

Prepared for:
Town of Branford

Targeted Industry Study Technical Report

March 2010



Branford Targeted Industry Study

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Key Findings

One recommendation of the Branford Plan of Conservation and Development was to conduct a targeted industry study, which looks at various historical growth trends for every industry¹ in the Town and region to determine which industries could thrive in the Town and which locations are best suited for various types of development. The Town commissioned the Connecticut Economic Resource Center, Inc. (CERC) to conduct the analysis, which included a business profile, targeted industry study, retail and consumer expenditure analyses, and focus groups with business owners and chamber members.

Some of the key findings include:

- During the past ten years, Branford had a slight increase in its total number of businesses while the State's trend was flat and New Haven County saw a slight decrease.
- Branford has had a history of biotech firms locating in town. Although two of the most recognizable companies are no longer located in Branford, other companies have moved in, including spin-offs, and there is available lab space.
- The economic recession has made it difficult for many borrowers to secure funding and for some companies to continue to generate sustainable profits. Most analysts agree that the recession ended during the third quarter of 2009 although job gains will not be seen until well into 2010.
- Industries that were found to be the most economically viable through a quantitative analysis of employment trends, wage rates, industry linkages and relative concentrations, for the greater Branford region include:
 - Hospitals (NAICS 622)
 - Chemical Manufacturing (NAICS 325)
 - Merchant Wholesalers, Nondurable Goods (NAICS 424)
 - Other Information Services (NAICS 519)
 - Securities, Commodity Contracts & Other Financial Investments (NAICS 523)

¹ The Branford industry analysis included all three-digit NAICS industries within the following sectors: 11 Agriculture, Forestry, Fishing and Hunting; 21 Mining, Quarrying, and Oil and Gas Extraction; 22 Utilities; 23 Construction; 31-33 Manufacturing; 42 Wholesale Trade; 44-45 Retail Trade; 48-49 Transportation and Warehousing; 51 Information; 52 Finance and Insurance; 53 Real Estate and Rental and Leasing; 54 Professional, Scientific, and Technical Services; 55 Management of Companies and Enterprises; 56 Administrative and Support and Waste Management and Remediation Services; 61 Educational Services; 62 Health Care and Social Assistance; 71 Arts, Entertainment, and Recreation; 72 Accommodation and Food Services; 81 Other Services (except Public Administration).

- Professional, Scientific, and Technical Services (NAICS 541)
- Management of Companies and Enterprises (NAICS 551)
- Educational Services (NAICS 611)
- Ambulatory Health Care Services (NAICS 621)
- Nursing and Residential Care Facilities (NAICS 623)
- Social Assistance (NAICS 624)

It may be beneficial to Branford to focus on attracting and maintaining companies that support the industries performing well in the County.

- The “targeted industries” which are generally compatible with residential uses area include Other Information Services (NAICS 519); Securities, Commodity Contracts & Other Financial Investments (NAICS 523); Professional, Scientific, and Technical Services (NAICS 541); Management of Companies and Enterprises (NAICS 551); and Educational Services (NAICS 611). However, many of these uses would be most appropriately located within a commercial zone.
- Branford does have the opportunity to serve as a regional retail center to serve Branford, as well as the shoreline communities to the east, including Madison, Guilford and Killingworth even though retail needs are accommodated by retail centers in North Haven, Orange and the outlet malls in Clinton and Westbrook. When comparing retail sales to retail sales potential, the retail industries most likely to serve as a draw to both Branford residents and the larger region include restaurants, book stores and gift stores, among others.
- Focus groups including business owners, developers, chamber officials, and real estate agents agreed that the uniqueness of certain locations did not mean that there were clear solutions for where to establish certain types of developments.
- Branford has several well-established areas of mixed use; flexible zoning tools (such as Special Development Area overlay zones) that can be used to develop well-planned and integrated mixed use, high quality projects; and recommendations from the Town’s Plan of Conservation and Development that identify where land use “nodes” should be located.
- Several areas of the Town are more appropriate for locally oriented businesses, and some are more appropriate for regionally oriented business. In Branford, the Branford Center area is most appropriate for local uses, as the area serves as a

service and entertainment center for the Town. However, the attractiveness of the area will attract patrons from other communities.

- The Town's Plan of Conservation and Development includes strategies that are intended to promote Smart Growth. Smart Growth essentially is utilizing land use practices which direct development into areas with an existing land use pattern and public facilities that can support and accommodate additional growth. Conversely growth would not be encouraged in areas with sensitive environmental resources or lack the infrastructure to support growth. The goal of Smart Growth is to create sustainable environments for living and working, and to create efficient transportation patterns.
- Economic development opportunities for selected areas in Branford include:

Route 1 West

- The corridor, with some aesthetic upgrades, could become an attractive corporate business park location. It is just off of the main Interstate 95 corridor, and although it lacks large, undeveloped parcels and the direct visibility and access important to national and regional retailers, it has excellent access to New Haven, the Interstate 95 corridor and customers and workers along the East Shore. This will build upon some of the development which has occurred within this area, such as the Lakeview Center complex.
- This could include the development of small industrial uses, as appropriate within a corporate business park setting.
- Some higher density residential uses may be appropriate along this corridor. This would have an advantage of providing a productive use of underutilized properties, and adding to the vibrancy of this corridor.

Branford Town Center

- The area is attractive to "destination" businesses (high-end restaurants and retail) that attract customers from throughout the region as well as retail and services serving the local community.
- There are few properties available for development or redevelopment within this area. Any potential economic growth opportunities would be from re-use or re-development of existing properties.
- The existing mixed uses, with primarily retail use on the ground floor and residential or office uses above, should be maintained.

- Design review by the Town Center Architectural Review Board of any new development within this area should be maintained to assure that the overall character of the area be preserved and/or enhanced.
- Some higher density residential uses within this area may be appropriate within carefully controlled design conditions that do not detract from the character of the central business district nor the surrounding residential neighborhoods.
- Additional office development may also be appropriate within these locations, or on multiple floors on top of retail uses along Main Street. These office uses would tend to be small users, which primarily serve the residents of Branford and surrounding areas.
- The Atlantic Wire Company is a significant redevelopment opportunity with the potential for a mixed-use development linked to both Branford Center and the railroad station. The Town should work with the property owner and state agencies to address the environmental remediation issues in order to make the property ready for redevelopment.

Railroad Station

- High density residential uses are the most attractive uses for developable properties within this area, as residents can benefit by the mass transportation facilities to New Haven and points to the west, such as Bridgeport and Stamford.
- Some small offices may be appropriate within this area, as part of a mixed-used development.
- As residential growth occurs within this area, there will be an increased need for small neighborhood-oriented retail uses to serve the growing population of this area as well as rail commuters. However, these retail uses should be small-scale, so as not to generate significant traffic on local streets, and remain in conformance with this overall neighborhood environment.

Exit 53

- The reconfiguration of this entrance ramp could open up much of this vacant area to development. A large scale retail development would be viable at this location, due to its accessibility and proximity to population centers. However, a mixed use development plan would also be feasible,

and may be more economically viable. This could include retail, office, higher density residential, some industrial uses. This can be designed to become one of the major economic centers of the region.

Exit 54

- There are few (except for one 15-acre parcel zoned and previously approved for a retail shopping center) opportunities for significant economic development within this general area. The retail area south of the interchange along Route 1 should be continually reinforced, with appropriate redevelopment of underutilized properties.
- The area north of the interchange along Cedar Street should be retained for light industrial and office uses. These uses would be compatible with the existing uses in the area. In addition, light industrial and office uses are more appropriate in this area than retail, in that it would not introduce major traffic generators north of the Turnpike interchange.

Exit 55

- The area south of Route 1 and north of Interstate 95 represents a potential development opportunity. This area can be used for hospitality, office or retail uses as a component of a mixed-use development, or some mixed-use combination that is planned and developed in a comprehensive and coordinated manner. This area would be suitable for this type of coordinated development, as the potential traffic would be primarily oriented toward the Turnpike interchange. This type of development would provide a greater fiscal and economic benefit to the Town than a “big box” developed on this site.

Exit 56

- The corporate industrial/ office areas should be reinforced as an important component of the local economy.
- Consideration should be given to the establishment of a mixed use area. On undeveloped areas of this sector consider retail, residential, office and related developments in a nodal development that encourages internal pedestrian circulation. This type of development should include high degrees of design, and public infrastructure.

Background

The Town of Branford is a full-service municipality, offering public water and sewer infrastructure to its residents and businesses. With a population of almost 30,000, Branford is bordered by Long Island Sound to the south, East Haven to the west, North Branford to the north, and Guilford to the east.

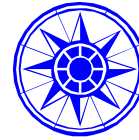
Interstate 95 and Route 1 are the major east-west transportation thoroughfares, which allow access to many businesses, as seen in Figure 1 (on next page). The Shoreline East commuter rail also connects the Town with New Haven (and other points south), Old Saybrook and New London.

As seen in Figure 1 (next page), businesses representing a variety of industries are located throughout the Town although there are concentrations in certain areas such as along the Route 1 corridor, within the downtown area, off of the I-95 exits, and bordering the shoreline. Smaller establishments abound although there are some companies that employ more than 50 workers each.

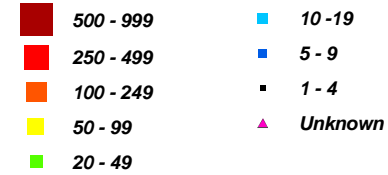
Which industries² are growing or emerging in the larger region? What is the future of the region's industry sectors, such as manufacturing and retail, given long-term trends and the current economic climate? The Town seeks to refine and solidify its industry niche in the region, develop economic development policies that fit the community's vision for the future, and execute strategies that will make a positive economic difference. As noted in its 2008 Plan of Conservation and Development (POCD), Branford called for the completion of a targeted business study to determine which industries could thrive within some of the unique neighborhoods and areas that comprise the town. The POCD was one in a series of strategies including the Vision Project, which called for the promotion of a vibrant economy in the Town; and the March 2008 Action Agenda, which identified areas of development opportunity including the exits along I-95, West Main Street (Route 1), the downtown area, and the train station. The Connecticut Economic Resource Center, Inc. (CERC) was commissioned to conduct the targeted business study, and the remainder of this document seeks to explain the economic trends and how Branford can best take advantage of them.

² The term "industry" as used in this report includes all sectors of economic activity and is not limited to the narrower definition that is synonymous with manufacturing. See footnote on page 1 for an additional explanation.

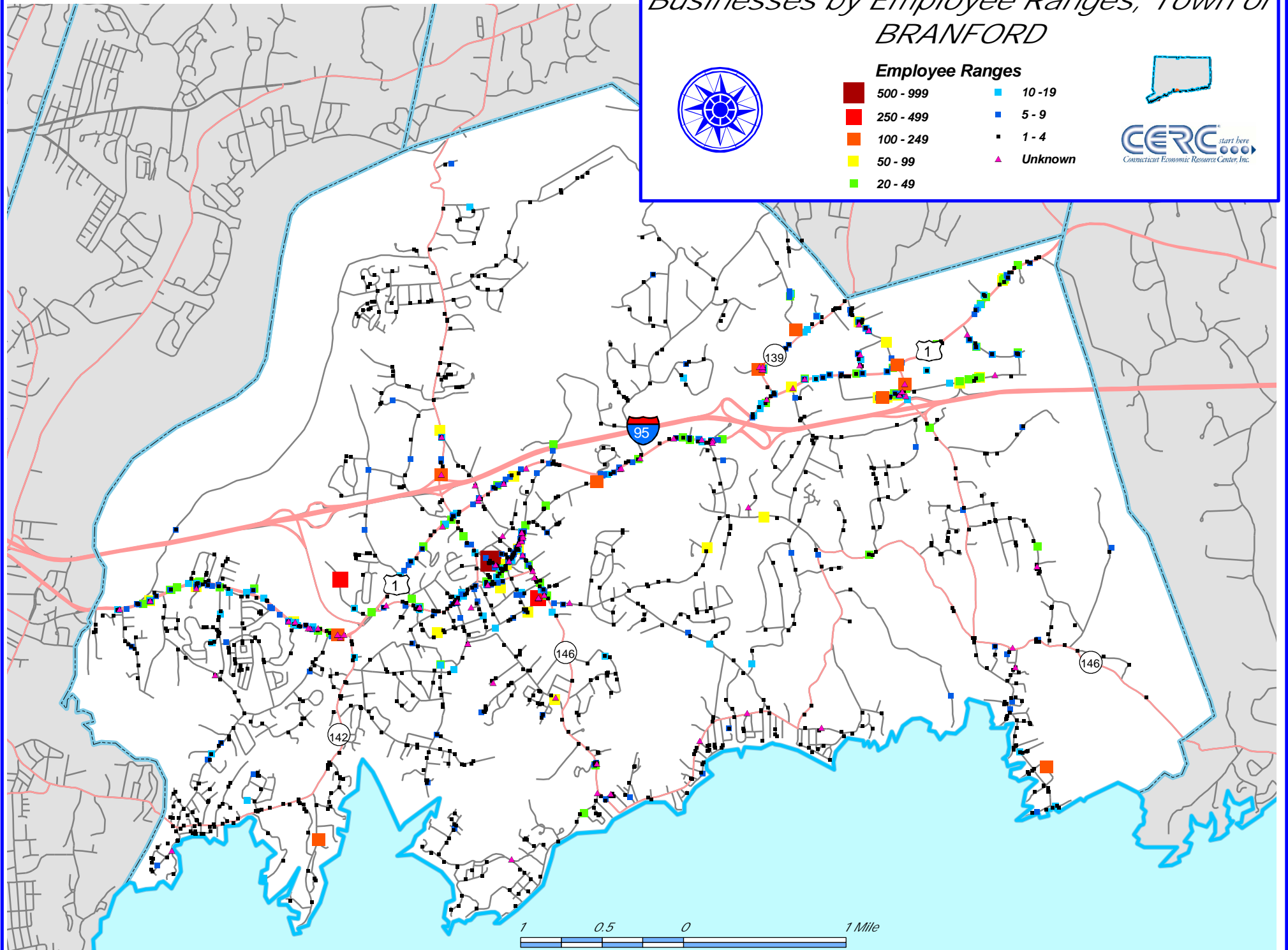
Businesses by Employee Ranges, Town of BRANFORD



Employee Ranges



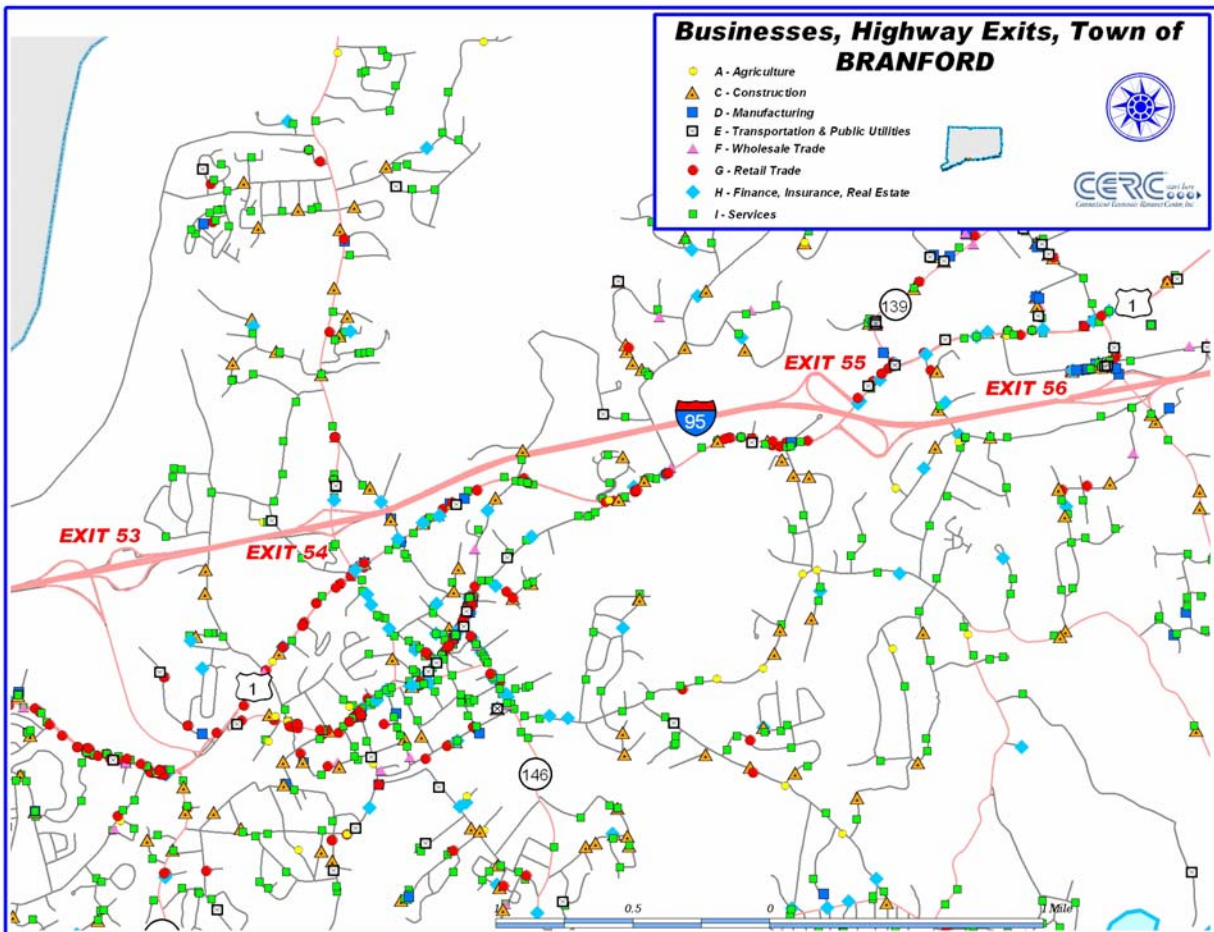
CERC
start here
Connecticut Economic Resource Center, Inc.



Branford Business Profile

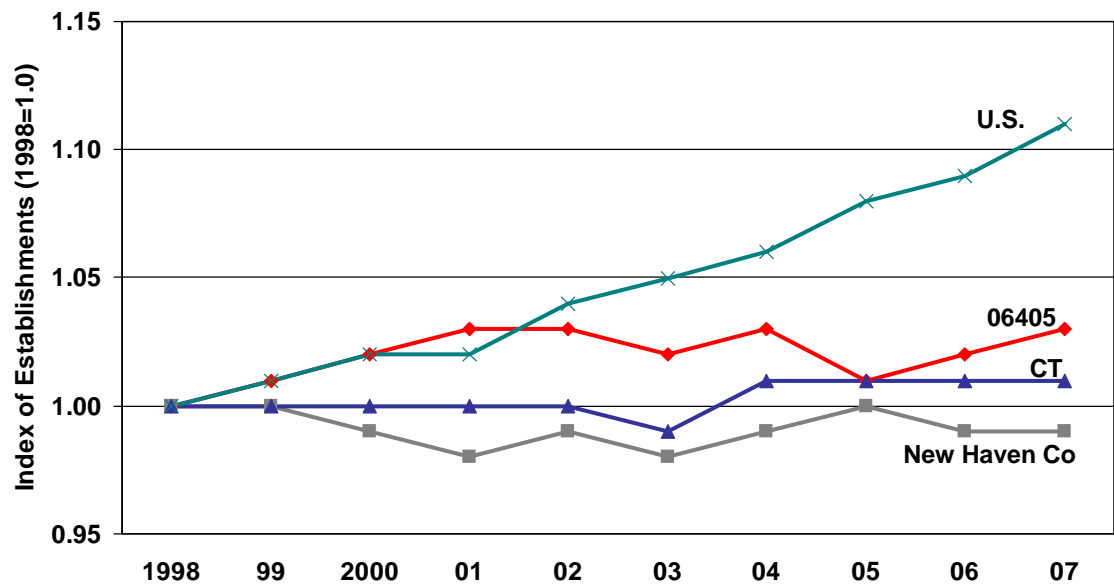
As shown in Figure 2, a variety of industries are represented by the businesses located near the exit ramps off of I-95. The downtown area is also seen on this map, just south of exit 54. Appendix C shows maps of these areas in more detail.

