driving time increases to 15 minutes, the number of surpluses also increases as shopping opportunities expand with the geographical area and consumers are better able to find the goods they seek. Within the 15-minute drive time there are retail surpluses in Other General Merchandise Stores, Sporting Goods/Hobby/Musical Instrument Stores, Health & Personal Care Stores, Beer, Wine, & Liquor Stores, Grocery Stores, and Furniture Stores.

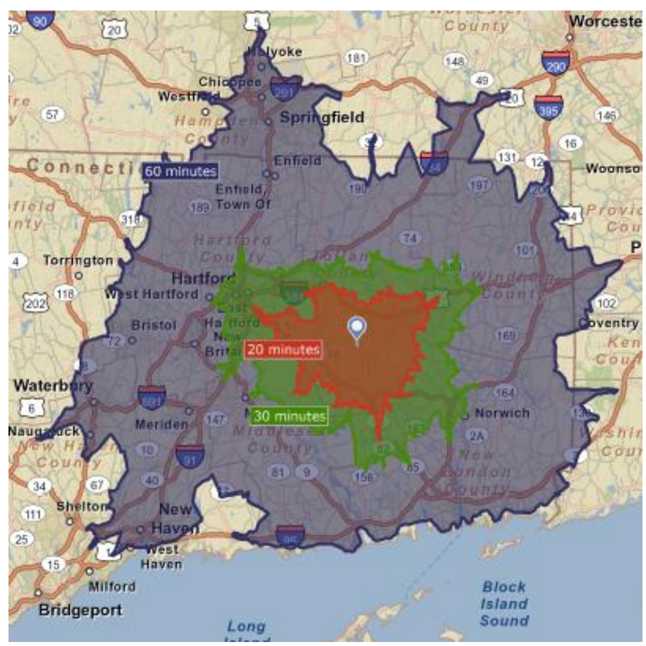


Figure 29: 20, 30, 60 Minute Drive Time Map

Source :Fig. 28 and 29: ESRI Business Analyst Online

Within the 20-minute drive time there are surpluses in Direct Selling Establishments; Vending Machine Operators; Used Merchandise Stores; Office Supplies, Stationary & Gift Stores; Sporting Goods/Hobby/ Musical Instrument Stores; Grocery Stores; and Automobile Dealers.

As we go further to the 30 minute and 60 minute drive times, we see that the number of sectors with surpluses increases but the amount of relative surplus/leakage decreases (see Figures 33 and 34). In the interest of finding an estimated market area for each of the sectors, we assumed that a market was at equilibrium (i.e. consumer spending, or demand, equals retail sales, or supply) at the point where leakage roughly equals surplus. Thus, the market area for each sector was approximated by finding the driving time in which a leakage turns into a surplus, or consumer spending is fully captured. For example, the market area for Grocery Stores was estimated to be between 10 and 15 minutes because at the 10-minute driving time the Grocery Stores have a leakage (consumers are leaving the ten minute radius to go grocery shopping), but at the 15-minute driving time Grocery Stores present a surplus (people are coming from outside the 15 minute area to shop for groceries). The equilibrium market is therefore somewhere between 10 and 15 minutes.

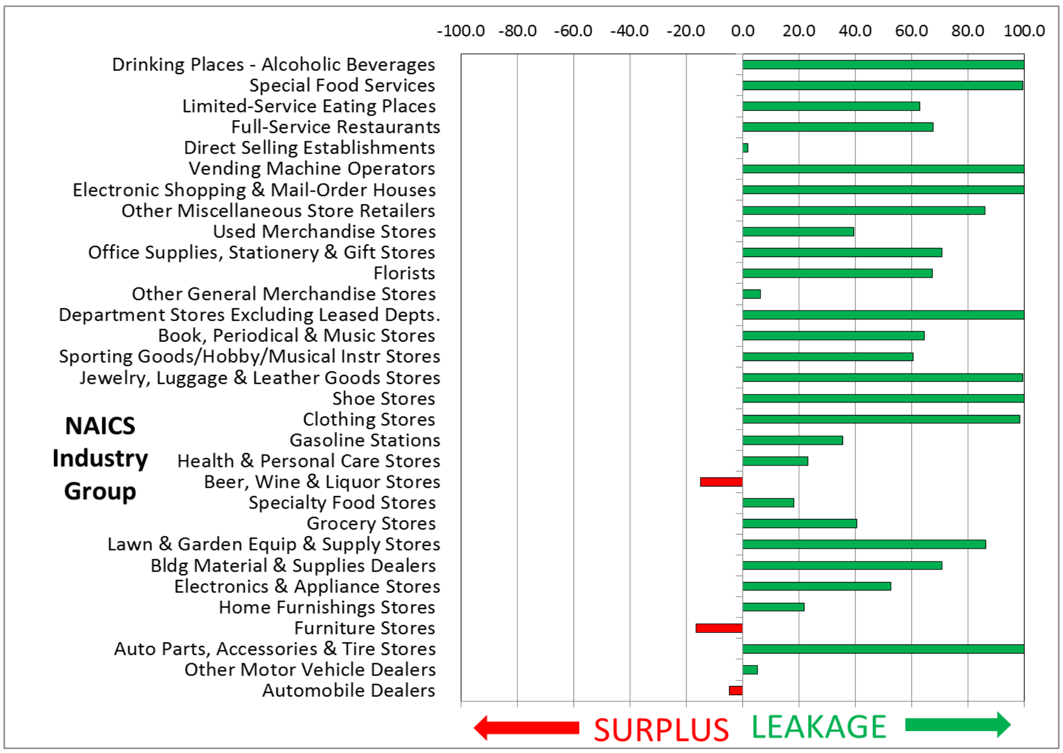


Figure 30: 10-minute Drive Time Source : ESRI Business Analyst

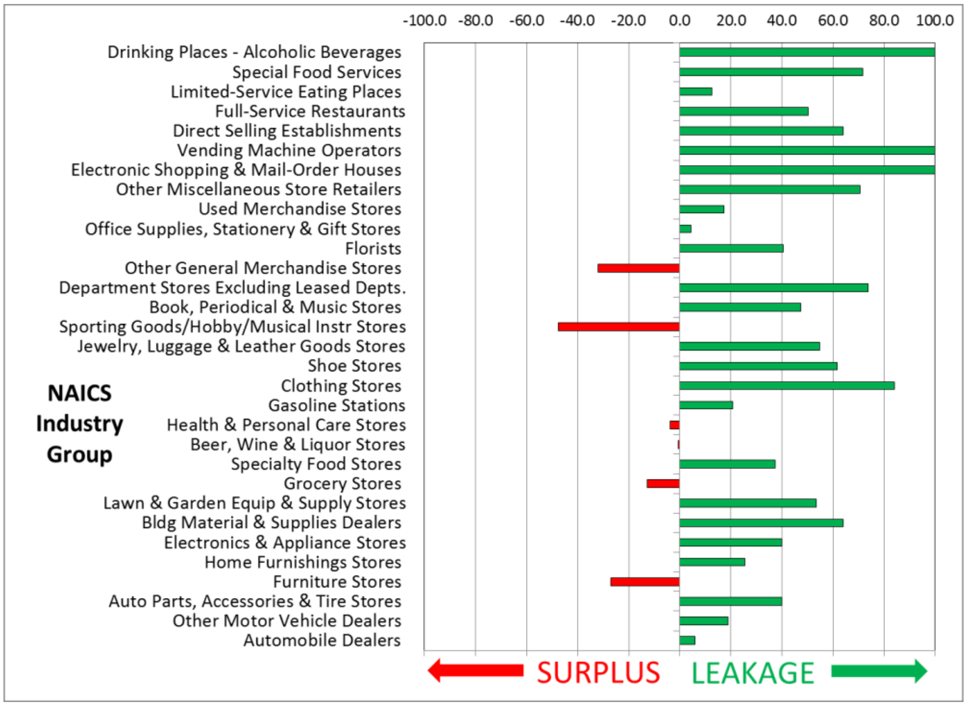


Figure 31: 15-minute Drive Time **Source: ESRI Business Analyst Online**

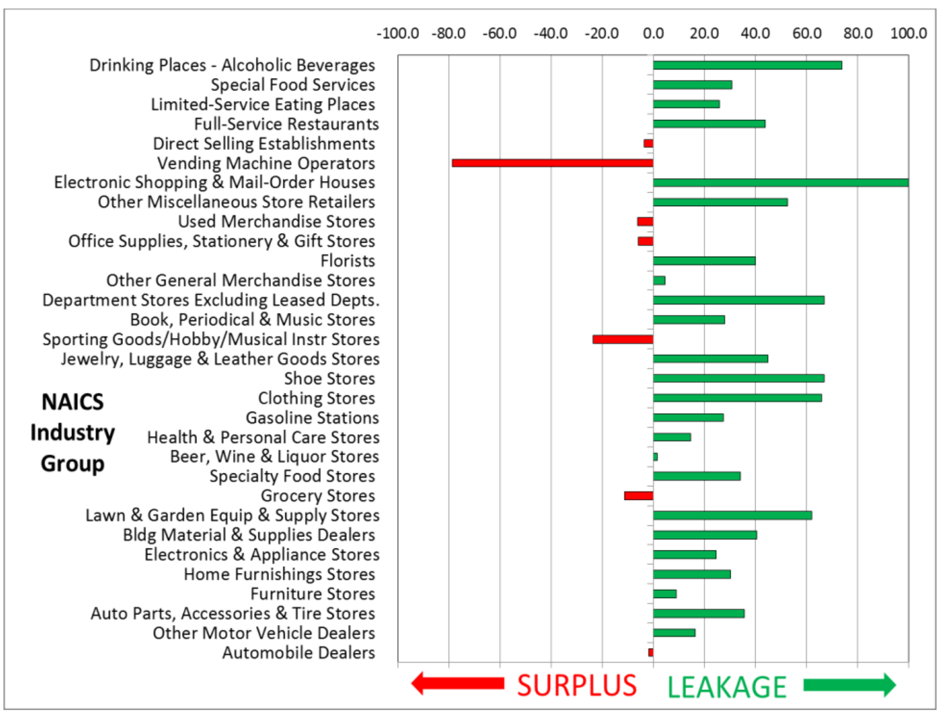


Figure 32: 20-minute Drive Time **Source: ESRI Business Analyst Online**

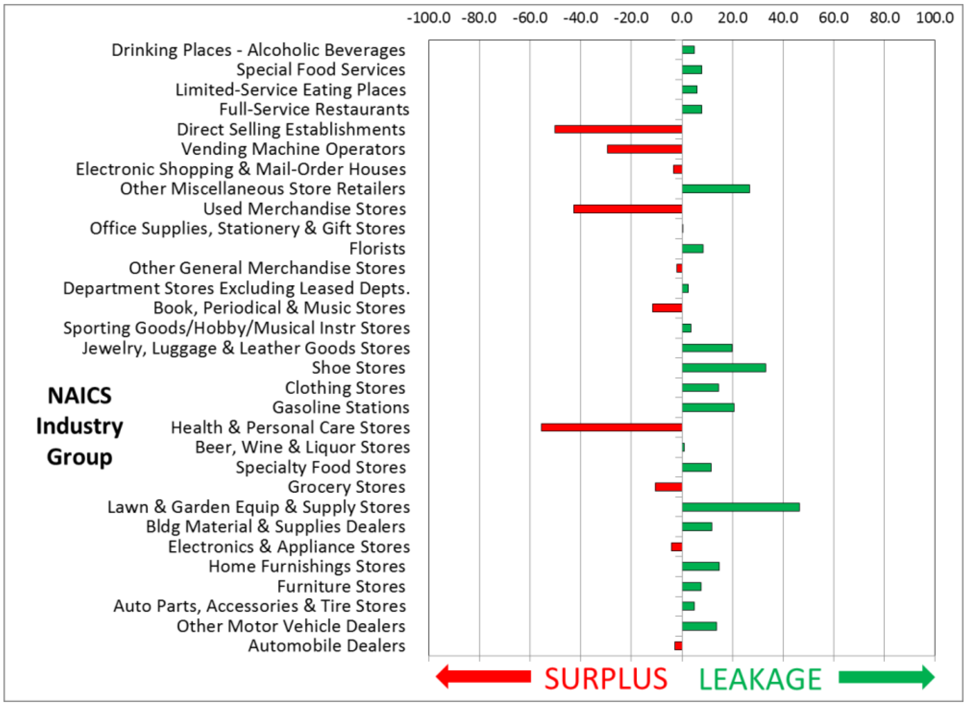


Figure 33: 30-minute Drive Time **Source: ESRI Business**

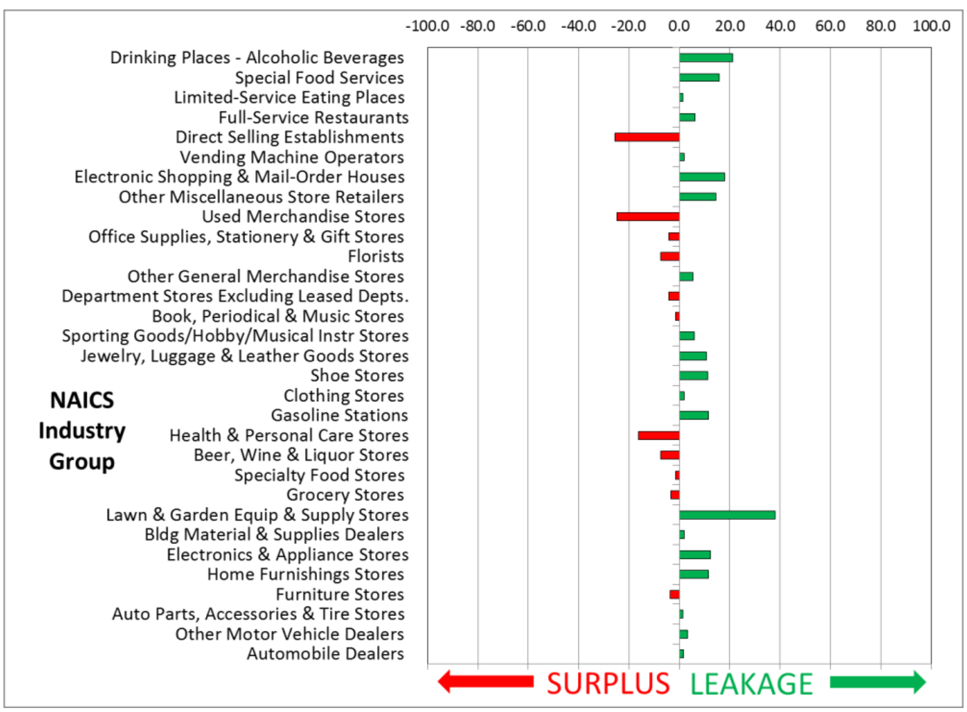


Figure 34: 60-minute Drive Time **Source: ESRI Business**

Table 2 consolidates the information from Figures 30 through 34 and summarizes the results of this process by providing an estimated market area for each sector. The greatest market potential for new stores in Hebron is found within sectors in which demand is not met within the 1 hour driving time (i.e. the estimated market area is above 60 minutes) *and* in which there is a large amount of leakage or a potential to capture dollars that are leaving the area. The sectors with the most potential to capture demand within the Hebron area are highlighted in red in Table 1 and include: Other Motor Vehicle Dealers; Home Furnishing Stores; Lawn and Garden Equipment and Supply Stores; Gasoline Stations; Shoe Stores; Jewelry, Luggage & Leather Goods Stores; Other Miscellaneous Store Retailers; Full-Service Restaurants; Limited-Service Eating Places; Special Food Services; and Drinking Places- Alcoholic Beverages. It is important to note that although the market for these sectors is unmet within the one hour driving radius, this also suggests that in some cases consumers are willing to drive beyond an hour to buy these goods. Thus some of these sectors might present only limited or niche opportunities for Hebron.

The amount of leakage in dollar amounts for each industry sector is presented in Table 2 by drive time. Using data on overall sales, the number of stores within each driving time per sector, and the corresponding amount of leakage, an estimated number of potential new stores was calculated. We will focus in this analysis on the sectors that have the highest potential for being successful in Hebron's local market as enumerated above and highlighted in Table 1. For the purposes of clarity, these sectors have been pulled from Table 2 and grouped into the categories of Durable Goods, Home and Garden, Apparel, Eating and Drinking Places, and Miscellaneous Goods. The leakage and market potential for new stores for each of these industry categories is presented in Tables 3 through 7.

Table 2: Estimated Market Area for Industry Sectors

Retail Sectors:	Estimated Market Area
Automobile Dealers	10 minutes
Furniture Stores	10 minutes
Beer, Wine & Liquor Stores	10 minutes
Grocery Stores	10 - 15 minutes
Health & Personal Care Stores	10 - 15 minutes
Sporting Goods/Hobby/Musical Instr Stores	10 - 15 minutes
Office Supplies, Stationery & Gift Stores	15 - 20 minutes
Used Merchandise Stores	15 - 20 minutes
Vending Machine Operators	15 - 20 minutes
Direct Selling Establishments	15 - 20 minutes
Electronics & Appliance Stores	20 - 30 minutes
Book, Periodical & Music Stores	20 - 30 minutes
Other General Merchandise Stores	20 - 30 minutes
Specialty Food Stores	30 - 60 minutes
Department Stores Excluding Leased Depts.	30 - 60 minutes
Florists	30 - 60 minutes
Electronic Shopping & Mail-Order Houses	30 - 60 minutes
Auto Parts, Accessories & Tire Stores	60 minutes
Bldg Material & Supplies Dealers	60 minutes
Clothing Stores	60 minutes
Limited-Service Eating Places	60 minutes
Other Motor Vehicle Dealers	60 + minutes
Home Furnishings Stores	60 + minutes
Lawn & Garden Equip & Supply Stores	60 + minutes
Gasoline Stations	60 + minutes
Shoe Stores	60 + minutes
Jewelry, Luggage & Leather Goods Stores	60 + minutes
Other Miscellaneous Store Retailers	60 + minutes
Full-Service Restaurants	60 + minutes
Special Food Services	60 + minutes
Drinking Places - Alcoholic Beverages	60 + minutes

Sector-specific results

The tables on the next page summarize the results for particular sectors.

NOTE: Leakage at 20-minute and 10-minute drive time may be largely due to low daytime population. Earners in high-income households in Hebron tend to leave town for work, with relatively few workers that come into Hebron during the day. Thus, the spending by households in Hebron is likely to exceed the sales by businesses in Hebron. Consequently, the "leakage" data for the 20- and 10-minute drive time may represent less of an opportunity that first appears due to this fact. In addition, as noted below, the opportunities identified for these sectors are likely to be niche opportunities that would require establishments that either sell specialized merchandise and/or provide specialized service or expertise as part of the retail experience.

Table 3: Leakage/Surplus and Potential New Stores

Retail Sectors:	Leakage for 10-minute drive time	Potential # of New Stores	Leakage for 15-minute drive time	Potential # of New Stores	Leakage for 20-minute drive time	Potential # of New Stores	Leakage for 30-minute drive time	Potential # of New Stores	Leakage for 60-minute drive time	Potential # of New Stores
Automobile Dealers	SURPLUS		$10,841,826	1.43	SURPLUS		SURPLUS		$161,324,145	27.72
Other Motor Vehicle Dealers	$263,365	0.22	$2,821,818	2.35	$5,086,950	5.12	$16,827,420	12.72	$22,889,127	17.65
Auto Parts, Accessories & Tire Stores	$2,346,961	3.89*	$4,844,916	8.03	$9,341,598	14.29	$6,472,418	8.84	$11,744,403	15.28
Furniture Stores	SURPLUS		SURPLUS		$3,527,447	1.00	$12,718,789	6.82	SURPLUS	
Home Furnishings Stores	$776,785	1.13	$2,844,827	6.17	$6,547,711	17.35	$13,090,970	26.51	$62,130,113	122.54
Electronics & Appliance Stores	$2,034,488	6.69	$6,933,235	22.65	$10,558,275	24.25	SURPLUS		$152,516,552	262.35
Bldg Material & Supplies Dealers	$4,439,398	19.48	$14,830,015	60.32	$23,029,546	53.10	$33,474,792	48.20	$35,498,235	42.01
Lawn & Garden Equip & Supply Stores	$714,284	12.68	$1,642,224	11.47	$3,582,949	32.78	$10,269,357	88.31	$47,851,797	386.21
Grocery Stores	$15,528,682	4.09	SURPLUS		SURPLUS		SURPLUS		SURPLUS	
Specialty Food Stores	$101,961	0.90	$746,822	5.96	$1,650,061	8.26	$2,580,571	9.91	SURPLUS	
Beer, Wine & Liquor Stores	SURPLUS		SURPLUS		$539,000	1.00	$1,508,147	3.17	SURPLUS	
Health & Personal Care Stores	$1,926,256	1.82	SURPLUS		$12,585,352	11.42	SURPLUS		SURPLUS	
Gasoline Stations	$10,643,265	2.20	$25,622,038	7.33	$67,693,852	18.15	$218,377,398	68.95	$752,563,717	202.96
Clothing Stores	$4,095,852	11.52*	$14,951,973	42.07	$28,928,470	85.12	$43,578,825	63.33	$38,890,005	50.08
Shoe Stores	$510,149	1.19*	$1,379,203	3.20	$3,104,713	8.06	$8,377,947	25.68	$19,663,472	51.57
Jewelry, Luggage & Leather Goods Stores	$970,726	3.90*	$2,409,395	9.67	$4,410,116	14.63	$9,829,095	33.79	$31,942,781	101.82
Sporting Goods/Hobby/Musical Instr Stores	$857,926	6.16	SURPLUS		SURPLUS		$2,526,295	8.84	$23,365,942	94.12
Book, Periodical & Music Stores	$588,288	3.65	$1,586,385	5.40	$2,119,214	6.20	SURPLUS		SURPLUS	
Department Stores Excluding Leased Depts.	$5,367,617	6.41*	$18,982,061	22.66	$38,378,616	20.25	$8,347,723	2.16	SURPLUS	
Other General Merchandise Stores	$348,007	0.27	SURPLUS		$4,341,301	1.05	SURPLUS		$153,754,660	36.22
Florists	$106,046	4.16	$441,261	6.81	$1,023,841	16.03	$980,390	9.72	SURPLUS	
Office Supplies, Stationery & Gift Stores	$601,849	9.73	$271,391	1.29	SURPLUS		$183,007	0.60	SURPLUS	
Used Merchandise Stores	$84,716	1.31	$130,998	4.21	SURPLUS		SURPLUS		SURPLUS	
Other Miscellaneous Store Retailers	$1,341,703	12.50	$4,437,075	43.26	$7,879,018	59.64	$18,923,823	111.98	$62,899,488	312.38
Vending Machine Operators	$98,890	0.00**	$1,019,377	0.04**	SURPLUS		SURPLUS		$4,155,663	2.56
Direct Selling Establishments	$29,657	0.04	$3,233,808	3.56	SURPLUS		SURPLUS		SURPLUS	
Full-Service Restaurants	$7,871,522	29.48	$23,013,241	72.65	$44,125,221	128.27	$41,699,894	100.17	$195,136,069	451.53
Limited-Service Eating Places	$8,349,617	20.34	$9,007,243	11.96	$35,507,890	47.80	$41,496,282	46.29	$50,611,041	53.79
Special Food Services	$1,441,757	4.05*	$5,391,961	15.15	$7,104,503	10.66	$9,390,788	14.45	$106,081,260	142.11
Drinking Places - Alcoholic Beverages	$260,431	1.97**	$870,244	6.57**	$1,504,529	11.35	$681,588	3.05	$24,199,065	125.93
Source: ESRI Business Analyst Online, 2010 Estimates										

* No stores in this sector within specified drive time. Estimated new stores calculated using data from the 15-minute drive time.

** No stores in this sector within specified drive time. Estimated new stores calculated using data from the 20-minute drive time.

Durable Goods

The market for both "Other Motor Vehicle Dealers" and "Home Furnishing Stores" is not fully captured within the 60-minute drive time from Hebron and may present some new retail opportunities for the area. Within the 15-minute drive time there is nearly $3 million in leakage in both sectors and an estimated potential for 2 new "Other Motor Vehicle Dealers" establishments and 6 new "Home Furnishings" stores. As seen in Table 4 below, the potential for new stores increases as we increase the market area, as the market for these goods is not satiated within the hour drive time. However, establishments in these sectors tend to be large footprint facilities located in high-traffic areas, far above what is usually found in Hebron. Opportunities that may materialize in Hebron are likely to be niche operations focusing on specialty furnishings, etc.

Table 4: Durable Goods

Durable Goods										
Retail Sectors:	Leakage for 10-minute drive time	Potential # of New Stores	Leakage for 15-minute drive time	Potential # of New Stores	Leakage for 20-minute drive time	Potential # of New Stores	Leakage for 30-minute drive time	Potential # of New Stores	Leakage for 60-minute drive time	Potential # of New Stores
Other Motor Vehicle Dealers	$263,365	0.22	$2,821,818	2.35	$5,086,950	5.12	$16,827,420	12.72	$22,889,127	17.65
Home Furnishings Stores	$776,785	1.13	$2,844,827	6.17	$6,547,711	17.35	$13,090,970	26.51	$62,130,113	122.54

Home and Garden

"Lawn & Garden Equipment and Supply Stores" have over $700,000 in leakage within the ten minute drive which could support approximately 13 new stores in that radius. The $1.6 million in leakage within the 15-minute drive could support 11 new stores, and the $3.5 million in leakage within the 20-minute drive could support almost 33 new stores. As in the case with durable goods, these enterprises tend to locate in areas with high traffic volume, suggesting that opportunities for Hebron may only be found in specialty operations (e.g., home and garden stores specializing in particular types of plantings and/or décor.)

Table 5: Home and Garden

Home and Garden										
Retail Sectors:	Leakage for 10-minute drive time	Potential # of New Stores	Leakage for 15-minute drive time	Potential # of New Stores	Leakage for 20-minute drive time	Potential # of New Stores	Leakage for 30-minute drive time	Potential # of New Stores	Leakage for 60-minute drive time	Potential # of New Stores
Lawn & Garden Equip & Supply Stores	$714,284	12.68	$1,642,224	11.47	$3,582,949	32.78	$10,269,357	88.31	$47,851,797	386.21

Apparel

Unmet demand in Apparel could potentially support one new shoe store within the 10-minute drive time, 3 new shoe stores within the 15-minute drive time, or 8 new shoe stores within the 20-minute drive time. Leakage in the "Jewelry, Luggage & Leather Goods Stores" sector could support nearly 4 new stores within 10 minutes, nearly 10 stores within 15 minutes, or nearly 15 stores within 20 minutes. On-line shopping is likely to account for much of the apparent leakage in this sector. Consequently, the actual opportunities are likely to be less than suggested by this analysis, and likely to consist of specialized niches as well.

