

GREATER NEW HAVEN: A STRATEGY FOR SUCCESS
**2019 SOUTH CENTRAL CONNECTICUT COMPREHENSIVE
ECONOMIC DEVELOPMENT STRATEGY**



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GREATER NEW HAVEN VISION STATEMENT

South Central Connecticut aims to develop the region's resiliency, diversity, and community while striving for the creation and implementation of business-friendly policies and projects that result in a more attractive business environment and higher quality of life for its residents.

OVERVIEW

REX Development is a public/private partnership promoting economic development in South Central Connecticut, representing the towns of Bethany, Branford, East Haven, Guilford, Hamden, Madison, Meriden, Milford, New Haven, North Branford, North Haven, Orange, Wallingford, West Haven and Woodbridge. Funded by private sector partners and the towns of the South Central Regional Council of Governments, REX supports programs and policies aimed at making the region more competitive in the global economy. REX also coordinates the development and implementation of the Comprehensive Economic Development Strategy.



The 2018 5-year update of the CEDS, Greater New Haven: A Strategy for Economic Success established an implementable roadmap for the region's economic growth. With knowledgeable and robust committees, the 2018 CEDS set forth goals, objectives and action items to propel the region's economic vitality. As to be expected, the plan was adjusted to respond to unforeseen challenges and opportunities. However, the adjustments were relevant, focused and supported the overall vision.

Greater New Haven has seen improvement in some key economic indicators, such as unemployment and median household, but has yet to achieve its full potential. With support from the Governor's office, we are encouraged that cities will be recognized as the economic engines they are, supported with appropriate investment by the state.

SWOT UPDATE

As the home of Yale University, New Haven has global name recognition as a world-class center of education, research, and culture. Yale is an innovation powerhouse and the primary driving force of economic development in our region. To maximize the economic impact of the University, Greater New Haven functions as a single entity in terms of economic activity. New Haven proper is approximately 19 sq. miles with little developable land. However, taking the whole region into consideration, Greater New Haven is the same size as Indianapolis, approximately 370 sq. miles.

With this manageable geographic area, some businesses launch in New Haven and move to the ring cities; some employees work in New Haven and reside in the suburbs; and there is a constant flow of goods and services throughout the region. In many ways, the fifteen towns of Greater New Haven operate as a "city" with interdependent parts contributing to the whole.

The 2018 CEDS subcommittees considered the region as a whole in the SWOT analysis. Some key points include:

Strengths

1. Prime location on the eastern seaboard
2. Highly educated workforce
3. Stable employer base
4. Access to a huge consumer market
5. Exceptional quality of life

Weaknesses

1. State government's fiscal instability

2. Mismatched workforce skill set
3. Aging transportation infrastructure

Opportunities

1. Transit oriented development along the Hartford line
2. New collaborative efforts with colleges and universities to provide programming specific to our job market and narrow wealth disparity
3. Revisit our established bus and rail transportation assets and reimagine a more efficient design that supports the needs of our residents
4. Underutilization of the Port of New Haven

Threats

1. Aging population
2. Increased competition for businesses and talent
3. Increased taxes
4. Limited housing inventory

In 2019, these items are largely unchanged, though we have implemented many programs to mitigate the weaknesses and threats and optimize our strengths and opportunities as documented below.

DEMOGRAPHICS

The region's population, number of households and educational attainment remain stable. Both median household income and media age increased slightly.

Population ⁽²⁰¹⁶⁾ ¹	569,788
Households ⁽²⁰¹⁶⁾ ¹	220,490
Per Capita Income ⁽²⁰¹⁶⁾ ¹	\$35,166
Median Household Income ⁽²⁰¹⁶⁾ ¹	\$66,893
Median Sales Price Single Family Homes – New Haven County ⁽²⁰¹⁸⁾ ²	\$210,000
Median Age ⁽²⁰¹⁶⁾ ¹	40
Largest Population ⁽²⁰¹⁶⁾ ¹	New Haven, 130,405
Smallest Population ⁽²⁰¹⁶⁾ ¹	Bethany, 5,521
Workforce Population (age 16+) ³	310,435