Figure 2: A variety of industries are represented near the I-95 exit ramps.



During the past ten years, Branford (zip code 06405) has seen a slight increase in its total number of businesses while the State's trend has been flat and New Haven County saw a slight decrease. In 2007, there were 1,066 establishments in Branford, according to the U.S. Census. Figure 3 shows indices of establishments: Branford's value in 2007 was 1.03, meaning that there were three percent more businesses in the Town in 2007 than in 1998. Meanwhile, during the same time period, the U.S. as a whole grew 11 percent. In Branford, as in most regions all across the country, the number of manufacturing establishments are declining but because of productivity enhancements and the more technological ways of performing manufacturing activities, the industry still has earning power for its employees.

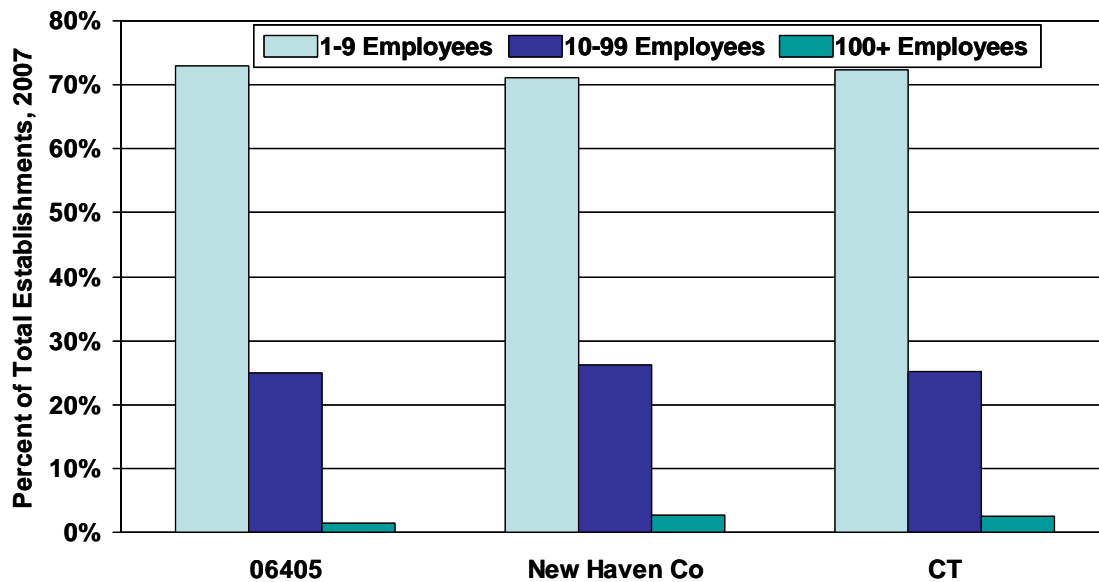
Figure 3: Branford's business trend has been slightly better than the state and county but all lag behind the nation.



Source: U.S. Census, County and Zip Code Business Patterns

The Town's business profile, according to the size of the companies, was very similar to the profiles of the county and the state. Almost three-quarters of the businesses in Branford in 2007 employed fewer than 10 people, and two percent employed more than 100. Figure 4 shows the similarities of the companies by size for Branford, New Haven County, and Connecticut.

Figure 4: Branford had a slightly larger share of small businesses than the county or state.

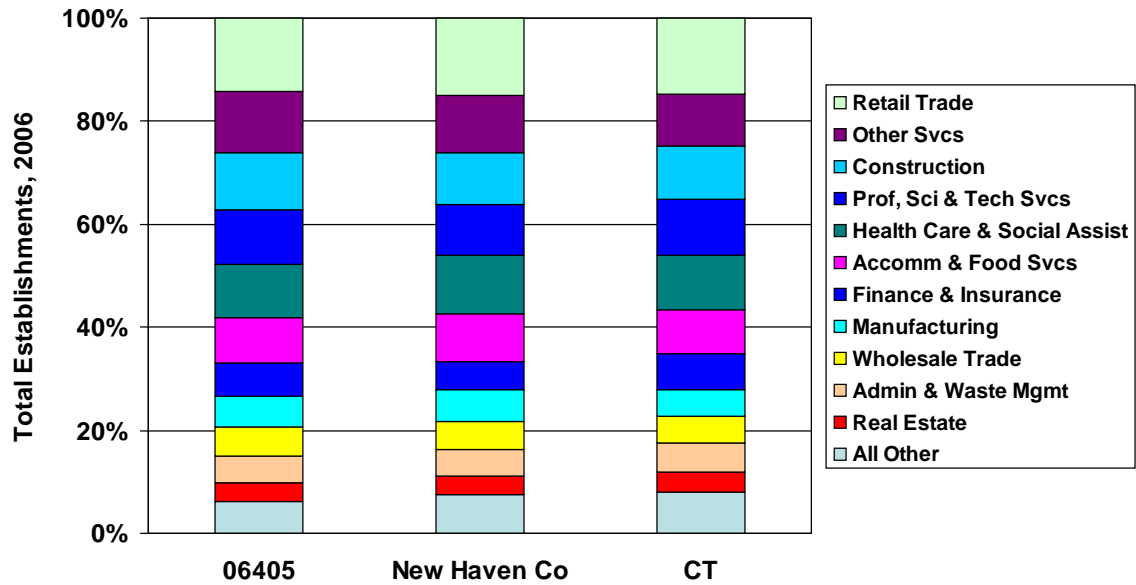


Source: U.S. Census, County and Zip Code Business Patterns

Business startups and expansions, as well as business layoffs and closings, create business churn which can ultimately help a region or community become more vibrant as strong companies expand and others shrink or move to take advantage of competitive practices. One business expansion that was announced in the Spring of 2009 was Harco, a manufacturer of airplane parts, that expected to hire an additional 30 workers. The U.S. Census expects to hire 1,500 part-time workers statewide to assist with the data collection of the 2010 decennial census, of which a portion of the workers may be from Branford. On the other hand, there have been some business closings within Branford as well: Atlantic Wire, a manufacturer of wire products, closed which affected 71 workers. And both Neurogen and Curagen, pharmaceutical companies, have left the Town over the recent past, affecting more than 20 people in the recent past but many more over the past decade. However, a spin-off of Curagen, 454 Life Sciences, employs more than 200 workers.

Figure 5 presents how the businesses are distributed by industry for Branford, New Haven County and Connecticut. Branford's shares of Construction and Other Services businesses were slightly higher than the county or state averages while the share of Healthcare and Social Assistance was slightly below.

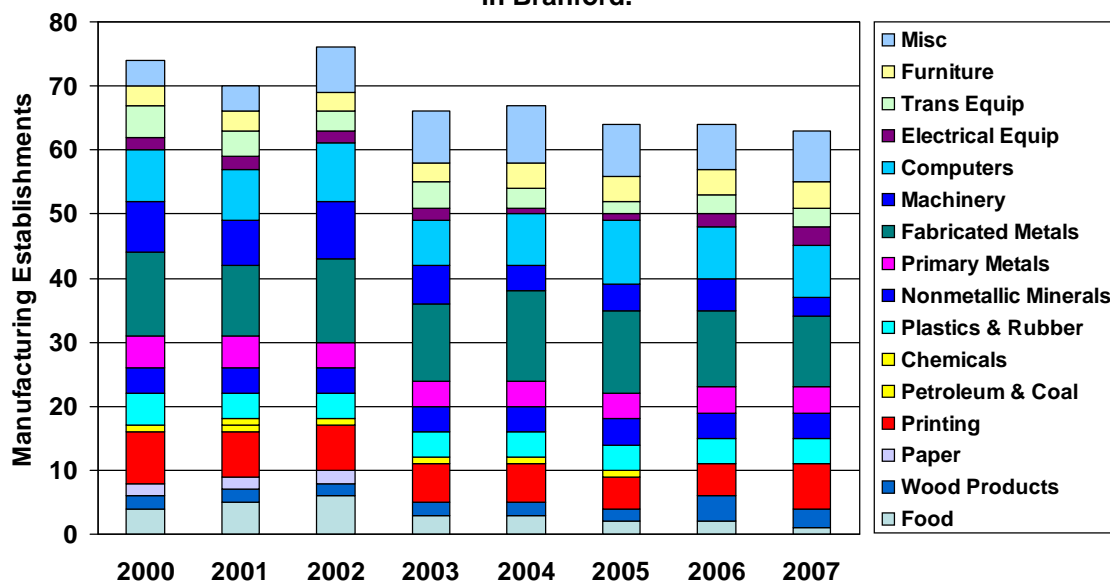
Figure 5: Branford's business profile is similar to the county and the state.



Source: U.S. Census, County and Zip Code Business Patterns

As seen in Figure 6, the total number of Manufacturing establishments has declined from 75 in 2000 to 63 in 2007. Since the total number of establishments in Town has increased during this time period, the Manufacturing share of the total has declined from seven percent to six percent.

Figure 6: Fabricated Metals comprised the largest share of Manufacturing establishments in Branford.



Source: U.S. Census, County and Zip Code Business Patterns

With 11 establishments, Fabricated Metals comprised the largest share of Manufacturing establishments in Town, with Computers and Miscellaneous Manufacturing following with eight companies each.

Regional Employment Trends

In addition to looking at the industries with the largest shares of total employment in the Town, it is beneficial to also look at relative concentration levels as well as for a larger geographic region. Looking at relative concentrations provides the benefit of seeing which industries have employment levels that are larger than the U.S. average. And looking at the relative concentration ratios for a larger geography provides a wider context within which to assess the overall health of potential industries for the Town.

Figure 7 lists the industries in New Haven County with the largest relative employment concentrations, otherwise known as location quotients (LQ). Twenty-five of the 87

industries studied had LQs that were greater than 1.2 (for reference, an LQ of 1.0 indicates that the region has the same employment ratio as the nation). Wage rates for all of these industries can be found in Appendix D.

Seven of these 25 industries were involved in manufacturing activities, and four of them (Miscellaneous Manufacturing, Electrical Equipment Manufacturing, Computer and Electronic Product Manufacturing, and Printing) had increasing LQs between 2000 and 2008.

Retail, in addition to Healthcare and Social Assistance, had four industries each on this list of 25. Two Retail (Nonstore Retailers; Sporting Goods, Hobby, Book and Music Stores) and two Healthcare and Social Assistance (Social Assistance, Hospitals) have had increasing employment concentrations between 2000 and 2008.

Sixteen of the 25 had increasing LQs between 2000 and 2008 while the other nine saw decreases.

Figure 7: Twenty-five industries had large relative employment concentrations in New Haven County in 2008...16 had concentration increases between 2000 and 2008...

| NAICS | Industry Description | New Haven Co Emp LQ | | LQ Change 00-08 |
|-------|--|---------------------|------|-----------------|
| | | 2000 | 2008 | |
| 339 | Miscellaneous Manufacturing | 1.90 | 3.04 | ↑ |
| 611 | Educational Services | 2.75 | 2.79 | ↑ |
| 517 | Telecommunications | 1.81 | 2.05 | ↑ |
| 335 | Electrical Equipment, Appliance and Component Manufacturing | 1.48 | 1.96 | ↑ |
| 519 | Other Information Services | 0.45 | 1.68 | ↑ |
| 454 | Nonstore Retailers | 1.30 | 1.67 | ↑ |
| 812 | Personal and Laundry Services | 1.38 | 1.60 | ↑ |
| 212 | Mining (except Oil and Gas) | 1.11 | 1.58 | ↑ |
| 624 | Social Assistance | 1.27 | 1.46 | ↑ |
| 334 | Computer and Electronic Product Manufacturing | 1.35 | 1.41 | ↑ |
| 622 | Hospitals | 1.27 | 1.34 | ↑ |
| 533 | Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) | 1.17 | 1.29 | ↑ |
| 424 | Merchant Wholesalers, Nondurable Goods | 1.09 | 1.27 | ↑ |
| 811 | Repair and Maintenance | 1.22 | 1.25 | ↑ |
| 323 | Printing and Related Support Activities | 1.20 | 1.23 | ↑ |
| 451 | Sporting Goods, Hobby, Book and Music Stores | 1.05 | 1.20 | ↑ |

...while nine industries had decreases.

| | | | | |
|-----|---|------|------|---|
| 485 | Transit and Ground Passenger Transportation | 3.02 | 2.62 | ↓ |
| 332 | Fabricated Metal Product Manufacturing | 2.09 | 1.98 | ↓ |
| 623 | Nursing and Residential Care Facilities | 2.06 | 1.88 | ↓ |
| 331 | Primary Metal Manufacturing | 1.71 | 1.68 | ↓ |
| 562 | Waste Management and Remediation Services | 1.87 | 1.48 | ↓ |
| 621 | Ambulatory Health Care Services | 1.38 | 1.30 | ↓ |
| 446 | Health and Personal Care Stores | 1.30 | 1.26 | ↓ |
| 445 | Food and Beverage Stores | 1.36 | 1.22 | ↓ |
| 325 | Chemical Manufacturing | 1.69 | 1.21 | ↓ |

Source: Moody's Economy.com; Calculations by CERC

The analysis just described is the first in a series to identify key industries in the region.

The following paragraphs detail further analyses performed, each building off of the previous ones.

Industry Segmentation

Industry segmentation analysis is an expansion of the economic base analysis. For this analysis, all of the 3-digit NAICS industries in the region are compared to the nation's industries. The steps of the industry segmentation analysis include:

- Calculate relative employment concentration for each industry for 2008.

- Calculate the absolute change in employment for each industry from 2000 to 2008.
- Perform a shift-share analysis to determine each industry's competitive share. If the competitive share component is positive, then the county's performance is not merely caused by national trends—a local advantage is helping the industry succeed.

After the calculations are complete, each industry is classified into one of the following categories:

1. **Current Strengths** have a relative employment concentration in the local economy and have seen recent growth. These industries have been able to develop a presence in the area and thrive.
2. **High Priority Retention Targets** include industries that have done well in the area in the past but their recent loss of competitive share calls for attention before employment declines.
3. **Emerging Strengths** do not currently have basic employment in the local economy but the industries have seen recent growth.
4. **Limited Prospects** include industries with weaker performance in the local area due to external trends or local weaknesses.

The industries that were identified as current strengths (with high relative employment concentration, employment growth, and competitive employment share relative to the U.S.) were NAICS 212 Mining; 339 Miscellaneous Manufacturing; 424 Merchant Wholesalers, Nondurable Goods; 448 Clothing and Clothing Accessories Stores; 454 Nonstore Retailers; 483 Water Transportation; 519 Other Information Services; 624 Social Assistance; and 812 Personal and Laundry Services. A list of all of the industries that were classified as current strengths, retention targets or emerging strengths are found in Appendix E.

Regional Multipliers and Linkages

When there is a change in an industry with jobs, income or output, there are ripple effects in addition to the direct change in a region. Economic multipliers calculate the

total effect of an economic change in a region by estimating how the direct effect will affect other industries in the region.

Employment and earnings multipliers estimate the number of new jobs and earnings added to the economy as a result of an economic impact on an industry. The economic multipliers estimate the additional jobs and earnings in the economy to meet the demands associated with the initial jobs and earnings. The total change is the sum of the initial and additional. For example, an industry with an economic multiplier of 2.1 means that if 10 jobs are added to companies in this industry, 11 additional jobs ($10 \text{ direct} * 2.1 - 10 \text{ direct} = 11 \text{ additional}$) are created to meet the demands of the initial companies, with a total effect of 21 jobs ($10 \text{ direct} * 2.1 = 21$).

In addition to economic multipliers, investigating regional inputs also gives a sense of how the industry affects the region. Regional inputs are the dollar amount of inputs an industry purchases from other industries in the region. They are estimated using an input-output model with region-specific data. The size of an industry's regional inputs speaks to the overall size of the industry. When regional inputs are paired with the industry's regional purchase coefficient (RPC), or the share of total industry demand supplied from within the region, opportunities for possible local production can be identified. For example, Figure 8 shows that there may be opportunities for the region to increase production of inputs for industries with high regional inputs and low RPCs, because these industries are large but buying a relatively small share of their inputs in the region. It may be beneficial to determine what the industries are buying outside of the region and whether the region has the resources and industry capacity to produce the inputs locally. If the region can keep its purchases locally, it helps strengthen local supply industries. This may create new industry in the region, and help the current industries already operating locally.

Figure 8: Opportunities for Local Production Based on Regional Inputs and RPC

| | | RPC | |
|-----------------|------|------------------|------------------|
| | | High | Low |
| Regional Inputs | High | Some Opportunity | High Opportunity |
| | Low | Low Opportunity | Some Opportunity |

Appendix F has detailed information about the economic linkages for the industries in New Haven County. Figure 9 shows a portion of this analysis, for it shows the industries with high regional inputs (at least \$50 million in 2007) but the share of the inputs purchased locally is lower than average (RPC is not larger than average RPC). Since these industries have many inputs but the share purchased locally is low, there may be an opportunity for the region to capture some of these sales.

Figure 9: Industries Classified as “High Opportunity” Based on Linkage Analysis

| NAICS | Industry Description | Rgn Inputs | RPC Used by Industry | RgnInput >\$50M? | RPC> AvgRPC? |
|-------|---|-------------|----------------------|------------------|--------------|
| 236 | Construction of Buildings | 738,004,140 | 42% | yes | no |
| 311 | Food Mfg | 233,632,942 | 40% | yes | no |
| 322 | Paper Mfg | 53,039,189 | 28% | yes | no |
| 326 | Plastics and Rubber Products Mfg | 82,241,543 | 31% | yes | no |
| 331 | Primary Metal Mfg | 376,378,418 | 31% | yes | no |
| 332 | Fabricated Metal Product Mfg | 416,943,206 | 38% | yes | no |
| 333 | Machinery Mfg | 182,697,049 | 41% | yes | no |
| 334 | Computer and Electronic Product Mfg | 608,426,210 | 48% | yes | no |
| 335 | Electrical Equip, Appliance & Component Mfg | 184,050,688 | 43% | yes | no |
| 336 | Transportation Equipment Mfg | 483,595,234 | 48% | yes | no |
| 339 | Miscellaneous Mfg | 308,248,649 | 50% | yes | no |
| 484 | Truck Transportation | 86,499,741 | 48% | yes | no |
| 511 | Publishing Industries | 110,834,748 | 44% | yes | no |
| 533 | Lessors of Nonfinancial Intangible Assets | 224,387,202 | 43% | yes | no |
| 562 | Waste Management and Remediation Services | 64,894,591 | 48% | yes | no |
| 722 | Food Services and Drinking Places | 321,850,526 | 49% | yes | no |
| 811 | Repair and Maintenance | 115,977,201 | 43% | yes | no |

Source: IMPLAN, 2007

National Employment Trends

Analyzing national trends is also beneficial because it forces the industry investigation to look at the big picture, and not just focus in on regional trends. Sometimes a region is quite specialized and an investigation focused on the region may not reveal a smaller industry with potential because the national trends are promising. The same argument can be made for looking at national industry predictions as well. An industry may not have much activity in the region, but may grow or decline substantially because of national trends.

Historical employment data were collected for every industry in the U.S. to see how the shares of total employment changed between 2000 and 2008. In addition, it is important

to determine how industries have been faring since the start of the most recent recession in December 2007. This recession has taken a large toll on every aspect of the economy; for instance the unemployment rate in June 2009 was 7 percent in Branford, 8.1 percent in Connecticut and 9.7 percent in the U.S., which are the highest rates in decades. And housing prices between the fourth quarter of 2007 and the fourth quarter of 2008 have tumbled 14.3 percent in Connecticut and 5.4 percent in Branford. Industries with positive or even flat growth will have a better chance at rebounding once the national and regional economies begin to improve in earnest.

Quality of Local Jobs

The Connecticut Department of Labor publishes annual data on average wage by industry. Compared to other states, Connecticut's average wage is relatively high, which is correlated with the skill level of the residents. Comparing annual average wage data by industry provides some insight into the quality of various industry jobs. Industries that pay above-average wages will enable its workers to purchase goods and services, which will most likely be beneficial to the region.