Table 6: Apparel

Apparel										
Retail Sectors:	Leakage for 10-minute drive time	Potential # of New Stores	Leakage for 15-minute drive time	Potential # of New Stores	Leakage for 20-minute drive time	Potential # of New Stores	Leakage for 30-minute drive time	Potential # of New Stores	Leakage for 60-minute drive time	Potential # of New Stores
Shoe Stores	$510,149	1.19*	$1,379,203	3.20	$3,104,713	8.06	$8,377,947	25.68	$19,663,472	51.57
Jewelry, Luggage & Leather Goods Stores	$970,726	3.90*	$2,409,395	9.67	$4,410,116	14.63	$9,829,095	33.79	$31,942,781	101.82

* No stores in this sector within specified drive time. Estimated new stores calculated using data from the 15-minute drive time.

Eating and Drinking Establishments

Eating and Drinking Establishments have a considerable amount of leakage especially in "Full-Service Restaurants" and "Special Food Services" which have $7.8 million and $1.4 million in leakage respectively within the 10-minute drive time. Approximately 29 new "Full-Service" Restaurants could be supported within 10 minutes alone with this amount of leakage. 72 new "Full-Service" Restaurants could be supported within 20 minutes, with $44 million in leaked spending, and 128 "Full-Service" Restaurants could be supported within 30 minutes, with $41 million in leakage.

Leakage in "Special Food Services" could support 4 new establishments within 10 minutes and 15 new establishments within 15 minutes. The "Alcoholic Beverage Drinking Places" sector has less leakage than the other two sectors but has the potential to support almost 2 new establishments within 10 minutes and nearly 7 new establishments within 15 minutes.

Table 7: Eating & Drinking Establishments

Eating and Drinking Establishments										
Retail Sectors:	Leakage for 10-minute drive time	Potential # of New Stores	Leakage for 15-minute drive time	Potential # of New Stores	Leakage for 20-minute drive time	Potential # of New Stores	Leakage for 30-minute drive time	Potential # of New Stores	Leakage for 60-minute drive time	Potential # of New Stores
Full-Service Restaurants	$7,871,522	29.48	$23,013,241	72.65	$44,125,221	128.27	$41,699,894	100.17	$195,136,069	451.53
Special Food Services	$1,441,757	4.05*	$5,391,961	15.15	$7,104,503	10.66	$9,390,788	14.45	$106,081,260	142.11
Drinking Places - Alcoholic Beverages	$260,431	1.97**	$870,244	6.57**	$1,504,529	11.35	$681,588	3.05	$24,199,065	125.93

* No stores in this sector within specified drive time. Estimated new stores calculated using data from the 15-minute drive time.
** No stores in this sector within specified drive time. Estimated new stores calculated using data from the 20-minute drive time.

Miscellaneous Goods

There is potential for 2 new Gasoline Stations to capture $10.6 million in leaked consumer sending within a 10 minute drive from Hebron. Seven new Gasoline Stations could be supported within 15 minutes ($25 million in current leakage), and 18 new Gasoline Stations within 20 minutes ($67 million in current leakage).

The ambiguous "Other Miscellaneous Retail" sector also shows leakage within each of the drive times. Leakage within the 10 minute area could support nearly 13 such establishments, while 43 establishments could be supported in the 15 minute radius, and nearly 60 within the 20 minute radius.

Table 8: Miscellaneous Goods

Miscellaneous Goods										
Retail Sectors:	Leakage for 10-minute drive time	Potential # of New Stores	Leakage for 15-minute drive time	Potential # of New Stores	Leakage for 20-minute drive time	Potential # of New Stores	Leakage for 30-minute drive time	Potential # of New Stores	Leakage for 60-minute drive time	Potential # of New Stores
Gasoline Stations	$10,643,265	2.20	$25,622,038	7.33	$67,693,852	18.15	$218,377,398	68.95	$752,563,717	202.96
Other Miscellaneous Store Retailers	$1,341,703	12.50	$4,437,075	43.26	$7,879,018	59.64	$18,923,823	111.98	$62,899,488	312.38

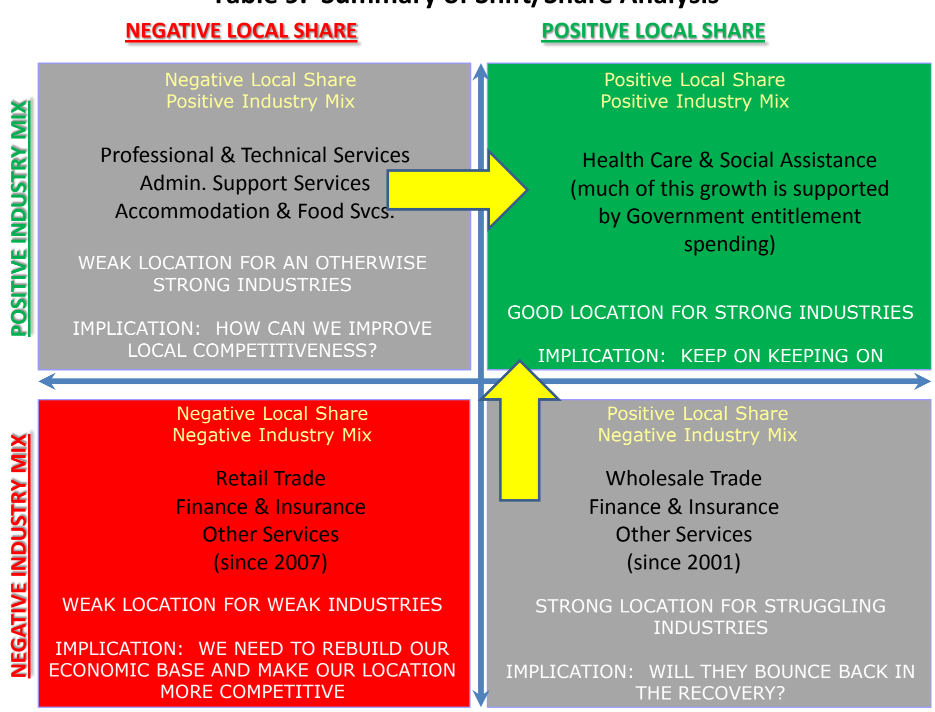
Shift Share Analysis

To determine which industries could have a competitive advantage in Hebron, a shift-share analysis was conducted. The complete analysis is available for review in the appendices.

This analysis compares changes in job growth in a local area with changes in a larger economy in which the area is located to isolate the factors driving the local changes. First, the shift/share analysis was used to compare growth in the Hartford County metropolitan area to growth in the Tolland County. The analysis isolates the share of overall growth in Tolland County that can be attributed to the overall growth in the Hartford metropolitan area economy (the "Regional Share"). Next, the analysis isolates the share of overall growth in the County due to growth in that particular industry cluster in the US economy (Industry Mix). Finally, the analysis identifies the share of overall growth due to a particular strength in the County economy itself (Local Shift).

The second step of the shift/share analysis compares growth in Hebron to growth in the Hartford metropolitan statistical area. This time, the analysis isolates the share of overall growth in Hebron attributed to the overall growth in Hartford County (the "Regional Share"). Next, the analysis isolates the share of overall growth in Hebron due to growth in particular industries in the Hartford County economy (Industry Mix). Finally, the analysis identifies

Table 9. Summary of Shift/Share Analysis



the share of overall growth due to a particular strength in the Hebron economy itself (Local Shift). Tolland County experienced a period of positive growth (0.08%) amongst all industries during 2001-2011. The last five years of the time frame examined, 2007-2011 saw a slower growth rate (-0.03%). The results are summarized in Table 9.

In the table above, the industries that have a negative industry mix (i.e., the sectors nationally or regionally are growing more slowly than the national or regional economy) and a negative local share (i.e., the growth rate of those sectors in Hebron is below the growth rate of these sectors nationally and/or regionally) are found in the red quadrant in the lower left-hand side of the table. NOTE: the analysis for this quadrant is based upon trends from 2007 to 2011. The industries in this quadrant represent the least promising prospects for Hebron, at least in the short term. They include financial services, which is undergoing a major restructuring both nationally and in the Hartford region, which has led to dramatic declines in employment, which are not likely to be reversed in the foreseeable future. Retail trade is also found in this quadrant. While the decline in employment in finance is structural and long-term, the declines in retail are cyclical and will be reversed as the economy improves. But in the meantime, retail presents limited prospects for growth in the area. The same is true for the third industry in this quadrant, Other Services.

The industries in the grey quadrants in the upper left and lower right corners of the figure are those industries that represent potential prospects for Hebron, based upon trends from 2001 and 2007 to 2011. As indicated by the yellow arrows in the figure, the key question is how to reposition Hebron as a business location so that it can attract these industries. This is particularly true for those industries in the upper left quadrant. The analysis shows that these are reasonably strong industries at the regional or national level that have not grown as quickly in Hebron. The analysis suggests that improving Hebron's climate for such businesses should help improve growth in these industries. Many of the recommendations in this report are focused on that issue. Those industries include Professional and Technical Services, Administrative Support Services and Accommodation and Food Services.

The industries in the lower right quadrant are those that have grown well in Hebron in the past, but since 2001, may be lagging behind now due to problems in those industries at the national and/or regional level. Those industries include Wholesale Trade as well as Finance & Insurance and Other Services (two sectors that were included in the "red" quadrant based upon their performance since 2007. These sectors may be opportunities for Hebron as the problems they face regionally or nationally are overcome.

Finally, the upper right quadrant includes those industries that have relatively strong national or regional performance and also have been able to grow well in Hebron in the past. Given the recent economic conditions, it is not surprising that there are few industries found in this "green" quadrant. Nonetheless, Healthcare and Social Assistance organizations have positive trends both at the regional/national level and locally in Hebron. This makes that sector an important target for Hebron.

Summary of Shift Share Analysis

The shift share analysis has identified the following potential industry targets for Hebron:

- **Professional & Technical Services-** Examples of services in this industry include accounting, bookkeeping, architectural and engineering services, research, marketing, photography, computer repair, and veterinary services.

- **Administrative Support Services-** This industry is associated with day-to-day operations services such as general management, office administration and clerical work, cleaning services, security, and travel arrangement services.
- **Health Care-** Services provided in this industry are conducted by trained, professional health practitioners and can vary from primary care to mental health care to elderly care. Some examples of specific services include diagnostic imaging, podiatry, family planning, home health care, dental services, speech therapy and surgical services.
- **Accommodation & Food Services-** Lodging and restaurant needs are provided in this industry. Hotels, motels, bed and breakfast lodging, fast-food restaurants, bars, fine dining, and coffee shops are all included in this industry.
- **Other Services-** A miscellaneous industry classification comprised of a variety of services not aligned with any specific category including machinery repair, funeral services, dry cleaning and laundry, advocacy, religious activities, and dating services.

A further discussion of Hebron's industry targets is included in the recommendations for this study. For the fully detailed Shift-Share analysis tables, see the report appendices.

Conclusions and Recommendations

This section of the report contains the conclusions from the analysis and recommendations to pursue the opportunities uncovered during the analysis. The information is provided in three subsections: the conclusions from the benchmarking analysis, identification of the target industries defined during the economic analysis and a summary of the situation facing Hebron by outlining the Town's strengths, weaknesses, opportunities and threats (known by the acronym SWOT analysis).

Following this discussion of conclusions, there is a delineation of the study recommendations and an action plan through which to implement them.

Preliminary Conclusions from Benchmarking Analysis

As detailed previously in this report, the benchmarking analysis compared the condition of Hebron's economy to that of the towns of Canton, Colchester, Glastonbury, Granby, Mansfield, Marlborough, Simsbury and Somers. The analysis uncovered the following aspects of Hebron's economy to be addressed by the market study:

- Retail needs resident population and workers: the benchmark analysis demonstrated that businesses in Hebron had relatively low sales per household when compared with the benchmark communities. Further analysis showed that this is probably due to the fact that Hebron's daytime population is a much smaller percentage of its total population than the benchmark communities. This lack of a daytime population is due to the relatively small number of jobs in Hebron as well as the lack of housing opportunities in or near Hebron Center.

- Business expansion/attraction and encouraging a larger daytime population are key: As indicated above, increasing Hebron's daytime population is an important step to build the retail base of the community. Therefore, part of the process of strengthening Hebron's retail sectors must involve increasing the daytime population by expanding non-retail businesses as well as by promoting more housing in and around Hebron Center itself.

- The importance of In-fill/niche businesses: At the present time, the possibilities for retail in Hebron Center are limited to niche businesses that can establish a place for themselves amid the limited opportunities presented by Hebron's relatively small (albeit affluent) population and low daytime population. The existing cadre of successful businesses in Hebron is testimony to the existence of such niches. But such businesses tend to start small and to be created one-storefront-at-a-time, rather than being part of a larger complex. In order to take advantage of such opportunities, Hebron should be prepared to promote infill in Hebron Center by small, specialty businesses. (NOTE: as the community experiences more and more success in this manner, the Town will draw the attention of larger operations. Therefore, while the Town is focused on small, infill opportunities, it must also have the capacity to respond to the need of larger projects that may eventually materialize.)

- Tourism, events and cross-promotions are an important part of this effort: Given Hebron's relatively small total population and small day-time population, the Town's retail sector depends upon getting the maximum number of "feet on the street" for support. In this context, every opportunity to bring tourists and others to Hebron Center can make an important contribution to strengthening Hebron's economy. In this context, community events and the cross-promotion of those events with activities in Hebron Center are essential components of the process of expanding retail opportunities in Hebron.

Hebron's Target Industries

The analysis completed for this report has helped define the industries that have the best opportunity to contribute to economic vitality in Hebron. While it may be difficult to attract retail to Heborn Center initially, the increased presence of other businesses will eventually make Hebron Center a more advantageous location for retail. In the meantime, Hebron should focus its efforts on attracting or expanding such businesses as:

- **Professional & Technical Services-** Examples of services in this industry include accounting, bookkeeping, architectural and engineering services, research, marketing, photography, computer repair, and related services.
- **Administrative Support Services-** This industry is associated with day-to-day operations services such as general management, office administration and clerical work, cleaning services, security, and travel arrangement services.
- **Health Care-** Services provided in this industry are conducted by trained, professional health practitioners and can vary from primary care to mental health care to elderly care. Some examples of specific services include diagnostic imaging, podiatry, family planning, home health care, dental services, speech therapy and surgical services.
- **Accommodation & Food Services-** Lodging and restaurant needs are provided in this industry. Hotels, motels, bed and breakfast lodging, fast-food restaurants, bars, fine dining, and coffee shops are all included in this industry.

- **Other Services-** A miscellaneous industry classification comprised of a variety of services not aligned with any specific category including machinery repair, funeral services, dry cleaning and laundry, advocacy, etc.

Other "ancillary" targets

Hebron's efforts at expanding the economy should emphasize, but not be limited to these target industries. For example, as part of this effort, Hebron should encourage two other types of activity in Hebron Center

- **Retail:** as indicated above, the primary emphasis on business attraction should be on non-retail businesses to help build the demand for retail in the Town. That being said, Hebron's high quality of life and relatively affluent population will always serve as an attraction for select specialty retail. The Town should be prepared for specialty retail to play a role in its infill development efforts.

- **Housing:** as indicated elsewhere, in order to get more "feet on the street" in Hebron Center, residential development and mixed use development (e.g., commercial development that may include second storey residential space) should be promoted in Hebron Center. In that sense, the results of this study are in close accord with the Incentive Housing Zoning Study recently completed for the Town.

SWOT Analysis

SWOT analysis is used to summarize an organization's or location's competitive position in a strategic planning process. In the case of the Hebron Center market study, SWOT is an acronym that stands for:

- **Strengths:** What aspects of Hebron Center are advantages as it seeks to attract businesses and/or customers?

- **Weaknesses:** What are those aspects of Hebron Center that make it less attractive to businesses and/or customers?

- **Opportunities:** What general economic, social or demographic trends can Hebron Center take advantage of?

- **Threats:** What facts or trends might reduce the economic competitiveness of Hebron Center?

Figure 35 on the next page provides a summary of Hebron's strengths, weaknesses, opportunities and threats as derived from the research conducted during this study.

Hebron's Strategic Position as Summarized in the SWOT Analysis

On the downside, as mentioned previously, Hebron has a low daytime population and a limited residential presence in and near Hebron Center. In addition, as was discussed at the stakeholder and community meetings, Hebron has no clear identity in the regional market place (e.g., as a cultural, recreational and/or retail hub). At the same time, Hebron provides no clear advantages for businesses. It has no direct connection to the Interstate system. While its real estate costs are slightly lower than the surrounding area, it has among the highest mill rates in the area. The threats Hebron faces are likely to be the result of a continued weakness in the national and regional economies and increased competitions from Glastonbury and other nearby centers.

Figure 35.
Summary of Hebron Center SWOT Analysis

STRENGTHS	WEAKNESSES
High Quality of Life Attractive Built Environment Strong Demographics (income, education) Strong base of existing businesses A diversity of sites (infill to Hebron Village Green)	Low Daytime Population Limited Residential Presence near the Center No Distinct Identity in the Marketplace No Clear Advantages
OPPORTUNITIES	**THREATS**
Current Anchors (Ted's, Trails, Tourism) School District Faculty/Students Home-based Businesses Through-commuters	Continued Weak Economy Increased competition from the neighbors (e.g., Glastonbury, etc.)

On the other hand, Hebron does have some strengths and opportunities to mobilize on its behalf. The community has a high quality of life (including very good schools) and an attractive built environment, including the recent streetscape improvements in Hebron Center. The Town also has a strong mix of existing businesses, with little or no indication of distressed businesses in or near Hebron Center. In addition, one of the major strengths Hebron has is the variety of development opportunities in the Center. These range from the potential for smaller infill projects throughout the Center to the large, mixed-use "shovel ready" opportunity found in the Hebron Village Green District. Indeed the Town is very fortunate to have created the Village Green District to broaden the portfolio of development opportunities it can offer. At the same time, Hebron has several opportunities it can pursue in its development efforts.

First, there are several "anchors" in Hebron Center that help bring customers to the area. These include existing businesses such as Ted's IGA and tourism associated with the Air Line Trail and various community festivals and events. In addition, the presence of the RHAM high school just north of Hebron Center presents opportunities for Hebron to serve faculty and students from the school. In addition, there is some through commuting traffic in Hebron (see the appendices to this report for more details) that could supplement the regular customer base for current and prospective businesses in Town. Finally, the Town's assessment records indicate that Hebron has approximately 150 home-based businesses in Town other than traditional service such as contractors and personal services enterprises. These information-based home enterprises could provide demand for "third places," shared office arrangements that are being created in small downtowns throughout the United States.

Hebron's Strategic Approach: Study Recommendations

Given Hebron's strategic position as summarized in the above SWOT analysis, the following recommendations have been put forth to strengthen the Town's competitiveness as a location for the target industries described above. The recommendations are intended to improve Hebron's visibility as a location for business, create a competitive advantage for Hebron as a business location and encourage systematic marketing and promotion of Hebron and Hebron Center as a site for business expansion and relocation.

1. **Continually Promote Hebron as a Retail Location**:

One of the major findings of this analysis is the disadvantage Hebron Center faces due to its low daytime population. Part of the process of overcoming this disadvantage is to maximize the promotion of Hebron Center as a location for shopping for goods and services. This should involve the following steps:

- **Cross promotions/festivals:** Festivals and other activities are an important way to draw potential customers into Hebron Center. Every community activity and festival is an opportunity to promote Hebron Center to potential customers and new businesses. The Town should continue its efforts to coordinate local events and promotions so that merchants are aware of and can take advantage of activities that are bringing visitors into or near Hebron Center. The recent "Shop and Walk Hebron" is an excellent example of the types of activities that can be used to build visitation to and awareness of Hebron Center. The promotion linked access to Hebron's trails and recreation facilities to Hebron Center, making the recreationists more aware of the shopping opportunities available in Hebron.

Flyer from the Recent "Shop & Walk Hebron" Promotion

- **Target specific segments:** As mentioned earlier in this report, there are certain segments of the population that should be targeted as attractive customers for Hebron Center's businesses. These include the following:
  - Teachers, staff and students from RHAM High school: Faculty, staff and students are an important source of "after school" customer traffic for Hebron Center. Promotions should be aimed to encourage more patronage of Hebron Center by these segments through such means as offering discounts and specials aimed at them, holding "back to school" and "after school" promotions, etc.
  - Tourists: Hebron's location on the Air Line Trail brings bikers and hikers into Hebron. As many communities have discovered, these visitors bring with them demand for goods and services ranging from B&Bs to bike rentals, specialty apparel and refreshments. New business opportunities can be developed by encouraging visitors to Hebron's trail system and to other nearby attractions such as Gay City State Park, the Town-owned historic Peters' House, one-room school houses, historic cemeteries and the National Register Historic District to visit Hebron Center to meet their needs during their stay.
  - Commuters: While the through commuting traffic in Hebron is relatively modest (about 500 vehicle trips/day), it is still may be worth developing services to meet the needs of this group. This can include personal services ranging from

dry cleaning to packaged family meals for busy commuters. The faculty and staff and RHAM High School are an important part of this segment.

- Home-based businesses: Research for this study identified 150 home-based businesses in Hebron that are in information-related professional services (accounting, consulting, etc.). There are probably additional home-based workers who are telecommuting employees of larger firms. Increasingly communities are discovering that such business people can benefit from the creation of "third places." These are locations where workers in home-based businesses can gather to share office equipment, conference space or broadband access. These locations are often valuable to home-based workers simply as an opportunity for peer interaction among workers feeling isolated at home. While cafes sometimes serve as "third places" in communities, increasingly they are being created as stand-alone business enterprises catering to the needs of home-based workers. It may be possible to develop such an opportunity in Hebron, supporting these already existing businesses and bringing additional activity to Hebron Center.

- **Promote mixed use/residential development in and near Hebron Center:** As part of the process of increasing the Center's daytime population, it is important to increase the number of residents who can easily access the Center. Creating residences in and near Hebron Center will be an important part of strengthening its competitiveness as a retail and business location. As was pointed out in the recent Incentive Housing Zone study, it is possible to promote mixed use development in Hebron Center, with retail and other businesses on the ground floor and apartment units in the upper floors. Not only would this strengthen the business climate in the Center, it would also expand housing options in the community for young people and seniors.

2. Create/Define a Competitive Advantage for businesses

In the focus groups and community meetings, it was pointed out that Hebron Center does not necessarily provide a clear competitive advantage for businesses. It has limited transportation access, is somewhat removed from the Hartford metropolitan area and, while real estate costs are somewhat low, that advantage can be offset by the Town's relatively high taxes. That being said, there are several ways in which Hebron's competitive advantage can be strengthened. These include:

- **Promoting Infill Opportunities along with the Hebron Village Green District**: Hebron is fortunate to have a variety of sites that can be developed or redeveloped for retail, commercial, mixed-use or residential opportunities. The Hebron Village Green District is a textbook example of how a community should prepare for new, larger-scale development that will blend with the existing community character. With its infrastructure improvements and zoning pre-approvals, it will prove to be an important economic development asset for the community. At the same time, Hebron Center contains numerous opportunities for infill development (e.g., constructing new buildings amid existing development). A preliminary identification of potential infill sites is provided in the appendices to this report. Note that the opportunities for infill that are identified here closely coincide with those that were defined in the Incentive Housing Zoning Study.

As part of realizing the potential for infill, the Town should review the zoning regulations in place throughout Hebron Center. The current Hebron Village Green District zoning provides some flexibility for development that would be even more powerful in an infill situation. Consequently, the Town should explore flexible zoning similar to that used for the Hebron Village Green District as well as the type of incentive zoning identified in the Incentive Housing Zoning study, providing density bonuses and/or relaxing parking requirements for infill development that will bring more commercial and residential activity to Hebron Center.

- **Use Targeted Tax Incentives:** The Economic Development Commission of the Town of Hebron has had an Economic Development Incentive Program in place for a number of years, with recent updates to enable the incentives to be applied to smaller scale developments and a broader array of businesses. It is an essential ingredient for Hebron at this point in time. This market study has made it clear that Hebron Center would benefit greatly from more commercial activity. Yet, the area has no clear advantage to offer businesses. Indeed, analysis conducted for this project indicates that Hebron has the highest mill rate from among the "benchmark" communities included in this study. At the same time, local government spending in Hebron is fairly close to the statewide average. Our analysis indicates that the reason for the high mill rate is that, compared to the benchmark communities, Hebron has a very low value per capita in its grand list. In addition, compared to the benchmarks, Hebron has very little commercial and industrial property available for taxation. Thus the properties in town are saddled with a relatively high rate of taxation. (See the appendix for the analysis of Hebron's tax situation.)

  The Economic Development Incentive Program will enable Hebron to provide tax relief for prospective businesses interested in infill opportunities or in locating in the Hebron Village Green District. This important tool will help attract businesses. The Economic Development Commission should work with the Town to review the Program to ensure that its targeted industries coincide with those identified in this plan. In addition, the Commission should review the thresholds for assistance under the Program to maximize the potential for incentives being awarded to infill projects in Hebron Center. In the long term, the judicious use of the Incentive Program to attract commercial development will stimulate more retail and other business in Hebron Center and throughout the Town. This will in turn broaden and strengthen the community's tax base and grand list. Thus, over time, the judicious use of the tax breaks available through the Economic Development Incentive Program should lead to a stronger grand list and an opportunity to reduce the tax burdens throughout Hebron.

3. Relentlessly Market/Promote Hebron and Hebron Center

The success of this strategy all comes down to a willingness to ceaselessly promote Hebron and Hebron Center. While marketing materials are important to this effort, it extends far beyond any single mailing or website. All of the following must be addressed if this initiative is to prove successful:

- **A clear consistent marketing approach**. Over the next few years, the efforts to promote Hebron and Hebron Center should provide a consistent marketing message with the following elements:
    - Hebron is a community that invests in the success of its businesses as evidenced by the Town's work on
    - Main Street sidewalk improvements
    - Hebron Village Green District Investments
    - Capital Improvement Programs and/or Grant Procurement Opportunities for façade improvement, etc.
    - Given its relatively low real estate prices, Hebron can provide a cost advantage to businesses, particularly thanks to the Economic Development Incentives available through the Town.
    - High Quality Country Living: Hebron has a rural quality of life that should be very appealing to companies and individuals relocating from more urban areas.
- **Compile key testimonials:** Business, particularly small businesses rely upon peers to inform their own decisions. Part of the effort to promote Hebron and Hebron Center as a place to do business will involve securing key testimonials from local businesses extolling the advantages of a Hebron location for their business.