Local Knowledge Input

In addition to the quantitative analysis presented so far, focus groups and personal interviews were conducted to gather additional qualitative information about strengths and weaknesses of the Town and the region. The findings from these sessions will be discussed later in this report, however, participants were asked to comment on which industries were strong or could be strong in the Town or region. That information has been included as one part of this analysis of figuring out which industries are vital for the region.

Putting it Together: Analyzing Key Industries in the Region

Now that the analyses have been described, it is time to put all of the information together to determine the key industries in the region. Criteria were developed for each analysis, and each industry was compared to the criteria:

Regional Employment Profile and Trend

1. Did the industry have a high relative employment concentration (LQ) in the region in 2008?
2. Was the industry a current or emerging strength, or high priority retention target, according to the industry segmentation analysis?

National Employment Trend

3. Did the industry experience positive share growth in U.S. employment between 2000 and 2008?
4. Has the industry experienced flat or positive employment growth since the start of the latest recession (December 2007)?

Regional Multipliers and Linkages

5. Was the industry's employment multiplier greater than the average of all the employment multipliers in the region?
6. Was the industry's income multiplier greater than the average of all the income multipliers in the region?
7. Did the industry buy at least \$50 million of its inputs within the region?
8. Was the industry's regional purchasing coefficient (RPC), a measure of the share of the industry's inputs that are purchased locally, stronger than the average of all the RPCs in the region?

Connecticut Wages

9. Was the industry's average state wage greater than the average state wage in 2007?

Local Knowledge

10. Did any of the focus group participants/interviewees believe that the industry was a strength in the area?

Each industry received one point for a "yes" answer on any of the above 10 criteria. Figure 10 shows the industries with the greatest number of positive criteria answers. Hospitals rose to the top of the list, with eight of the ten possible criteria. The next grouping of industries, those that received at least seven, were a mix of Chemical

Manufacturing (because of the presence of biotech firms), finance, professional and technical services, educational services, and healthcare. Industries with six positive criteria included telecommunications, finance and insurance and food manufacturing (with the rise of specialty bakeries).

Although not seen in the figure, of the 16 industries receiving five positive criteria, a handful of industries were involved with retail or recreation. Please see Appendix A for a complete list of the industries and the criteria.

Figure 10: Key Industries in the Region; Hospitals Received 8 Out of Possible 10 Criteria

| NAICS | Industry Description | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | SUM |
|-------|---|---|---|---|---|---|---|---|---|---|----|-----|
| 622 | Hospitals | √ | √ | √ | √ | √ | | √ | √ | | √ | 8 |
| 325 | Chemical Manufacturing (includes pharmaceuticals) | √ | | | | √ | √ | √ | √ | √ | √ | 7 |
| 424 | Merchant Wholesalers, Nondurable Goods | √ | √ | | √ | √ | | √ | √ | √ | | 7 |
| 519 | Other Information Services | √ | √ | | √ | √ | √ | | √ | √ | | 7 |
| 523 | Securities, Commodity Contracts & Other Financial Investments | | √ | √ | | √ | √ | √ | √ | √ | | 7 |
| 541 | Professional, Scientific, and Technical Services | | | √ | √ | √ | | √ | √ | √ | √ | 7 |
| 551 | Management of Companies and Enterprises | | | √ | √ | √ | | √ | √ | √ | √ | 7 |
| 611 | Educational Services | √ | √ | √ | √ | | | √ | √ | | √ | 7 |
| 621 | Ambulatory Health Care Services | √ | √ | √ | √ | | | √ | √ | | √ | 7 |
| 623 | Nursing and Residential Care Facilities | √ | √ | √ | √ | | | √ | √ | | √ | 7 |
| 624 | Social Assistance | √ | √ | √ | √ | | | √ | √ | | √ | 7 |
| 311 | Food Manufacturing | | √ | | √ | √ | √ | √ | | | √ | 6 |
| 425 | Wholesale Trade Agents and Brokers | | | √ | √ | √ | | √ | √ | √ | | 6 |
| 454 | Nonstore Retailers | √ | √ | | | | √ | √ | √ | √ | | 6 |
| 483 | Water Transportation | | √ | √ | | √ | √ | | √ | √ | | 6 |
| 515 | Broadcasting (except Internet) | | √ | | | √ | √ | √ | √ | √ | | 6 |
| 517 | Telecommunications | √ | | | | √ | √ | √ | √ | √ | | 6 |
| 518 | Internet Svc Providers, Web Search Portals & Data Processing | | | | √ | √ | √ | √ | √ | √ | | 6 |
| 522 | Credit Intermediation and Related Activities | | √ | √ | | √ | | √ | √ | √ | | 6 |
| 524 | Insurance Carriers and Related Activities | | | √ | √ | √ | | √ | √ | √ | | 6 |
| 525 | Funds, Trusts, and Other Financial Vehicles | | √ | √ | √ | √ | √ | | | √ | | 6 |
| 812 | Personal and Laundry Services | √ | √ | √ | √ | | | √ | √ | | | 6 |

Qualitative and Fiscal Impacts

The key industries that were found by quantitative measures in the previous section of the report to have economic potential in New Haven County were analyzed as to their qualitative impacts upon the community. These impacts were evaluated based upon the specific physical and functional nature within New Haven County of the specific industries identified. The results of this analysis are found in the matrix in Appendix B. Specifically, this analysis includes the following impacts:

- Traffic – Retail uses tend to have the highest traffic impact, as they attract a large number of customers during evening and Saturday peak hours. Some industrial uses have high potential impacts if they include the significant truck shipment of goods. However, many industrial uses involve minimal shipment of goods, with the primary traffic impact being generated by employee commutation. This would be a similar situation as for office uses which house management and service uses.
- Community character – different economic activities may have non-quantifiable impacts upon community character, dependent upon where they are located. This is noted below, along with the most appropriate location.
- Wetlands – The specific nature of the potential impacts is largely dependent upon the specific site and location of the proposed activity. This is primarily regulated through local Inland Wetlands Regulations, and other applicable state and federal regulations. These resources would be protected through the site review process. However, where noted, some potential uses may have some greater impact upon inland and tidal wetlands.
- Protection of Long Island Sound – This is primarily impacted and regulated on a site basis, through the Coastal Area Management regulations. However, if a particular use may have a greater impact upon these resources, it is noted.
- Other Natural Resources – The primary impact upon biological resources and water quality is primarily subject to regulation and evaluation of the specific impacts of each site. However, there may be some general characteristics of each industry. As noted in the POCD, the air quality is largely subject to outside sources, and traffic generation. However, if any particular economic activity would have a potential additional adverse impact upon air quality, it is noted.

- Prepare for Sea Level Rise – This potential impact is geographically dependent, not functionally dependant. However, if some of the potential targeted industries may be impacted by potential sea level rise, it is noted.

In terms of a fiscal impact analysis, it is designed to assess one-time and ongoing municipal costs and revenues attributed to a proposed development. Revenues for the town include fees associated with permits and utility connection fees as well as ongoing property tax revenues. However, there are also costs associated with new developments such as improving and maintaining the municipal infrastructure. In addition, there may be increases in the demand for services in the town including the library, police, fire, school and public works departments.

Figure 11 provides information on the total annual tax revenues brought into Branford for 19 selected properties. The total tax (TT) is the sum of the taxes assessed on the real estate as well as the personal property (PP). Comparing these 19 properties, in terms of the total tax revenues generated, a retail establishment on Route 1 (#17) brought in more than \$250,000 each year to the Town. At the other end of the spectrum was a retail establishment within the Town Center (#19), which generated just more than \$11,000. However, in terms of total taxes per acre, the retail property within the Town Center generated the most, because most of the parking is off-site. Manufacturing properties tended to have valuable equipment on site, so their ratios of personal property to total taxes were rather high, and a few almost equaling the value of the real estate. In terms of total taxes per square feet of facilities, a retail building on Route 1 (#17) had the largest ratio followed by an auto sales and service establishment (#1). A medical office and two residential developments rounded out the top five.

Figure 11: Tax Revenues from a Sample of Branford Businesses

| Property # | Property Type | Total Taxes | TT/Acre | TT/Sq Ft | Rank | | Ratio PP to Total Taxes |
|------------|-----------------------|-------------|----------|----------|---------|----------|----------------------------|
| | | | | | TT/Acre | TT/Sq Ft | |
| 1 | auto sales & service | \$56,867 | \$12,895 | \$2.81 | 11 | 2 | 20% |
| 2 | biotech | \$68,248 | \$7,954 | \$1.10 | 17 | 15 | 18% |
| 3 | biotech | \$130,177 | \$15,243 | \$0.77 | 9 | 17 | 44% |
| 4 | healthcare | \$134,049 | \$12,528 | \$1.67 | 12 | 9 | 5% |
| 5 | lodging | \$52,134 | \$24,945 | \$1.07 | 4 | 16 | 18% |
| 6 | mfg, biotech, medical | \$204,116 | \$24,622 | \$1.70 | 5 | 8 | 44% |
| 7 | manufacturing | \$52,127 | \$9,308 | \$0.36 | 15 | 19 | 49% |
| 8 | manufacturing | \$35,425 | \$7,651 | \$1.48 | 18 | 11 | 28% |
| 9 | manufacturing | \$43,735 | \$11,540 | \$1.13 | 13 | 14 | 49% |
| 10 | manufacturing | \$39,793 | \$13,004 | \$0.59 | 10 | 18 | 46% |
| 11 | manufacturing | \$107,748 | \$26,937 | \$1.25 | 3 | 13 | 35% |
| 12 | marina | \$136,794 | \$8,636 | \$1.86 | 16 | 7 | 9% |
| 13 | medical offices | \$77,373 | \$20,097 | \$2.70 | 6 | 3 | 6% |
| 14 | residential | \$181,242 | \$6,543 | \$2.46 | 19 | 5 | 5% |
| 15 | residential | \$126,985 | \$40,963 | \$2.64 | 2 | 4 | 3% |
| 16 | retail | \$187,967 | \$11,323 | \$1.51 | 14 | 10 | 21% |
| 17 | retail - route 1 | \$253,376 | \$15,291 | \$3.75 | 8 | 1 | 14% |
| 18 | retail - route 1 | \$138,123 | \$20,018 | \$2.08 | 7 | 6 | 15% |
| 19 | retail - town center | \$11,005 | \$47,849 | \$1.38 | 1 | 12 | 3% |

Source: Town of Branford; Calculations by CERC

As for the costs associated with developments, it is generally assumed that commercial and industrial uses generate fewer costs for the town (costs can include library, police, fire, school and public works departments), retail developments have slightly higher costs (due to the need for some public safety services), and residential developments can vary depending on how many senior services or public school services are used.

Therefore, it is assumed that on average, commercial and industrial developments generate revenues for the town, retail developments offer slightly positive impacts, and residential projects have various impacts. It is important to evaluate the fiscal impacts of proposed developments as they occur.

Analysis of Retail Supply and Demand

In addition to the analysis of all of the industries in New Haven County, it is interesting to note how the retail industries are faring and if there are any niche markets, or retail destinations, in the region. The retail analysis measures current conditions and does not include future retail trends. Two market areas were identified:

- the local market as defined as within Town of Branford; and
- the regional market consisting of near Shoreline East and adjacent areas (North Branford, Guilford, Madison, Westbrook, Clinton, East Haven and North Haven).

The regional supply of retail facilities includes the growing retail area in North Haven along Universal Drive. There has been some indication that Branford residents and those east along the shoreline, would prefer not to drive across the Quinnipiac River Bridge and up Interstate 91 to North Haven for their retail needs. If this is true, the regional retail potential for new businesses within Branford would be understated by the statistics, as the supply of retail includes the retail uses within North Haven.

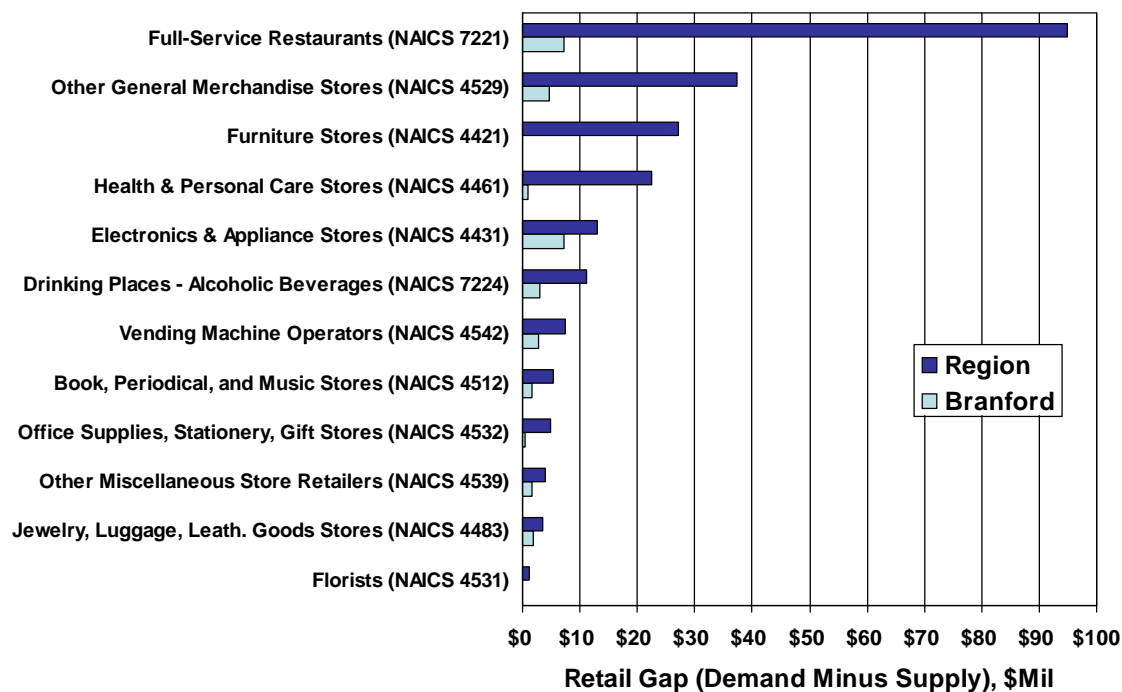
The analysis compares retail sales in the market area to the retail potential, which is a way to calculate retail demand by comparing the consumption of households to the available supply. The analysis of supply and demand identified retail leakage and surplus. Retail leakage occurs when local expenditures exceeded local sales, indicating that consumers left the area to purchase goods and services and that there is a potential for more retail businesses to address this demand leaving the defined market area. Retail surplus occurs when the sales of existing retail businesses exceed locally generated demand, indicating that the retail services are drawing in customers from outside the local market area, and that there would be limited demand for additional retail businesses. In these situations, additional retail businesses are likely to draw at least a portion of their business from existing businesses.

Retail Growth Prospects for Branford and Region

Overall, there is a retail leakage within the region, meaning that people have to leave the region in order to satisfy some of their retail needs. So there is a potential for additional retail businesses within the Town. Figure 12 shows the retail industries that have gaps (meaning that demand is larger than supply) in both Branford and the larger market region. Full-service restaurants and general merchandise stores have the largest

regional retail gaps and considerable gaps for the Town. Next is furniture stores, but the potential demand for furniture and accessories appears to be particularly questionable given the closing of furniture stores along the Boston Post Road - Route 1 Corridor in Milford and Orange. Much of these closings can be attributable to two factors: the recession which has greatly impacted large consumer purchases such as furniture; and the opening of the IKEA store in New Haven. These industries could be seen as growth prospects because demand is not being met by the existing town or regional establishments. However, consideration for current economic conditions must be taken into account, as in the furniture stores example.

Figure 12: Industries with Retail Gaps in the Town and Market Region – Growth Prospects³



Source: ESRI, 2008

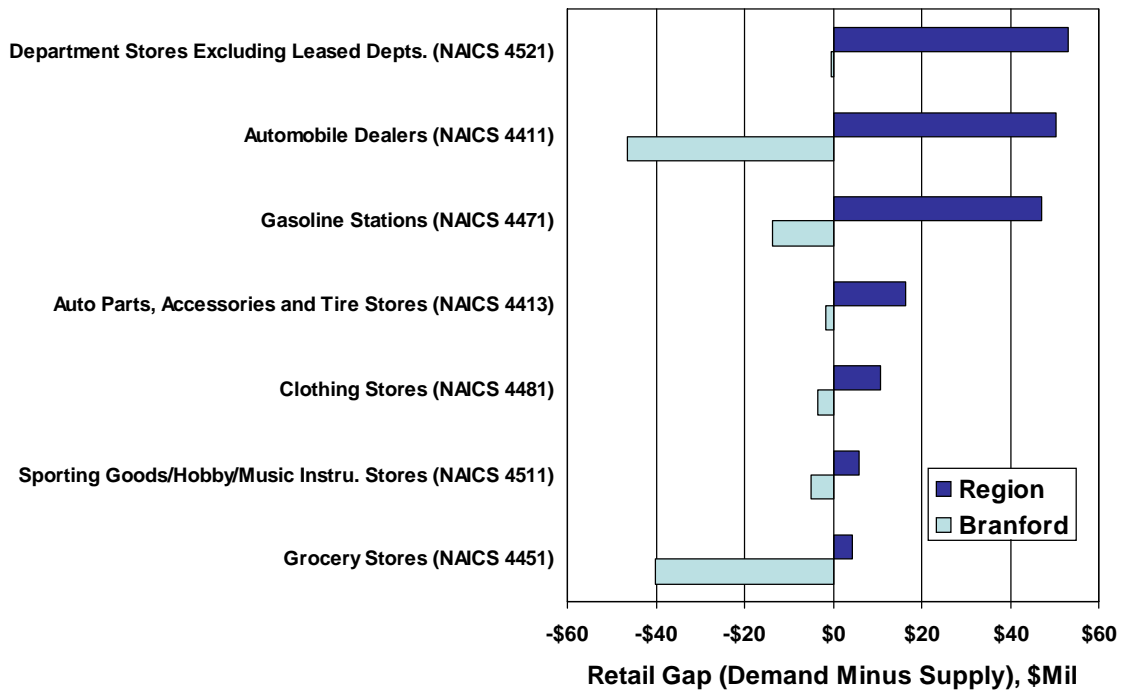
³ Other General Merchandise Stores (NAICS 4529) does not include department stores. Other Miscellaneous Store Retailers (NAICS 4539) does not include florists; office supplies, stationery and gift stores; and used merchandise stores. These industries are not included because they are analyzed separately in this analysis.

Destination Retail for Branford

Figure 13 shows the retail industries that have retail gaps (demand is larger than supply) in the market region but surpluses (supply is larger than demand) for the Town. This means that according to the analysis, the Town not only has enough of these retail industries to meet the needs of its own residents but it also supplies needs in the greater region. As for clothing stores and sporting goods stores, these most likely fall into this category because of their “destination retail” appeal, consisting of boutiques in the downtown area and the growth of Zane’s Cycles.

Even though automobile dealers fall into this category, it is unlikely that any new new-car automobile retail facilities will open in the foreseeable future. In fact, most communities are now forced to address the re-use of former automobile dealers. The other industries that fall into this category most likely are not considered “destination retail.”

Figure 13: Industries with Retail Gaps in the Market Region and Surpluses in Town

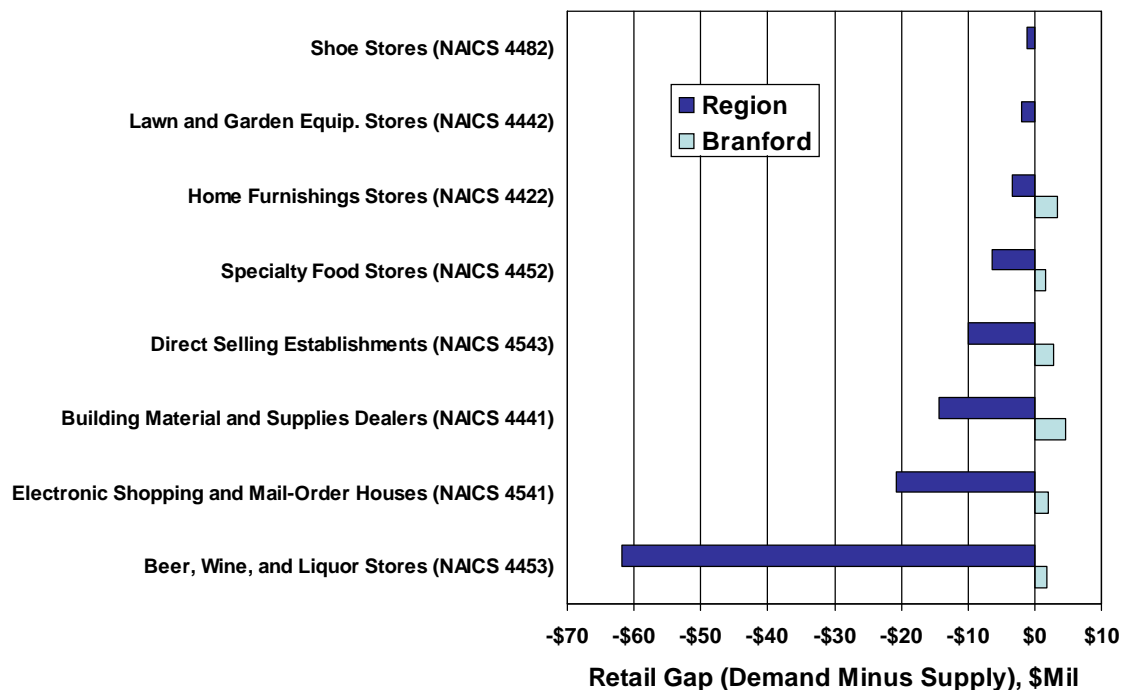


Source: ESRI, 2008

Locally-Oriented Retail Opportunities

The industries in Figure 14 have surpluses in the market region and demand gaps in the Town, meaning that Branford residents have to leave the municipality to satisfy their demand for these types of retail, although the market region as a whole has enough supply. These industries may be viable for the Town if serving basic needs without intending to be a destination for other consumers in the larger region.

Figure 14: Industries with Surpluses in the Market Region and Demand Gaps in Town⁴



Source: ESRI, 2008

Four retail industries were found to have demand surpluses in both the Town and market region, meaning that prospects for new establishments may be limited:

- Limited-Service Eating Places (NAICS 7222)
- Special Food Services (NAICS 7223)
- Other Motor Vehicle Dealers (NAICS 4412)
- Used Merchandise Stores (NAICS 4533)

⁴ Direct selling establishments (NAICS 4543) are primarily involved in retail sale by telephone, house-to-house canvass or in the workplace. Electronic shopping and mail-order houses (NAICS 4541) include establishments primarily engaged in retailing by means of mail or by electronic media.

The overall retail analysis indicates that there are opportunities for regionally-oriented and locally-oriented development. However, current economic conditions may prevent some of these retail prospects to be viable in the near-term.

Household Expenditures

In Branford, there are more than 12,500 households, each with annual average household expenditures of \$66,000. In the seven-town market area, there are almost 48,000 households, each with an average annual household expenditure of almost \$70,800. Figure 15 provides a list of the expenditures that comprised the largest share of the total for both the market area and Branford. Mortgage interest, food at home and away from home, health care and entertainment top both lists.

Figure 15: Total Annual Household Expenditures in 2009 in Branford and its Market Area

| | Market Area | | | Branford | |
|-------------------------------|------------------------|---------|--|------------------------|---------|
| | 2009 Avg HH Ann Expend | % Total | | 2009 Avg HH Ann Expend | % Total |
| Mortgage Interest | \$5,855.54 | 8.3% | | \$5,347.55 | 8.1% |
| Food At Home | \$5,207.69 | 7.4% | | \$4,937.94 | 7.5% |
| Food Away From Home | \$4,400.50 | 6.2% | | \$4,102.90 | 6.2% |
| Health Care | \$4,077.49 | 5.8% | | \$3,895.43 | 5.9% |
| Entertainment | \$4,010.54 | 5.7% | | \$3,723.07 | 5.6% |
| New Vehicle Purchase | \$3,778.29 | 5.3% | | \$3,505.49 | 5.3% |
| Apparel | \$3,403.66 | 4.8% | | \$3,157.15 | 4.8% |
| Gasoline & Oil | \$2,992.31 | 4.2% | | \$2,819.85 | 4.3% |
| Contributions | \$2,955.64 | 4.2% | | \$2,684.69 | 4.1% |
| Property Taxes | \$2,568.83 | 3.6% | | \$2,336.06 | 3.5% |
| Electricity | \$1,669.36 | 2.4% | | \$1,596.67 | 2.4% |
| Tuition | \$1,638.29 | 2.3% | | \$1,483.60 | 2.2% |
| Housewares & Small App | \$1,635.73 | 2.3% | | \$1,516.82 | 2.3% |
| Recreational Equip & Supplies | \$1,537.70 | 2.2% | | \$1,435.67 | 2.2% |
| Vehicle Insurance | \$1,535.28 | 2.2% | | \$1,449.97 | 2.2% |
| Video & Audio Equipment | \$1,331.58 | 1.9% | | \$1,254.31 | 1.9% |
| Household Supplies | \$1,217.43 | 1.7% | | \$1,105.49 | 1.7% |
| Vehicle Repair & Maintenance | \$1,064.40 | 1.5% | | \$1,002.07 | 1.5% |
| Telephone Svc Excl Cell | \$1,027.94 | 1.5% | | \$979.92 | 1.5% |
| Furniture | \$903.31 | 1.3% | | \$827.83 | 1.3% |

Source: CERC DataFinder/Applied Geographic Solutions

Many of these expenditures can contribute to the local economy including food away from home, health care, entertainment, vehicle purchases, apparel, gasoline, housewares, household supplies, vehicle repair and furniture. In fact, after paying the mortgage bills, food is the next largest expenditure followed by healthcare and entertainment. These types of services can be provided within Town for its residents.

Focus Groups

The Town requested that a series of focus groups be conducted to provide additional qualitative input about potential areas for development. Focus groups, while not typically part of a quantitative industry analysis, offer some useful and complementary information.

A series of focus group discussions was conducted with four different audiences. The first group was comprised of developers, property owners and realtors. Each industry was well represented, i.e. two participants represented local, regional and national realty companies; three general building contractors; a representative from the largest local/regional utility company; and one engineering firm representative.

The second group included manufacturing and biotech company representatives. This group consisted of a mixture of residents and business owners along with a representative from a regional manufacturing association. There was a good combination of those who were well-steeped in either traditional manufacturing such as firearms or new types of manufacturing such as biotech and pharmaceuticals.

The third group represented Branford's retail sector. Representatives from local hotel/motel establishments, consumer sporting goods, a local restaurant and a tourism expert provided a snapshot of where the Town needed to increase "people traffic" and emphasized the importance of positioning Branford as a destination. This group felt that doing so would boost their numbers/sales.

The final focus group discussion session was a gathering of Chamber member companies. Unlike the others, this group was the most familiar with the "inside" issues the Town faces in terms of establishing growth strategies. Because all the participants were active members of the local Chamber of Commerce, they were, by default, more familiar with the inner workings of the Town's economic development issues than the other group participants. Some of the participants were retired bankers and construction company owners who were well versed in the history of Branford's economic development efforts. Others were younger-aged entrepreneurs in the consumer gift business and computer systems, which provided good insights about where the Town should spend its time and efforts in order to generate new growth opportunities. For

example, these participants felt that if the State and Town could craft new, creative business incentive programs, making those types of funds available both in the form of grants or loans, they would greatly benefit the small businesses in Branford, provide great opportunities and stimulate growth. They also felt that a stronger representation of younger business people within local government would help bring new, fresh ideas to the various local governing bodies, e.g. planning & zoning, environmental and economic development groups.

Below is a list of the questions asked to each group:

- How familiar are you with recent planning efforts?
- What type of business would work best with yours?
- What developments could enhance the Town's sense of place?
- Which industries are strong in Branford?
- What services would support your business growth and expansion?
- Which towns are Branford's competitors and what are they offering?
- Realtors/owners – Who has been inquiring about property, facilities and for what type of projects?
- What can or should be done to promote “green” businesses development in town?
- Are LEED (Leadership in Energy and Environmental Design) standards in construction an attraction or obstacle to development?
- Are there other economic development issues that you care about in the Town?

A relatively small number of people were familiar with recent town planning efforts, with the exception of the Chamber members. Overall, participants felt that the best types of businesses for Branford's growth would be biomedical and biotech companies because of the types of skilled workforce they attract and the higher paying jobs leading to increased spending in housing, services and taxes – all of which benefit the Town. Some participants felt that big box retail, lifestyle malls, niche retail and specialty shops would be a good growth area but others disagreed, citing the high level of retail stores that had recently closed due to economic conditions.

Most agreed manufacturing as we knew it is declining everywhere in U.S. Some felt the “sense of place” was important to maintain and others felt that the Town's diversity was

based upon which part of Town in which we referred. The development of the area in and around Exit 56 generated a lively discussion in each session for a number of reasons according to the groups' feedback.

As is the case in many towns, some participants expressed frustration with the length of time that it takes to gain approvals and permits. Several longtime residents noted that until the early 1980s, Branford was known as a "development-friendly" town. Their current perception is that anti-development sentiment dominates testimony at public meetings and influences the decisions of land use boards and commissions as well as some elected officials.

Some developers, design professionals, and large land owners felt that the application and permitting processes are too expensive (involving large front-end expenditures on plans), unpredictable, cumbersome and uncoordinated and that some staff are over-zealous in enforcement and interpretation of codes and regulations.

Most felt that Branford was so unique that the Town really doesn't compete with surrounding towns while others felt that Branford competes with all the towns in Connecticut. Few reported any recent inquiries about available property or facilities. Interestingly, "green" development and LEED certification did not resonate with group participants because of cost issues.

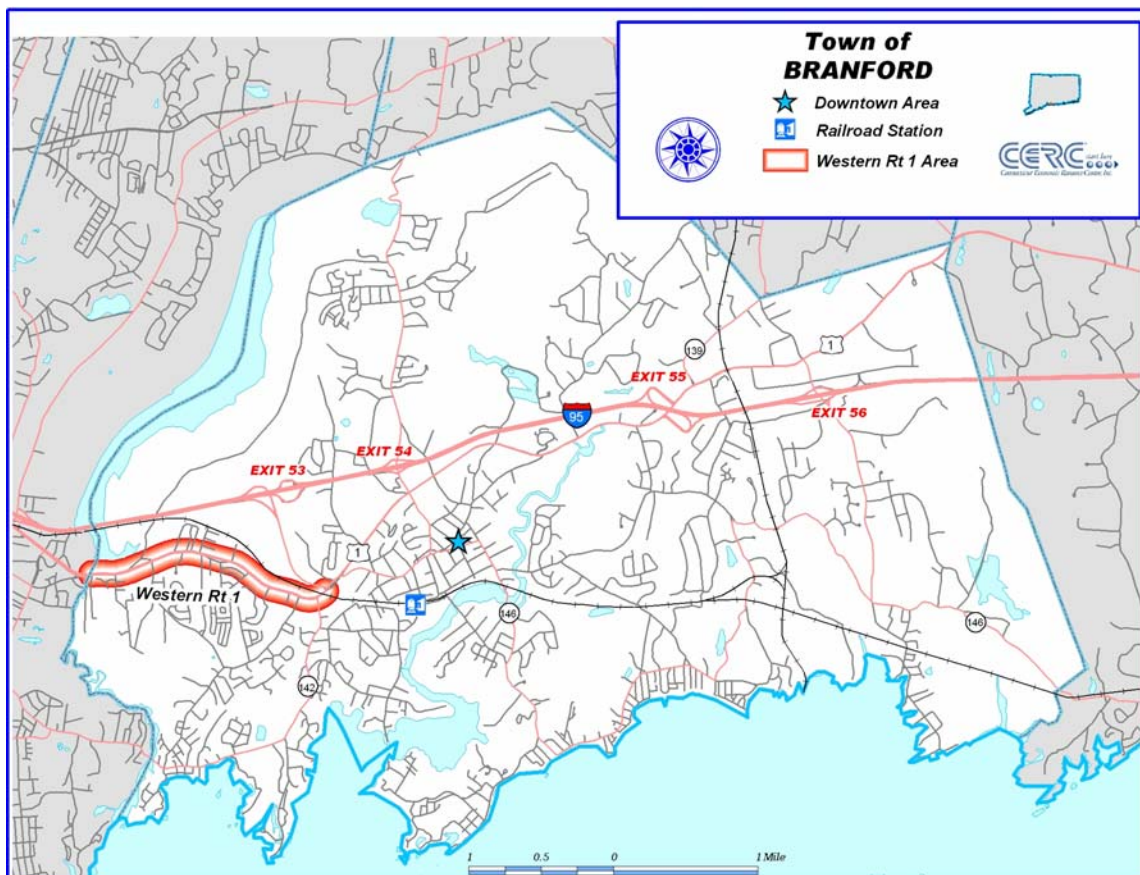
Most felt the Town should take the lead in assisting businesses to plan for the Town's future development and identify sound financial/revenue streams.

Land Use Options

Branford has several well-established areas of mixed use; flexible zoning tools (such as Special Development Area overlay zones) that can be used to develop well-planned and integrated mixed use, high quality projects; and recommendations from the Town's Plan of Conservation and Development that identify where land use "nodes" should be located.

This section of the report matches previously identified "targeted industries" with general locations where those industries are likely to thrive (Figure 16). Some locations are suitable for more regionally-oriented business, while others are better suited for town- or neighbor-oriented business. Since the types of industry likely to locate in Branford are generally compatible with residential use, most locations are amenable to mixed use.

Figure 16: Selected Areas with Economic Development Opportunities



The Town's Plan of Conservation and Development includes strategies that are intended to promote Smart Growth. Smart Growth essentially is utilizing land use practices which

direct development into areas with an existing land use pattern and public facilities that can support and accommodate additional growth. Conversely growth would not be encouraged in areas with sensitive environmental resources or lack the infrastructure to support growth. The goal of Smart Growth is to create sustainable environments for living and working, and to create efficient transportation patterns.

The Town of Branford has the choice whether to promote development in accordance with Smart Growth principles. Smart Growth strategies could include, but are not limited to, the following:

- Promote development that continues to strengthen Branford Center as a mixed-use center of the community.
- Higher density development within proximity to the Shoreline East railroad station. This type of mixed use development would primarily include residential development, which would enable residents to commute by rail into New Haven and other points along the shoreline.
- Strengthen the existing commercial “strips” along Route 1 into more pedestrian friendly environments.

Route 1 West

Development Factors

- There are many small parcels of land along the corridor. These small parcels are often difficult to develop or redevelop to contemporary standards, without the combination of properties.
- Many of the developed properties are underutilized. Many of the buildings are small or functionally obsolete and are not being utilized to their maximum economic potential.
- Automotive oriented uses are prevalent, including automotive repair and sales. A few automotive dealerships are of relatively recent development.
- Like many commercial strips, the corridor has a generally poor aesthetic appeal. It is visually dominated by the road itself, utility poles and many unattractive buildings.
- There was significant growth of retail uses along transportation corridors emanating out of urban areas during the period of 1950 through the 1970s. This led to retail development along Route 1 through Branford and East Haven.

However, this trend has changed, as suburban locations adjacent or in proximity to interstate highway interchanges have become more desirable retail locations and the older commercial strips have diminished in their desirability. Therefore, the Route 1 West corridor has diminished in its desirability as a retail location within the southern Connecticut region.

- The corridor is bordered by older residential neighborhoods, which limit expansion of commercial development within this area. These residential neighborhoods are important components of the Town of Branford. Any impacts of development or redevelopment need to be respectful of the preservation of the residential quality of these neighborhoods.

Economic Development Opportunities

- The area could benefit from a program of improving the aesthetics of the area. This can include a streetscape planting program, and the installation of median landscaped strips along the road, where appropriate.
- The area could also benefit from enhanced site design standards, including standards for landscaping within and adjacent to the right-of-way, location of parking and building design standards.
- The streetscape improvements should include provisions for pedestrian and bicycle circulation along the road, specifically including the installation of a bikeway/walkway along the road.
- Neighborhood oriented retail uses within this corridor will continue to be viable. These uses can be accommodated within the existing small retail centers.
- The corridor, with the aesthetic upgrades described above, could become an attractive corporate business park location. It is just off of the main Interstate 95 corridor, and although it lacks large, undeveloped parcels and the direct visibility and access important to national and regional retailers, it has excellent access to New Haven, the Interstate 95 corridor and customers and workers along the East Shore. This will build upon some of the development which has occurred within this area, such as the Lakeview Center complex.
- This could include the development of small industrial uses, as appropriate within a corporate business park setting.
- The former Echlin property is underutilized industrial property just off of Route 1 that could support a corporate business park development.

- Some higher density residential uses may be appropriate along this corridor. This would have an advantage of providing a productive use of underutilized properties, and adding to the vibrancy of this corridor.

Branford Town Center

Development Factors

- The Branford Town Center is a very attractive mixed use area of retail, office and governmental uses in close proximity to higher density residential uses.
- The commercial uses along Main Street have been developed in a manner to establish Branford Center as one of the most attractive town centers within the State. It combines small retailers, restaurants, offices, and the municipal offices in a functional and attractive downtown area. The challenge and focus of municipal efforts should be to preserve the physical characteristics of the downtown area and ensure that its economy remains viable. The recently completed (June 2008) Main Street Gateway Study outlines a plan to make this area more attractive and pedestrian-friendly. Proposed traffic flow improvements also address traffic safety and parking.
- Branford Town Center is surrounded by moderate to high density residential areas, including single-family residences on small lots and multi-family residences, ranging from conversions and expansion of large older homes to large condo and apartment buildings. The continued economic viability of Branford Town Center is largely based upon the preservation of the character of its surrounding residential neighborhoods.
- Parking for the business uses within Branford Town Center has been identified as an issue for the continued economic viability of downtown Branford. However, it is by no means certain that the lack of parking has been an impediment to the economic growth of this area. The Town's Parking and Circulation Study should be closely examined along with incorporating management procedures that would provide for the maximum utilization of the existing parking areas.
- The site of the Atlantic Wire Company is located at the south end of Branford Center near the railroad station. The 5.6-acre site represents the most significant redevelopment opportunity within the area.

Economic Development Opportunities

- The area is attractive to “destination” businesses (high-end restaurants and retail) that attract customers from throughout the region as well as retail and services serving the local community.
- There are few properties available for development or redevelopment within this area. Any potential economic growth opportunities would be from re-use or re-development of existing properties.
- The existing mixed uses, with primarily retail use on the ground floor and residential or office uses above, should be maintained.
- Design review by the Town Center Architectural Review Board of any new development within this area should be maintained to assure that the overall character of the area be preserved and/or enhanced.
- Some higher density residential uses within this area may be appropriate within carefully controlled design conditions that do not detract from the character of the central business district nor the surrounding residential neighborhoods.
- Additional office development may also be appropriate within these locations, or on multiple floors on top of retail uses along Main Street. These office uses would tend to be small users, which primarily serve the residents of Branford and surrounding areas.
- The Atlantic Wire Company site consists of 5.6 acres located between Meadow Street and the railroad tracks, along the Branford River. The site consists of older industrial buildings, with approximately 270,000 square feet of building space. The property is a significant redevelopment opportunity with the potential for a mixed –use development linked to both Branford Center and the railroad station. The opportunities may include re-use of the existing buildings. The Town should work with the property owner and state agencies to address the environmental remediation issues in order to make the property ready for redevelopment.

Railroad Station

Development Factors

- The railroad station is located within a dense, older neighborhood, dominated by residential uses.
- There is virtually no undeveloped land except for the partially developed “Anchor Reef” parcel.