- **Promote via a mailing list/email list of target industries** highlighting the Hebron Village Green District and infill opportunities: It is important to get the word out to businesses in the greater Hartford area that Hebron represents a potential opportunity for them to relocate and/or expand their business. A customized email list of such businesses is included with this report. The list should be updated and expanded whenever possible.

- **Hold an annual realtor's roundtable and properties tour**: The Economic Development Commission should continue the practice of holding realtor's roundtables and properties tours to keep Hebron-area realtors aware of the opportunities available in the Town and in Hebron Center. Over the next three years, the effort should be made to continue attracting commercial realtors from beyond Hebron to include the greater Hartford metropolitan area and regional commercial realtors.

- **Continue & expand the Hebron Business Expo**: This annual event has already become an important source for Hebron area businesses to learn about what their peers are doing and to develop business-to-business connections and opportunities. This essential service should be continued and expanded to include more businesses, including—if possible—home-based businesses that might benefit from connections to other local enterprises.

- **Create a squad of "Hebron ambassadors"** for personal selling of Hebron as a place to do business: As mentioned earlier, small businesses rely upon peer information when making business decisions. The Economic Development Commission should develop a cadre of "Hebron Ambassadors" that would agree to serve as a representative of the Town's businesses to promote opportunities to firms interested in relocating to or expanding in Hebron. Building such personal connections (both in person and via social media) will increase the likelihood of businesses considering Hebron as a potential location.

4. Be Focused, Be Patient:

This study has helped identify ways in which Hebron can compete more effectively for business. In many cases, the recommendations here simply endorse "best practices" that the Town and/or the Economic Development Commission have already embraced (e.g., the creation of the Hebron Village Green District, the realtors' roundtables, the business expo, etc.). Success will come incrementally. As the economy continues to improve businesses will be created and/or locate in Hebron. But, particularly at first, it is likely to happen one small business at a time. Each new business should be cause for a celebration and an indication that progress is continuing. Any economic development plan requires at least several years before it produces a resulting steady stream of new business activity. Given current economic conditions, it is likely to take several years before this marketing plan will reach its full potential. Consequently, the Town and the Economic Development Commission should seek to maintain a commitment to this approach for at least three to five years.

Work Plan

Part of maintaining a commitment to this marketing approach is developing and adhering to a clear work plan with tasks, timing and responsibilities clearly delineated. A sample work plan is provided on the following page to serve as a guide for implementation of the recommendations contained in this report.

Proposed Work Plan for the Hebron Marketing Strategy			
PROMOTE HEBRON			
Action	Responsible Party/Partners	Time Frame	Metric
Establish clear, consistent marketing message in all outreach	Economic Development Commission in cooperation with Town and Civic Organizations	Within one year of plan initiation.	An agreement among participating organizations on the key points to be included in all promotions of Hebron and its events/festivals.
Secure Testimonials from Hebron Businesses	Economic Development Coordinator	Ongoing—major implementation within one year of plan initiation	Creation of a list of testimonials in electronic format that can be adapted to various solicitations/outreach efforts.
Execute a mailing to target businesses in the Hartford area	Economic Development Coordinator	Within six months of plan initiation.	Mailing sent to list of targeted firms in Hartford area.
Continue/expand Realtors' Roundtable	Economic Development Coordinator	Expanded outside of Hebron by third year after plan initiation.	Realtors' Roundtable includes major commercial realtors from greater Hartford area.
Continue/expand Business Expo	Economic Development Coordinator in cooperation with Town and Civic Organizations	Business Expo Continued.	Business Expo shows increasing business participation three years after plan initiation.
Foster cross promotions focused on various target market segments (e.g., tourists, RHAM faculty/staff, etc.)	Economic Development Commission in cooperation with Town and Civic Organizations	Ongoing	Three successfully cross-promoted events/festivals addressing at least two market segments held within three years of plan initiation.
Create "Hebron Ambassadors" Program	Economic Development Coordinator in cooperation with Town	By third year after plan initiation.	A roster of at least six "Hebron Ambassadors" is created and deployed for face-to-face and social media interactions with prospects.

BUILD COMPETITIVE ADVANTAGE			
Action	Responsible Party/Partners	Time Frame	Metric
Develop local policies to support infill development	Town Planning Department in cooperation with Town Planning and Zoning Commission and Economic Development Commission.	Within 3 years of plan initiation	Zoning for Hebron Center incorporates appropriate incentives and flexible criteria to support infill as adopted by the Board of Selectmen
Review Economic Development Incentive Program to ensure it can serve the industries targeted in this strategy and maximize its potential to provide incentives for infill.	Economic Development Coordinator in cooperation with Town Manager and Town Planner	Within 2 years of plan initiation.	Economic Development Incentive Program revised and adopted by the Board of Selectmen as appropriate.

Project Appendices

Appendix 1: Meeting Summaries

Appendix 2: Hebron Commuting Patterns

Appendix 3: Shift Share

Appendix 4: Tax Analysis

Appendix 5: Home-based Business

Appendix 6: Infill Sites

Appendix 7: Mailing Lists

Appendix 8: Sample Marketing Brochures

Appendix 1

Meeting Summaries

Stakeholders' Session

March 21, 2013
5:00PM to 6:00PM

Attendees (9):
Randy Anagnostis, *Hebron EDC*
Bill Anderson, *Blackledge Country Club*
Mark Friend, *Megson & Heagle*
Dawn McDermott, *First Niagara Bank*
Dave Sousa, *CDM Smith*
Mike Tarbell, *Tarbel, Heintz & Associates*
Todge Armata, *Ted's Market*
From Fairweather Consulting:
Peter Fairweather
Sandra Davis

Agenda:

Introductions
Goals of the Market Study
An Overview of Key Sectors
Discussion of Development Opportunities
Business-Specific SWOT Analysis
Wrap Up & Next Steps

INTRODUCTION: The meeting began with a greeting by Randy Anagnostis and a brief roundtable introduction of each of the attendees. Peter Fairweather explained that the purpose of this meeting was to get ideas for potential development opportunities in Hebron Center. The suggestions and comments provided in the meeting will help Fairweather Consulting assess the existing commercial makeup of Hebron Center, identify potential and future markets, and identify potential barriers to development in Hebron.

HEBRON OVERVIEW: The first topic of discussion was an overview of Hebron's key sectors based on a diagram which compared data collected on job growth between in Hebron 2007 and 2011 and wage levels in 2011 in Hebron to the same data for Connecticut as a whole. The Wholesale Trade sector was the only sector to show both higher job growth rates and wages in Hebron than in Connecticut. The majority of Hebron's largest employing sectors (Retail Trade, Health Care and Social Assistance, and Accommodation and Food Services) had lower average wages than the average annual wage of $61,110 in Connecticut, and grew at the same pace or slower than Connecticut, with the exception of the Health Care and Social Assistance sector which grew faster in Hebron than in Connecticut.

Many of the attendees were not surprised with the sectors that showed up in the diagram. Retail trade is the biggest employer in Hebron, and as Todge Armata (owner of Ted's Market) described, these jobs are often part time jobs held by students and are predominantly low-paying. Though construction showed up in the diagram as a low-paying, slow growth sector, it was mentioned by one of the attendees that the construction sector can only go up and that it should be seen as an opportunity for future growth in Hebron. Sectors that did not show up in the diagram which were mentioned as important components of Hebron's economy included the agricultural industry and sole proprietorships.

Next was an overview of Hebron's competitiveness and strength of its industries. It was found that since 2007, Hebron has a negative "local share," in retail trade, suggesting that the local economy has done relatively poorly in supporting this sector, and a negative "industry mix," indicating that the retail trade industry has been in a slump throughout Connecticut. This did not seem very surprising to many in attendance. It was noted that Hebron has had problems attracting new retail opportunities due to high taxes and a lack of critical mass. Further, it was mentioned that retail businesses are hesitant to be located in less visible areas such as Liberty Drive and Pendleton Drive. Most will not move to Hebron unless they are located on Route 66, which currently has little to no vacant lots.

DEVELOPMENT OPPORTUNITIES: Finding ways to attract more out of town shoppers and better understanding the market of current Hebron residents was suggested as a potential strategy. In particular, it was noted that many people tend to shop either in the town where they live, on the way back home, or on their way to appointments (medical and other). Having a medical center in town, its was suggested, would draw residents from neighboring towns and create an opportunity for more people to shop in Hebron Center. In addition, creating more affordable housing opportunities downtown (potentially above businesses) would increase Hebron's critical mass and allow younger people to stay in town.Ideas such as mixed use buildings and second-story housing had been part of the original proposal for the Village Green District plan. In addition, it was suggested that an aquatic center or some type of community center such as the one in Mansfield would also help draw people into Hebron. As stated by one attendee, "Hebron needs a hook!"

The analysis also identified the ambiguous "Other Services" sector as having a positive local share suggesting that it is thriving in Hebron though the industry itself was in decline nationally. These "other services" were suggested could be comprised of the three to four chiropractors in town and other such personal care services.

Peter Fairweather asked whether there were any other types of businesses that seemed to work well or do poorly in Hebron. Many responded that there is a lack of high end restaurants, but also a lack of fast food restaurants (due to the stigma low quality attached to them). Liquor stores were mentioned have done well in town. The general consensus was that the majority of Hebron residents drive 10 to 15 minutes to go dining or shopping.

The next part of the discussion focused on understanding the types of residents that live in Hebron and brainstorming ways to tap into that market. Based on data from *ESRI Business Analyst Online*, the majority of people within a 5 minute and 10 minute radius of Hebron were characterized as "Sophisticated Squires:" affluent people who live in newer housing developments and tend to own stocks and large life insurance policies. According to this data, the second most predominant type of resident is in the "Suburban Splendor" category, which is made up of successful suburbanites with median household incomes at approximately $130,000. It was surprising to one attendee that these were the top demographic segments in Hebron and considered Hebron residents to be simpler and less ostentatious in their spending. In any case, Peter Fairweather suggested that the data indicates a strong buying power within 10 minutes of Hebron.

One attendee suggested that it was a concern that there are few “empty nesters” in the area because this demographic segment tends to contribute highly to property taxes, schools, and are consumers of various commodities and services. In addition, the high school population, including both students and faculty, were identified as an important market for retail and commercial opportunities in Hebron as the regional high school is located right near the center of Town. The economic potential of the rail trail and trails system in and around Hebron was also discussed, with suggestions that there may be ways for merchants to provide goods and services to that population.

After discussing Hebron’s demographics and market potential, Peter presented a land-use map of Hebron which showed the town by various land uses, including commercial, retail, agriculture, undeveloped, etc. It was noted that there are very few undeveloped lots in Hebron Center but that some were potentials for in-fill development. In-fill development would in turn create a more “downtown Main Street” affect. There was concern, however, over the increasing volume of traffic new retail opportunities might create on Route 66 and what changes might have to be made to convert

Route 66 back into a Main Street. Such changes would require the cooperation of the Connecticut DOT. It was pointed out that the DOT has supported measures to enable Route 6 in Andover to become a more walkable Main Street by changing the speed limit of the section of the road that runs through the town.

Concerns over development constraints in the Village Green area and other developable lands in Hebron were discussed at length. The biggest constraint for development is the amount of wetlands in the area. One attendee said that site preparation costs for Village Green District alone could be expensive due to wetland issues alone. It was also pointed out that the conceptual master plan for Village Green District would be most easily accomplished by a single, large developer. In the absence of that one large developer, development of the Village Green District would involve multiple parties with shared responsibility for utilities and other infrastructure improvements. This could make development for that area particularly complex and could discourage smaller individual developments at the site.

Other ideas for Hebron Center included the establishment of “co-working spaces” where telecommuters could work and interact with one another. This would allow people who typically work from home, or commute, to work and shop in town. The extension of sidewalks was also suggested as a way to create a more walkable downtown area.

The meeting concluded with an exercise that asked attendees to identify the strengths, weaknesses, opportunities, and threats that Hebron presents businesses that are either currently in the area or are considering locating to Hebron. The following tables summarize the results of this exercise.

STRENGTHS:

What specific factors about Hebron as a location enable businesses like yours to be successful?

- **Recreational facilities that draw people into town (golf courses, gymnastics (Patti Dunne's), sports)**
- **High average household income**
- **Strong sense of pride, heritage, and community (Hebron fair grounds, Maple Fest)**
- **High School/Middle School near Center present market opportunities**
- **Easy access to multiple State roads**
- **High quality of life and social atmosphere**
- **Natural resources: rail trails, Gay City State Park**

WEAKNESSES:

What specific factors about Hebron as a location prevent businesses like yours from being successful?

- **Costs**
- **Taxes**
- **Restrictive business codes**
- **External attitude**
- **Speed of traffic through Route 66**
- **Inability to obtain State funds for development (especially considering the amount residents pay in income and sales taxes)**
- **Residents mostly work out of town (Bedroom community)**
- **Distance to major highways**
- **Population is spread out**
- **Not a large enough amount of traffic going through town**
- **Not enough draws into town (aquatic facility, etc.)**

OPPORTUNITIES:

What new sources of income or activity either are available or are potentially available to a target business like yours due to the fact that it is Hebron?

- Potential for a community center
- 55+ older market
- Untapped housing markets- 55+ condos and apartments
- Capture dollars that go out of town
- Medical services
- Health club
- In-fill development on Route 66 for small independent businesses
- Market potential of drive through traffic

THREATS:

What sources of new competition or potential sources of problems for target businesses like yours are due to the fact that it is Hebron?

- Empty-nester flight
- Lack of incentives
- Flight of young people
- Distance to highways
- Lack of housing near or in the center
- Not enough diversity of businesses (i.e. 15 package stores)

Stakeholders' Session

March 22, 2013
8:30AM to 9:30AM

Attendees (8):
Randy Anagnostis, *Hebron EDC*
Jim Celio, *Century 21 CRA, Horton Brothers*
Bruce Goldstein*, Paradise Agency*
Ron Goldstein, *Paradise Agency, Attorney*
Troy Kelsey, *Gina Marie's Restaurant*
Mac McCorrison, *McCorrison-DarFish*
From Fairweather Consulting:
Peter Fairweather
Sandra Davis

Agenda:

Introductions
Goals of the Market Study
An Overview of Key Sectors
Discussion of Development Opportunities
Business-Specific SWOT Analysis
Wrap Up & Next Steps

INTRODUCTION: The meeting began with a greeting by Randy Anagnostis and a brief roundtable introduction of each of the attendees. Peter Fairweather explained that the purpose of this meeting was to get ideas for potential development opportunities and recommendations for how to successfully market Hebron Center. The suggestions and comments provided in the meeting will help Fairweather Consulting assess the existing commercial makeup of Hebron Center, identify potential and future markets, and identify potential barriers to development in Hebron.

HEBRON OVERVIEW: The first topic of discussion was an overview of Hebron's key sectors based on a diagram which compared data collected on job growth in Hebron between 2007 and 2011 and wage levels in 2011 in Hebron to the same data collected for Connecticut as a whole. The Wholesale Trade sector was the only sector to show both higher job growth rates and wages in Hebron than in Connecticut. The majority of Hebron's largest employing sectors (Retail Trade, Health Care and Social Assistance, and Accommodation and Food Services) had lower average wages than the average annual wage of $61,110 in Connecticut and grew at the same pace or slower than Connecticut, with the exception of the Health Care sector which grew faster in Hebron than in Connecticut as a whole. Real estate, rental, and leasing and construction were industries that showed up as potential problems in Hebron's economy as they both showed slow employment growth and low wages compared to the state as a whole.

Attendees were seemingly unsurprised by the analysis on key sectors in Hebron. One attendee commented that their concern was not necessarily focused on increasing *employment* but on which types of businesses would increase *shopping* in the Town Center. This led to an overview of an analysis which identified the region's competitiveness and strength of its industries. It was found that retail trade, by 2007 measures, has a negative "local share," suggesting that Hebron's local economy does poorly in supporting this sector, and a negative "industry mix," indicating that the retail trade industry is also in decline nationwide. It was noted, however, that this data doesn't include the past two years and is therefore pre economic recovery.

The apparent weakness of the retail sector in Hebron was attributed to Hebron's inability to sustain retail businesses or to address many of their needs, including visibility and infrastructure requirements. Established retailers seeking new locations want "billboard" locations and visibility but Hebron has a limited ability to accommodate these stores as space on Route 66 is limited. Furthermore, these retailers tend to look predominantly at overall numbers of people and at least on paper, Hebron seems to have a limited critical mass and a lack of resident demand. It was further noted that Hebron tends to have a reputation for not being business friendly due to its high taxes, strict zoning and design standards, and for being very selective as to which types of businesses to allow in Town. Available land for businesses is also very constrained and hindered by wetlands regulations.

DEVELOPMENT OPPORTUNITIES: Attracting CVS onto Route 66 has been an important recent success story for Hebron and it was agreed that this success should be used as a marketing tool to prompt other established retailers to consider Hebron. The attractiveness and potential draw of Hebron for businesses was then discussed. One of the main draws of Hebron is that it has the potential to be a center point for drawing consumers from nearby towns (i.e. spillover from Glastonbury) and to serve commuters traveling through Hebron to other nearby locations. The local market for Hebron was suggested as a 15 minute radius which extends to the towns of Andover and Lebanon. Hebron also has the reputation for having a good quality of life as defined at least partially its reputation for having a good school system, which could prove attractive to employers looking to relocate into the area.

Peter asked whether there were any types of businesses which would have a competitive advantage in Hebron compared to its neighboring towns. Attendees agreed that businesses that catered to kids and families could be successful in Hebron, including for example a skating rink. It was also suggested that Hebron needed more dining options and that things such as outdoor eating, art shows, and other cultural activities would entice more people to come into Hebron Center and shop. In addition, having a full health care facility was noted as an obvious choice for Hebron as there are no full health facilities in the neighboring towns.

Some participants suggested that making the necessary changes for Hebron to attract new businesses and capture the local market potential required shifting the Town's perspective to become more accommodating to businesses. For example, attracting the types of businesses Hebron wants may require offering some type of incentive packages, including tax breaks and infrastructure improvements. It was pointed out that Hebron has had success in attracting business such as the Hartford Health Care Medical Group and in the development of senior communities although both projects initially seemed unfeasible. The goal is to use these successes to frame a mindset of success in the community and market the Town accordingly.

Successfully marketing Hebron, it was agreed, will require an understanding of and promotion of the types of residents within the town and their market potential. Though it is common for developers and businesses to just count heads or rooftops (which Hebron currently lacks), Hebron should be marketed for having a large market potential as demonstrated by the high median household income of residents within Hebron's surrounding area. It is also important for the town itself to understand the consumer demands of its residents.

Specific development opportunities in town were discussed briefly. In-fill development was suggested as an acceptable possibility. The Horton property (Hebron Village Green) and the parking lot next to the Fire Department were the two undeveloped or underdeveloped lots which were considered.
The meeting concluded with an exercise that asked attendees to identify the strengths, weaknesses, opportunities, and threats that Hebron presents businesses that are either currently in the area or are considering locating to Hebron. The following tables summarize the results of this exercise.

STRENGTHS:
What specific factors about Hebron as a location enable businesses like yours to be successful?

Rural but accessible for commuters to major employment areas
High quality of life: good schools, little to no crime
Relative-median values of property (?)
Town Center
Demographics of residents

WEAKNESSES:
What specific factors about Hebron as a location prevent businesses like yours from being successful?

Town politics/regulations
No large employers
Lack of availability of sites

OPPORTUNITIES:
What new sources of income or activity either are available or are potentially available to a target business like yours due to the fact that it is Hebron?

More development in Center
We are at a tipping point- Commercial and business values are exceptional but need focused effort to inform outside world of that fact
Resurgence of the economy
Competition for a full care facility is lacking in the immediate area

THREATS:

What sources of new competition or potential sources of problems for target businesses like yours are due to the fact that it is Hebron?

Preconceived notion of "rooftop count" necessity to be successful in business
Lack of funding
Hebron's reputation as not being business friendly
Town politics/regulations
Conventional mentality of our town is to do business with "large player" developers and businesses

Appendix 2

Hebron Commuting Patterns

The following analysis gives a comprehensive overview of the commuting patterns of Hebron residents and workers that reside elsewhere but travel to Hebron to work.

Total Employee Inflow/Outflow

As depicted in Figure 1 to the right, the majority of Hebron's working residents, as of 2010, work outside of Hebron. 93% of working residents, or 3,043 people who live in Hebron, commute elsewhere for work, while 218 (approximately 7%) work and live within Hebron (see Table 1).

Of those employed in Hebron (a total of 921 people), 703 (76%) workers live outside of Hebron and 218 (24%) workers live in Hebron.

Though overall there is a considerable amount more outflow of workers from Hebron than inflow, (approximately 80% outflow, 20% inflow), of the jobs that exist in Hebron, an overwhelming majority (76%) are held by nonresidents.

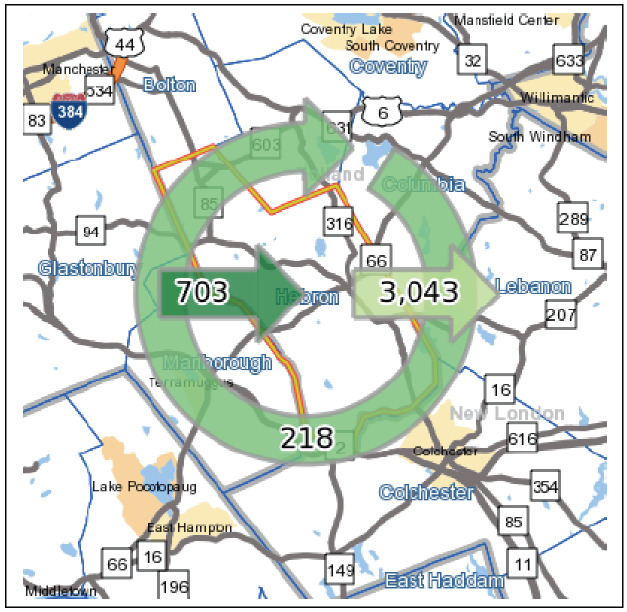


Figure 1: Inflow/Outflow 2010
Source: U.S. Census Bureau, Center for Economic

Table 1: Hebron Residents' Commuting Patterns

In-Area Labor Force Efficiency (All Private Jobs)	2010	
	Count	Share
Living in Hebron	3,261	100.0%
Living and Employed in Hebron	218	6.7%
Living in Hebron but Employed Outside	3,043	93.3%

Source: U.S. Census Bureau, Center for Economic Studies

Table 2: Hebron Workers' Commuting Patterns

In-Area Employment Efficiency (All Private Jobs)	2010	
	Count	Share
Employed in Hebron	921	100.0%
Employed and Living in Hebron	218	23.7%
Employed in Hebron but Living Outside	703	76.3%

Source: U.S. Census Bureau, Center for Economic Studies

Work Destinations

The top work destination for commuters from Hebron is the City of Hartford (see Table 2 below). Including Hartford proper, East Hartford, and West Hartford the overall number of commuters to Hartford is 895 people, or nearly 30% of all commuters. Other primary commuting destinations for Hebron residents include Middletown, Manchester, and Glastonbury Center with approximately 3% to 4% of all commuters.

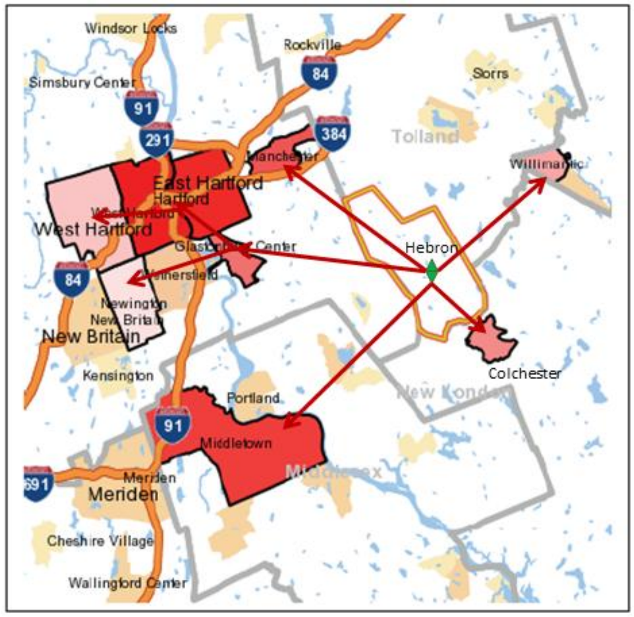
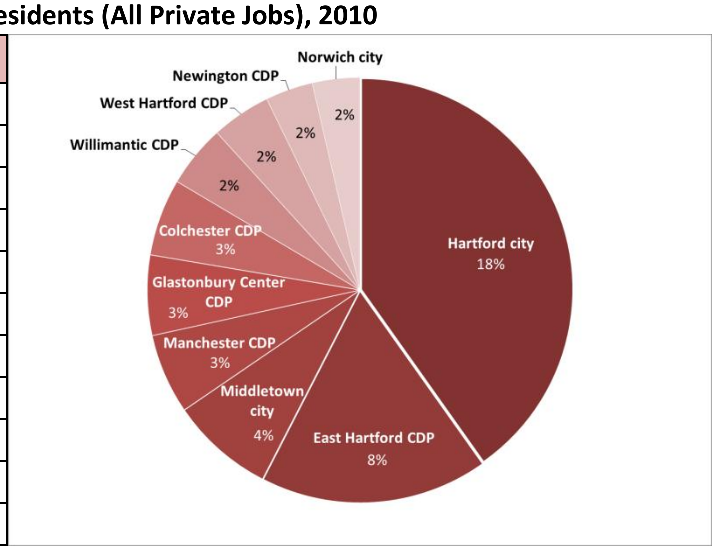


Figure 2: Work Destinations for Hebron Commuters
Source: U.S. Census Bureau, Center for Economic

Table 3: Top Ten Work Destinations for Hebron Residents (All Private Jobs), 2010

	Count	Share
Hartford city	579	17.8%
East Hartford CDP	251	7.7%
Middletown city	113	3.5%
Manchester CDP	88	2.7%
Glastonbury Center CDP	87	2.7%
Colchester CDP	86	2.6%
Willimantic CDP	67	2.1%
West Hartford CDP	65	2.0%
Newington CDP	51	1.6%
Norwich city	51	1.6%
All Other Locations	1,823	55.9%



Source: U.S. Census Bureau, Center for Economic Studies

Home Destinations

People coming into Hebron to work seem to live in a wide range of locations. Williamantic houses the largest number of Hebron's employees with 4% of workers (33 people) residing here. Colchester is a close second with 3% of workers or 24 people residing here. Generally however, it appears that workers commuting to Hebron are not centrally located in any one place. The major part of all workers commuting to Hebron (87%) live in places other than the top ten "home destinations" listed below in Table 4. The fact that 76% of Hebron's employees live outside of Hebron suggests that there is a potential opportunity to capture

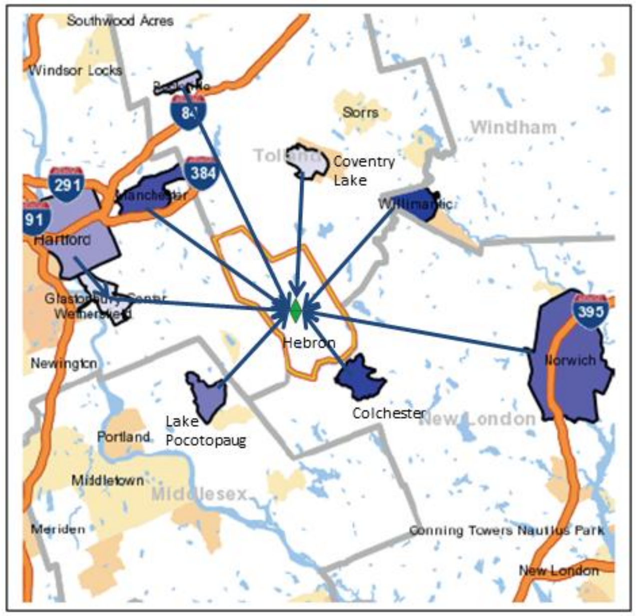
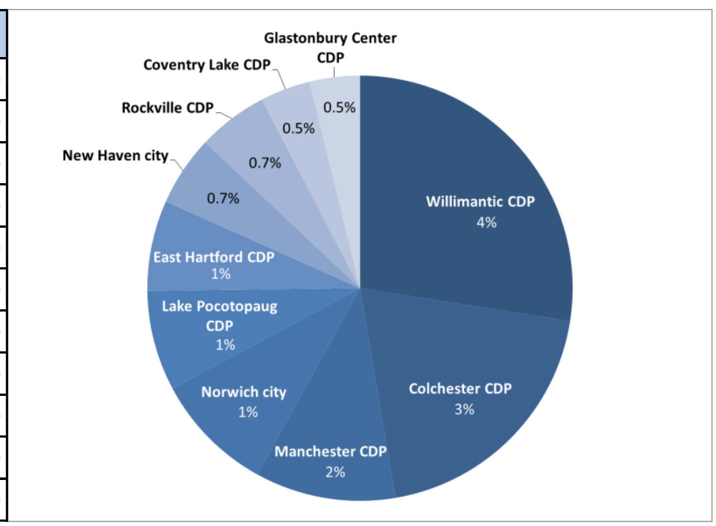


Figure 3: Home Destinations of Hebron's Workers
Source: U.S. Census Bureau, Center for Economic

Table 4: Top Ten Home Destinations for Hebron Workers (All Private Jobs), 2010

	Count	Share
Willimantic CDP	33	3.6%
Colchester CDP	24	2.6%
Manchester CDP	13	1.4%
Norwich city	11	1.2%
Lake Pocotopaug CDP	9	1.0%
East Hartford CDP	8	0.9%
New Haven city	6	0.7%
Rockville CDP	6	0.7%
Coventry Lake CDP	5	0.5%
Glastonbury Center CDP	5	0.5%
All Other Locations	801	87.0%



Source: U.S. Census Bureau, Center for Economic Studies

Commuters of Neighboring Towns

The commuting patterns of workers from Towns neighboring Hebron were analyzed to determine whether commuters pass through Hebron to reach either their work or home destinations. Commuters passing through Hebron represent a potential market of consumers which Hebron has an opportunity to serve. Many people shop or schedule appointments (doctor's appointments, personal care services, etc.) in places that are on their way to or from work. For each neighboring town, the number of commuters passing through Hebron has been estimated to give insight into the market of drive-by visitors.

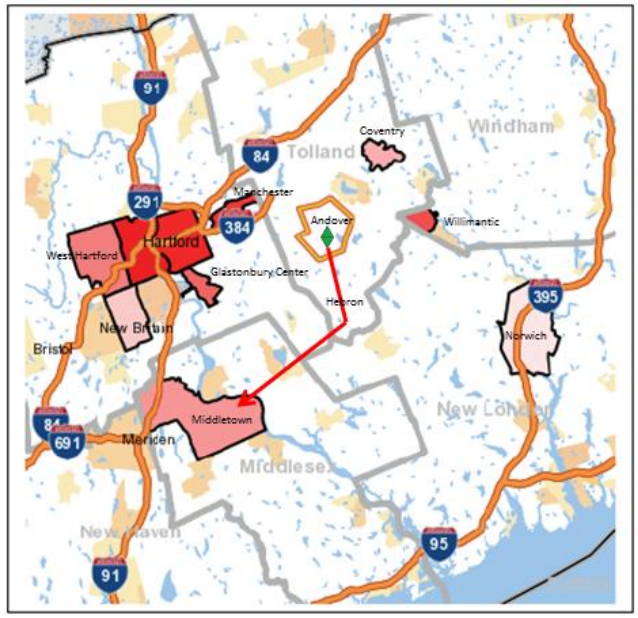


Figure 4: Work Destinations for Andover Commuters
Source: U.S. Census Bureau, Center for Economic Studies

Andover

As seen in Figure 4 to the right, commuters from Andover pass through Hebron to get to Middletown for work. This is the fastest route based on estimated travel times from Google Maps. Of the top ten commuter routes from Andover only the one to Middletown goes through Route 66 in Hebron.

Figure 5 shows the top home destinations for people who travel to Andover to work. No routes from any of these home destinations to Andover cross through Hebron.

In total there are approximately 27 commuters coming to or leaving from Andover and going through Hebron (see Table 5).

Table 5: Andover Commuters Traveling through Hebron

Live in Andover, Work in:	
Place	# of Commuters
Middletown	27
Work in Andover, Live in:	
Place	# of Commuters
-	0
	Total
	27

Source: U.S. Census Bureau, Center for Economic Studies

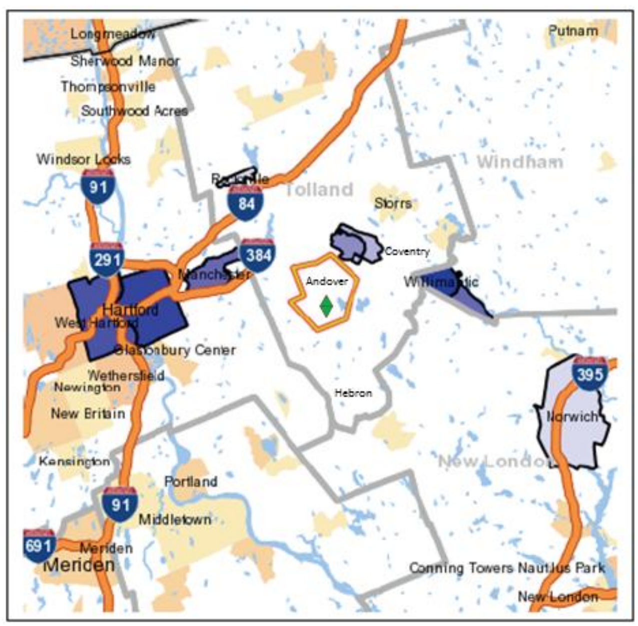


Figure 5: Home Destinations for Andover's Workers
Source: U.S. Census Bureau, Center for Economic Studies

Bolton

Commuters from Bolton to Middletown could potentially travel through the Route 66 corridor through Hebron (see Figure 7), however, depending on traffic conditions, the route through Route 384 going through Hartford is faster (according to Google Maps). For the purposes of this analysis, we will assume that half of the commuters going to Middletown will pass through Hartford and the other half will pass through Hebron.

Of the top home destinations for people working in Bolton, there are no driving routes that directly pass through Hebron.

The estimated number of total commuters coming from Bolton or going to Bolton is 23 people once accounting for the commuters that reach Middletown through Hartford.

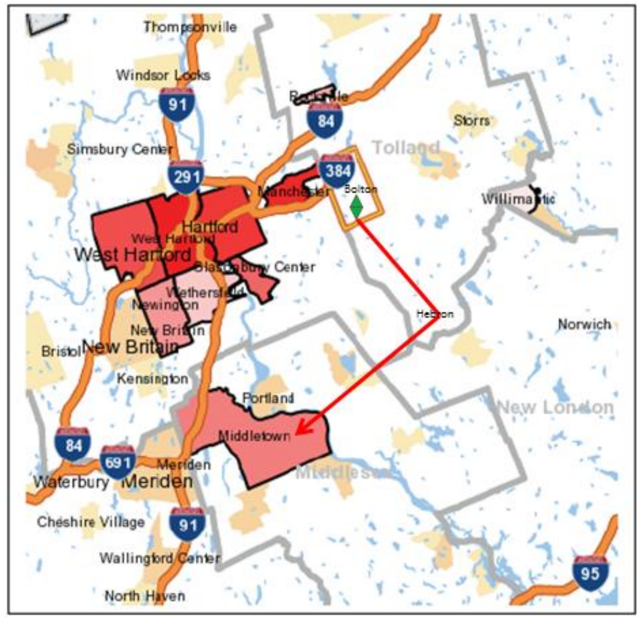


Figure 6: Work Destinations for Bolton Commuters
Source: U.S. Census Bureau, Center for Economic Studies

Table 6: Bolton Commuters Traveling through Hebron

Live in Bolton, Work in:	
Place	# of Commuters
Middletown	23
Work in Bolton, Live in:	
Place	# of Commuters
-	0
	Total
	23

Source: U.S. Census Bureau, Center for Economic Studies

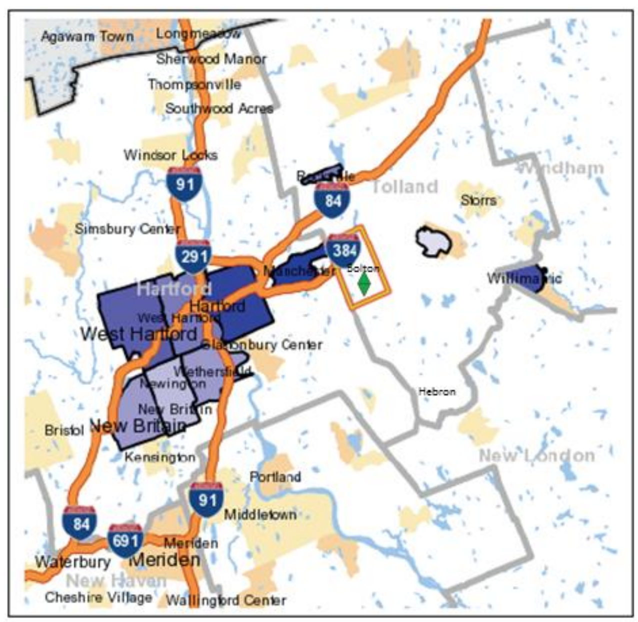


Figure 7: Home Destinations for Bolton Workers
Source: U.S. Census Bureau, Center for Economic Studies

Colchester

The fastest route for commuters from Colchester t
Glastonbury, however it is possible to travel to thes
the fastest route, according to Google Maps from C

We will assume, as in with the analysis of Bolton
from Colchester to Hartford, Manchester, and Will
traffic conditions, etc. We will do the same and as
Harford, Hartford, and Willimantic to work in Colche

Overall, it is estimated that a total of 237 commu
Colchester (see Table 7 below).

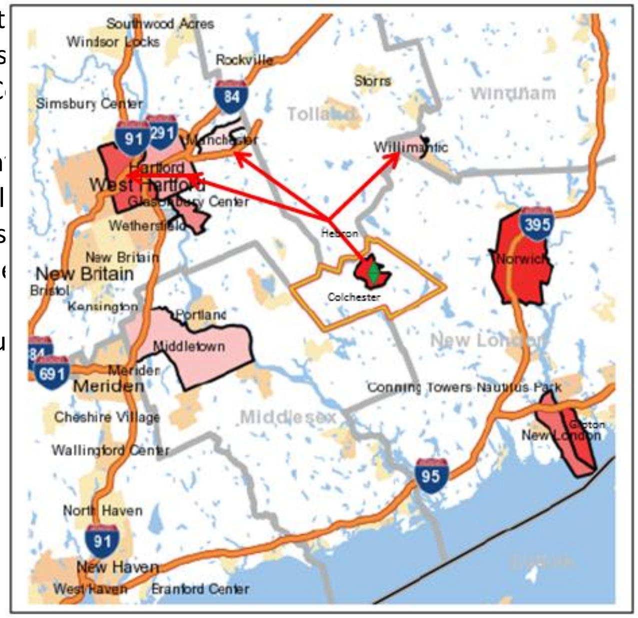


Figure 8: Work Destinations for Colchester Residents
Source: U.S. Census Bureau, Center for Economic Studies

Table 7: Colchester Commuters Traveling through Hebron

Live in Colchester, Work in:	
Place	# of Commuters
Hartford	101
East Hartford	37
Manchester	23
Willimantic	31
Work in Colchester, Live in:	
Place	# of Commuters
Hartford	9
East Hartford	16
Willimantic	21
	Total
	237

Source: U.S. Census Bureau, Center for Economic Studies

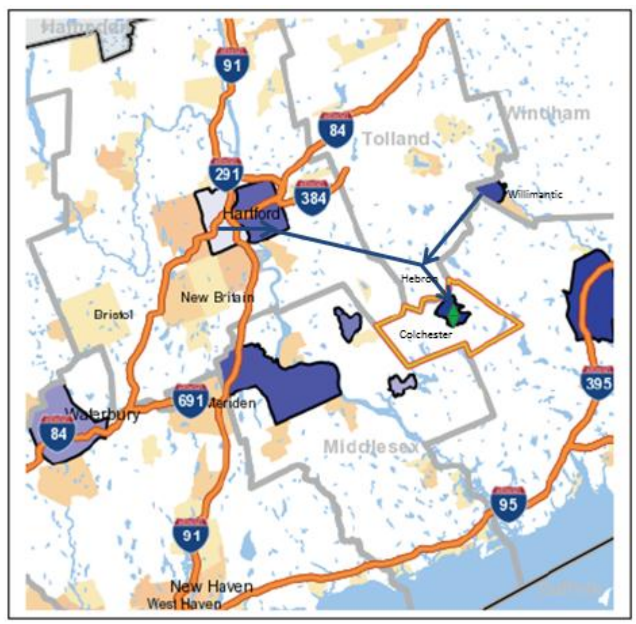


Figure 8: Home Destinations for Colchester Workers
Source: U.S. Census Bureau, Center for Economic Studies

Columbia

The fastest route for commuters from Columbia to both Middletown and Colchester Center is through Route 66 in Hebron, according to Google Maps (see Figure 11).

Likewise, people commuting from Colchester to Columbia to work will most likely pass through Hebron as it is the fastest route (see Figure 12).

An estimated total of 86 commuters pass through Hebron on their way from or to Columbia.

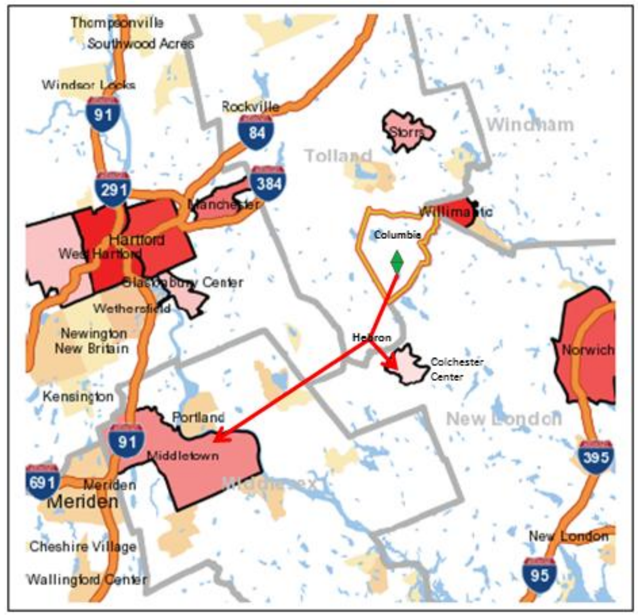


Figure 9: Work Destinations for Columbia Commuters
Source: U.S. Census Bureau, Center for Economic Studies

Table 8: Columbia Commuters Traveling through Hebron

Live in Columbia, Work in:	
Place	# of Commuters
Middletown	42
Colchester Center	27
Work in Columbia, Live in:	
Place	# of Commuters
Colchester Center	17
	Total
	86

Source: U.S. Census Bureau, Center for Economic Studies

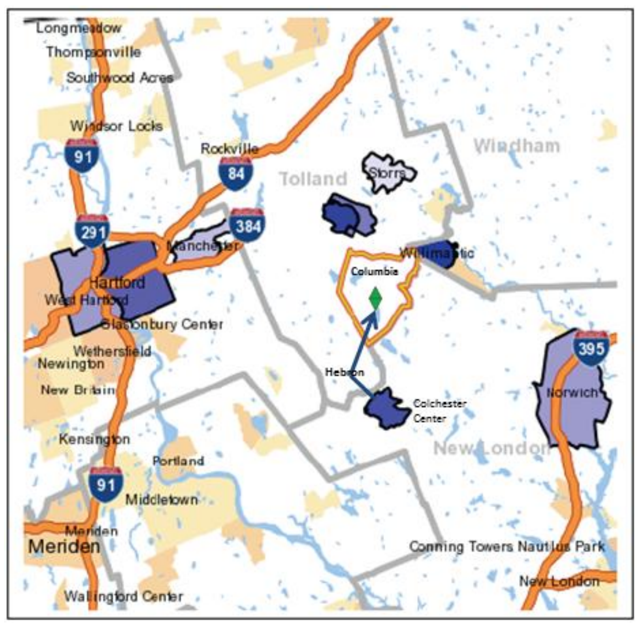


Figure 10: Home Destinations for Columbia Workers
Source: U.S. Census Bureau, Center for Economic Studies

Glastonbury

Based on the top work destinations of Glastonbury residents and people who travel to work in Glastonbury, it appears that there are no direct routes that would bring commuters through Hebron on their way to and from work (see Figures 12 and 13).

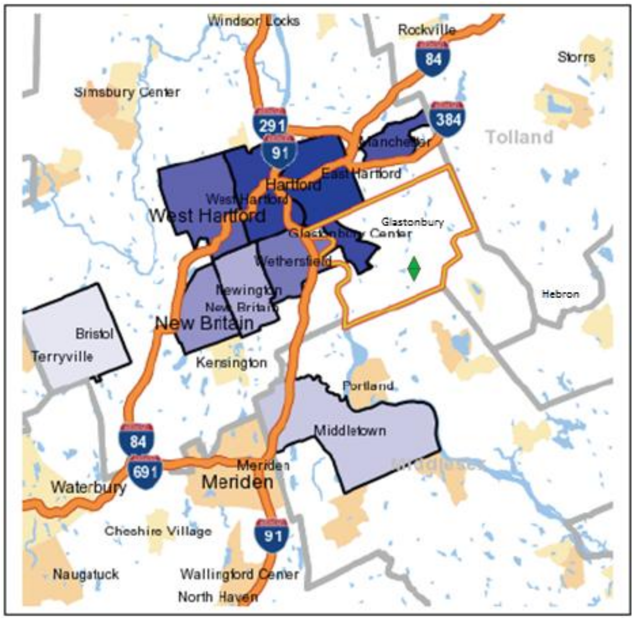


Figure 12: Home Destinations for Glastonbury Workers
Source: U.S. Census Bureau, Center for Economic Studies

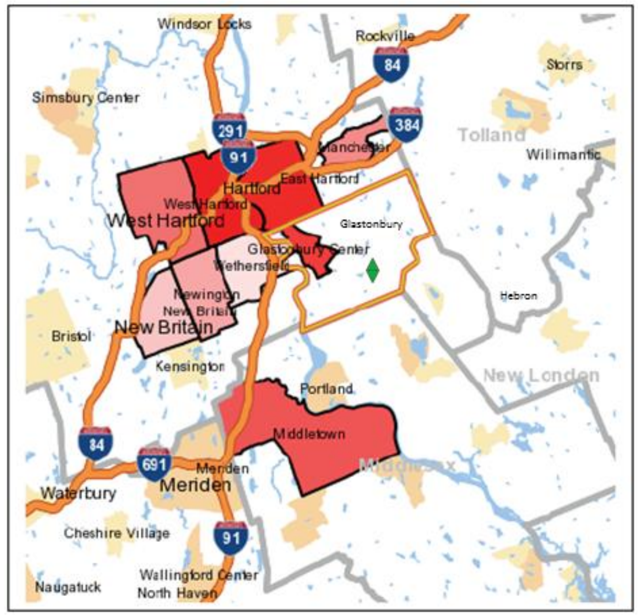


Figure 11: Work Destinations for Glastonbury Commuters
Source: U.S. Census Bureau, Center for Economic Studies

Lebanon

The fastest commute from Lebanon to Glastonbury Center and Hartford is through Route 66 passing through Hebron and then through Route 2 in Glastonbury (see Figure 15). Commuters living in Lebanon but working in Hartford will also mostly likely pass through Hebron on their way back home as this is the fastest route according to Google Maps.

Approximately 149 commuters to and from Lebanon pass through Hebron (see Table 9).

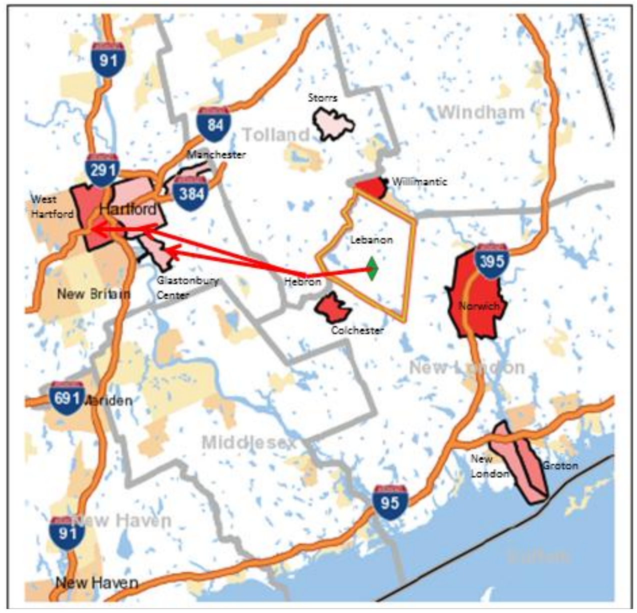


Figure 13: Work Destinations for Lebanon Commuters
Source: U.S. Census Bureau, Center for Economic Studies

Table 9: Lebanon Commuters Traveling through Hebron

Live in Lebanon, Work in:	
Place	# of Commuters
Hartford	75
East Hartford	29
Glastonbury Center	29
Work in Lebanon, Live in:	
Place	# of Commuters
Hartford	9
East Hartford	7
	Total
	149

Source: U.S. Census Bureau, Center for Economic Studies

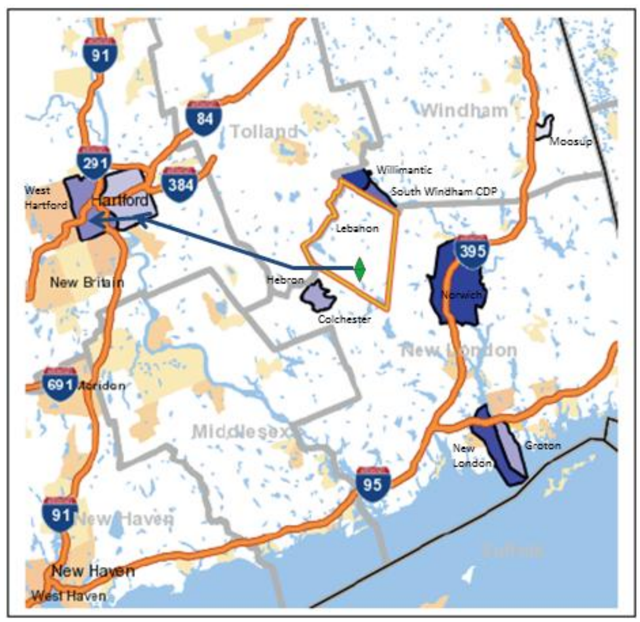


Figure 14: Home Destinations for Lebanon Workers
Source: U.S. Census Bureau, Center for Economic Studies

Mansfield

Travel routes from Mansfield to Middletown and Meriden through Hartford and through Hebron are nearly equidistant according to Google Maps. Again, the estimated total number of commuters from Mansfield passing through Hebron was calculated by assuming that half of the people going to Middletown and Meriden go through Hartford and the other half go through Hebron.

Travel routes to top home destinations for workers in Mansfield do not pass through Hebron (see Figure 18).

The total estimated number of commuters traveling through Hebron to get to and from Mansfield is 52 people.