- The residential uses are primarily older houses on small lots.
- The area contains a mixture of small industrial uses.
- There has been recent development within the area of high-end, high density condominium development.
- The primary property available for development is an old industrial complex, which has some partial uses including a marina.
- This area is somewhat removed from the major business areas and transportation corridors of the Town.
- There is a cluster of industrial properties along Elm Street, north of the railroad station. Some of these properties may no longer be economically viable for continued industrial uses. The existing uses should be encouraged to remain, but if they are no longer economically viable, redevelopment of these sites into higher density residential uses, which would be subject to stringent design standards to ensure compatibility with the neighborhood, would be an appropriate and beneficial use of these properties.

Economic Development Opportunities

- High density residential uses are the most attractive uses for developable properties within this area, as residents can benefit by the mass transportation facilities to New Haven and points to the west, such as Bridgeport and Stamford.
- Some small offices may be appropriate within this area, as part of a mixed-used development.
- As residential growth occurs within this area, there will be an increased need for small neighborhood-oriented retail uses to serve the growing population of this area as well as rail commuters. However, these retail uses should be small-scale, so as not to generate significant traffic on local streets, and remain in conformance with this overall neighborhood environment.

Exit 53

Development Factors

- The area has attracted a significant number of national retailers over many decades.

- The Wal-Mart is in somewhat of an unusual location, in that it is not directly located on a main road. However, the market characteristics of the regional population within this area make this general location attractive to major retailers.
- There is a large amount of vacant and underutilized land in this vicinity. The properties west of the exit access road are undeveloped and inaccessible to the Town roadway system because of the interchange ramp and the location of railroad tracks on the property's south side.
- There is a primarily unutilized industrial complex north of the Wal-Mart. Most of the building space is vacant and under-utilized.
- The Branhaven Plaza is a principal retail center within the Town, and anchors the retail areas along Route 1 within this vicinity.
- There are some under-utilized properties along Route 1 east of the exit ramps, all of which are very small (less than five acres each).

Economic Development Opportunities

- The reconfiguration of this entrance ramp could open up much of this vacant area to development. A large scale retail development would be viable at this location, due to its accessibility and proximity to population centers. However, a mixed use development plan would also be feasible, and may be more economically viable. This could include retail, office, higher density residential, some industrial uses. This can be designed to become one of the major economic centers of the region.

Exit 54

Development Factors

- Most of this area is developed for small to medium sized retail uses and car dealerships, south of the interchange along Route 1.
- The area north of the exit has been developed for light industrial uses.

Economic Development Opportunities

- There are few (except for one 15-acre parcel zoned and previously approved for a retail shopping center) opportunities for significant economic development within this general area. The retail area south of the interchange along Route 1

should be continually reinforced, with appropriate redevelopment of underutilized properties.

- The area north of the interchange along Cedar Street should be retained for light industrial and office uses. These uses would be compatible with the existing uses in the area. In addition, light industrial and office uses is more appropriate in this area than retail, in that it would not introduce major traffic generators north of the Turnpike interchange.

Exit 55

Development Factors

- There is small scale retail development along Route 1, on both sides of the interchange.
- There is some vacant land just off of Route 1, north of the interchange.
- The area includes some light industrial uses on the north side of the interchange, extending into North Branford.
- Any development within this area would need to be comprehensively planned and coordinated, and not based upon subdivision into small parcels with the potential for uncoordinated development.

Economic Development Opportunities

- The area south of Route 1 and north of Interstate 95 represents a potential development opportunity. This area can be used for hospitality, office or retail uses as a component of a mixed-use development, or some mixed-use combination that is planned and developed in a comprehensive and coordinated manner. This area would be suitable for this type of coordinated development, as the potential traffic would be primarily oriented toward the Turnpike interchange. This type of development would provide a greater fiscal and economic benefit to the Town than a “big box” developed on this site.

Exit 56

Development Factors

- This is the only area in town that contains several large (more than 20 acres each) parcels of undeveloped land zoned for business uses.

- There is a significant corporate business development (mix of office, healthcare and manufacturing) north of the Interstate 95 and south of Route 1.
- The northwest sector of this area is heavily influenced by the presence of a major commercial truck stop, but also contains a supermarket, numerous industrial facilities, medical manufacturing and vacant, underdeveloped property.
- There are a few small retail and related uses along Route 1.
- The area contains several hotel and related hospitality uses.

Economic Development Opportunities

- The corporate industrial/ office areas should be reinforced as an important component of the local economy.
- Consideration should be given to the establishment of a mixed use area. On undeveloped areas of this sector consider retail, residential, office and related developments in a nodal development that encourages internal pedestrian circulation. This type of development should include high degrees of design, and public infrastructure.

Appendix A: Industry Segmentation Analysis

| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
|-------|--|----------------------------|-----------------------------|-----------------------------------|--|------------------|------------------|---------------------|--------------------|----------------------------------|-----------------------------|-----|
| NAICS | Industry Description | LQ _{≥1.2} 2008 | Segmen- tation Target | U.S. Share Increase 00- 08? | Recent U.S. Ind Growth > U.S. Avg? | EmpMult >Avg? | IncMult >Avg? | RgnInput >\$50M? | IndRPC> AvgRPC? | Ind Wage > State Avg Wage? | Focus Group Strength? | SUM |
| 622 | Hospitals | 1 | 1 | 1 | 1 | 1 | | 1 | 1 | | 1 | 8 |
| 325 | Chemical Manufacturing | 1 | | | | 1 | 1 | 1 | 1 | 1 | 1 | 7 |
| 424 | Merchant Wholesalers, Nondurable Goods | 1 | 1 | | 1 | 1 | | 1 | 1 | 1 | | 7 |
| 519 | Other Information Services | 1 | 1 | | 1 | 1 | 1 | | 1 | 1 | | 7 |
| 523 | Securities, Commodity Contracts & Other Financial Investments | | 1 | 1 | | 1 | 1 | 1 | 1 | 1 | | 7 |
| 541 | Professional, Scientific, and Technical Services | | | 1 | 1 | 1 | | 1 | 1 | 1 | 1 | 7 |
| 551 | Management of Companies and Enterprises | | | 1 | 1 | 1 | | 1 | 1 | 1 | 1 | 7 |
| 611 | Educational Services | 1 | 1 | 1 | 1 | | | 1 | 1 | | 1 | 7 |
| 621 | Ambulatory Health Care Services | 1 | 1 | 1 | 1 | | | 1 | 1 | | 1 | 7 |
| 623 | Nursing and Residential Care Facilities | 1 | 1 | 1 | 1 | | | 1 | 1 | | 1 | 7 |
| 624 | Social Assistance | 1 | 1 | 1 | 1 | | | 1 | 1 | | 1 | 7 |
| 311 | Food Manufacturing | | 1 | | 1 | 1 | 1 | 1 | | | 1 | 6 |
| 425 | Wholesale Electronic Markets and Agents and Brokers | | | 1 | 1 | 1 | | 1 | 1 | 1 | | 6 |
| 454 | Nonstore Retailers | 1 | 1 | | | | 1 | 1 | 1 | 1 | | 6 |
| 483 | Water Transportation | | 1 | 1 | | 1 | 1 | | 1 | 1 | | 6 |
| 515 | Broadcasting (except Internet) | | 1 | | | 1 | 1 | 1 | 1 | 1 | | 6 |
| 517 | Telecommunications | 1 | | | | 1 | 1 | 1 | 1 | 1 | | 6 |
| 518 | Internet Service Providers, Web Search Portals & Data Processing | | | | 1 | 1 | 1 | 1 | 1 | 1 | | 6 |
| 522 | Credit Intermediation and Related Activities | | 1 | 1 | | 1 | | 1 | 1 | 1 | | 6 |
| 524 | Insurance Carriers and Related Activities | | | 1 | 1 | 1 | | 1 | 1 | 1 | | 6 |
| 525 | Funds, Trusts, and Other Financial Vehicles | | 1 | 1 | 1 | 1 | 1 | | | 1 | | 6 |
| 812 | Personal and Laundry Services | 1 | 1 | 1 | 1 | | | 1 | 1 | | | 6 |
| 212 | Mining (except Oil and Gas) | 1 | 1 | | 1 | 1 | | | | 1 | | 5 |
| 331 | Primary Metal Manufacturing | 1 | | | | 1 | 1 | 1 | | 1 | | 5 |
| 334 | Computer and Electronic Product Manufacturing | 1 | | | | 1 | 1 | 1 | | 1 | | 5 |
| 335 | Electrical Equipment, Appliance, and Component Manufacturing | 1 | | | | 1 | 1 | 1 | | 1 | | 5 |
| 339 | Miscellaneous Manufacturing | 1 | 1 | | | 1 | | 1 | | 1 | | 5 |
| 445 | Food and Beverage Stores | 1 | | | 1 | | | 1 | 1 | | 1 | 5 |
| 446 | Health and Personal Care Stores | 1 | | 1 | 1 | | | 1 | 1 | | | 5 |
| 448 | Clothing and Clothing Accessories Stores | | 1 | 1 | | | | 1 | 1 | | 1 | 5 |
| 488 | Support Activities for Transportation | | 1 | 1 | | 1 | | | 1 | 1 | | 5 |
| 521 | Monetary Authorities - Central Bank | | | | | 1 | 1 | 1 | 1 | 1 | | 5 |
| 531 | Real Estate | | | 1 | | 1 | 1 | 1 | 1 | | | 5 |
| 533 | Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) | 1 | | | 1 | 1 | 1 | 1 | | | | 5 |

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
|--|----------------|-----------------------------|-----------------------------------|--|------------------|------------------|---------------------|--------------------|----------------------------------|-----------------------------|-----|
| NAICS | LQ≥1.2 2008 | Segmen- tation Target | U.S. Share Increase 00- 08? | Recent U.S. Ind Growth > U.S. Avg? | EmpMult >Avg? | IncMult >Avg? | RgnInput >\$50M? | IndRPC> AvgRPC? | Ind Wage > State Avg Wage? | Focus Group Strength? | SUM |
| 562 Waste Management and Remediation Services | 1 | | 1 | 1 | 1 | | 1 | | | | 5 |
| 712 Museums, Historical Sites, and Similar Institutions | | | 1 | 1 | | 1 | | 1 | | 1 | 5 |
| 713 Amusement, Gambling, and Recreation Industries | | 1 | 1 | 1 | | | 1 | 1 | | | 5 |
| 722 Food Services and Drinking Places | | 1 | 1 | 1 | | | 1 | | | 1 | 5 |
| 211 Oil and Gas Extraction | | | 1 | 1 | 1 | | | | 1 | | 4 |
| 236 Construction of Buildings | | 1 | | | 1 | | 1 | | 1 | | 4 |
| 238 Specialty Trade Contractors | | 1 | 1 | | 1 | | 1 | | | | 4 |
| 312 Beverage and Tobacco Product Manufacturing | | | | 1 | 1 | 1 | | | 1 | | 4 |
| 322 Paper Manufacturing | | | | | 1 | 1 | 1 | | 1 | | 4 |
| 324 Petroleum and Coal Products Manufacturing | | | | 1 | 1 | 1 | | | 1 | | 4 |
| 333 Machinery Manufacturing | | | | | 1 | 1 | 1 | | 1 | | 4 |
| 336 Transportation Equipment Manufacturing | | | | | 1 | 1 | 1 | | 1 | | 4 |
| 423 Merchant Wholesalers, Durable Goods | | | | | 1 | | 1 | 1 | 1 | | 4 |
| 444 Building Material and Garden Equipment and Supplies Dealers | | 1 | 1 | | | | 1 | 1 | | | 4 |
| 452 General Merchandise Stores | | | 1 | 1 | | | 1 | 1 | | | 4 |
| 481 Air Transportation | | 1 | | | 1 | 1 | | | 1 | | 4 |
| 511 Publishing Industries (except Internet) | | | | | 1 | 1 | 1 | | 1 | | 4 |
| 512 Motion Picture and Sound Recording Industries | | | | 1 | 1 | 1 | | 1 | | | 4 |
| 711 Performing Arts, Spectator Sports, and Related Industries | | | 1 | 1 | | | | 1 | | 1 | 4 |
| 721 Accommodation | | 1 | | | | 1 | | 1 | | 1 | 4 |
| 813 Religious, Grantmaking, Civic, Professional, and Similar Organizations | | | 1 | 1 | | | 1 | 1 | | | 4 |
| GVS State Government | | | 1 | 1 | | | 1 | | 1 | | 4 |
| 213 Support Activities for Mining | | | 1 | | | 1 | | | 1 | | 3 |
| 221 Utilities | | | | 1 | 1 | | | | 1 | | 3 |
| 237 Heavy and Civil Engineering Construction | | | | | 1 | | 1 | | 1 | | 3 |
| 313 Textile Mills | | 1 | | | 1 | 1 | | | | | 3 |
| 326 Plastics and Rubber Products Manufacturing | | | | | 1 | 1 | 1 | | | | 3 |
| 327 Nonmetallic Mineral Product Manufacturing | | 1 | | | 1 | 1 | | | | | 3 |
| 332 Fabricated Metal Product Manufacturing | 1 | | | | 1 | | 1 | | | | 3 |
| 441 Motor Vehicle and Parts Dealers | | | | | 1 | | 1 | 1 | | | 3 |
| 451 Sporting Goods, Hobby, Book, and Music Stores | 1 | | | | | | | 1 | | 1 | 3 |
| 484 Truck Transportation | | | | | 1 | 1 | 1 | | | | 3 |
| 485 Transit and Ground Passenger Transportation | 1 | | 1 | 1 | | | | | | | 3 |
| 486 Pipeline Transportation | | | | 1 | 1 | | | | 1 | | 3 |
| 487 Scenic and Sightseeing Transportation | | | | 1 | 1 | | | 1 | | | 3 |
| 493 Warehousing and Storage | | | 1 | | | | | 1 | | 1 | 3 |

[illegible]

Appendix B: Qualitative Impacts by Key Industries

| Use | Traffic Impact | Community Character | Wetlands | LI Sound | Other Natural Resources | Sea Level Rise Impact | Other Factors |
|--|--|--|---|--|---|--------------------------|---|
| Misc. Manufacturing | Low, unless it involves significant truck activity | Positive, if properly located and designed | Depends upon location and site design | Should not be located on shores of Long Island Sound | No impacts if manufacturing is in compliance with all applicable state and federal environmental regulations. | Geographically Dependant | Some of these uses can be noisy, and unsightly, and would not be compatible with residential neighborhoods. |
| Merchant Wholesaling, Nondurable goods | Potentially high, as it is likely to involve significant truck traffic | May not be detrimental if properly located and screened. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Food Manufacturing | Low, unless it involves significant truck activity | May not be detrimental if properly located and screened. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | Often small scale businesses with moderate overall impacts. |
| Chemical Manufacturing | Moderate, as it usually requires large shipments of material | Positive, if properly located and designed | There may be increased dangers of spills of potentially hazardous materials. As such, appropriate containment measures are necessary. | Should not be located on shores of Long Island Sound | There may be increased dangers of spills of potentially hazardous materials. As such, appropriate containment measures are necessary. | Geographically Dependant | Potentially involves handling and production of hazardous materials. Some uses can be noisy, unsightly, or have other environmental impacts which would not be compatible with residential neighborhoods. |

| Use | Traffic Impact | Community Character | Wetlands | LI Sound | Other Natural Resources | Sea Level Rise Impact | Other Factors |
|---|--|---|---|--|-------------------------|---|---|
| Wholesale Trade Agents and Brokers | Potentially high, as it is likely to involve significant truck traffic | May not be detrimental if properly located and screened. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Telecommunications | Low | Positive, if properly located and designed. However, some of these uses may be accompanied by satellite dishes, antennae or other similar facilities, which may impact aesthetic character. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Clothing stores | High potential | Should be placed within established retail environment. Free standing stores in residential or industrial | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Water Transportation | Low, unless direct passenger ferry. | May be disruptive to shoreline environment. | Potential to impact tidal wetland resources | Properly placed and designed, could be consistent with beneficial use of LIS | No specific impacts | Docking facilities and boat terminals could be impacted by rising sea levels. | Water transportation facilities are best located within few commercial shoreline areas. |

| Use | Traffic Impact | Community Character | Wetlands | LI Sound | Other Natural Resources | Sea Level Rise Impact | Other Factors |
|-------------------------------|--|---|---------------------------------------|--|-------------------------|--------------------------|---------------|
| Social Assistance | Low | If properly located, could have positive impact upon community, by providing needed services. Specific location dependant upon specific nature of facility. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Personal and laundry services | Low | Should be within established retail environment. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Construction | Low | Construction yards could be detrimental to residential neighborhoods. Should not be in visible locations. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Specialty Trade Contractors | Low | Construction yards could be detrimental to residential neighborhoods. Should not be in visible locations. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | | |
| Nonmetallic Mineral | May involve large amount of truck traffic. | Positive, if properly located and designed | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | | |

| Use | Traffic Impact | Community Character | Wetlands | LI Sound | Other Natural Resources | Sea Level Rise Impact | Other Factors |
|---|--|---|---------------------------------------|--|-------------------------|--------------------------|---------------|
| Furniture and Home furnishing Stores | Low, generally. | Should be placed within established retail environment. Free standing stores in residential or industrial environment would detract from community character. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Support Activities – Transportation | Generally low, but could be significant. | Likely to be consistent with community character, if properly located. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Social Assistance | Low | Likely to be consistent with community character, if properly located. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Credit Intermediation | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Other Information Services | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Insurance Carriers | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |

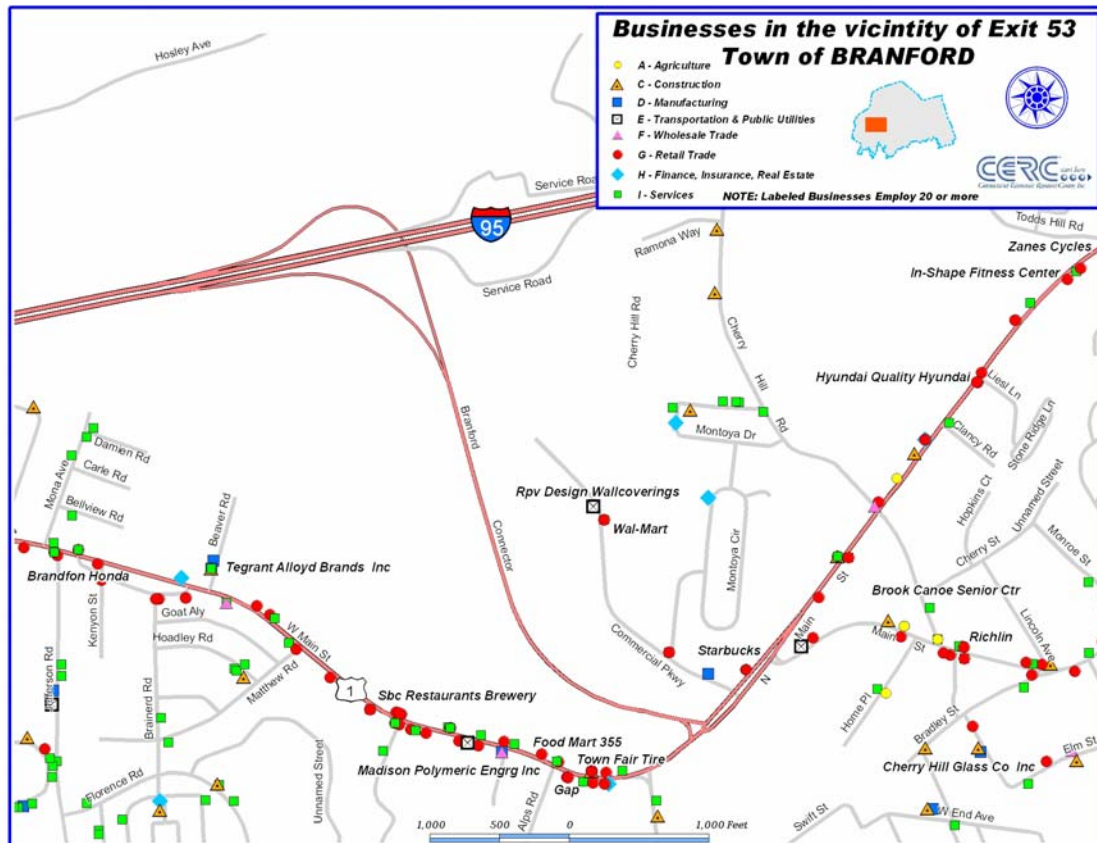
| Use | Traffic Impact | Community Character | Wetlands | LI Sound | Other Natural Resources | Sea Level Rise Impact | Other Factors |
|--|--|--|---------------------------------------|--|-------------------------|--------------------------|---------------|
| Securities, Commodities Contracts & Other Financial Investments | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Funds, Trusts, and other Financial Vehicles | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Management of Companies and Enterprises | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Professional, Scientific, and Technical Services | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Nonstore Retailers | Low, unless it involves significant truck activity | Positive, if properly located and designed | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Internet Service Providers | Low | Usually in high quality office environment. Positive impact in commercial location. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Broadcasting | Low | Positive, if properly located and designed, without large antennae | Depends upon location and site design | should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |

| Use | Traffic Impact | Community Character | Wetlands | LI Sound | Other Natural Resources | Sea Level Rise Impact | Other Factors |
|--|------------------------|---|---------------------------------------|--|-------------------------|--|---------------|
| Accommodations | Moderate | Could enhance character along Route 1 if properly designed and operated. | Depends upon location and site design | Waterside resorts may have impact on LIS | No specific impacts | Geographically Dependant, waterside resorts may be adversely impacted. | |
| Food Services & drinking Places | High | Could enhance quality of downtown area, and be supportive of character in other commercial environments. | Depends upon location and site design | Waterside restaurants may have impact on LIS | No specific impacts | Geographically Dependant, waterside restaurants may be adversely impacted. | |
| Building Material / Garden Supplies Dealers | High traffic potential | These uses are dominated by large scale retail facilities, (big box) and would be appropriate only in select locations near interchanges. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Educational Services | Moderate | These services are generally small-scaled, and could conform to the character of most Branford business districts | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Ambulatory Health Care Center | Moderate | If properly placed, these uses can enhance certain business areas. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |

| Use | Traffic Impact | Community Character | Wetlands | LI Sound | Other Natural Resources | Sea Level Rise Impact | Other Factors |
|---|-----------------|---|---------------------------------------|--|-------------------------|--------------------------|---------------|
| Hospitals | High | High impact uses, which require relatively large sites. Could be used to enhance certain commercial strips. | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |
| Nursing and Residential Care Facilities | Low to Moderate | With proper design, these uses can act as transitional uses between commercial and residential areas. Small | Depends upon location and site design | Should not be located on shores of Long Island Sound | No specific impacts | Geographically Dependant | |

Appendix C: Town Maps

Figure C1: Retail establishments are prominent along Route 1 off of I-95's exit 53.