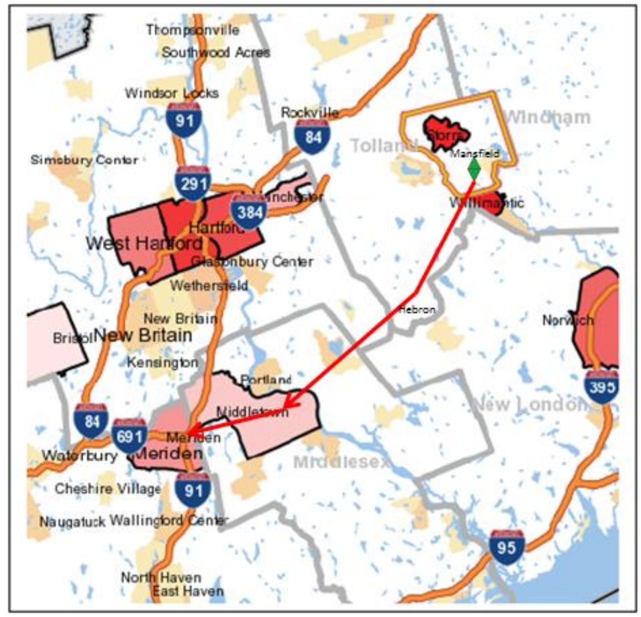


Figure 15: Work Destinations for Mansfield Commuters
Source: U.S. Census Bureau, Center for Economic Studies

Table 10: Mansfield Commuters Traveling through Hebron

Live in Mansfield, Work in:	
Place	# of Commuters
Middletown	25
Meriden	28
Work in Mansfield, Live in:	
Place	# of Commuters
-	0
	Total
	52

Source: U.S. Census Bureau, Center for Economic Studies

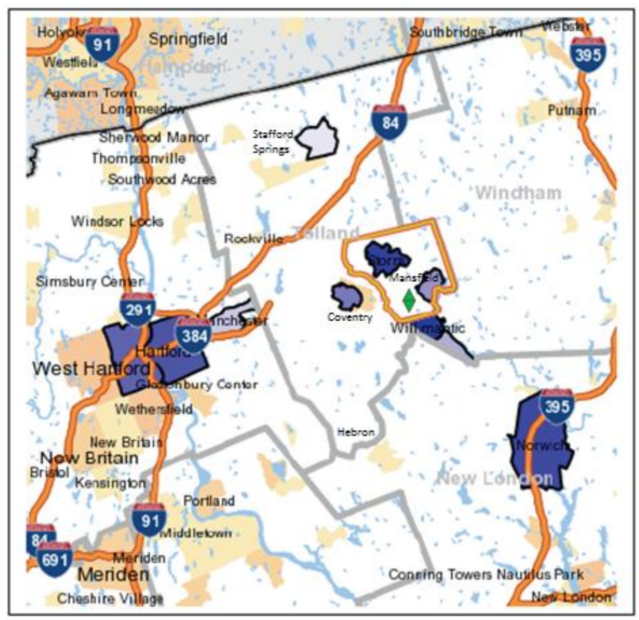


Figure 16: Home Destinations for Mansfield Workers
Source: U.S. Census Bureau, Center for Economic Studies

Marlborough

For workers commuting from Marlborough, there are no direct routes that would take them through Route 66 in Hebron, as the top work destinations for commuters from Marlborough are all West of Marlborough (see Figure 18).

There are small though significant amounts of people who live East of Marlborough in Willimantic who commute through Hebron to work in Marlborough (see Figure 19). An approximate total of 13 people commute from or to Marlborough through Hebron to work as seen in Table 11 below.

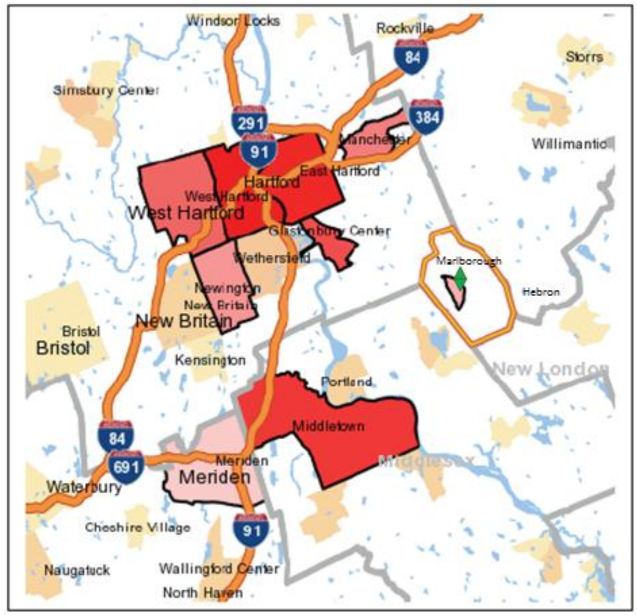


Figure 17: Work Destinations for Marlborough Commuters
Source: U.S. Census Bureau, Center for Economic Studies

Table 11: Marlborough Total Commuters through Hebron

Live in Marlborough, Work in:	
Place	# of Commuters
-	0
Work in Marlborough, Live in:	
Place	# of Commuters
Willimantic	13
	Total
	13

Source: U.S. Census Bureau, Center for Economic Studies

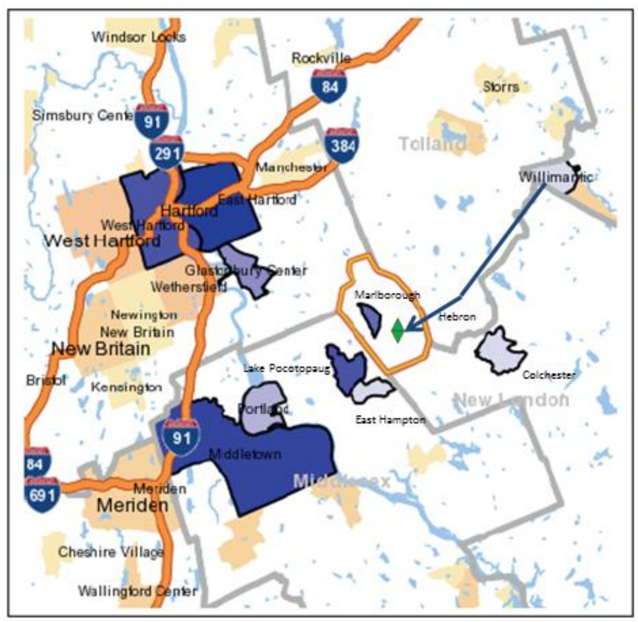


Figure 18: Home Destinations for Marlborough Workers
Source: U.S. Census Bureau, Center for Economic Studies

Windham

Approximately 106 people commute to or from Windham to work and pass through Route 66 in Hebron. As seen in Table 12 below, an estimated 55 people who live in Windham drive through Hebron to work in Middletown, and about 51 people who live in Middletown drive to Windham to work presumably taking the same route through Hebron.

Table 12: Windham Total Commuters through Hebron

Live in Windham, Work in:	
Place	# of Commuters
Middletown	55
Work in Windham, Live in:	
Place	# of Commuters
Middletown	51
	Total
	106

Source: U.S. Census Bureau, Center for Economic Studies

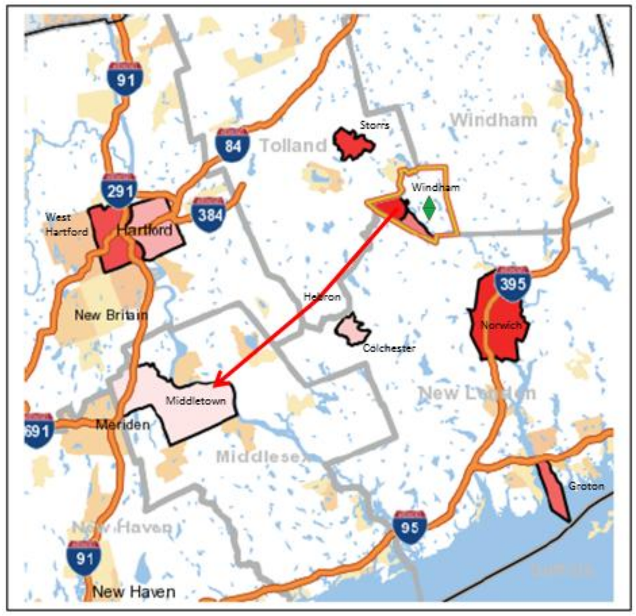


Figure 19: Work Destinations for Windham Commuters
Source: U.S. Census Bureau, Center for Economic Studies

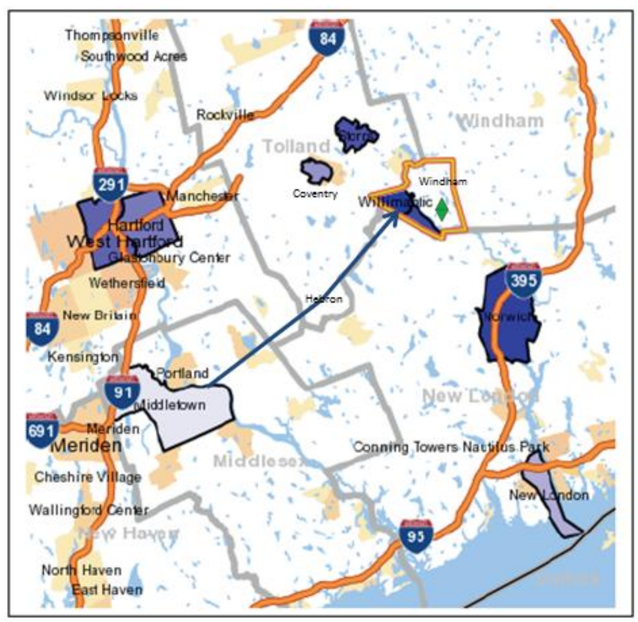


Figure 20: Home Destinations for Windham Workers
Source: U.S. Census Bureau, Center for Economic Studies

In all there are an estimated 574 commuters that pass through Hebron to reach their work or home destinations. Table 13 to the right breaks this down by final destination place. Hartford and Middletown are the top work destinations for commuters traveling through Hebron and East Hartford and Willimantic are the top home destinations for people traveling through Hebron returning from work.

Table 13: Total Commuters Passing through Hebron

Work in:	
Place	# of Commuters
Middletown	102
Hartford	176
East Hartford	66
Manchester	23
Willimantic	31
Colchester Center	27
Glastonbury Center	29
Meriden	28
Total	**482**

Live in:	
Place	# of Commuters
Hartford	18
East Hartford	23
Willimantic	21
Colchester Center	17
Willimantic	13
Total	**92**

Total
574

Source: Source: U.S. Census Bureau, Center for Economic Studies

Appendix 3

Shift Share

Shift-Share Analysis: Tolland County versus Hebron, 2001-2011

Sector	County Growth Component, Percent	County Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
Construction	0.08	20.77	-0.22	-61.67	-0.20	-4.52
Wholesale Trade	0.08	9.14	0.12	15.02	0.20	1.57
Retail Trade	0.08	5.44	-0.09	-6.57	-0.05	-2.76
Finance and Insurance	0.08	0.98	-0.10	-1.24	0.51	5.41
Real Estate and Rental and Leasing	0.08	1.28	-0.12	-2.08	-0.54	-5.44
Professional, Scientific, and Technical Services	0.08	29.46	0.28	110.21	-0.72	-27.63
Administrative and Support and Waste Mgmt, etc	0.08	25.31	0.31	104.13	-0.96	-81.56
Health Care and Social Assistance	0.08	72.67	0.13	129.26	0.91	122.55
Accommodation and Food Services	0.08	17.22	0.00	-0.97	-0.17	-5.23
Other Services (except Public Administration)	0.08	16.32	0.09	19.49	0.12	1.24
		198.59		**305.58**		**3.62**

Shift-Share Analysis: Tolland County versus Hebron, 2007-2011

Sector	County Growth Component, Percent	County Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
Construction	-0.03	-10.36	-0.16	-60.06	-0.31	-8.69
Wholesale Trade	-0.03	-0.56	0.00	0.02	0.05	0.08
Retail Trade	-0.03	-9.55	-0.04	-14.47	-0.03	-0.74
Finance and Insurance	-0.03	-0.17	0.02	0.11	-0.09	-0.28
Real Estate and Rental and Leasing	-0.03	-1.74	-0.12	-7.69	-0.52	-4.67
Professional, Scientific, and Technical Services	-0.03	-9.47	0.32	109.59	-0.34	-0.20
Administrative and Support and Waste Mgmt, etc	-0.03	-2.55	0.11	10.00	0.06	0.42
Health Care and Social Assistance	-0.03	-4.06	0.05	7.95	0.13	5.05
Accommodation and Food Services	-0.03	-4.28	-0.01	-2.25	-0.15	-4.13
Other Services (except Public Administration)	-0.03	-2.02	0.08	5.60	-0.02	-0.08
		-44.75		**48.82**		**-13.24**

Shift-Share Analysis: Hartford MSA versus Hebron, 2001-2011

Sector	MSA Growth Component, Percent	MSA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
Construction	-0.03	-135.09	-0.19	-938.08	-0.24	-5.36
Wholesale Trade	-0.03	-37.71	-0.03	-45.52	0.35	2.82
Retail Trade	-0.03	-67.28	-0.01	-31.35	-0.13	-7.17
Finance and Insurance	-0.03	-200.78	-0.09	-655.65	0.50	5.33
Real Estate and Rental and Leasing	-0.03	-7.34	-0.01	-3.66	-0.65	-6.53
Professional, Scientific, and Technical Services	-0.03	-10.06	0.01	5.56	-0.46	-17.41
Administrative and Support and Waste Mgmt, etc	-0.03	-3.99	0.03	4.81	-0.68	-57.97
Health Care and Social Assistance	-0.03	-238.63	0.14	1207.70	0.91	122.26
Accommodation and Food Services	-0.03	-49.50	0.07	136.65	-0.25	-7.64
Other Services (except Public Administration)	-0.03	-15.03	0.00	-0.72	0.21	2.23
		-765.41		**-320.28**		**30.56**

Shift-Share Analysis: Hartford MSA versus Hebron, 2007-2011

Sector	MSA Growth Component, Percent	MSA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
Construction	-0.04	-224.02	-0.20	-1174.17	-0.27	-7.58
Wholesale Trade	-0.04	-63.42	-0.03	-50.76	0.08	0.13
Retail Trade	-0.04	-110.93	-0.01	-19.70	-0.06	-1.66
Finance and Insurance	-0.04	-274.65	-0.07	-514.67	0.00	-0.01
Real Estate and Rental and Leasing	-0.04	-14.56	-0.02	-6.35	-0.63	-5.63
Professional, Scientific, and Technical Services	-0.04	-21.73	0.02	11.49	-0.03	-0.02
Administrative and Support and Waste Mgmt, etc	-0.04	-29.01	0.01	8.60	0.16	1.07
Health Care and Social Assistance	-0.04	-275.88	0.13	897.77	0.06	2.22
Accommodation and Food Services	-0.04	-20.88	0.05	28.24	-0.21	-5.99
Other Services (except Public Administration)	-0.04	-34.83	-0.01	-5.93	0.06	0.19
		-1069.93		**-825.48**		**-17.29**

Shift-Share Analysis: Hartford LMA versus Hebron, 2001-2011

Sector	LMA Growth Component, Percent	LMA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
Construction	-0.03	-106.86	-0.17	-734.06	-0.25	-5.68
Wholesale Trade	-0.03	-41.77	-0.06	-95.27	0.38	3.02
Retail Trade	-0.03	-81.18	-0.03	-103.90	-0.11	-6.07
Finance and Insurance	-0.03	-262.84	-0.14	-1415.21	0.55	5.84
Real Estate and Rental and Leasing	-0.03	-7.00	0.08	20.88	-0.74	-7.42
Professional, Scientific, and Technical Services	-0.03	-3.17	0.03	3.72	-0.47	-17.97
Administrative and Support and Waste Mgmt, etc	-0.03	-3.35	0.02	2.62	-0.67	-56.89
Health Care and Social Assistance	-0.03	-361.11	0.23	3274.57	0.82	109.96
Accommodation and Food Services	-0.03	-150.87	0.23	1374.68	-0.40	-12.38
Other Services (except Public Administration)	-0.03	-7.13	0.01	2.60	0.20	2.11
		-1025.27		**2330.62**		**14.53**

Shift-Share Analysis: Hartford LMA versus Hebron, 2007-2011

Sector	LMA Growth Component, Percent	LMA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
Construction	-0.03	-168.59	-0.21	-1120.58	-0.27	-7.42
Wholesale Trade	-0.03	-39.32	-0.03	-41.09	0.08	0.13
Retail Trade	-0.03	-80.83	-0.02	-39.62	-0.06	-1.44
Finance and Insurance	-0.03	-193.88	-0.07	-439.97	0.00	-0.01
Real Estate and Rental and Leasing	-0.03	-6.84	0.00	-1.06	-0.64	-5.74
Professional, Scientific, and Technical Services	-0.03	-24.10	0.01	4.08	-0.02	-0.01
Administrative and Support and Waste Mgmt, etc	-0.03	-13.63	0.01	5.92	0.16	1.06
Health Care and Social Assistance	-0.03	-220.60	0.12	860.20	0.06	2.36
Accommodation and Food Services	-0.03	-33.79	0.06	67.91	-0.23	-6.29
Other Services (except Public Administration)	-0.03	-4.25	0.02	3.20	0.03	0.09
		-785.82		**-701.01**		**-17.28**

Shift-Share Analysis: Hartford MSA versus Tolland County, 2001-2011

Sector		MSA Growth Component, Percent	MSA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	**Agriculture, forestry, fishing and hunting**	**-0.03**	**-22.93**	**-0.30**	**-257.22**	**0.61**	**56.50**
111	Crop production	-0.03	-5.45	-0.09	-19.18	0.66	51.49
21	**Mining**	**-0.03**	**-1.48**	**-0.28**	**-15.42**	**-0.22**	**-8.35**
23	**Construction**	**-0.03**	**-123.63**	**-0.17**	**-791.77**	**0.02**	**6.61**
236	Construction of buildings	-0.03	-23.25	-0.18	-158.73	-0.12	-18.53
237	Heavy and civil engineering construction	-0.03	-4.02	0.09	14.05	0.67	49.48
238	Specialty trade construction	-0.03	-104.34	-0.21	-794.30	0.05	9.60
31-33	**Manufacturing**	**-0.03**	**-476.23**	**-0.18**	**-3251.63**	**0.00**	**-0.09**
311	Food manufacturing	-0.03	-16.35	0.33	200.43	-0.38	-5.73
313	Textile mills	-0.03	-6.77	-0.56	-139.74	-0.03	-6.77
321	Wood product manufacturing	-0.03	-7.50	-0.40	-109.95	0.69	6.90
326	Plastics and rubber products manufacturing	-0.03	-19.04	-0.25	-177.89	0.00	0.12
332	Fabricated metal product manufacturing	-0.03	-80.44	-0.14	-419.91	0.09	1.76
333	Machinery manufacturing	-0.03	-67.57	-0.23	-568.77	0.00	-0.77
334	Computer and electronic product manufacturing	-0.03	-38.06	-0.26	-368.08	0.39	34.28
335	Electrical equipment and appliance manufacturing	-0.03	-45.97	-0.35	-602.74	0.44	1.32
337	Furniture and related product manufacturing	-0.03	-8.04	-0.17	-50.08	-0.35	-5.90
339	Miscellaneous manufacturing	-0.03	-27.11	-0.28	-277.76	0.10	2.27
42	**Wholesale trade**	**-0.03**	**-47.48**	**-0.05**	**-82.44**	**0.25**	**29.83**
423	Merchant wholesalers, durable goods	-0.03	-60.61	-0.13	-298.52	0.33	17.97
44-45	**Retail trade**	**-0.03**	**-76.42**	**-0.02**	**-50.16**	**0.00**	**0.14**
441	Motor vehicle and parts dealers	-0.03	-14.73	-0.04	-24.14	0.07	1.39
442	Furniture and home furnishings stores	-0.03	-9.77	-0.11	-39.57	0.37	11.82
444	Building material and garden supply stores	-0.03	-5.13	-0.01	-2.44	-0.29	-31.92
445	Food and beverage stores	-0.03	-30.24	-0.04	-48.70	0.09	7.48
446	Health and personal care stores	-0.03	-8.15	-0.03	-10.24	-0.04	-0.91
447	Gasoline stations	-0.03	-7.55	-0.11	-29.41	0.48	45.67
448	Clothing and clothing accessories stores	-0.03	-6.61	0.07	16.77	-0.78	-94.40
453	Miscellaneous store retailers	-0.03	-24.31	-0.21	-190.46	-0.02	-0.98
454	Nonstore retailers	-0.03	-5.21	-0.06	-12.48	0.16	2.55
48-49	**Transportation and warehousing**	**-0.03**	**-23.33**	**-0.02**	**-21.59**	**1.63**	**920.99**
484	Truck transportation	-0.03	-3.08	-0.02	-1.93	-0.36	-12.89
51	**Information**	**-0.03**	**-35.58**	**-0.07**	**-98.04**	**-0.23**	**-43.55**
511	Publishing industries, except Internet	-0.03	-15.27	-0.15	-84.50	0.08	1.55
519	Other information services	-0.03	-2.05	0.25	19.34	0.17	4.18
52	**Finance and insurance**	**-0.03**	**-268.57**	**-0.12**	**-1206.50**	**0.10**	**1.32**
522	Credit intermediation and related activities	-0.03	-62.88	-0.19	-436.02	0.12	3.59
53	**Real estate and rental and leasing**	**-0.03**	**-4.99**	**0.06**	**10.45**	**-0.10**	**-1.76**
54	**Professional and technical services**	**-0.03**	**-13.49**	**0.04**	**21.82**	**0.31**	**122.65**
541	Professional and technical services	-0.03	-13.49	0.04	21.82	0.31	122.65
56	**Administrative and waste management**	**-0.03**	**-11.73**	**0.01**	**4.84**	**0.38**	**125.71**
61	**Educational services**	**-0.03**	**-92.20**	**0.38**	**1294.01**	**0.14**	**16.28**
611	Educational services	-0.03	-92.20	0.38	1294.01	0.14	16.28
62	**Health care and social assistance**	**-0.03**	**-411.30**	**0.23**	**3538.09**	**-0.02**	**-21.30**
621	Ambulatory health care services	-0.03	-124.09	0.22	1030.45	-0.13	-16.30
622	Hospitals	-0.03	-53.36	0.14	272.35	-0.09	-6.83
623	Nursing and residential care facilities	-0.03	-73.81	0.16	445.99	0.13	43.86
624	Social assistance	-0.03	-153.03	0.62	3507.52	0.18	74.78
71	**Arts, entertainment, and recreation**	**-0.03**	**-9.17**	**0.07**	**25.42**	**0.08**	**5.73**
72	**Accommodation and food services**	**-0.03**	**-176.50**	**0.22**	**1438.28**	**-0.15**	**-33.87**
721	Accommodation	-0.03	-7.18	-0.04	-10.44	-0.25	-16.48
722	Food services and drinking places	-0.03	-183.68	0.25	1733.64	-0.16	-45.76
81	**Other services, except public administration**	**-0.03**	**-16.37**	**0.00**	**-2.28**	**0.17**	**36.62**
811	Repair and maintenance	-0.03	-23.55	-0.12	-107.27	0.04	1.61
812	Personal and laundry services	-0.03	-20.66	-0.09	-68.17	0.03	0.63
813	Membership associations and organizations	-0.03	-5.75	-0.01	-1.65	0.48	66.79
814	Private households	-0.03	-33.53	1.08	1340.68	0.01	1.95
			-1802.24		530.44		1207.73

Shift-Share Analysis: Hartford MSA versus Tolland County, 2007-2011

Sector		MSA Growth Component, Percent	MSA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	**Agriculture, forestry, fishing and hunting**	**-0.04**	**-6.59**	**-0.05**	**-8.80**	**0.28**	**20.15**
111	Crop production	-0.04	-7.24	-0.08	-14.27	0.35	16.64
21	**Mining**	**-0.04**	**-0.62**	**-0.08**	**-1.21**	**-0.10**	**-0.79**
23	**Construction**	**-0.04**	**-224.02**	**-0.20**	**-1174.17**	**0.01**	**4.30**
236	Construction of buildings	-0.04	-44.35	-0.22	-258.67	-0.02	-2.41
237	Heavy and civil engineering construction	-0.04	-0.77	0.05	0.94	0.37	18.31
238	Specialty trade construction	-0.04	-180.36	-0.23	-1074.46	0.01	1.55
31-33	**Manufacturing**	**-0.04**	**-325.82**	**-0.08**	**-635.18**	**-0.09**	**-56.49**
311	Food manufacturing	-0.04	-9.32	0.14	34.15	-0.09	-1.23
313	Textile mills	-0.04	-4.47	-0.35	-41.14	-0.04	-4.47
321	Wood product manufacturing	-0.04	-7.21	-0.29	-54.47	-0.05	-1.20
326	Plastics and rubber products manufacturing	-0.04	-28.28	-0.25	-182.25	0.03	0.67
332	Fabricated metal product manufacturing	-0.04	-66.66	-0.07	-114.51	0.07	0.00
333	Machinery manufacturing	-0.04	-48.24	-0.11	-133.86	-0.23	-65.55
334	Computer and electronic product manufacturing	-0.04	-4.32	0.01	0.83	-0.01	-0.01
335	Electrical equipment and appliance manufacturing	-0.04	-20.69	-0.12	-66.46	-0.08	-0.85
337	Furniture and related product manufacturing	-0.04	-12.21	-0.17	-52.74	-0.26	-3.15
339	Miscellaneous manufacturing	-0.04	-7.59	-0.04	-7.90	-0.14	-3.21
42	**Wholesale trade**	**-0.04**	**-63.42**	**-0.03**	**-50.76**	**0.00**	**0.08**
423	Merchant wholesalers, durable goods	-0.04	-64.46	-0.09	-143.10	0.04	0.62
44-45	**Retail trade**	**-0.04**	**-110.93**	**-0.01**	**-19.70**	**-0.06**	**-21.68**
441	Motor vehicle and parts dealers	-0.04	-28.44	-0.06	-40.85	-0.03	-1.84
442	Furniture and home furnishings stores	-0.04	-16.80	-0.12	-52.83	-0.08	-3.36
444	Building material and garden supply stores	-0.04	-23.04	-0.08	-45.97	-0.07	-2.75
445	Food and beverage stores	-0.04	-9.94	0.06	14.52	-0.03	-1.19
446	Health and personal care stores	-0.04	-7.09	0.00	0.10	-0.11	-5.14
447	Gasoline stations	-0.04	-8.25	-0.07	-14.04	-0.03	-1.18
448	Clothing and clothing accessories stores	-0.04	-59.92	-0.16	-253.71	-0.46	-36.56
453	Miscellaneous store retailers	-0.04	-9.05	-0.04	-8.68	-0.20	-11.85
454	Nonstore retailers	-0.04	-0.69	0.03	0.53	-0.03	0.00
48-49	**Transportation and warehousing**	**-0.04**	**-11.10**	**0.02**	**5.94**	**-0.01**	**-0.08**
484	Truck transportation	-0.04	-1.19	0.03	0.81	0.01	0.02
51	**Information**	**-0.04**	**-36.49**	**-0.04**	**-34.42**	**-0.28**	**-58.61**
511	Publishing industries, except Internet	-0.04	-10.02	-0.05	-13.25	-0.06	-2.05
519	Other information services	-0.04	-9.25	-0.33	-79.37	-0.32	-47.13
52	**Finance and insurance**	**-0.04**	**-274.65**	**-0.07**	**-514.67**	**0.06**	**0.38**
522	Credit intermediation and related activities	-0.04	-62.88	-0.12	-198.44	0.02	1.04
53	**Real estate and rental and leasing**	**-0.04**	**-14.56**	**-0.02**	**-6.35**	**-0.14**	**-8.38**
54	**Professional and technical services**	**-0.04**	**-21.73**	**0.02**	**11.49**	**0.28**	**93.24**
541	Professional and technical services	-0.04	-21.73	0.02	11.49	0.28	93.24
56	**Administrative and waste management**	**-0.04**	**-29.01**	**0.01**	**8.60**	**0.07**	**6.41**
61	**Educational services**	**-0.04**	**-55.18**	**0.16**	**230.34**	**-0.06**	**-1.91**
611	Educational services	-0.04	-55.18	0.16	230.34	-0.06	-1.91
62	**Health care and social assistance**	**-0.04**	**-275.88**	**0.13**	**897.77**	**-0.10**	**-14.29**
621	Ambulatory health care services	-0.04	-101.03	0.14	372.51	-0.07	-6.88
622	Hospitals	-0.04	-36.41	0.09	83.66	-0.13	-10.51
623	Nursing and residential care facilities	-0.04	-33.02	0.08	66.42	-0.09	-1.12
624	Social assistance	-0.04	-96.13	0.23	583.53	-0.05	-7.52
71	**Arts, entertainment, and recreation**	**-0.04**	**-4.32**	**0.05**	**6.02**	**0.04**	**1.78**
72	**Accommodation and food services**	**-0.04**	**-20.88**	**0.05**	**28.24**	**-0.09**	**-14.51**
721	Accommodation	-0.04	-22.00	-0.09	-53.44	-0.18	-10.22
722	Food services and drinking places	-0.04	-42.89	0.07	77.67	-0.10	-9.31
81	**Other services, except public administration**	**-0.04**	**-34.83**	**-0.01**	**-5.93**	**0.06**	**4.06**
811	Repair and maintenance	-0.04	-19.80	-0.06	-28.52	0.01	0.24
812	Personal and laundry services	-0.04	-15.22	-0.02	-9.81	-0.09	-4.48
813	Membership associations and organizations	-0.04	-20.07	-0.04	-22.04	0.25	17.89
814	Private households	-0.04	-20.19	0.31	164.63	0.01	0.85
			-1510.03		-1262.79		-46.34

Shift-Share Analysis: Hartford LMA versus Tolland County, 2001-2011

	Sector	LMA Growth Component, Percent	LMA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	**Agriculture, forestry, fishing and hunting**	**-0.03**	**-0.50**	**0.04**	**0.71**	**0.27**	**25.05**
111	Crop production	-0.03	-3.32	0.11	14.89	0.45	35.29
21	**Mining**	**-0.03**	**-1.41**	**-0.24**	**-13.24**	**-0.26**	**-10.01**
23	**Construction**	**-0.03**	**-106.86**	**-0.17**	**-734.06**	**0.02**	**6.66**
236	Construction of buildings	-0.03	-20.50	-0.19	-155.03	-0.11	-17.52
237	Heavy and civil engineering construction	-0.03	-2.72	0.08	8.16	0.69	50.86
238	Specialty trade construction	-0.03	-89.06	-0.20	-717.96	0.05	9.15
31-33	**Manufacturing**	**-0.03**	**-399.53**	**-0.19**	**-3039.00**	**0.01**	**4.93**
311	Food manufacturing	-0.03	-16.84	0.41	272.59	-0.46	-6.89
313	Textile mills	-0.03	-7.30	-0.45	-129.22	-0.14	-34.67
321	Wood product manufacturing	-0.03	-7.40	-0.44	-128.50	0.73	7.31
326	Plastics and rubber products manufacturing	-0.03	-7.81	-0.14	-42.67	-0.11	-3.08
332	Fabricated metal product manufacturing	-0.03	-84.52	-0.17	-568.40	0.12	2.33
333	Machinery manufacturing	-0.03	-55.52	-0.23	-503.98	0.00	-0.51
334	Computer and electronic product manufacturing	-0.03	-35.07	-0.28	-387.13	0.40	35.80
335	Electrical equipment and appliance manufacturing	-0.03	-36.46	-0.31	-448.44	0.40	1.19
337	Furniture and related product manufacturing	-0.03	-8.31	-0.19	-63.76	-0.32	-5.47
339	Miscellaneous manufacturing	-0.03	-25.35	-0.35	-354.44	0.18	3.93
42	**Wholesale trade**	**-0.03**	**-41.77**	**-0.06**	**-95.27**	**0.26**	**31.11**
423	Merchant wholesalers, durable goods	-0.03	-49.80	-0.13	-263.95	0.33	18.01
44-45	**Retail trade**	**-0.03**	**-81.18**	**-0.03**	**-103.90**	**0.02**	**1.19**
441	Motor vehicle and parts dealers	-0.03	-15.08	-0.06	-36.48	0.09	1.72
442	Furniture and home furnishings stores	-0.03	-4.18	-0.05	-8.17	0.31	9.90
444	Building material and garden supply stores	-0.03	-0.08	0.03	0.08	-0.33	-36.18
445	Food and beverage stores	-0.03	-23.77	-0.04	-38.15	0.09	7.24
446	Health and personal care stores	-0.03	-8.21	-0.05	-15.24	-0.02	-0.58
447	Gasoline stations	-0.03	-4.08	-0.06	-9.98	0.43	41.50
448	Clothing and clothing accessories stores	-0.03	-4.83	-0.02	-2.95	-0.70	-84.27
453	Miscellaneous store retailers	-0.03	-23.16	-0.25	-230.25	0.02	1.27
454	Nonstore retailers	-0.03	-4.96	-0.09	-18.38	0.19	3.01
48-49	**Transportation and warehousing**	**-0.03**	**-218.20**	**2.62**	**22703.09**	**-1.01**	**-573.29**
484	Truck transportation	-0.03	-4.73	0.14	25.99	-0.51	-18.48
51	**Information**	**-0.03**	**-27.75**	**-0.06**	**-70.61**	**-0.24**	**-45.49**
511	Publishing industries, except Internet	-0.03	-11.53	-0.14	-64.28	0.07	1.37
519	Other information services	-0.03	-1.06	0.16	6.60	0.27	6.51
52	**Finance and insurance**	**-0.03**	**-262.84**	**-0.14**	**-1415.21**	**0.12**	**1.51**
522	Credit intermediation and related activities	-0.03	-55.14	-0.19	-414.37	0.12	3.66
53	**Real estate and rental and leasing**	**-0.03**	**-7.00**	**0.08**	**20.88**	**-0.12**	**-2.07**
54	**Professional and technical services**	**-0.03**	**-3.17**	**0.03**	**3.72**	**0.33**	**128.14**
541	Professional and technical services	-0.03	-3.17	0.03	3.72	0.33	128.14
56	**Administrative and waste management**	**-0.03**	**-3.35**	**0.02**	**2.62**	**0.37**	**122.83**
61	**Educational services**	**-0.03**	**-82.01**	**0.38**	**1246.32**	**0.14**	**15.80**
611	Educational services	-0.03	-82.01	0.38	1246.32	0.14	15.80
62	**Health care and social assistance**	**-0.03**	**-361.11**	**0.23**	**3274.57**	**-0.02**	**-17.71**
621	Ambulatory health care services	-0.03	-106.05	0.22	921.24	-0.13	-15.64
622	Hospitals	-0.03	-52.19	0.13	268.15	-0.08	-6.17
623	Nursing and residential care facilities	-0.03	-61.41	0.16	379.15	0.13	46.49
624	Social assistance	-0.03	-141.45	0.58	3230.61	0.23	92.42
71	**Arts, entertainment, and recreation**	**-0.03**	**-7.48**	**0.07**	**20.96**	**0.08**	**6.05**
72	**Accommodation and food services**	**-0.03**	**-150.87**	**0.23**	**1374.68**	**-0.16**	**-36.06**
721	Accommodation	-0.03	-5.01	-0.04	-8.44	-0.25	-16.27
722	Food services and drinking places	-0.03	-155.88	0.26	1608.05	-0.16	-47.27
81	**Other services, except public administration**	**-0.03**	**-7.13**	**0.01**	**2.60**	**0.16**	**33.83**
811	Repair and maintenance	-0.03	-17.73	-0.12	-83.73	0.03	1.45
812	Personal and laundry services	-0.03	-15.96	-0.08	-52.67	0.02	0.49
813	Membership associations and organizations	-0.03	-5.36	-0.01	-2.34	0.48	67.24
814	Private households	-0.03	-31.90	1.24	1568.06	-0.15	-20.63
			-1762.14		**23178.84**		**-307.56**

Shift-Share Analysis: Hartford LMA versus Tolland County, 2007-2011

Sector		LMA Growth Component, Percent	LMA Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	**Agriculture, forestry, fishing and hunting**	**-0.03**	**-0.31**	**0.03**	**0.26**	**0.20**	**14.49**
111	Crop production	-0.03	-0.13	0.03	0.13	0.24	11.49
21	**Mining**	**-0.03**	**-0.50**	**-0.07**	**-1.12**	**-0.10**	**-0.83**
23	**Construction**	**-0.03**	**-168.59**	**-0.28**	**-1525.45**	**0.09**	**34.22**
236	Construction of buildings	-0.03	-35.41	-0.35	-398.12	0.11	13.04
237	Heavy and civil engineering construction	-0.03	-2.03	0.00	0.15	0.41	20.54
238	Specialty trade construction	-0.03	-131.12	-0.32	-1339.68	0.10	28.22
31-33	**Manufacturing**	**-0.03**	**-227.26**	**-0.10**	**-694.44**	**-0.07**	**-44.05**
311	Food manufacturing	-0.03	-9.85	0.16	50.86	-0.11	-1.51
313	Textile mills	-0.03	-3.53	-0.32	-35.64	-0.08	-9.03
321	Wood product manufacturing	-0.03	-5.63	-0.50	-89.11	0.15	3.49
326	Plastics and rubber products manufacturing	-0.03	-17.57	-0.32	-180.58	0.10	2.43
332	Fabricated metal product manufacturing	-0.03	-53.48	-0.09	-157.09	0.09	0.00
333	Machinery manufacturing	-0.03	-33.88	-0.14	-147.32	-0.20	-57.14
334	Computer and electronic product manufacturing	-0.03	-2.84	0.00	0.26	0.00	0.00
335	Electrical equipment and appliance manufacturing	-0.03	-11.88	-0.10	-38.33	-0.11	-1.07
337	Furniture and related product manufacturing	-0.03	-9.38	-0.22	-66.83	-0.21	-2.47
339	Miscellaneous manufacturing	-0.03	-11.72	-0.19	-72.84	0.01	0.33
42	**Wholesale trade**	**-0.03**	**-39.32**	**-0.04**	**-46.58**	**0.01**	**0.21**
423	Merchant wholesalers, durable goods	-0.03	-40.41	-0.09	-118.93	0.05	0.72
44-45	**Retail trade**	**-0.03**	**-80.83**	**-0.02**	**-45.50**	**-0.05**	**-18.02**
441	Motor vehicle and parts dealers	-0.03	-21.69	-0.08	-54.05	0.00	-0.22
442	Furniture and home furnishings stores	-0.03	-9.60	-0.12	-36.02	-0.09	-3.51
444	Building material and garden supply stores	-0.03	-14.44	-0.07	-34.04	-0.07	-2.89
445	Food and beverage stores	-0.03	-2.34	0.04	2.76	-0.02	-0.52
446	Health and personal care stores	-0.03	-7.22	-0.02	-5.47	-0.09	-4.05
447	Gasoline stations	-0.03	-5.97	-0.08	-15.43	-0.02	-0.61
448	Clothing and clothing accessories stores	-0.03	-46.60	-0.30	-442.52	-0.32	-25.87
453	Miscellaneous store retailers	-0.03	-6.88	-0.06	-13.12	-0.17	-10.48
454	Nonstore retailers	-0.03	-1.31	0.00	0.11	0.00	0.00
48-49	**Transportation and warehousing**	**-0.03**	**-19.28**	**0.08**	**50.99**	**-0.08**	**-0.46**
484	Truck transportation	-0.03	-2.84	-0.02	-1.63	0.05	0.10
51	**Information**	**-0.03**	**-24.47**	**-0.04**	**-30.05**	**-0.28**	**-58.19**
511	Publishing industries, except Internet	-0.03	-6.69	-0.06	-13.15	-0.05	-1.70
519	Other information services	-0.03	-8.10	-0.69	-178.24	0.04	5.78
52	**Finance and insurance**	**-0.03**	**-193.88**	**-0.08**	**-512.11**	**0.07**	**0.44**
522	Credit intermediation and related activities	-0.03	-49.63	-0.17	-264.60	0.07	3.02
53	**Real estate and rental and leasing**	**-0.03**	**-6.84**	**-0.01**	**-1.36**	**-0.15**	**-9.04**
54	**Professional and technical services**	**-0.03**	**-24.10**	**0.00**	**3.54**	**0.29**	**98.57**
541	Professional and technical services	-0.03	-24.10	0.00	3.54	0.29	98.57
56	**Administrative and waste management**	**-0.03**	**-13.63**	**0.01**	**5.79**	**0.07**	**6.25**
61	**Educational services**	**-0.03**	**-42.04**	**0.14**	**188.31**	**-0.04**	**-1.26**
611	Educational services	-0.03	-42.04	0.14	188.31	-0.04	-1.26
62	**Health care and social assistance**	**-0.03**	**-220.60**	**0.11**	**807.06**	**-0.09**	**-12.69**
621	Ambulatory health care services	-0.03	-81.14	0.13	340.59	-0.06	-5.84
622	Hospitals	-0.03	-40.10	0.09	115.02	-0.14	-10.60
623	Nursing and residential care facilities	-0.03	-29.01	0.08	69.70	-0.08	-1.08
624	Social assistance	-0.03	-70.36	0.17	390.34	0.01	0.95
71	**Arts, entertainment, and recreation**	**-0.03**	**-3.78**	**0.05**	**5.92**	**0.04**	**2.01**
72	**Accommodation and food services**	**-0.03**	**-33.79**	**0.06**	**66.86**	**-0.10**	**-16.00**
721	Accommodation	-0.03	-12.25	-0.11	-43.73	-0.16	-9.18
722	Food services and drinking places	-0.03	-46.04	0.08	112.63	-0.10	-9.95
81	**Other services, except public administration**	**-0.03**	**-4.25**	**0.02**	**3.19**	**0.03**	**1.90**
811	Repair and maintenance	-0.03	-3.09	0.05	5.44	-0.10	-2.08
812	Personal and laundry services	-0.03	-10.00	-0.03	-9.60	-0.09	-4.23
813	Membership associations and organizations	-0.03	-13.81	-0.05	-20.58	0.25	18.20
814	Private households	-0.03	-16.44	0.26	136.11	0.07	4.56
			-934.88		**-1724.69**		**-2.46**

Shift-Share Analysis: Connecticut versus Tolland County, 2001-2011

Sector		State Growth Component, Percent	State Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	Agriculture, forestry, fishing and hunting	-0.04	-13.12	-0.02	-8.33	0.33	30.64
111	Crop production	-0.04	-14.01	-0.05	-18.39	0.62	48.05
21	Mining	-0.04	-6.81	-0.21	-36.33	-0.29	-11.16
23	Construction	-0.04	-537.30	-0.17	-2411.98	0.02	6.87
236	Construction of buildings	-0.04	-112.25	-0.18	-515.84	-0.12	-19.55
237	Heavy and civil engineering construction	-0.04	-59.39	-0.18	-274.25	0.94	69.67
238	Specialty trade construction	-0.04	-365.61	-0.17	-1622.09	0.02	3.30
31-33	Manufacturing	-0.04	-2332.09	-0.23	-13702.31	0.04	29.43
311	Food manufacturing	-0.04	-7.35	0.01	2.43	-0.06	-0.96
313	Textile mills	-0.04	-38.93	-0.55	-548.44	-0.04	-9.68
321	Wood product manufacturing	-0.04	-32.31	-0.39	-326.16	0.68	6.85
326	Plastics and rubber products manufacturing	-0.04	-108.42	-0.29	-805.79	0.04	1.11
332	Fabricated metal product manufacturing	-0.04	-353.46	-0.20	-1845.96	0.15	2.99
333	Machinery manufacturing	-0.04	-302.08	-0.31	-2398.85	0.08	13.26
334	Computer and electronic product manufacturing	-0.04	-290.39	-0.32	-2405.49	0.44	39.59
335	Electrical equipment and appliance manufacturing	-0.04	-112.13	-0.19	-544.71	0.27	0.82
337	Furniture and related product manufacturing	-0.04	-46.35	-0.29	-350.22	-0.22	-3.79
339	Miscellaneous manufacturing	-0.04	-105.67	-0.17	-470.09	0.00	-0.02
42	Wholesale trade	-0.04	-158.06	-0.02	-88.95	0.22	26.79
423	Merchant wholesalers, durable goods	-0.04	-196.95	-0.11	-567.55	0.31	16.82
44-45	Retail trade	-0.04	-566.67	-0.04	-534.07	0.02	1.49
441	Motor vehicle and parts dealers	-0.04	-87.72	-0.06	-145.77	0.09	1.79
442	Furniture and home furnishings stores	-0.04	-48.41	-0.13	-167.04	0.39	12.60
444	Building material and garden supply stores	-0.04	-31.46	-0.02	-12.45	-0.29	-31.65
445	Food and beverage stores	-0.04	-131.05	-0.03	-117.18	0.09	6.78
446	Health and personal care stores	-0.04	-74.10	-0.09	-171.73	0.02	0.54
447	Gasoline stations	-0.04	-26.23	-0.07	-45.07	0.44	41.96
448	Clothing and clothing accessories stores	-0.04	-37.73	-0.01	-11.15	-0.70	-84.74
453	Miscellaneous store retailers	-0.04	-110.35	-0.20	-564.77	-0.03	-1.76
454	Nonstore retailers	-0.04	-61.45	-0.12	-182.72	0.21	3.36
48-49	Transportation and warehousing	-0.04	-18.11	0.05	23.70	1.55	878.28
484	Truck transportation	-0.04	-44.30	-0.11	-130.03	-0.26	-9.41
51	Information	-0.04	-514.24	-0.26	-3439.30	-0.04	-8.50
511	Publishing industries, except Internet	-0.04	-237.15	-0.39	-2360.68	0.31	6.27
519	Other information services	-0.04	-51.50	1.02	1360.86	-0.59	-14.25
52	Finance and insurance	-0.04	-288.61	-0.02	-167.35	0.00	0.03
522	Credit intermediation and related activities	-0.04	-215.75	-0.13	-746.03	0.06	1.94
53	Real estate and rental and leasing	-0.04	-96.04	-0.08	-194.91	0.03	0.54
54	Professional and technical services	-0.04	-251.00	-0.03	-195.16	0.39	151.40
541	Professional and technical services	-0.04	-251.00	-0.03	-195.16	0.39	151.40
56	Administrative and waste management	-0.04	-222.56	-0.03	-160.05	0.41	138.76
61	Educational services	-0.04	-529.56	0.37	5094.34	0.15	17.02
611	Educational services	-0.04	-529.56	0.37	5094.34	0.15	17.02
62	Health care and social assistance	-0.04	-1706.92	0.25	11123.21	-0.04	-40.64
621	Ambulatory health care services	-0.04	-503.25	0.23	2974.55	-0.14	-16.88
622	Hospitals	-0.04	-349.56	0.21	1896.61	-0.16	-12.61
623	Nursing and residential care facilities	-0.04	-272.05	0.17	1178.40	0.12	42.25
624	Social assistance	-0.04	-582.03	0.53	7898.97	0.28	112.79
71	Arts, entertainment, and recreation	-0.04	-29.99	0.07	55.96	0.08	5.92
72	Accommodation and food services	-0.04	-630.32	0.21	3365.49	-0.14	-30.85
721	Accommodation	-0.04	-16.48	0.00	0.91	-0.29	-19.17
722	Food services and drinking places	-0.04	-646.80	0.23	3920.17	-0.14	-39.88
81	Other services, except public administration	-0.04	-71.27	0.07	132.53	0.09	20.27
811	Repair and maintenance	-0.04	-68.99	-0.08	-140.49	-0.01	-0.24
812	Personal and laundry services	-0.04	-2.32	0.04	2.51	-0.10	-2.51
813	Membership associations and organizations	-0.04	-9.40	0.02	5.51	0.45	62.57
814	Private households	-0.04	-147.31	0.64	2437.28	0.45	64.20
			-7435.38		-1143.50		1216.31

Shift-Share Analysis: Connecticut versus Tolland County, 2007-2011

	Sector	State Growth Component, Percent	State Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	**Agriculture, forestry, fishing and hunting**	**-0.04**	**-2.20**	**0.05**	**2.68**	**0.17**	**12.40**
111	Crop production	-0.04	-4.08	0.02	1.89	0.26	12.10
21	**Mining**	**-0.04**	**-7.71**	**-0.20**	**-33.72**	**0.02**	**0.18**
23	**Construction**	**-0.04**	**-767.42**	**-0.20**	**-3502.98**	**0.01**	**5.30**
236	Construction of buildings	-0.04	-180.14	-0.23	-932.03	-0.01	-1.53
237	Heavy and civil engineering construction	-0.04	-30.17	-0.06	-42.88	0.48	23.85
238	Specialty trade construction	-0.04	-557.06	-0.21	-2666.32	-0.01	-2.89
31-33	**Manufacturing**	**-0.04**	**-1120.17**	**-0.09**	**-2143.65**	**-0.08**	**-49.97**
311	Food manufacturing	-0.04	-8.70	0.02	3.57	0.04	0.49
313	Textile mills	-0.04	-8.65	-0.17	-32.28	-0.23	-26.21
321	Wood product manufacturing	-0.04	-25.51	-0.29	-167.32	-0.05	-1.13
326	Plastics and rubber products manufacturing	-0.04	-60.75	-0.14	-196.36	-0.08	-1.81
332	Fabricated metal product manufacturing	-0.04	-205.83	-0.09	-425.28	0.09	0.00
333	Machinery manufacturing	-0.04	-149.79	-0.14	-466.91	-0.19	-56.03
334	Computer and electronic product manufacturing	-0.04	-32.01	-0.01	-4.14	0.00	0.00
335	Electrical equipment and appliance manufacturing	-0.04	-57.52	-0.07	-89.83	-0.14	-1.38
337	Furniture and related product manufacturing	-0.04	-48.15	-0.26	-281.88	-0.17	-1.99
339	Miscellaneous manufacturing	-0.04	-74.74	-0.10	-158.98	-0.08	-1.94
42	**Wholesale trade**	**-0.04**	**-197.45**	**-0.02**	**-88.31**	**-0.01**	**-0.13**
423	Merchant wholesalers, durable goods	-0.04	-128.45	-0.05	-130.78	0.00	0.02
44-45	**Retail trade**	**-0.04**	**-493.53**	**-0.01**	**-140.20**	**-0.06**	**-19.67**
441	Motor vehicle and parts dealers	-0.04	-98.45	-0.06	-121.35	-0.03	-1.85
442	Furniture and home furnishings stores	-0.04	-74.92	-0.17	-288.47	-0.03	-1.30
444	Building material and garden supply stores	-0.04	-95.68	-0.09	-182.45	-0.06	-2.39
445	Food and beverage stores	-0.04	-37.08	0.06	53.36	-0.04	-1.47
446	Health and personal care stores	-0.04	-37.97	-0.02	-13.82	-0.10	-4.38
447	Gasoline stations	-0.04	-22.42	-0.03	-17.46	-0.06	-2.35
448	Clothing and clothing accessories stores	-0.04	-162.39	-0.12	-431.28	-0.50	-40.09
453	Miscellaneous store retailers	-0.04	-56.80	-0.08	-96.62	-0.16	-9.49
454	Nonstore retailers	-0.04	-30.49	-0.03	-18.60	0.03	0.00
48-49	**Transportation and warehousing**	**-0.04**	**-105.76**	**-0.01**	**-26.74**	**0.02**	**0.11**
484	Truck transportation	-0.04	-36.54	-0.07	-55.84	0.10	0.21
51	**Information**	**-0.04**	**-308.41**	**-0.13**	**-928.28**	**-0.19**	**-38.30**
511	Publishing industries, except Internet	-0.04	-131.50	-0.22	-632.22	0.10	3.38
519	Other information services	-0.04	-2.15	0.03	1.31	-0.68	-100.11
52	**Finance and insurance**	**-0.04**	**-400.23**	**-0.03**	**-245.11**	**0.02**	**0.11**
522	Credit intermediation and related activities	-0.04	-198.34	-0.10	-429.46	0.00	-0.04
53	**Real estate and rental and leasing**	**-0.04**	**-109.08**	**-0.07**	**-171.15**	**-0.08**	**-5.06**
54	**Professional and technical services**	**-0.04**	**-197.04**	**0.00**	**-12.40**	**0.30**	**101.08**
541	Professional and technical services	-0.04	-197.04	0.00	-12.40	0.30	101.08
56	**Administrative and waste management**	**-0.04**	**-365.98**	**-0.05**	**-383.70**	**0.13**	**11.73**
61	**Educational services**	**-0.04**	**-244.61**	**0.16**	**848.88**	**-0.06**	**-1.74**
611	Educational services	-0.04	-244.61	0.16	848.88	-0.06	-1.74
62	**Health care and social assistance**	**-0.04**	**-865.02**	**0.13**	**2473.13**	**-0.10**	**-14.69**
621	Ambulatory health care services	-0.04	-292.14	0.13	858.71	-0.06	-5.89
622	Hospitals	-0.04	-166.29	0.11	403.15	-0.15	-12.08
623	Nursing and residential care facilities	-0.04	-115.90	0.09	229.17	-0.10	-1.26
624	Social assistance	-0.04	-290.66	0.21	1355.17	-0.03	-4.04
71	**Arts, entertainment, and recreation**	**-0.04**	**-16.05**	**0.03**	**10.77**	**0.06**	**2.89**
72	**Accommodation and food services**	**-0.04**	**-78.06**	**0.06**	**105.22**	**-0.10**	**-15.79**
721	Accommodation	-0.04	-38.38	-0.03	-22.25	-0.24	-14.14
722	Food services and drinking places	-0.04	-116.43	0.07	184.23	-0.10	-9.42
81	**Other services, except public administration**	**-0.04**	**-64.38**	**0.02**	**29.23**	**0.03**	**2.12**
811	Repair and maintenance	-0.04	-55.50	-0.04	-49.25	0.00	-0.09
812	Personal and laundry services	-0.04	-34.79	0.01	4.00	-0.12	-5.92
813	Membership associations and organizations	-0.04	-50.44	-0.03	-28.48	0.23	16.65
814	Private households	-0.04	-76.31	0.25	419.77	0.08	5.37
			-4575.68		**-4206.31**		**-9.45**