Businesses in the vicinity of Exit 54
Town of BRANFORD

Legend:

- A - Agriculture
- C - Construction
- D - Manufacturing
- E - Transportation & Public Utilities
- F - Wholesale Trade
- G - Retail Trade
- H - Finance, Insurance, Real Estate
- I - Services

NOTE: Labeled Businesses Employ 20 or more

Map Labels:

- Mary T Murphy School
- Life Care
- First Student
- La Luna Ristorante
- Kiernan Photography
- Zanes Cycles
- In-Shape Fitness Center
- Hyundai Quality Hyundai
- Cedar Woods Retirement Residence
- School Transportation Services
- Donovans Reef
- Tenderloin Steak House LLC
- New Haven Dental Group
- Mangos Bar & Grille
- Quinnipiac Medical

Scale: 1,000 500 0 1,000 Feet

Figure C3: A mix of retail, services, construction and other industries are located near exit 55.

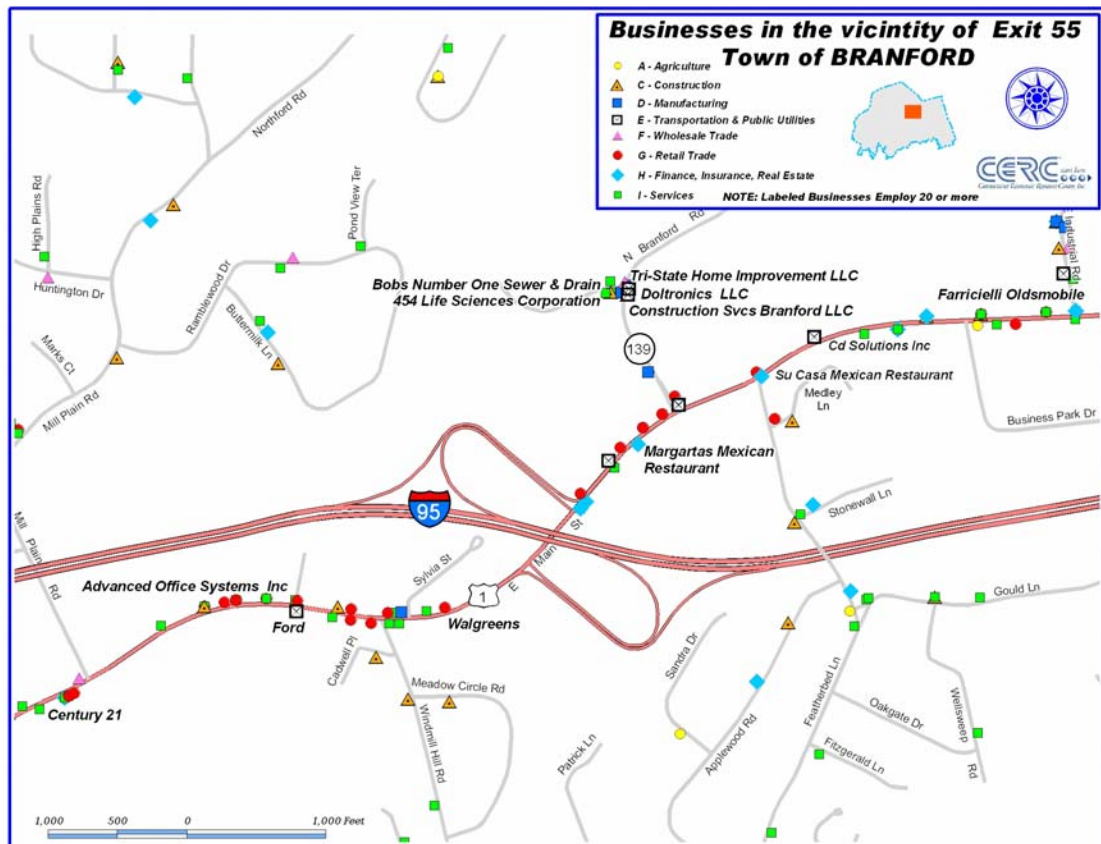
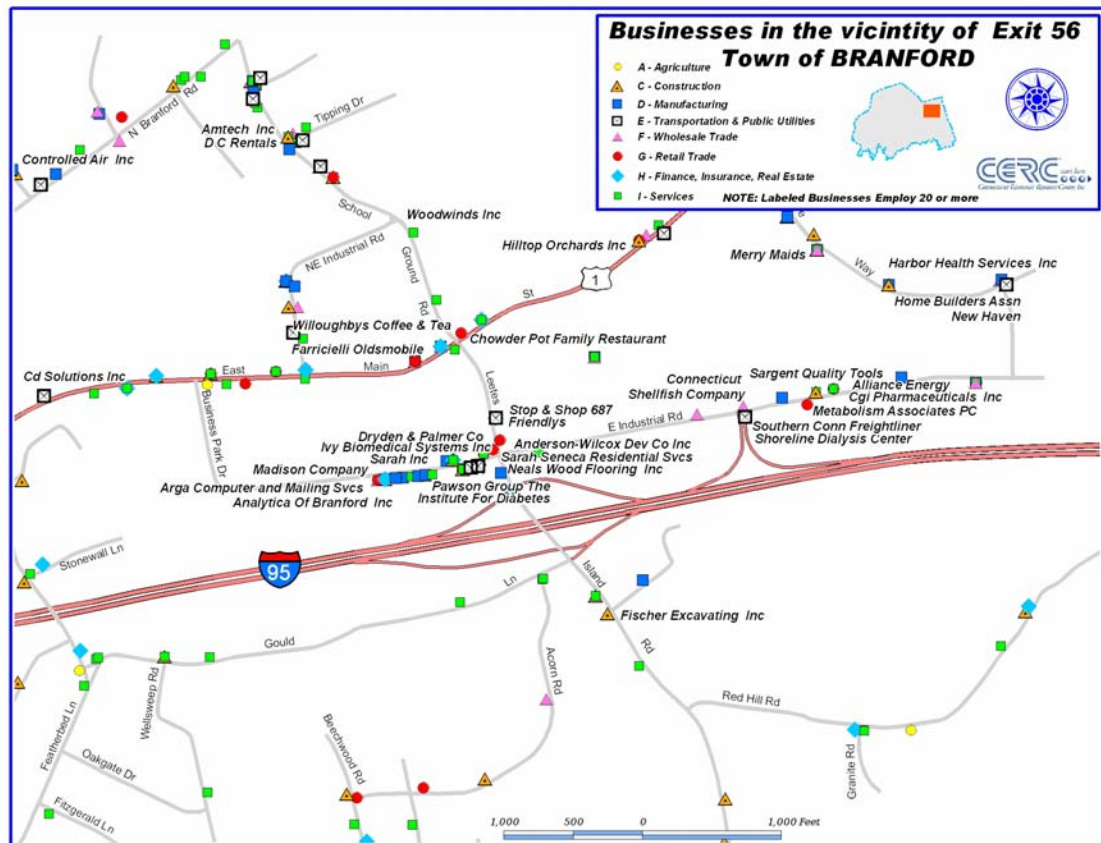


Figure C4: Manufacturing and services, along with other industries, are found near exit 56.



Appendix D: Covered Employment & Wages by Industry - Connecticut
(2008 QCEW Program Data) - Source CT DOL

| NAICS | Industry | # Estabs | Annual Total Average Employment | Annual Wages | Annual Average Wage | Average Weekly Wage |
|-------|--|----------------|---------------------------------------|-------------------------|---------------------------|---------------------------|
| | Statewide Total | 112,595 | 1,676,493 | \$97,552,985,718 | \$58,189 | \$1,119 |
| | 11 Agriculture, forestry, fishing and hunting | 359 | 4,850 | \$137,941,317 | \$28,442 | \$547 |
| | 111 Crop production | 173 | 3,639 | \$98,339,692 | \$27,024 | \$520 |
| | 112 Animal production | 92 | 865 | \$28,341,709 | \$32,765 | \$630 |
| | 113 Forestry and logging | 11 | 7 | \$171,266 | \$24,467 | \$471 |
| | 114 Fishing, hunting and trapping | 14 | 46 | \$2,189,548 | \$47,599 | \$915 |
| | 115 Agriculture and forestry support activities | 69 | 293 | \$8,899,102 | \$30,372 | \$584 |
| | 21 Mining | 48 | 701 | \$43,614,854 | \$62,218 | \$1,197 |
| | 211 Oil and gas extraction | * | * | * | \$62,218 | * |
| | 212 Mining, except oil and gas | 48 | 701 | \$43,614,854 | \$62,218 | \$1,197 |
| | 213 Support activities for mining | * | * | * | \$62,218 | * |
| | 22 Utilities | 165 | 6,761 | \$740,286,378 | \$109,494 | \$2,106 |
| | 221 Utilities | 165 | 6,761 | \$740,286,378 | \$109,494 | \$2,106 |
| | 23 Construction | 11,015 | 65,402 | \$3,787,386,071 | \$57,909 | \$1,114 |
| | 236 Construction of buildings | 3,054 | 13,549 | \$853,569,685 | \$62,999 | \$1,212 |
| | 237 Heavy and civil engineering construction | 551 | 5,832 | \$410,012,141 | \$70,304 | \$1,352 |
| | 238 Specialty trade construction | 7,410 | 46,021 | \$2,523,804,245 | \$54,840 | \$1,055 |
| | 31-33 Manufacturing | 5,117 | 186,522 | \$13,141,556,184 | \$70,456 | \$1,355 |
| | 311 Food manufacturing | 279 | 6,913 | \$272,123,413 | \$39,364 | \$757 |
| | 312 Beverage and tobacco product manufacturing | 40 | 837 | \$53,796,695 | \$64,273 | \$1,236 |
| | 313 Textile mills | 32 | 872 | \$39,755,248 | \$45,591 | \$877 |
| | 314 Textile product mills | 106 | 1,265 | \$49,558,978 | \$39,177 | \$753 |
| | 315 Apparel manufacturing | 27 | 248 | \$9,706,833 | \$39,140 | \$753 |
| | 316 Leather and allied product manufacturing | * | * | * | \$70,456 | * |
| | 321 Wood product manufacturing | 136 | 1,550 | \$68,526,016 | \$44,210 | \$850 |
| | 322 Paper manufacturing | 89 | 4,603 | \$281,355,061 | \$61,124 | \$1,175 |
| | 323 Printing and related support activities | 434 | 7,173 | \$379,702,672 | \$52,935 | \$1,018 |
| | 324 Petroleum and coal products manufacturing | * | * | * | \$70,456 | * |
| | 325 Chemical manufacturing | 190 | 14,452 | \$1,701,558,058 | \$117,739 | \$2,264 |
| | 326 Plastics and rubber products manufacturing | 204 | 6,625 | \$339,629,315 | \$51,265 | \$986 |
| | 327 Nonmetallic mineral product manufacturing | 159 | 2,874 | \$152,668,079 | \$53,120 | \$1,022 |
| | 331 Primary metal manufacturing | 84 | 4,040 | \$242,627,403 | \$60,056 | \$1,155 |
| | 332 Fabricated metal product manufacturing | 1,340 | 33,101 | \$1,885,452,719 | \$56,961 | \$1,095 |
| | 333 Machinery manufacturing | 553 | 17,732 | \$1,339,134,892 | \$75,521 | \$1,452 |
| | 334 Computer and electronic product manufacturing | 331 | 14,164 | \$936,393,654 | \$66,111 | \$1,271 |
| | 335 Electrical equipment and appliance manufacturing | 183 | 11,047 | \$918,461,439 | \$83,141 | \$1,599 |
| | 336 Transportation equipment manufacturing | 258 | 44,309 | \$3,655,718,505 | \$82,505 | \$1,587 |
| | 337 Furniture and related product manufacturing | 317 | 3,289 | \$149,812,210 | \$45,549 | \$876 |
| | 339 Miscellaneous manufacturing | 355 | 11,428 | \$665,574,994 | \$58,241 | \$1,120 |
| | 42 Wholesale trade | 10,122 | 69,196 | \$5,511,573,839 | \$79,652 | \$1,532 |
| | 423 Merchant wholesalers, durable goods | 2,902 | 31,434 | \$2,302,477,924 | \$73,248 | \$1,409 |
| | 424 Merchant wholesalers, nondurable goods | 1,367 | 23,296 | \$1,627,449,555 | \$69,860 | \$1,343 |
| | 425 Electronic markets and agents and brokers | 5,853 | 14,466 | \$1,581,646,360 | \$109,335 | \$2,103 |
| | 44-45 Retail trade | 13,204 | 188,364 | \$5,705,507,519 | \$30,290 | \$582 |
| | 441 Motor vehicle and parts dealers | 1,291 | 21,176 | \$997,116,421 | \$47,087 | \$906 |
| | 442 Furniture and home furnishings stores | 872 | 7,381 | \$248,802,070 | \$33,708 | \$648 |
| | 443 Electronics and appliance stores | 711 | 6,947 | \$320,138,760 | \$46,083 | \$886 |
| | 444 Building material and garden supply stores | 964 | 15,626 | \$571,744,342 | \$36,589 | \$704 |
| | 445 Food and beverage stores | 2,194 | 41,725 | \$1,014,588,179 | \$24,316 | \$468 |
| | 446 Health and personal care stores | 1,054 | 13,836 | \$454,720,866 | \$32,865 | \$632 |

| NAICS | Industry | # Estabs | Annual Total Average Employment | Annual Wages | Annual Average Wage | Average Weekly Wage |
|--------------|--|---------------|---------------------------------------|-------------------------|---------------------------|---------------------------|
| 447 | Gasoline stations | 1,045 | 6,124 | \$142,392,043 | \$23,251 | \$447 |
| 448 | Clothing and clothing accessories stores | 1,830 | 22,133 | \$445,699,313 | \$20,137 | \$387 |
| 451 | Sporting goods, hobby, book and music stores | 845 | 8,744 | \$167,656,262 | \$19,174 | \$369 |
| 452 | General merchandise stores | 353 | 25,494 | \$542,089,833 | \$21,263 | \$409 |
| 453 | Miscellaneous store retailers | 1,382 | 9,940 | \$239,878,784 | \$24,133 | \$464 |
| 454 | Nonstore retailers | 663 | 9,238 | \$560,680,646 | \$60,693 | \$1,167 |
| 48-49 | Transportation and warehousing | 1,895 | 41,775 | \$1,922,117,008 | \$46,011 | \$885 |
| 481 | Air transportation | 77 | 2,081 | \$126,526,359 | \$60,801 | \$1,169 |
| 482 | Rail transportation | * | * | * | \$46,011 | * |
| 483 | Water transportation | 43 | 914 | \$98,840,756 | \$108,141 | \$2,080 |
| 484 | Truck transportation | 738 | 6,931 | \$321,628,402 | \$46,404 | \$892 |
| 485 | Transit and ground passenger transportation | 361 | 12,229 | \$356,890,293 | \$29,184 | \$561 |
| 486 | Pipeline transportation | 5 | 167 | \$17,681,289 | \$105,876 | \$2,036 |
| 487 | Scenic and sightseeing transportation | 15 | 123 | \$2,671,875 | \$21,723 | \$418 |
| 488 | Support activities for transportation | 355 | 3,762 | \$339,046,721 | \$90,124 | \$1,733 |
| 491 | Postal service | * | * | * | \$46,011 | * |
| 492 | Couriers and messengers | 168 | 7,021 | \$281,975,875 | \$40,162 | \$772 |
| 493 | Warehousing and storage | 133 | 8,547 | \$376,855,438 | \$44,092 | \$848 |
| 51 | Information | 1,843 | 37,675 | \$2,614,779,783 | \$69,404 | \$1,335 |
| 511 | Publishing industries, except Internet | 494 | 11,107 | \$734,043,193 | \$66,088 | \$1,271 |
| 512 | Motion picture and sound recording industries | 372 | 2,935 | \$88,758,974 | \$30,242 | \$582 |
| 515 | Broadcasting, except Internet | 103 | 5,420 | \$450,621,775 | \$83,141 | \$1,599 |
| 517 | Telecommunications | 477 | 13,044 | \$1,003,456,121 | \$76,929 | \$1,479 |
| 518 | ISPs, search portals, and data processing | 149 | 2,359 | \$145,375,798 | \$61,626 | \$1,185 |
| 519 | Other information services | 248 | 2,810 | \$192,523,922 | \$68,514 | \$1,318 |
| 52 | Finance and insurance | 7,242 | 118,072 | \$16,830,518,734 | \$142,545 | \$2,741 |
| 521 | Monetary authorities - central bank | * | * | * | \$142,545 | * |
| 522 | Credit intermediation and related activities | 2,567 | 29,604 | \$2,575,588,661 | \$87,001 | \$1,673 |
| 523 | Securities, commodity contracts, investments | 2,284 | 22,919 | \$7,699,384,489 | \$335,939 | \$6,460 |
| 524 | Insurance carriers and related activities | 2,391 | 65,549 | \$6,555,545,584 | \$100,010 | \$1,923 |
| 525 | Funds, trusts, and other financial vehicles | * | * | * | \$142,545 | * |
| 53 | Real estate and rental and leasing | 3,063 | 14,481 | \$781,965,186 | \$53,999 | \$1,038 |
| 531 | Real estate | 3,063 | 14,481 | \$781,965,186 | \$53,999 | \$1,038 |
| 532 | Rental and leasing services | * | * | * | \$53,999 | * |
| 533 | Lessors of nonfinancial intangible assets | * | * | * | \$53,999 | * |
| 54 | Professional and technical services | 12,874 | 92,624 | \$7,923,359,803 | \$85,543 | \$1,645 |
| 541 | Professional and technical services | 12,874 | 92,624 | \$7,923,359,803 | \$85,543 | \$1,645 |
| 55 | Management of companies and enterprises | 737 | 28,540 | \$3,898,834,990 | \$136,609 | \$2,627 |
| 551 | Management of companies and enterprises | 737 | 28,540 | \$3,898,834,990 | \$136,609 | \$2,627 |
| 56 | Administrative and waste management | 6,943 | 85,772 | \$3,248,839,613 | \$37,878 | \$728 |
| 561 | Administrative and support activities | 6,454 | 79,610 | \$2,934,596,661 | \$36,862 | \$709 |
| 562 | Waste management and remediation services | 489 | 6,162 | \$314,242,952 | \$50,997 | \$981 |
| 61 | Educational services | 1,474 | 51,350 | \$2,598,034,103 | \$50,595 | \$973 |
| 611 | Educational services | 1,474 | 51,350 | \$2,598,034,103 | \$50,595 | \$973 |
| 62 | Health care and social assistance | 9,651 | 238,037 | \$10,973,907,642 | \$46,102 | \$887 |
| 621 | Ambulatory health care services | 6,417 | 76,715 | \$4,410,381,403 | \$57,490 | \$1,106 |
| 622 | Hospitals | 49 | 60,070 | \$3,477,394,732 | \$57,889 | \$1,113 |
| 623 | Nursing and residential care facilities | 1,192 | 59,722 | \$2,059,442,376 | \$34,484 | \$663 |
| 624 | Social assistance | 1,993 | 41,530 | \$1,026,689,131 | \$24,722 | \$475 |
| 71 | Arts, entertainment, and recreation | 1,701 | 24,425 | \$707,617,870 | \$28,971 | \$557 |
| 711 | Performing arts and spectator sports | 520 | 4,226 | \$242,183,329 | \$57,308 | \$1,102 |
| 712 | Museums, historical sites, zoos, and parks | 111 | 2,127 | \$61,215,020 | \$28,780 | \$553 |