Shift-Share Analysis: Connecticut versus Hartford MSA, 2001-2011

Sector		State Growth Component, Percent	State Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	**Agriculture, forestry, fishing and hunting**	**-0.04**	**-13.12**	**-0.02**	**-8.33**	**-0.31**	**-259.26**
111	Crop production	-0.04	-14.01	-0.05	-18.39	-0.07	-14.36
112	Animal production	-0.04	-3.75	0.15	14.98	-0.96	-214.91
115	Agriculture and forestry support activities	-0.04	-1.59	-0.07	-2.86	-0.42	-24.89
21	**Mining**	**-0.04**	**-6.81**	**-0.21**	**-36.33**	**-0.10**	**-5.55**
22	**Utilities**	**-0.04**	**-119.29**	**-0.29**	**-907.71**	**-0.31**	**-657.13**
221	Utilities	-0.04	-119.29	-0.29	-907.71	-0.31	-657.13
23	**Construction**	**-0.04**	**-537.30**	**-0.17**	**-2411.98**	**-0.03**	**-119.34**
236	Construction of buildings	-0.04	-112.25	-0.18	-515.84	-0.03	-28.71
237	Heavy and civil engineering construction	-0.04	-59.39	-0.18	-274.25	0.25	36.65
238	Specialty trade construction	-0.04	-365.61	-0.17	-1622.09	-0.06	-234.63
31-33	**Manufacturing**	**-0.04**	**-2332.09**	**-0.23**	**-13702.31**	**0.02**	**285.69**
311	Food manufacturing	-0.04	-7.35	0.01	2.43	0.29	176.33
312	Beverage and tobacco product manufacturing	-0.04	-11.76	-0.23	-69.02	0.18	2.18
313	Textile mills	-0.04	-38.93	-0.55	-548.44	-0.04	-9.68
314	Textile product mills	-0.04	-8.32	-0.13	-28.11	-0.46	-118.24
315	Apparel manufacturing	-0.04	-33.66	-0.79	-689.26	0.04	4.02
321	Wood product manufacturing	-0.04	-32.31	-0.39	-326.16	-0.03	-8.86
322	Paper manufacturing	-0.04	-113.60	-0.41	-1192.87	-0.09	-96.37
323	Printing and related support activities	-0.04	-174.55	-0.41	-1842.81	-0.03	-50.87
325	Chemical manufacturing	-0.04	-283.27	-0.33	-2438.22	0.17	60.21
326	Plastics and rubber products manufacturing	-0.04	-108.42	-0.29	-805.79	0.01	6.10
327	Nonmetallic mineral product manufacturing	-0.04	-24.11	-0.18	-111.89	-0.09	-18.41
331	Primary metal manufacturing	-0.04	-99.98	-0.39	-995.87	0.17	32.37
332	Fabricated metal product manufacturing	-0.04	-353.46	-0.20	-1845.96	0.03	102.23
333	Machinery manufacturing	-0.04	-302.08	-0.31	-2398.85	0.05	133.36
334	Computer and electronic product manufacturing	-0.04	-290.39	-0.32	-2405.49	0.03	46.11
335	Electrical equipment and appliance manufacturing	-0.04	-112.13	-0.19	-544.71	-0.19	-328.42
336	Transportation equipment manufacturing	-0.04	-184.80	-0.06	-301.50	-0.10	-330.67
337	Furniture and related product manufacturing	-0.04	-46.35	-0.29	-350.22	0.10	29.00
339	Miscellaneous manufacturing	-0.04	-105.67	-0.17	-470.09	-0.13	-131.88
42	**Wholesale trade**	**-0.04**	**-158.06**	**-0.02**	**-88.95**	**-0.05**	**-91.60**
423	Merchant wholesalers, durable goods	-0.04	-196.95	-0.11	-567.55	-0.05	-108.58
424	Merchant wholesalers, nondurable goods	-0.04	-73.21	-0.04	-83.44	-0.01	-4.75
425	Electronic markets and agents and brokers	-0.04	-112.13	0.31	888.76	-0.05	-24.67
44-45	**Retail trade**	**-0.04**	**-566.67**	**-0.04**	**-534.07**	**-0.01**	**-23.27**
441	Motor vehicle and parts dealers	-0.04	-87.72	-0.06	-145.77	-0.01	-3.76
442	Furniture and home furnishings stores	-0.04	-48.41	-0.13	-167.04	0.00	-1.00
443	Electronics and appliance stores	-0.04	-21.59	-0.04	-22.11	0.05	1.79
444	Building material and garden supply stores	-0.04	-31.46	-0.02	-12.45	-0.02	-4.65
445	Food and beverage stores	-0.04	-131.05	-0.03	-117.18	-0.04	-40.15
446	Health and personal care stores	-0.04	-74.10	-0.09	-171.73	0.03	8.69
447	Gasoline stations	-0.04	-26.23	-0.07	-45.07	-0.07	-18.35
448	Clothing and clothing accessories stores	-0.04	-37.73	-0.01	-11.15	0.05	12.96
451	Sporting goods, hobby, book and music stores	-0.04	-86.56	-0.19	-425.74	-0.02	-12.01
452	General merchandise stores	-0.04	-149.98	0.20	770.21	-0.07	-67.88
453	Miscellaneous store retailers	-0.04	-110.35	-0.20	-564.77	-0.04	-36.34
454	Nonstore retailers	-0.04	-61.45	-0.12	-182.72	0.02	4.52
48-49	**Transportation and warehousing**	**-0.04**	**-18.11**	**0.05**	**23.70**	**-0.10**	**-88.73**
484	Truck transportation	-0.04	-44.30	-0.11	-130.03	0.07	7.94
485	Transit and ground passenger transportation	-0.04	-59.24	0.18	269.35	-0.02	-10.99
488	Support activities for transportation	-0.04	-16.99	-0.07	-31.55	-0.15	-50.78
492	Couriers and messengers	-0.04	-51.58	-0.14	-184.65	-0.28	-423.31
493	Warehousing and storage	-0.04	-97.08	0.49	1225.43	-0.21	-180.56
51	**Information**	**-0.04**	**-514.24**	**-0.26**	**-3439.30**	**0.16**	**207.72**
511	Publishing industries, except Internet	-0.04	-237.15	-0.39	-2360.68	0.21	118.24
512	Motion picture and sound recording industries	-0.04	-37.26	0.46	442.58	-0.57	-38.59
515	Broadcasting, except Internet	-0.04	-55.41	0.38	537.12	0.08	101.85
517	Telecommunications	-0.04	-259.09	-0.37	-2508.08	0.02	23.50
518	ISPs, search portals, and data processing	-0.04	-124.44	-0.59	-1888.14	0.33	135.74
519	Other information services	-0.04	-51.50	1.02	1360.86	-0.79	-60.41
52	**Finance and insurance**	**-0.04**	**-288.61**	**-0.02**	**-167.35**	**-0.13**	**-1251.70**
522	Credit intermediation and related activities	-0.04	-215.75	-0.13	-746.03	-0.08	-187.03
523	Securities, commodity contracts, investments	-0.04	-254.37	0.43	2834.06	-0.60	-296.82
524	Insurance carriers and related activities	-0.04	-299.80	-0.08	-591.38	0.01	27.08
53	**Real estate and rental and leasing**	**-0.04**	**-96.04**	**-0.08**	**-194.91**	**0.11**	**19.99**
531	Real estate	-0.04	-0.89	0.04	0.93	0.02	6.94
54	**Professional and technical services**	**-0.04**	**-251.00**	**-0.03**	**-195.16**	**0.05**	**23.38**
541	Professional and technical services	-0.04	-251.00	-0.03	-195.16	0.05	23.38
55	**Management of companies and enterprises**	**-0.04**	**-6.96**	**0.05**	**8.10**	**0.35**	**905.26**
551	Management of companies and enterprises	-0.04	-6.96	0.05	8.10	0.35	905.26

Shift-Share Analysis: Connecticut versus Hartford MSA, 2001-2011

	Sector	State Growth Component, Percent	State Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
56	**Administrative and waste management**	**-0.04**	**-222.56**	**-0.03**	**-160.05**	**0.01**	**5.21**
561	Administrative and support activities	-0.04	-218.93	-0.03	-177.60	-0.01	-9.59
562	Waste management and remediation services	-0.04	-3.64	0.02	2.10	0.11	26.53
61	**Educational services**	**-0.04**	**-529.56**	**0.37**	**5094.34**	**-0.02**	**-70.48**
611	Educational services	-0.04	-529.56	0.37	5094.34	-0.02	-70.48
62	**Health care and social assistance**	**-0.04**	**-1706.92**	**0.25**	**11123.21**	**-0.05**	**-717.69**
621	Ambulatory health care services	-0.04	-503.25	0.23	2974.55	-0.03	-145.68
622	Hospitals	-0.04	-349.56	0.21	1896.61	-0.10	-196.27
623	Nursing and residential care facilities	-0.04	-272.05	0.17	1178.40	-0.03	-86.37
624	Social assistance	-0.04	-582.03	0.53	7898.97	0.07	375.44
71	**Arts, entertainment, and recreation**	**-0.04**	**-29.99**	**0.07**	**55.96**	**-0.02**	**-8.30**
711	Performing arts and spectator sports	-0.04	-49.53	-0.22	-283.28	-0.04	-13.40
712	Museums, historical sites, zoos, and parks	-0.04	-2.01	0.06	3.34	-0.07	-0.07
713	Amusement, gambling, and recreation	-0.04	-77.50	0.16	325.63	-0.18	-15.60
72	**Accommodation and food services**	**-0.04**	**-630.32**	**0.21**	**3365.49**	**-0.01**	**-90.00**
721	Accommodation	-0.04	-16.48	0.00	0.91	-0.07	-18.18
722	Food services and drinking places	-0.04	-646.80	0.23	3920.17	-0.01	-46.86
81	**Other services, except public administration**	**-0.04**	**-71.27**	**0.07**	**132.53**	**-0.10**	**-62.33**
811	Repair and maintenance	-0.04	-68.99	-0.08	-140.49	-0.07	-62.03
812	Personal and laundry services	-0.04	-2.32	0.04	2.51	-0.16	-120.93
813	Membership associations and organizations	-0.04	-9.40	0.02	5.51	-0.06	-12.22
814	Private households	-0.04	-147.31	0.64	2437.28	0.41	511.37
99	**Nonclassifiable establishments**	**-0.04**	**-9.05**	**-0.39**	**-90.87**	**-0.23**	**-16.65**
			-8107.99		-2133.97		-2014.77

Shift-Share Analysis: Connecticut versus Hartford MSA, 2007-2011

Sector		State Growth Component, Percent	State Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
11	**Agriculture, forestry, fishing and hunting**	-0.04	-2.20	0.05	2.68	-0.14	-24.74
111	Crop production	-0.04	-4.08	0.02	1.89	-0.14	-25.41
115	Agriculture and forestry support activities	-0.04	-1.75	0.18	6.85	-0.36	-5.07
21	**Mining**	-0.04	-7.71	-0.20	-33.72	0.08	1.31
22	**Utilities**	-0.04	-21.52	-0.03	-13.12	-0.13	-33.20
221	Utilities	-0.04	-21.52	-0.03	-13.12	-0.13	-33.20
23	**Construction**	-0.04	-767.42	-0.20	-3502.98	-0.04	-208.36
236	Construction of buildings	-0.04	-180.14	-0.23	-932.03	-0.03	-36.03
237	Heavy and civil engineering construction	-0.04	-30.17	-0.06	-42.88	0.07	1.45
238	Specialty trade construction	-0.04	-557.06	-0.21	-2666.32	-0.05	-250.31
31-33	**Manufacturing**	-0.04	-1120.17	-0.09	-2143.65	-0.03	-235.50
311	Food manufacturing	-0.04	-8.70	0.02	3.57	0.08	20.38
312	Beverage and tobacco product manufacturing	-0.04	-4.12	-0.05	-4.96	0.22	7.56
313	Textile mills	-0.04	-8.65	-0.17	-32.28	-0.23	-26.21
314	Textile product mills	-0.04	-11.12	-0.15	-36.12	-0.09	-5.20
315	Apparel manufacturing	-0.04	-6.86	-0.42	-64.08	0.27	1.61
321	Wood product manufacturing	-0.04	-25.51	-0.29	-167.32	-0.04	-6.68
322	Paper manufacturing	-0.04	-52.41	-0.20	-230.46	-0.13	-64.37
323	Printing and related support activities	-0.04	-93.12	-0.23	-470.57	-0.01	-4.50
325	Chemical manufacturing	-0.04	-149.83	-0.17	-560.89	0.02	7.48
326	Plastics and rubber products manufacturing	-0.04	-60.75	-0.14	-196.36	-0.14	-104.17
327	Nonmetallic mineral product manufacturing	-0.04	-35.06	-0.21	-167.90	-0.14	-40.73
331	Primary metal manufacturing	-0.04	-23.13	-0.08	-43.02	0.01	0.66
332	Fabricated metal product manufacturing	-0.04	-205.83	-0.09	-425.28	-0.01	-20.91
333	Machinery manufacturing	-0.04	-149.79	-0.14	-466.91	-0.01	-7.13
334	Computer and electronic product manufacturing	-0.04	-32.01	-0.01	-4.14	-0.03	-2.83
335	Electrical equipment and appliance manufacturing	-0.04	-57.52	-0.07	-89.83	-0.09	-49.55
336	Transportation equipment manufacturing	-0.04	-63.84	0.01	17.29	-0.10	-160.37
337	Furniture and related product manufacturing	-0.04	-48.15	-0.26	-281.88	0.06	18.24
339	Miscellaneous manufacturing	-0.04	-74.74	-0.10	-158.98	0.02	3.29
42	**Wholesale trade**	-0.04	-197.45	-0.02	-88.31	-0.05	-81.18
423	Merchant wholesalers, durable goods	-0.04	-128.45	-0.05	-130.78	-0.08	-131.19
424	Merchant wholesalers, nondurable goods	-0.04	-55.91	-0.01	-14.12	-0.01	-1.50
425	Electronic markets and agents and brokers	-0.04	-13.05	0.02	7.00	0.06	10.90
44-45	**Retail trade**	-0.04	-493.53	-0.01	-140.20	-0.03	-93.96
441	Motor vehicle and parts dealers	-0.04	-98.45	-0.06	-121.35	-0.04	-28.50
442	Furniture and home furnishings stores	-0.04	-74.92	-0.17	-288.47	0.01	5.63
443	Electronics and appliance stores	-0.04	-2.65	0.05	3.18	-0.03	-1.56
444	Building material and garden supply stores	-0.04	-95.68	-0.09	-182.45	-0.03	-17.88
445	Food and beverage stores	-0.04	-37.08	0.06	53.36	-0.05	-12.07
446	Health and personal care stores	-0.04	-37.97	-0.02	-13.82	-0.02	-3.99
447	Gasoline stations	-0.04	-22.42	-0.03	-17.46	-0.07	-14.81
448	Clothing and clothing accessories stores	-0.04	-162.39	-0.12	-431.28	-0.08	-128.46
451	Sporting goods, hobby, book and music stores	-0.04	-63.48	-0.11	-160.62	0.03	7.34
452	General merchandise stores	-0.04	-109.35	0.14	341.19	0.00	-1.06
453	Miscellaneous store retailers	-0.04	-56.80	-0.08	-96.62	0.00	0.19
454	Nonstore retailers	-0.04	-30.49	-0.03	-18.60	0.02	0.32
48-49	**Transportation and warehousing**	-0.04	-105.76	-0.01	-26.74	-0.01	-1.89
484	Truck transportation	-0.04	-36.54	-0.07	-55.84	0.06	1.74
485	Transit and ground passenger transportation	-0.04	-41.11	0.12	112.56	0.03	15.01
488	Support activities for transportation	-0.04	-16.59	-0.05	-18.50	-0.07	-10.59
492	Couriers and messengers	-0.04	-42.14	-0.09	-81.80	-0.13	-82.56
493	Warehousing and storage	-0.04	-27.48	-0.03	-15.70	0.09	21.77
51	**Information**	-0.04	-308.41	-0.13	-928.28	0.06	56.89
511	Publishing industries, except Internet	-0.04	-131.50	-0.22	-632.22	0.13	32.77
512	Motion picture and sound recording industries	-0.04	-10.67	0.12	29.47	-0.28	-28.71
515	Broadcasting, except Internet	-0.04	-23.13	0.14	74.60	0.00	-1.04
517	Telecommunications	-0.04	-160.68	-0.23	-820.53	0.13	36.03
518	ISPs, search portals, and data processing	-0.04	-47.88	-0.31	-333.47	-0.01	-3.27
519	Other information services	-0.04	-2.15	0.03	1.31	-0.40	-95.16
52	**Finance and insurance**	-0.04	-400.23	-0.03	-245.11	-0.08	-593.61
522	Credit intermediation and related activities	-0.04	-198.34	-0.10	-429.46	-0.06	-102.90
523	Securities, commodity contracts, investments	-0.04	-55.19	0.10	123.77	-0.02	-3.04
524	Insurance carriers and related activities	-0.04	-255.01	-0.04	-240.43	-0.01	-33.56
53	**Real estate and rental and leasing**	-0.04	-109.08	-0.07	-171.15	0.02	5.67
531	Real estate	-0.04	-39.18	-0.01	-12.72	0.05	7.50
54	**Professional and technical services**	-0.04	-197.04	0.00	-12.40	-0.02	-8.65
541	Professional and technical services	-0.04	-197.04	0.00	-12.40	-0.02	-8.65
55	**Management of companies and enterprises**	-0.04	-84.51	0.12	217.44	-0.03	-19.11
551	Management of companies and enterprises	-0.04	-84.51	0.12	217.44	-0.03	-19.11

Shift-Share Analysis: Connecticut versus Hartford MSA, 2007-2011

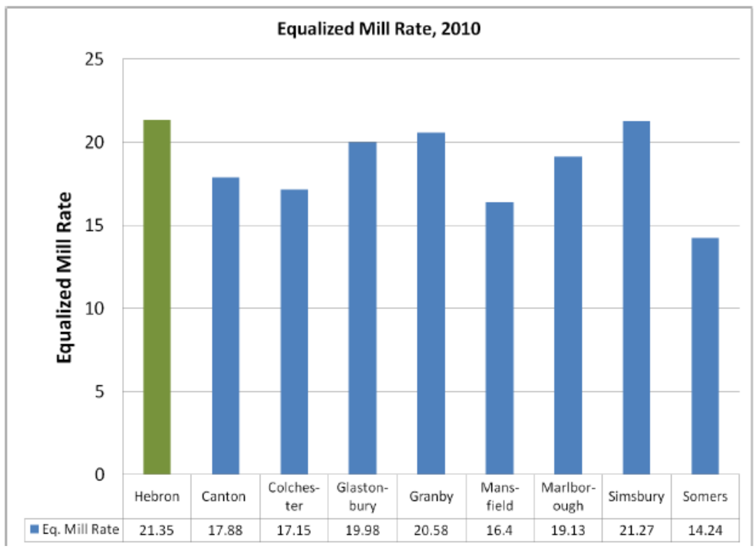
Sector		State Growth Component, Percent	State Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
56	**Administrative and waste management**	-0.04	-365.98	-0.05	-383.70	0.02	14.98
561	Administrative and support activities	-0.04	-335.31	-0.05	-342.25	0.02	12.63
562	Waste management and remediation services	-0.04	-30.67	-0.06	-43.24	-0.04	-8.93
61	**Educational services**	-0.04	-244.61	0.16	848.88	-0.03	-47.64
611	Educational services	-0.04	-244.61	0.16	848.88	-0.03	-47.64
62	**Health care and social assistance**	-0.04	-865.02	0.13	2473.13	-0.04	-295.89
621	Ambulatory health care services	-0.04	-292.14	0.13	858.71	-0.03	-74.06
622	Hospitals	-0.04	-166.29	0.11	403.15	-0.06	-55.46
623	Nursing and residential care facilities	-0.04	-115.90	0.09	229.17	-0.05	-42.58
624	Social assistance	-0.04	-290.66	0.21	1355.17	-0.01	-34.15
71	**Arts, entertainment, and recreation**	-0.04	-16.05	0.03	10.77	-0.01	-1.66
711	Performing arts and spectator sports	-0.04	-28.11	-0.10	-63.96	0.17	10.50
712	Museums, historical sites, zoos, and parks	-0.04	-0.13	0.04	0.13	-0.06	-0.75
713	Amusement, gambling, and recreation	-0.04	-12.19	0.06	16.33	-0.07	-1.90
72	**Accommodation and food services**	-0.04	-78.06	0.06	105.22	-0.05	-25.40
721	Accommodation	-0.04	-38.38	-0.03	-22.25	-0.11	-60.60
722	Food services and drinking places	-0.04	-116.43	0.07	184.23	-0.04	-44.17
81	**Other services, except public administration**	-0.04	-64.38	0.02	29.23	-0.07	-59.17
811	Repair and maintenance	-0.04	-55.50	-0.04	-49.25	-0.05	-27.88
812	Personal and laundry services	-0.04	-34.79	0.01	4.00	-0.07	-27.07
813	Membership associations and organizations	-0.04	-50.44	-0.03	-28.48	-0.06	-28.93
814	Private households	-0.04	-76.31	0.25	419.77	0.03	15.20
99	**Nonclassifiable establishments**	-0.04	-7.13	1.07	170.23	0.46	11.93
			-5456.26		**-3831.75**		**-1639.17**

Appendix 4

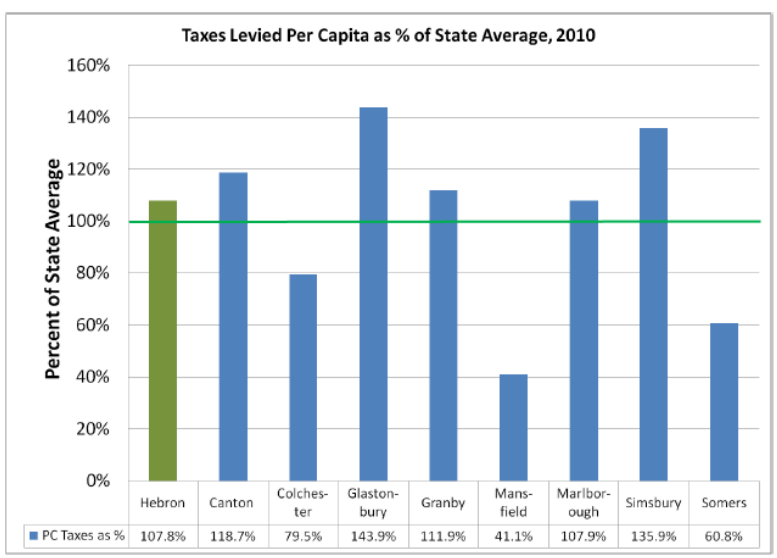
Tax Analysis

Why Tax Incentives Matter for Hebron

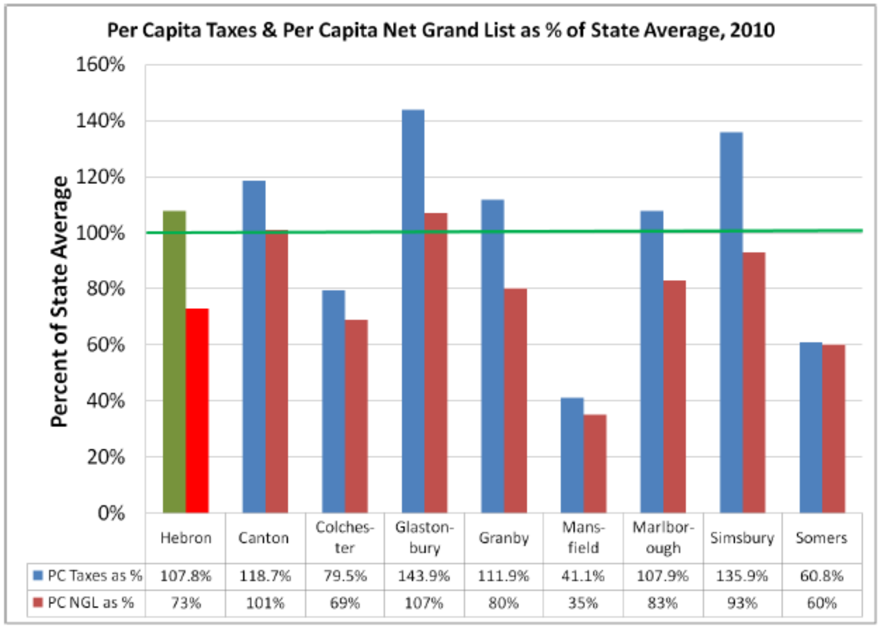
1. Hebron has a high mill rate



2. But Spending is not high: It is only 7 percent higher per capita than the statewide average.



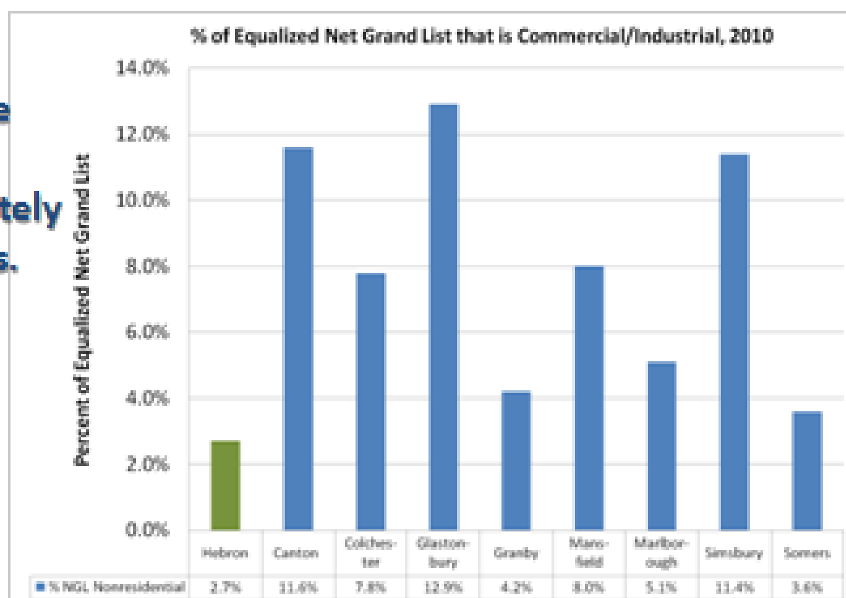
3. Hebron's Tax Base is Low: Hebron's Net Grand List (value of taxable properties) on a per capita basis is 73% of the State average



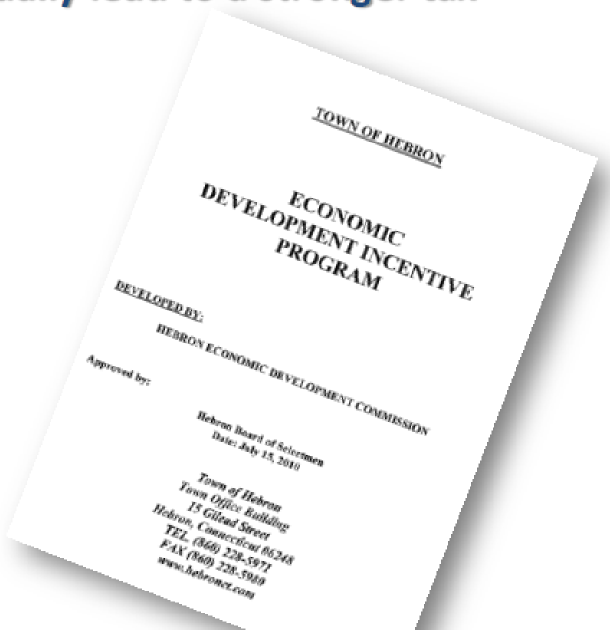
Why Tax Incentives Matter for Hebron

4. Hebron is overly reliant upon residential value. Only 2.7% of its tax revenues come from commercial/industrial properties.