| NAICS | Industry | # Estabs | Annual Total Average Employment | Annual Wages | Annual Average Wage | Average Weekly Wage |
|-----------|---|---------------|---------------------------------------|-------------------------|---------------------------|---------------------------|
| 713 | Amusement, gambling, and recreation | 1,070 | 18,072 | \$404,219,521 | \$22,367 | \$430 |
| 72 | Accommodation and food services | 7,597 | 113,185 | \$2,030,903,820 | \$17,943 | \$345 |
| 721 | Accommodation | 481 | 12,261 | \$309,704,458 | \$25,259 | \$486 |
| 722 | Food services and drinking places | 7,116 | 100,924 | \$1,721,199,362 | \$17,054 | \$328 |
| 81 | Other services, except public administration | 13,775 | 58,166 | \$1,743,154,050 | \$29,969 | \$576 |
| 811 | Repair and maintenance | 2,701 | 14,077 | \$553,507,487 | \$39,320 | \$756 |
| 812 | Personal and laundry services | 3,192 | 19,144 | \$468,561,955 | \$24,476 | \$471 |
| 813 | Membership associations and organizations | 2,068 | 16,101 | \$524,244,616 | \$32,560 | \$626 |
| 814 | Private households | 5,814 | 8,844 | \$196,839,992 | \$22,257 | \$428 |
| | Total government | 3,653 | 250,520 | \$13,206,624,278 | \$52,717 | \$1,014 |
| | Federal | 572 | 19,470 | \$1,140,152,678 | \$58,559 | \$1,126 |
| | State | 784 | 70,856 | \$4,375,997,174 | \$61,759 | \$1,188 |
| | Local | 2,297 | 160,194 | \$7,690,474,426 | \$48,007 | \$923 |
| 99 | Nonclassifiable establishments | 117 | 75 | \$4,462,676 | \$59,502 | \$1,144 |

Appendix E: Industry Segmentation Analysis: Results

All industries analyzed; the industries in the list are either current or emerging strengths, or retention targets.

| NAICS Description: | | 2008 At least 50 jobs? | 2008 LQ>1.1? | 2000-08 Added 50 jobs? | 2000-08 Positive Compet Sh? | Segmentation |
|--------------------|---|------------------------------|-----------------|------------------------------|-----------------------------------|--------------------|
| 212 | Mining (except Oil and Gas) | yes | yes | yes | yes | current strength |
| 339 | Miscellaneous Manufacturing | yes | yes | yes | yes | current strength |
| 424 | Merchant Wholesalers, Nondurable Goods | yes | yes | yes | yes | current strength |
| 448 | Clothing and Clothing Accessories Stores | yes | yes | yes | yes | current strength |
| 454 | Nonstore Retailers | yes | yes | yes | yes | current strength |
| 483 | Water Transportation | yes | yes | yes | yes | current strength |
| 519 | Other Information Services | yes | yes | yes | yes | current strength |
| 624 | Social Assistance | yes | yes | yes | yes | current strength |
| 812 | Personal and Laundry Services | yes | yes | yes | yes | current strength |
| | | | | | | |
| 236 | Construction of Buildings | yes | no | yes | yes | emerging strength |
| 238 | Specialty Trade Contractors | yes | no | yes | yes | emerging strength |
| 311 | Food Manufacturing | yes | no | yes | yes | emerging strength |
| 313 | Textile Mills | yes | no | yes | yes | emerging strength |
| 327 | Nonmetallic Mineral Product Manufacturing | yes | no | yes | yes | emerging strength |
| 442 | Furniture and Home Furnishings Stores | yes | no | yes | yes | emerging strength |
| 481 | Air Transportation | yes | no | yes | yes | emerging strength |
| 488 | Support Activities for Transportation | yes | no | yes | yes | emerging strength |
| 492 | Couriers and Messengers | yes | no | yes | yes | emerging strength |
| 515 | Broadcasting (except Internet) | yes | no | yes | yes | emerging strength |
| 522 | Credit Intermediation and Related Activities | yes | no | yes | yes | emerging strength |
| 523 | Securities, Commodity Contracts & Other Fincl Investments | yes | no | yes | yes | emerging strength |
| 525 | Funds, Trusts, and Other Financial Vehicles | yes | no | yes | yes | emerging strength |
| 532 | Rental and Leasing Services | yes | no | yes | yes | emerging strength |
| 713 | Amusement, Gambling, and Recreation Industries | yes | no | yes | yes | emerging strength |
| 721 | Accommodation | yes | no | yes | yes | emerging strength |
| 722 | Food Services and Drinking Places | yes | no | yes | yes | emerging strength |
| | | | | | | |
| 444 | Building Material & Garden Equip & Supplies Dealers | yes | yes | yes | no | priority retention |
| 611 | Educational Services | yes | yes | yes | no | priority retention |
| 621 | Ambulatory Health Care Services | yes | yes | yes | no | priority retention |
| 622 | Hospitals | yes | yes | yes | no | priority retention |
| 623 | Nursing and Residential Care Facilities | yes | yes | yes | no | priority retention |

Source: Moody's Economy.com (7/09 data)

Appendix F: Economic Linkages, New Haven County, 2007

| NAICS | Industry Description | Emp Mult | Inc Mult | EmpMult | IncMult | Rgn Inputs | RPC Used | RgnInput |
|-------|--|----------|----------|---------|---------|---------------|-------------|----------|
| | | Type II | Type II | >Avg? | >Avg? | | by Industry | >\$50M? |
| 111 | Crop Production | 1.146 | 1.448 | no | no | 3,829,966 | 31% | no |
| 112 | Animal Production | 1.113 | 1.874 | no | yes | 1,204,561 | 23% | no |
| 114 | Fishing, Hunting and Trapping | 1.306 | 1.620 | no | no | 2,198,016 | 54% | no |
| 115 | Support Activities for Agriculture and Forestry | 1.082 | 1.474 | no | no | 267,497 | 28% | no |
| 211 | Oil and Gas Extraction | 3.402 | 1.466 | yes | no | 206,962 | 29% | no |
| 212 | Mining (except Oil and Gas) | 1.878 | 1.469 | yes | no | 2,711,799 | 29% | no |
| 213 | Support Activities for Mining | 1.608 | 4.252 | no | yes | 40,001 | 44% | no |
| 221 | Utilities | 1.948 | 1.440 | yes | no | 30,923,217 | 9% | no |
| 236 | Construction of Buildings | 1.730 | 1.517 | yes | no | 738,004,140 | 42% | yes |
| 237 | Heavy and Civil Engineering Construction | 1.730 | 1.517 | yes | no | | | |
| 238 | Specialty Trade Contractors | 1.730 | 1.517 | yes | no | | | |
| 311 | Food Mfg | 2.436 | 2.411 | yes | yes | 233,632,942 | 40% | yes |
| 312 | Beverage and Tobacco Product Mfg | 2.959 | 2.586 | yes | yes | 24,625,327 | 44% | no |
| 313 | Textile Mills | 1.879 | 1.818 | yes | yes | 10,092,981 | 29% | no |
| 314 | Textile Product Mills | 1.680 | 1.675 | yes | yes | 12,266,885 | 35% | no |
| 315 | Apparel Mfg | 1.988 | 1.467 | yes | no | 6,592,668 | 35% | no |
| 316 | Leather and Allied Product Mfg | 1.421 | 1.648 | no | no | 140,124 | 37% | no |
| 321 | Wood Product Mfg | 1.604 | 1.686 | no | yes | 14,740,097 | 33% | no |
| 322 | Paper Mfg | 2.190 | 1.849 | yes | yes | 53,039,189 | 28% | yes |
| 323 | Printing and Related Support Activities | 1.847 | 1.423 | yes | no | 38,197,031 | 42% | no |
| 324 | Petroleum and Coal Products Mfg | 2.849 | 1.742 | yes | yes | 4,621,290 | 16% | no |
| 325 | Chemical Mfg | 3.002 | 2.315 | yes | yes | 1,437,897,260 | 53% | yes |
| 326 | Plastics and Rubber Products Mfg | 1.815 | 1.761 | yes | yes | 82,241,543 | 31% | yes |
| 327 | Nonmetallic Mineral Product Mfg | 1.886 | 1.673 | yes | yes | 45,267,440 | 40% | no |
| 331 | Primary Metal Mfg | 2.403 | 2.014 | yes | yes | 376,378,418 | 31% | yes |
| 332 | Fabricated Metal Product Mfg | 1.854 | 1.655 | yes | no | 416,943,206 | 38% | yes |
| 333 | Machinery Mfg | 2.051 | 1.783 | yes | yes | 182,697,049 | 41% | yes |
| 334 | Computer and Electronic Product Mfg | 2.783 | 2.295 | yes | yes | 608,426,210 | 48% | yes |
| 335 | Electrical Equipment, Appliance & Component Mfg | 2.204 | 1.815 | yes | yes | 184,050,688 | 43% | yes |
| 336 | Transportation Equipment Mfg | 2.387 | 1.968 | yes | yes | 483,595,234 | 48% | yes |
| 337 | Furniture and Related Product Mfg | 1.641 | 1.615 | yes | no | 22,271,553 | 40% | no |
| 339 | Miscellaneous Mfg | 2.013 | 1.583 | yes | no | 308,248,649 | 50% | yes |
| 423 | Merchant Wholesalers, Durable Goods | 2.096 | 1.596 | yes | no | 807,456,507 | 60% | yes |
| 424 | Merchant Wholesalers, Nondurable Goods | 2.096 | 1.596 | yes | no | | | |
| 425 | Wholesale Electronic Markets, Agents, Brokers | 2.096 | 1.596 | yes | no | | | |
| 441 | Motor Vehicle and Parts Dealers | 1.674 | 1.524 | yes | no | 138,117,205 | 61% | yes |
| 442 | Furniture and Home Furnishings Stores | 1.476 | 1.630 | no | no | 32,718,688 | 61% | no |
| 443 | Electronics and Appliance Stores | 1.363 | 1.364 | no | no | 11,088,777 | 61% | no |
| 444 | Building Material, Garden Equip & Supplies Dealers | 1.559 | 1.599 | no | no | 97,534,218 | 61% | yes |
| 445 | Food and Beverage Stores | 1.371 | 1.562 | no | no | 146,871,096 | 61% | yes |
| 446 | Health and Personal Care Stores | 1.382 | 1.553 | no | no | 60,292,063 | 61% | yes |
| 447 | Gasoline Stations | 1.509 | 1.650 | no | no | 37,294,875 | 61% | no |
| 448 | Clothing and Clothing Accessories Stores | 1.297 | 1.658 | no | no | 69,432,902 | 61% | yes |
| 451 | Sporting Goods, Hobby, Book, and Music Stores | 1.273 | 1.589 | no | no | 28,610,513 | 61% | no |
| 452 | General Merchandise Stores | 1.328 | 1.610 | no | no | 99,070,838 | 61% | yes |
| 453 | Miscellaneous Store Retailers | 1.216 | 1.435 | no | no | 22,962,639 | 61% | no |
| 454 | Nonstore Retailers | 1.484 | 1.729 | no | yes | 92,206,916 | 61% | yes |
| 481 | Air Transportation | 2.385 | 1.758 | yes | yes | 14,327,141 | 41% | no |
| 482 | Rail Transportation | 2.081 | 1.628 | yes | no | 13,994,564 | 42% | no |
| 483 | Water Transportation | 4.133 | 3.277 | yes | yes | 16,327,691 | 54% | no |
| 484 | Truck Transportation | 1.721 | 1.699 | yes | yes | 86,499,741 | 48% | yes |
| 485 | Transit and Ground Passenger Transportation | 1.336 | 1.484 | no | no | 39,038,985 | 45% | no |
| 486 | Pipeline Transportation | 1.784 | 1.659 | yes | no | | | |
| 487 | Scenic and Sightseeing Transportation | 1.676 | 1.383 | yes | no | 13,185,551 | 56% | no |
| 488 | Support Activities for Transportation | 1.676 | 1.383 | yes | no | 13,185,551 | 56% | no |
| 491 | Postal Service | 1.380 | 1.334 | no | no | 29,019,156 | 44% | no |
| 492 | Couriers and Messengers | 1.442 | 1.445 | no | no | 11,747,171 | 45% | no |
| 493 | Warehousing and Storage | 1.496 | 1.360 | no | no | 16,588,980 | 52% | no |
| 511 | Publishing Industries | 2.006 | 1.719 | yes | yes | 110,834,748 | 44% | yes |
| 512 | Motion Picture and Sound Recording Industries | 2.143 | 2.181 | yes | yes | 31,476,035 | 53% | no |
| 513 | Broadcasting and Telecommunications | 2.497 | 1.829 | yes | yes | 705,303,597 | 53% | yes |

| NAICS | Industry Description | Emp Mult | Inc Mult | EmpMult | IncMult | Rgn Inputs | RPC Used | RgnInput |
|--------|---|----------|----------|---------|---------|-------------|-------------|----------|
| | | Type II | Type II | >Avg? | >Avg? | | by Industry | >\$50M? |
| 514 | Information Services & Data Processing Svcs | 2.710 | 1.847 | yes | yes | 59,063,429 | 55% | yes |
| 521, 2 | Monetary Authorities | 1.959 | 1.712 | yes | yes | 199,432,110 | 58% | yes |
| 522 | Credit Intermediation and Related Activities | 2.112 | 1.576 | yes | no | 70,569,919 | 60% | yes |
| 523 | Securities, Commodity Contracts | 2.056 | 1.672 | yes | yes | 133,303,901 | 55% | yes |
| 524 | Insurance Carriers and Related Activities | 1.957 | 1.606 | yes | no | 505,934,203 | 64% | yes |
| 525 | Funds, Trusts, and Other Financial Vehicles | 3.749 | 1.786 | yes | yes | 10,100,351 | 49% | no |
| 531 | Real Estate | 1.634 | 1.966 | yes | yes | 376,186,575 | 67% | yes |
| 532 | Rental and Leasing Services | 1.583 | 1.652 | no | no | 69,768,414 | 56% | yes |
| 533 | Lessors of Nonfinancial Intangible Assets | 11.699 | 4.436 | yes | yes | 224,387,202 | 43% | yes |
| 541 | Professional, Scientific, and Technical Services | 1.878 | 1.587 | yes | no | 870,691,338 | 60% | yes |
| 551 | Management of Companies and Enterprises | 2.331 | 1.553 | yes | no | 178,247,049 | 65% | yes |
| 561 | Administrative and Support Services | 1.462 | 1.522 | no | no | 273,200,908 | 58% | yes |
| 562 | Waste Management and Remediation Services | 1.812 | 1.636 | yes | no | 64,894,591 | 48% | yes |
| 611 | Educational Services | 1.402 | 1.462 | no | no | 449,943,231 | 60% | yes |
| 621 | Ambulatory Health Care Services | 1.619 | 1.529 | no | no | 612,798,662 | 63% | yes |
| 622 | Hospitals | 1.810 | 1.567 | yes | no | 497,969,583 | 59% | yes |
| 623 | Nursing and Residential Care Facilities | 1.406 | 1.418 | no | no | 166,090,950 | 61% | yes |
| 624 | Social Assistance | 1.224 | 1.486 | no | no | 110,457,238 | 52% | yes |
| 711 | Performing Arts, Spectator Sports | 1.234 | 1.565 | no | no | 21,876,470 | 59% | no |
| 712 | Museums, Historical Sites, and Similar Institutions | 1.530 | 1.675 | no | yes | 2,691,702 | 64% | no |
| 713 | Amusement, Gambling, and Recreation Industries | 1.281 | 1.648 | no | no | 54,143,389 | 61% | yes |
| 721 | Accommodation | 1.540 | 1.717 | no | yes | 35,819,748 | 63% | no |
| 722 | Food Services and Drinking Places | 1.264 | 1.603 | no | no | 321,850,526 | 49% | yes |
| 811 | Repair and Maintenance | 1.531 | 1.649 | no | no | 115,977,201 | 43% | yes |
| 812 | Personal and Laundry Services | 1.420 | 1.592 | no | no | 112,779,201 | 58% | yes |
| 813 | Religious, Grantmaking, Civic, Professional Orgs | 1.464 | 1.572 | no | no | 116,339,269 | 62% | yes |
| 814 | Private Households | 1.074 | 1.266 | no | no | | | |
| 901 | Federal | 1.302 | 1.296 | no | no | 205,783 | 51% | no |
| 905 | State and Local | 1.492 | 1.391 | no | no | 122,728,000 | 41% | yes |

Source: IMPLAN

RPC>

| NAICS | Industry Description | AvgRPC? |
|-------|--|---------|
| 111 | Crop Production | no |
| 112 | Animal Production | no |
| 114 | Fishing, Hunting and Trapping | yes |
| 115 | Support Activities for Agriculture and Forestry | no |
| 211 | Oil and Gas Extraction | no |
| 212 | Mining (except Oil and Gas) | no |
| 213 | Support Activities for Mining | no |
| 221 | Utilities | no |
| 236 | Construction of Buildings | no |
| 237 | Heavy and Civil Engineering Construction | |
| 238 | Specialty Trade Contractors | |
| 311 | Food Mfg | no |
| 312 | Beverage and Tobacco Product Mfg | no |
| 313 | Textile Mills | no |
| 314 | Textile Product Mills | no |
| 315 | Apparel Mfg | no |
| 316 | Leather and Allied Product Mfg | no |
| 321 | Wood Product Mfg | no |
| 322 | Paper Mfg | no |
| 323 | Printing and Related Support Activities | no |
| 324 | Petroleum and Coal Products Mfg | no |
| 325 | Chemical Mfg | yes |
| 326 | Plastics and Rubber Products Mfg | no |
| 327 | Nonmetallic Mineral Product Mfg | no |
| 331 | Primary Metal Mfg | no |
| 332 | Fabricated Metal Product Mfg | no |
| 333 | Machinery Mfg | no |
| 334 | Computer and Electronic Product Mfg | no |
| 335 | Electrical Equipment, Appliance & Component Mfg | no |
| 336 | Transportation Equipment Mfg | no |
| 337 | Furniture and Related Product Mfg | no |
| 339 | Miscellaneous Mfg | no |
| 423 | Merchant Wholesalers, Durable Goods | yes |
| 424 | Merchant Wholesalers, Nondurable Goods | |
| 425 | Wholesale Electronic Markets, Agents, Brokers | |
| 441 | Motor Vehicle and Parts Dealers | yes |
| 442 | Furniture and Home Furnishings Stores | yes |
| 443 | Electronics and Appliance Stores | yes |
| 444 | Building Material, Garden Equip & Supplies Dealers | yes |
| 445 | Food and Beverage Stores | yes |
| 446 | Health and Personal Care Stores | yes |
| 447 | Gasoline Stations | yes |
| 448 | Clothing and Clothing Accessories Stores | yes |
| 451 | Sporting Goods, Hobby, Book, and Music Stores | yes |
| 452 | General Merchandise Stores | yes |
| 453 | Miscellaneous Store Retailers | yes |
| 454 | Nonstore Retailers | yes |
| 481 | Air Transportation | no |
| 482 | Rail Transportation | no |
| 483 | Water Transportation | yes |
| 484 | Truck Transportation | no |
| 485 | Transit and Ground Passenger Transportation | no |
| 486 | Pipeline Transportation | |
| 487 | Scenic and Sightseeing Transportation | yes |
| 488 | Support Activities for Transportation | yes |
| 491 | Postal Service | no |
| 492 | Couriers and Messengers | no |
| 493 | Warehousing and Storage | yes |
| 511 | Publishing Industries | no |
| 512 | Motion Picture and Sound Recording Industries | yes |
| 513 | Broadcasting and Telecommunications | yes |

RPC>

AvgRPC?

| NAICS | Industry Description | |
|--------|---|-----|
| 514 | Information Services & Data Processing Svcs | yes |
| 521, 2 | Monetary Authorities | yes |
| 522 | Credit Intermediation and Related Activities | yes |
| 523 | Securities, Commodity Contracts | no |
| 524 | Insurance Carriers and Related Activities | yes |
| 525 | Funds, Trusts, and Other Financial Vehicles | yes |
| 531 | Real Estate | no |
| 532 | Rental and Leasing Services | yes |
| 533 | Lessors of Nonfinancial Intangible Assets | yes |
| 541 | Professional, Scientific, and Technical Services | yes |
| 551 | Management of Companies and Enterprises | no |
| 561 | Administrative and Support Services | yes |
| 562 | Waste Management and Remediation Services | yes |
| 611 | Educational Services | yes |
| 621 | Ambulatory Health Care Services | yes |
| 622 | Hospitals | yes |
| 623 | Nursing and Residential Care Facilities | yes |
| 624 | Social Assistance | yes |
| 711 | Performing Arts, Spectator Sports | yes |
| 712 | Museums, Historical Sites, and Similar Institutions | yes |
| 713 | Amusement, Gambling, and Recreation Industries | no |
| 721 | Accommodation | no |
| 722 | Food Services and Drinking Places | yes |
| 811 | Repair and Maintenance | yes |
| 812 | Personal and Laundry Services | |
| 813 | Religious, Grantmaking, Civic, Professional Orgs | yes |
| 814 | Private Households | no |
| 901 | Federal | |
| 905 | State and Local | |

Appendix G: National Employment Trends

| NAICS | Industry Description | U.S. Share 2000 | U.S. Share 2008 | U.S. Share Increase? |
|-------|---|--------------------|--------------------|-------------------------|
| ETA | Total Nonfarm Payroll | | | |
| 211 | Oil and Gas Extraction | 0.1% | 0.1% | yes |
| 212 | Mining (except Oil and Gas) | 0.2% | 0.2% | no |
| 213 | Support Activities for Mining | 0.1% | 0.2% | yes |
| 221 | Utilities | 0.5% | 0.4% | no |
| 236 | Construction of Buildings | 1.2% | 1.2% | no |
| 237 | Heavy and Civil Engineering Construction | 0.7% | 0.7% | no |
| 238 | Specialty Trade Contractors | 3.2% | 3.3% | yes |
| 311 | Food Mfg | 1.2% | 1.1% | no |
| 312 | Beverage and Tobacco Product Mfg | 0.2% | 0.1% | no |
| 313 | Textile Mills | 0.3% | 0.1% | no |
| 314 | Textile Product Mills | 0.2% | 0.1% | no |
| 315 | Apparel Mfg | 0.4% | 0.1% | no |
| 316 | Leather and Allied Product Mfg | 0.1% | 0.0% | no |
| 321 | Wood Product Mfg | 0.5% | 0.3% | no |
| 322 | Paper Mfg | 0.5% | 0.3% | no |
| 323 | Printing and Related Support Activities | 0.6% | 0.4% | no |
| 324 | Petroleum and Coal Products Mfg | 0.1% | 0.1% | no |
| 325 | Chemical Mfg | 0.7% | 0.6% | no |
| 326 | Plastics and Rubber Products Mfg | 0.7% | 0.5% | no |
| 327 | Nonmetallic Mineral Product Mfg | 0.4% | 0.3% | no |
| 331 | Primary Metal Mfg | 0.5% | 0.3% | no |
| 332 | Fabricated Metal Product Mfg | 1.3% | 1.1% | no |
| 333 | Machinery Mfg | 1.1% | 0.9% | no |
| 334 | Computer and Electronic Product Mfg | 1.4% | 0.9% | no |
| 335 | Electrical Equipment, Appliance, and Component Mfg | 0.4% | 0.3% | no |
| 336 | Transportation Equipment Mfg | 1.6% | 1.2% | no |
| 337 | Furniture and Related Product Mfg | 0.5% | 0.4% | no |
| 339 | Miscellaneous Mfg | 0.6% | 0.5% | no |
| 423 | Merchant Wholesalers, Durable Goods | 2.5% | 2.2% | no |
| 424 | Merchant Wholesalers, Nondurable Goods | 1.6% | 1.5% | no |
| 425 | Wholesale Electronic Markets and Agents and Brokers | 0.5% | 0.6% | yes |
| 441 | Motor Vehicle and Parts Dealers | 1.4% | 1.3% | no |
| 442 | Furniture and Home Furnishings Stores | 0.4% | 0.4% | no |
| 443 | Electronics and Appliance Stores | 0.4% | 0.4% | no |
| 444 | Building Material and Garden Equipment and Supplies Dealers | 0.9% | 0.9% | yes |
| 445 | Food and Beverage Stores | 2.3% | 2.1% | no |
| 446 | Health and Personal Care Stores | 0.7% | 0.7% | yes |
| 447 | Gasoline Stations | 0.7% | 0.6% | no |
| 448 | Clothing and Clothing Accessories Stores | 1.0% | 1.1% | yes |
| 451 | Sporting Goods, Hobby, Book, and Music Stores | 0.5% | 0.5% | no |
| 452 | General Merchandise Stores | 2.1% | 2.2% | yes |
| 453 | Miscellaneous Store Retailers | 0.8% | 0.6% | no |
| 454 | Nonstore Retailers | 0.4% | 0.3% | no |
| 481 | Air Transportation | 0.5% | 0.4% | no |
| 482 | Rail Transportation | 0.2% | 0.2% | no |
| 483 | Water Transportation | 0.0% | 0.0% | yes |
| 484 | Truck Transportation | 1.1% | 1.0% | no |
| 485 | Transit and Ground Passenger Transportation | 0.3% | 0.3% | yes |
| 486 | Pipeline Transportation | 0.0% | 0.0% | no |
| 487 | Scenic and Sightseeing Transportation | 0.0% | 0.0% | no |
| 488 | Support Activities for Transportation | 0.4% | 0.4% | yes |
| 492 | Couriers and Messengers | 0.5% | 0.4% | no |
| 493 | Warehousing and Storage | 0.4% | 0.5% | yes |

| NAICS | Industry Description | U.S. Share 2000 | U.S. Share 2008 | U.S. Share Increase? |
|--------------|--|----------------------------|----------------------------|---------------------------------|
| 511 | Publishing Industries (except Internet) | 0.8% | 0.6% | no |
| 512 | Motion Picture and Sound Recording Industries | 0.3% | 0.3% | no |
| 515 | Broadcasting (except Internet) | 0.3% | 0.2% | no |
| 517 | Telecommunications | 1.1% | 0.7% | no |
| 518 | Internet Service Providers, Web Search Portals & Data Processing | 0.2% | 0.2% | no |
| 519 | Other Information Services | 0.1% | 0.1% | no |
| 521 | Monetary Authorities - Central Bank | 0.0% | 0.0% | no |
| 522 | Credit Intermediation and Related Activities | 1.9% | 2.0% | yes |
| 523 | Securities, Commodity Contracts, Other Fincl Investments | 0.6% | 0.6% | yes |
| 524 | Insurance Carriers and Related Activities | 1.7% | 1.7% | yes |
| 525 | Funds, Trusts, and Other Financial Vehicles | 0.1% | 0.1% | yes |
| 531 | Real Estate | 1.0% | 1.1% | yes |
| 532 | Rental and Leasing Services | 0.5% | 0.5% | no |
| 533 | Lessors of Nonfinancial Intangible Assets | 0.0% | 0.0% | no |
| 541 | Professional, Scientific, and Technical Services | 5.1% | 5.7% | yes |
| 551 | Management of Companies and Enterprises | 1.4% | 1.4% | yes |
| 561 | Administrative and Support Services | 6.0% | 5.6% | no |
| 562 | Waste Management and Remediation Services | 0.2% | 0.3% | yes |
| 611 | Educational Services | 1.8% | 2.2% | yes |
| 621 | Ambulatory Health Care Services | 3.3% | 4.1% | yes |
| 622 | Hospitals | 3.0% | 3.4% | yes |
| 623 | Nursing and Residential Care Facilities | 2.0% | 2.2% | yes |
| 624 | Social Assistance | 1.4% | 1.8% | yes |
| 711 | Performing Arts, Spectator Sports, and Related Industries | 0.3% | 0.3% | yes |
| 712 | Museums, Historical Sites, and Similar Institutions | 0.1% | 0.1% | yes |
| 713 | Amusement, Gambling, and Recreation Industries | 1.0% | 1.0% | yes |
| 721 | Accommodation | 1.4% | 1.4% | no |
| 722 | Food Services and Drinking Places | 6.2% | 7.0% | yes |
| 811 | Repair and Maintenance | 0.9% | 0.9% | no |
| 812 | Personal and Laundry Services | 0.9% | 1.0% | yes |
| 813 | Religious, Grantmaking, Civic, Professional Orgs | 2.0% | 2.2% | yes |
| GVF | Federal Government | 2.2% | 2.0% | no |
| GVL | Local Government | 10.0% | 10.6% | yes |
| GVS | State Government | 3.6% | 3.8% | yes |

Sources: Moody's Economy.com (7/09 data); U.S. BLS

Appendix G: National Employment Trends

| NAICS | Industry Description | U.S. BLS (1000s, SA) | | | |
|-------|---|----------------------|---------------|---------------------|----------------------|
| | | U.S. 12/07 | U.S. 9/09p | EmpCh 12/07-9/09 | Greater U.S. Avg? |
| ETA | Total Nonfarm Payroll | 138152 | 130947 | -5.2% | |
| 211 | Oil and Gas Extraction | 153.5 | 166.1 | 8.2% | yes |
| 212 | Mining (except Oil and Gas) | 223.6 | 215.1 | -3.8% | yes |
| 213 | Support Activities for Mining | 306.1 | 275.2 | -10.1% | no |
| 221 | Utilities | 556.9 | 565 | 1.5% | yes |
| 236 | Construction of Buildings | 1737.1 | 1388.5 | -20.1% | no |
| 237 | Heavy and Civil Engineering Construction | 1006.2 | 836.4 | -16.9% | no |
| 238 | Specialty Trade Contractors | 4779.9 | 3812.9 | -20.2% | no |
| 311 | Food Mfg | 1493.4 | 1473.5 | -1.3% | yes |
| 312 | Beverage and Tobacco Product Mfg | 198.4 | 189.8 | -4.3% | yes |
| 313 | Textile Mills | 163.4 | 121.7 | -25.5% | no |
| 314 | Textile Product Mills | 154.7 | 126 | -18.6% | no |
| 315 | Apparel Mfg | 208.9 | 163.9 | -21.5% | no |
| 316 | Leather and Allied Product Mfg | 33.5 | 30.3 | -9.6% | no |
| 321 | Wood Product Mfg | 497.8 | 360.4 | -27.6% | no |
| 322 | Paper Mfg | 454.9 | 405.6 | -10.8% | no |
| 323 | Printing and Related Support Activities | 615.6 | 512.5 | -16.7% | no |
| 324 | Petroleum and Coal Products Mfg | 115 | 114.6 | -0.3% | yes |
| 325 | Chemical Mfg | 858.5 | 802.8 | -6.5% | no |
| 326 | Plastics and Rubber Products Mfg | 752.2 | 627.9 | -16.5% | no |
| 327 | Nonmetallic Mineral Product Mfg | 489.9 | 401.5 | -18.0% | no |
| 331 | Primary Metal Mfg | 452.1 | 354.7 | -21.5% | no |
| 332 | Fabricated Metal Product Mfg | 1561.8 | 1276.9 | -18.2% | no |
| 333 | Machinery Mfg | 1189.1 | 989 | -16.8% | no |
| 334 | Computer and Electronic Product Mfg | 1259.7 | 1117.8 | -11.3% | no |
| 335 | Electrical Equipment, Appliance, and Component Mfg | 428.8 | 373.9 | -12.8% | no |
| 336 | Transportation Equipment Mfg | 1689.2 | 1317.1 | -22.0% | no |
| 337 | Furniture and Related Product Mfg | 516.3 | 373.7 | -27.6% | no |
| 339 | Miscellaneous Mfg | 643 | 585.1 | -9.0% | no |
| 423 | Merchant Wholesalers, Durable Goods | 3123.6 | 2820.7 | -9.7% | no |
| 424 | Merchant Wholesalers, Nondurable Goods | 2075.7 | 1986.1 | -4.3% | yes |
| 425 | Wholesale Electronic Markets and Agents and Brokers | 845.6 | 842.3 | -0.4% | yes |
| 441 | Motor Vehicle and Parts Dealers | 1902.1 | 1666.3 | -12.4% | no |
| 442 | Furniture and Home Furnishings Stores | 571.1 | 479.2 | -16.1% | no |
| 443 | Electronics and Appliance Stores | 554.1 | 512.1 | -7.6% | no |
| 444 | Building Material and Garden Equipment and Supplies Dealers | 1280 | 1165.4 | -9.0% | no |
| 445 | Food and Beverage Stores | 2863 | 2815.3 | -1.7% | yes |
| 446 | Health and Personal Care Stores | 1009.3 | 980.4 | -2.9% | yes |
| 447 | Gasoline Stations | 850.4 | 828.9 | -2.5% | yes |
| 448 | Clothing and Clothing Accessories Stores | 1517.1 | 1408.7 | -7.1% | no |
| 451 | Sporting Goods, Hobby, Book, and Music Stores | 658.5 | 605.3 | -8.1% | no |
| 452 | General Merchandise Stores | 3055.9 | 3031.3 | -0.8% | yes |
| 453 | Miscellaneous Store Retailers | 860 | 790.3 | -8.1% | no |
| 454 | Nonstore Retailers | 446.4 | 416.5 | -6.7% | no |
| 481 | Air Transportation | 498.9 | 462.3 | -7.3% | no |
| 482 | Rail Transportation | 230.8 | 212.3 | -8.0% | no |
| 483 | Water Transportation | 67.5 | 56.1 | -16.9% | no |
| 484 | Truck Transportation | 1420.4 | 1257.7 | -11.5% | no |
| 485 | Transit and Ground Passenger Transportation | 418.3 | 402.8 | -3.7% | yes |
| 486 | Pipeline Transportation | 40.6 | 43.1 | 6.2% | yes |
| 487 | Scenic and Sightseeing Transportation | 29.7 | 29.2 | -1.7% | yes |
| 488 | Support Activities for Transportation | 591.2 | 534.1 | -9.7% | no |
| 492 | Couriers and Messengers | 582 | 546.3 | -6.1% | no |
| 493 | Warehousing and Storage | 676 | 634.3 | -6.2% | no |

| NAICS | Industry Description | U.S. BLS (1000s, SA) | | | |
|-------|--|----------------------|---------------|---------------------|----------------------|
| | | U.S. 12/07 | U.S. 9/09p | EmpCh 12/07-9/09 | Greater U.S. Avg? |
| 511 | Publishing Industries (except Internet) | 897.5 | 786.8 | -12.3% | no |
| 512 | Motion Picture and Sound Recording Industries | 378.9 | 384.3 | 1.4% | yes |
| 515 | Broadcasting (except Internet) | 319 | 288.5 | -9.6% | no |
| 517 | Telecommunications | 1032.6 | 974.7 | -5.6% | no |
| 518 | Internet Service Providers, Web Search Portals & Data Processing | 266.3 | 256.1 | -3.8% | yes |
| 519 | Other Information Services | 130.8 | 135.2 | 3.4% | yes |
| 521 | Monetary Authorities - Central Bank | 21.9 | 20.3 | -7.3% | no |
| 522 | Credit Intermediation and Related Activities | 2794.4 | 2585 | -7.5% | no |
| 523 | Securities, Commodity Contracts, Other Fincl Investments | 859.3 | 780.5 | -9.2% | no |
| 524 | Insurance Carriers and Related Activities | 2315.2 | 2248.6 | -2.9% | yes |
| 525 | Funds, Trusts, and Other Financial Vehicles | 90 | 86.6 | -3.8% | yes |
| 531 | Real Estate | 1497.8 | 1398 | -6.7% | no |
| 532 | Rental and Leasing Services | 636 | 555.9 | -12.6% | no |
| 533 | Lessors of Nonfinancial Intangible Assets | 28 | 27.4 | -2.1% | yes |
| 541 | Professional, Scientific, and Technical Services | 7819.3 | 7576.6 | -3.1% | yes |
| 551 | Management of Companies and Enterprises | 1903.8 | 1814 | -4.7% | yes |
| 561 | Administrative and Support Services | 8026.9 | 6841.4 | -14.8% | no |
| 562 | Waste Management and Remediation Services | 359 | 364.5 | 1.5% | yes |
| 611 | Educational Services | 2978 | 3059.4 | 2.7% | yes |
| 621 | Ambulatory Health Care Services | 5560.2 | 5871.6 | 5.6% | yes |
| 622 | Hospitals | 4566.6 | 4726.6 | 3.5% | yes |
| 623 | Nursing and Residential Care Facilities | 2985.5 | 3073.1 | 2.9% | yes |
| 624 | Social Assistance | 2479.9 | 2580.7 | 4.1% | yes |
| 711 | Performing Arts, Spectator Sports, and Related Industries | 416.1 | 398.4 | -4.3% | yes |
| 712 | Museums, Historical Sites, and Similar Institutions | 132.5 | 130.4 | -1.6% | yes |
| 713 | Amusement, Gambling, and Recreation Industries | 1444.3 | 1379.6 | -4.5% | yes |
| 721 | Accommodation | 1892.4 | 1699.8 | -10.2% | no |
| 722 | Food Services and Drinking Places | 9665.5 | 9546 | -1.2% | yes |
| 811 | Repair and Maintenance | 1249.1 | 1150.6 | -7.9% | no |
| 812 | Personal and Laundry Services | 1319 | 1296.1 | -1.7% | yes |
| 813 | Religious, Grantmaking, Civic, Professional Orgs | 2948.8 | 2950.6 | 0.1% | yes |
| GVF | Federal Government | 2746 | 2818 | 2.6% | yes |
| GVL | Local Government | 14481 | 14445 | -0.2% | yes |
| GVS | State Government | 5142 | 5140 | 0.0% | yes |

Sources: Moody's Economy.com (7/09 data); U.S. BLS