This means that the taxes are high & are disproportionately paid by households.



5. Hebron needs to attract commercial/industrial uses that will diversify the tax base and strengthen retail and other businesses. All of this will eventually lead to a stronger tax base for the Town.



TOWN OF HEBRON

ECONOMIC DEVELOPMENT INCENTIVE PROGRAM

DEVELOPED BY:

HEBRON ECONOMIC DEVELOPMENT COMMISSION

Approved by:

Hebron Board of Selectmen
Date: July 15, 2010

Town of Hebron
Town Office Building
15 Gilead Street
Hebron, Connecticut 06248
TEL (860) 228-5971
FAX (860) 228-5980
www.hebronct.com

Appendix 5

Home-based Businesses

TAXPAYER	DBA	STREET	CITY	STATE	ZIP1	OWNERSHIP_TYPE
ALTERNATIVE RESOURCE MANAGEMENT INC		27 WALNUT DRIVE	HEBRON	CT	06248	H
CAROLA KIM V	KC ENTERPRISES	389 OLD COLCHESTER R	AMSTON	CT	06231	H
CATHCART WARREN N	ADVANTAGE COMPUTERS	227 JAGGER LA	HEBRON	CT	06248	H
CORDANI BETTY M		139 NORTH ST	HEBRON	CT	06248	H
D A DAVID & ASSOCIATES INC		PO BOX 1554	HEBRON	CT	06248	H
DOMBROWSKI HENRY P & JOYCE B		251 BURNT HILL RD	HEBRON	CT	06248	H
FEDERICO MICHAEL J	HILLCOURT FINANCIAL	32 KARLSWOOD ROAD	HEBRON	CT	06248	H
GREEN LAWRENCE E		748 CHURCH ST	AMSTON	CT	06231	H
HILLS ALAN H ETAL		527 GILEAD ST	HEBRON	CT	06248	F
HUMPHREY LILLIANA P	CAKES BY LILLY	447 WALL ST	HEBRON	CT	06248	H
ITALIANO ROBERT		366 OLD COLCHESTER RD	AMSTON	CT	06231	H
JBC ENTERPRISES INC		232 MAIN ST	HEBRON	CT	06248	H
K LEARY INC		264 MILLSTREAM RD	AMSTON	CT	06231	H
KOVACS EDWINA	KADOBI LODGE CRAFTS	244 CHURCH ST	AMSTON	CT	06231	H
KRAFTWORK SYSTEMS INC		PO BOX 115	AMSTON	CT	06231	H
MASON BUILT LLC		128 JAGGER LN	HEBRON	CT	06248	H
MASSA ELAINE F	AN IT RESOURCE	52 SENTINAL WOODS DR	HEBRON	CT	06248	H
MIKKELSON MICHAEL D	ARCHITECTURAL DESIGN SERVICE	14 CARVER LANE	HEBRON	CT	06248	H
MINARD JONATHAN	MINARD LIGHTING & GRIP	283 HOPE VALLEY ROAD	AMSTON	CT	06231	H
MORIN EDWARD		243 GILEAD ST	HEBRON	CT	06248	H
NINA INTERIORS LTD		134 HOPE VALLEY RD	HEBRON	CT	06248	H
NOVAK LAUREEN M		304 WALL STREET	HEBRON	CT	06248	H
NOW TECHNOLOGIES INC		57 CHESTERFIELD ROAD	AMSTON	CT	06231	H

PAPRZYCA CHARLES F	FROG HOLLOW ENTERPRISES	35 ABBY DR	HEBRON	CT	06248	H
PERFORMANCE SERVICES CORP		2 OLDE HALL RD	HEBRON	CT	06248	H
PLASZEWSKI JO ANN M	SAFENET	427 EAST ST	HEBRON	CT	06248	H
R J DEAN ASSOCIATES INC		109 CHITTENDEN RD	AMSTON	CT	06231	H
RHJ CONSTRUCTION CO INC		690 CHURCH ST	AMSTON	CT	06231	H
ROSATI MARGARET ROOHR	LAUGHING DOGS	PO BOX 71	AMSTON	CT	06231	H
SCAGLIARINI KAREN		15 NORTHAM ROAD	AMSTON	CT	06231	H
SPENO FREDERICK L JR SRA	RE APPRAISALS	PO BOX 154	HEBRON	CT	06248	H
STODDARD TIMOTHY H	HEBRON APPLIANCE SERVICE	605 GILEAD STREET	HEBRON	CT	06248	H
THOMAS KENNETH L	KLT CO	122 HOPE VALLEY ROAD	AMSTON	CT	06231	H
TYLER DIANA W	WYTHE STUDIOS	13 REIDY HILL ROAD	AMSTON	CT	06231	H
WALL RUSSELL M & JUDY F	ZIP EZ	212 CHURCH STREET	AMSTON	CT	06231	H
WOODCRAFT DESIGNS INC		PO BOX 207	HEBRON	CT	06248	H
NEW ENGLAND HERBAL SUPPLY CO		299 JAGGER LN	HEBRON	CT	06248	H
MALKASIAN ROBIN & BURR KATHLEEN		119 WEST ST	HEBRON	CT	06248	H
CROSSKEY MARTHA M		259 JONES ST	AMSTON	CT	06231	H
NEW ENGLAND PROPERTY SERVICE LLC		50 BRIGHTON RD	HEBRON	CT	06248	H
PRIORITY 1 LIFE SAFETY STROBES LLC		56 COUNTRY LN	HEBRON	CT	06248	H
BENTON ELIZABETH J LLC		54 DEER MEADOW LN	HEBRON	CT	06248	H
BLARNEYSTONE LLC		77 CANNON DR	AMSTON	CT	06231	H
DCT LLC		222 WEST MAIN ST	HEBRON	CT	06248	H
DONATION LINE LLC		49 NORTHAM RD	AMSTON	CT	06231	H
DOWNEY JOHN M		164 OLD COLCHESTER RD	AMSTON	CT	06231	H
JME ENTERPRISES LLC		49 SCARBORO RD	HEBRON	CT	06248	H
MASON SECURITIES FUND LLC		122 SCARBORO RD	HEBRON	CT	06248	H
MILESTONE VENTURES LLP		119 WEST ST	HEBRON	CT	06248	H
SYLVESTER ANTHONY T	SYLVESTER CONSTRUCTION CO	PO BOX 65	HEBRON	CT	06248	H
PODELL JUDITH	LEFTLANE LLC	667 GILEAD ST	HEBRON	CT	06248	H

COMPASS GROUP	COMPASS TWO LLC	PO BOX 260888	PLANO	TX	75026	H
RUSSO JAMES J	J RUSSO PRODUCTIONS	255 SKINNER LN	HEBRON	CT	06248	H
KASULIS CHRISTINE R	MAJESTIC KETTLE CORN	P O BOX 297	HEBRON	CT	06248	H
IMA APPRAISAL SERVICES LLC		PO BOX 348	HEBRON	CT	06248	H
DION PRODUCTIONS LLC		23 HICKORY DR	HEBRON	CT	06248	H
GERKE CATHERINE		100 OLD COLCHESTER RD	AMSTON	CT	06231	H
WILLIAMS EDWARD A III		486 WALL STREET	HEBRON	CT	06248	H
PETESADL INC		282 BURNT HILL RD	HEBRON	CT	06248	H
CHESTER ENVIRONMENTAL ASSOC INC		350 WEST ST	HEBRON	CT	06248	H
JJB INC		149 DALY RD	HEBRON	CT	06248	H
HARTAN SHAWN	SHAWN HARTAN PHOTOGRAPHY	19 JOEL DR	HEBRON	CT	06248	H
RC TRAINING & CONSULTNG SERVICES LLC		21 OAKLAND RD	AMSTON	CT	06231	H
HAMILTON GARY	GARY HAMILTON PHOTOGRAPHY	41 WEST BRANCH DR	HEBRON	CT	06248	H
TROY MATTHEW A	PATIO PRODUCTIONS	103 REIDY HILL ROAD	AMSTON	CT	06231	H
ORZELL JOHN R	TRI-COUNTY WEB CONSULTING	459 EAST ST	HEBRON	CT	06248	H
PALMER KATHY	JOURNEYS BY KATHY	254 SKINNER LN	HEBRON	CT	06248	H
THOMAS BRANCATO LLC		50 RIDGE ROAD	HEBRON	CT	06248	H
MJH ASSOCIATES LLC		349 EAST ST	HEBRON	CT	06248	H
HOWELL DONNA M	CHI CHI DESIGNS	190 GILEAD ST	HEBRON	CT	06248	H
GASPER GEOFFREY A	INTO THE RIGHT EAR PUBLIC	305 WALL ST	HEBRON	CT	06248	H
GUTCHO MITCHELL	GLOBAL YACHTS USA MG	79 CHESTERFIELD RD	AMSTON	CT	06231	H
GONSALVES ERNIE F	SAVE ON INTERIORS	8 HILLCREST DR	AMSTON	CT	06231	H

FONTANELLA JAE J	CT CRASH DATA RETRIEVAL	8 JUDD BROOK LN	AMSTON	CT	06231	H
SECURE MOBILE SOLUTIONS INC		34 OLD COLCHESTER ROAD	AMSTON	CT	06231	H
RETIREMENT SERVICES		26 FOREST VIEW LANE	HEBRON	CT	06248	H
ENSTAR LLC		274 WALL ST	HEBRON	CT	06248	H
CONNECTICUT SEALERS LLC		23 ELSMERE RD	AMSTON	CT	06231	H
CHARTER OAK TELEPHONE LLC		PO BOX 835	HEBRON	CT	06248	H
BIBELICIOUS SAUCES INC		26 HAWK'S LANDING	AMSTON	CT	06231	H
WJ BRIGGS & ASSOCIATES INC		PO BOX 746	HEBRON	CT	06248	H
AFFORDABLE SERVICES LLC		411 BURROWS HILL RD	HEBRON	CT	06248	H
DORAN COLIN J	DORAN SERVICES	39 LONDON RD	HEBRON	CT	06248	H
ADVANCE SERVICE LLC		434 WALL ST	HEBRON	CT	06248	H
WATER SOURCE LLC		281 JONES ST	AMSTON	CT	06231	H
MERRIFIELD ROBERT	MERRIFIELD APPRAISAL	122 CANNON DR	AMSTON	CT	06231	H
M J WALSH & SONS REAL ESTATE APPRA		61 CHESTERFIELD RD	AMSTON	CT	06231	H
KARLSON KAROLYN		53 WILLOW DR	HEBRON	CT	06248	H
WALTNER WOODS LLC		258 OLD COLCHESTER RD	AMSTON	CT	06231	H
BARBARA MOSCATO ACCOUNTING LLC		258 REIDY HILL RD	AMSTON	CT	06231	H
VERIKAS RICHARD R JR	VERIKAS ENTERPRISES	PO BOX 803	HEBRON	CT	06248	H
PARSADANOV TINA	STUDIO BLUE PHOTOGRAPHY	905 GILEAD ST	HEBRON	CT	06248	H
CLEAN SLATE ENVIRONMENTAL INC		351 WEST ST	HEBRON	CT	06248	H
ZEINER CATHERINE	PROFIT CENTER THE	159 WEST ST	HEBRON	CT	06248	H
JOHNSTON ERNEST	JDMR LOGISTICS	115 OLD ANDOVER RD	HEBRON	CT	06248	H
SANDBERG MATTHEW	TRACK CENTRAL	7 SENATE BROOK DR	AMSTON	CT	06231	H
WALLS MICHAEL B	2 WALLS DESIGN	74 CHESTNUT HILL RD	HEBRON	CT	06248	H
PONCE DE LEON TECHNOLOGY LLC		91 CONGRESS DR	AMSTON	CT	06231	H
MCKEON MARIA F	MCKEON PROFESSIONAL SERVICES	117 SENATE BROOK DR	AMSTON	CT	06231	H
CUNNINGHAM BRIAN F ESQ	ATTORNEY AT LAW	60 BRIAN DR	HEBRON	CT	06248	H
EDP STAFFING LLC		PO BOX 651	HEBRON	CT	06248	H

FASHIONVILLE LLC		14 SAW MILL WAY	AMSTON	CT	06231	H
FORTIN JASON M ETAL	PROFESSIONAL APPRAISAL GROUP	PO BOX 331	HEBRON	CT	06248	H
SUMMIT PROMOTIONS LLC	AG PROMOTIONS	233 CHURCH ST	AMSTON	CT	06231	H
XILLION LLC		91 BURROWS HILL RD	AMSTON	CT	06231	H
HAUGH CATHERINE M	SISTERS IN SPIRITUALITY	16 WELLINGTON WAY	AMSTON	CT	06231	H
NDJ SOLUTIONS LLC		29 FOREST VIEW LN	HEBRON	CT	06248	H
FARASHA & SUAD DANCE & DESIGNS LLC		230 WALL ST BOX 465	HEBRON	CT	06248	H
SINKEZ MICHELE B	BLISSMEADOW ARTS	209 MILLSTREAM RD	AMSTON	CT	06231	H
TEMPLE STEPHEN		186 KINNEY RD	AMSTON	CT	06231	H
SUROVIAK LUKE		489 JONES ST	AMSTON	CT	06231	H
DION DEREK	DEREK DION'S WRESTLING CAMP	36 HOPE VALLEY RD	AMSTON	CT	06231	H
TRAILER SYSTEMS LLC		262 EAST ST	HEBRON	CT	06248	H
HAUGH RON	NO REGRETS	16 WELLINGTON WAY	AMSTON	CT	06231	H
PFEIFFER JOHN	PROMOTIONAL SOURCES	351 JAGGER LN	HEBRON	CT	06248	H
HEINRICH COMPENSATION CONSULTING LLC		238 OLD HARTFORD RD	AMSTON	CT	06231	H
CPU'S 4U INC		PO BOX 124	AMSTON	CT	06231	H
CAMPBELL DONALD	NORTH BRIDGE COMPUTERS	PO BOX 124	AMSTON	CT	06231	H
PEN PAL TRAVEL LLC		PO BOX 244	HEBRON	CT	06248	H
MARX DIVERSIFIED INTERESTS LLC	FALADE MARK P	70 YORKSHIRE DR	HEBRON	CT	06248	H
COMPLETE RESIDENTIAL SERVICES LLC		58 MARJORIE CIRCLE	HEBRON	CT	06248	H
ROSER MARK	RESULTS GROUP THE	515 OLD SLOCUM RD	HEBRON	CT	06248	H
TOW DAVID DBA	CYBERDRAGON	745 EAST ST	HEBRON	CT	06248	H
HAUGH RYAN	A GRADE ABOVE	16 WELLINGTON WAY	AMSTON	CT	06231	H
MASSE SHARON L	COUNTRY SPOOL THE	643 WALL ST	HEBRON	CT	06248	H
DANIELS CHARLES W ETAL	WIN-WIN FINANCIAL LLC	PO BOX 147	AMSTON	CT	06231	H
BELL MARIA L	MI-SO CUTE	101 SCARBORO RD	HEBRON	CT	06248	H
CAMPISI ROSANNE	MRS KING'S QUILTS N	43 WALNUT DR	HEBRON	CT	06248	H

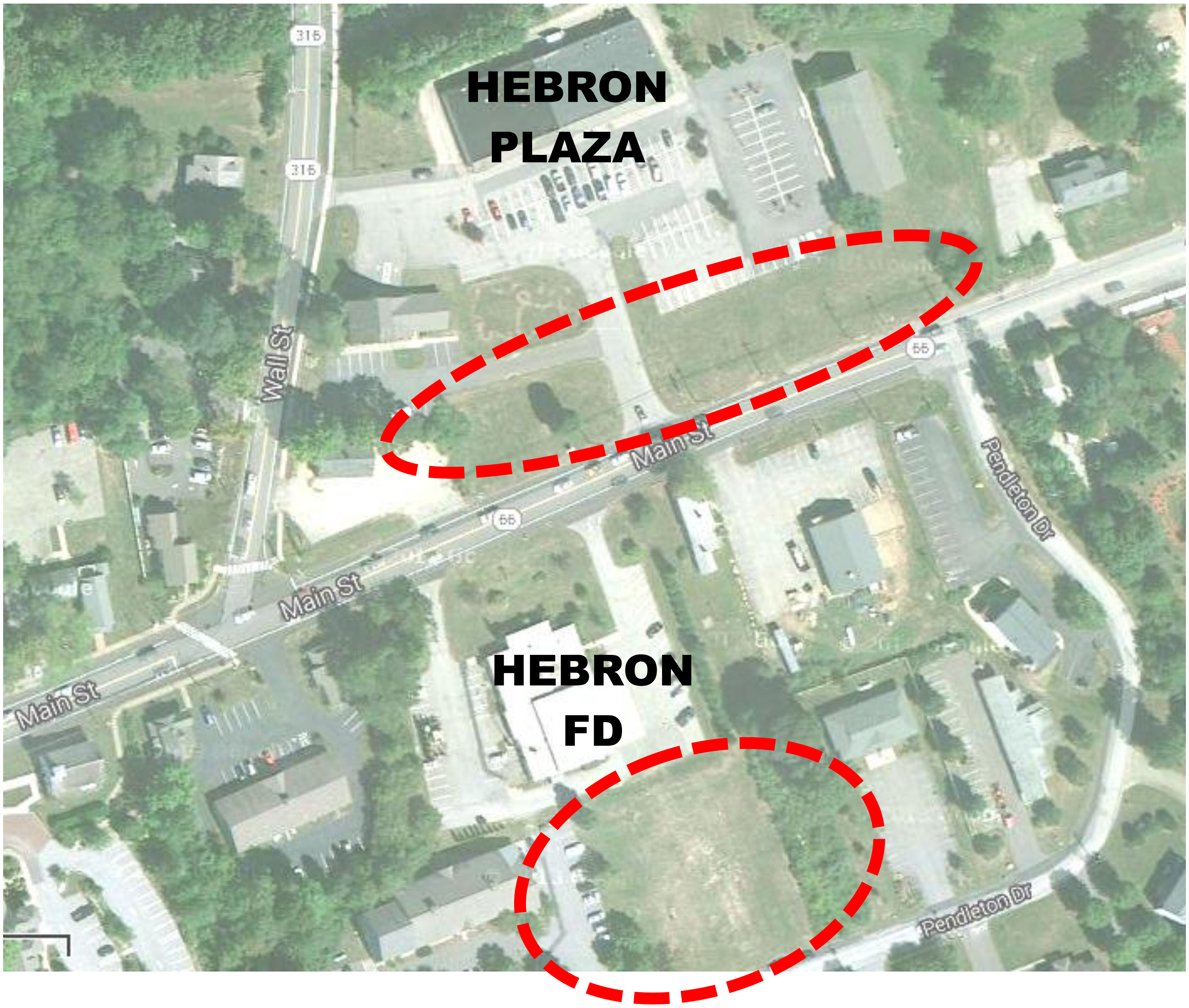
	THINGS					
ASPEN CAPITAL GROUP LLC		51 CARVER LANE	HEBRON	CT	06248	H
LUDWIG ELLEN M	MADE BY A TROLL	306 WEST MAIN ST	AMSTON	CT	06231	H
SCHALLER DENISE	STAMPIN UP	80 CONE RD	HEBRON	CT	06248	H
GAULARD JAY	ILEEG INC	25 SENTINAL WOODS	HEBRON	CT	06248	H
HUSTUS KENNETH J JR	BUMPERS ON THE RUN LLC	3 LAURA DR	HEBRON	CT	06248	H
DROBOCKYI VOLODYMYR & IRYNA	VIA TECHNOLOGY	123 SENATE BROOK DR	AMSTON	CT	06231	H
HINCHEY MYRIAH	TAO VITALITY, LONGEVITY OPTIMAL	PO BOX 666	HEBRON	CT	06248	H
MAT MAN	LANFORD'S LUNCHBOX	PO BOX 144	HEBRON	CT	06248	H
SANFORD LINDSEY	POLE FOR THE MIND BODY & SOUL	126 LONDON RD	HEBRON	CT	06248	H
HILLS GREG		312 OLD SLOCUM RD	HEBRON	CT	06248	F
CFT SERVICES LLC		500 HOPE VALLEY RD	AMSTON	CT	06231	H
BIERI RAMON W	AGE WELL HEALTH LLC	137 SENATE BROOK DR.	HEBRON	CT	06248	H
STEVENS GREGORY	ARTISTIC PROJECTION	127 CONGRESS DRIVE	AMSTON	CT	06231	H
BILODEAU MARK OR JAKE	BILODEAU LAWN CARE & HANDYMAN SERVICES	109 WELLSWOOD RD	AMSTON	CT	06231	H
CONSTRUCTION PRODUCTIONS LLC		8 PORTER RD	HEBRON	CT	06248	H
LAYER8 LLC		173 OLD COLCHESTER RD	AMSTON	CT	06248	H
GORDON LAWRENCE	LAWRENCE GORDON DESIGNS	164 BURROWS HILL RD	AMSTON	CT	06231	H
SOUZA STRUCTURAL ENGINEERING LLC		349 WEST MAIN ST	AMSTON	CT	06231	H
MIRAKIAN JAMES E		33 MOHEGAN LN	AMSTON	CT	06231	H
A HANDYMAN LLC		45 WILLOW DR	HEBRON	CT	06248	H
EAGLEMOON RAES	EAGLEMOON RAES	162 WALL ST, APT C7	HEBRON	CT	06248	H

Appendix 6

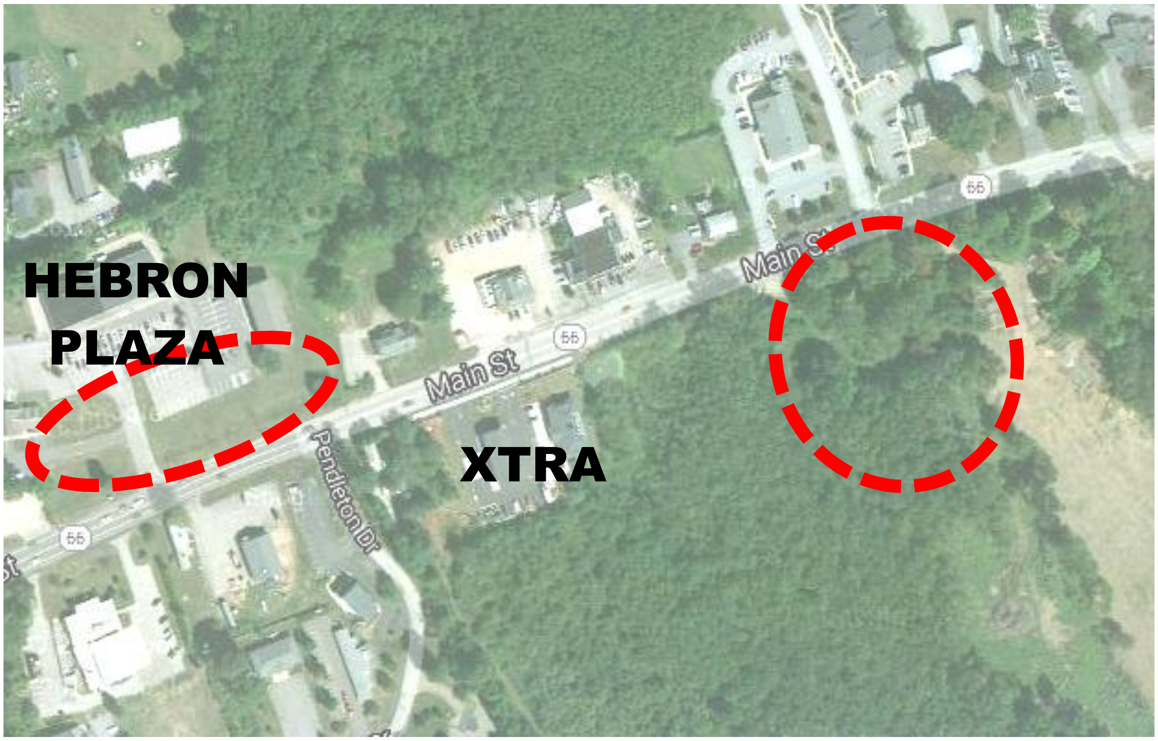
Infill Sites

Parking Lots Adjacent to Ted's IGA Supermarket

Adjacent to Hebron Plaza and Hebron Fire Department



Adjacent to the Hebron Village Green District and Hebron Plaza



South of Hebron Green

Appendix 7

Mailing Lists

Business Services

Medical/Health Services

Real Estate Developers

[See attached CD Rom]

Appendix 8

Sample Marketing Brochures