EDUCATIONAL ATTAINMENT OF THE POPULATION 25 YEARS AND OLDER, 2016

Greater New Haven region⁴

	Population 25 Years and Older	High School		College	
		No Diploma	Diploma	Associates Degree	Bachelor's Degree or Higher
Region	395,056	27%	29%	7%	37%
Connecticut	2,466,129	28%	27%	7%	38%

1 U.S. Census Bureau, Census 2000 (Tables DP-1 & DP-2), 2010 U.S. Census Demographic Profile Data (Table DP-1), 2006-2010 American Community Survey 5- Year Estimates (Tables B19013 & B19301), and 2012-2016 American Community Survey 5-Year Estimates (Tables B01003, DP02, DP05, B19013, B19301)

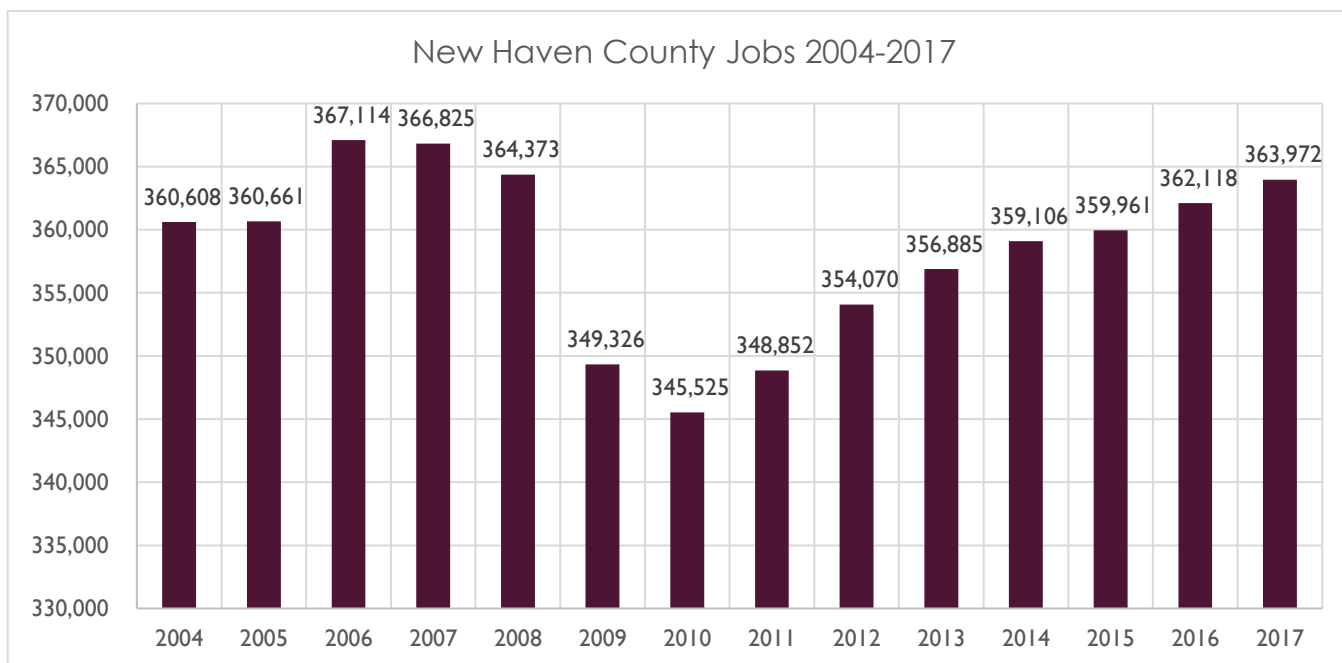
2 Berkshire Hathaway Home Services, New England Properties, 4th Quarter 2018 Market Report New Haven County

3 Connecticut Department of Labor, Labor Force 2018 Annual Average

4 U.S. Census Bureau, 2012-2016 American Community Survey 5-Year Estimates (B15002)

JOB RECOVERY

New Haven County employment continues to recover from the 2010 low of 345,525. As of 2018, we are still lagging the 2006 high of 367,114.⁵



In 2019, we anticipate 1800-3000 new jobs coming online with the opening of a second Amazon distribution center in the region.

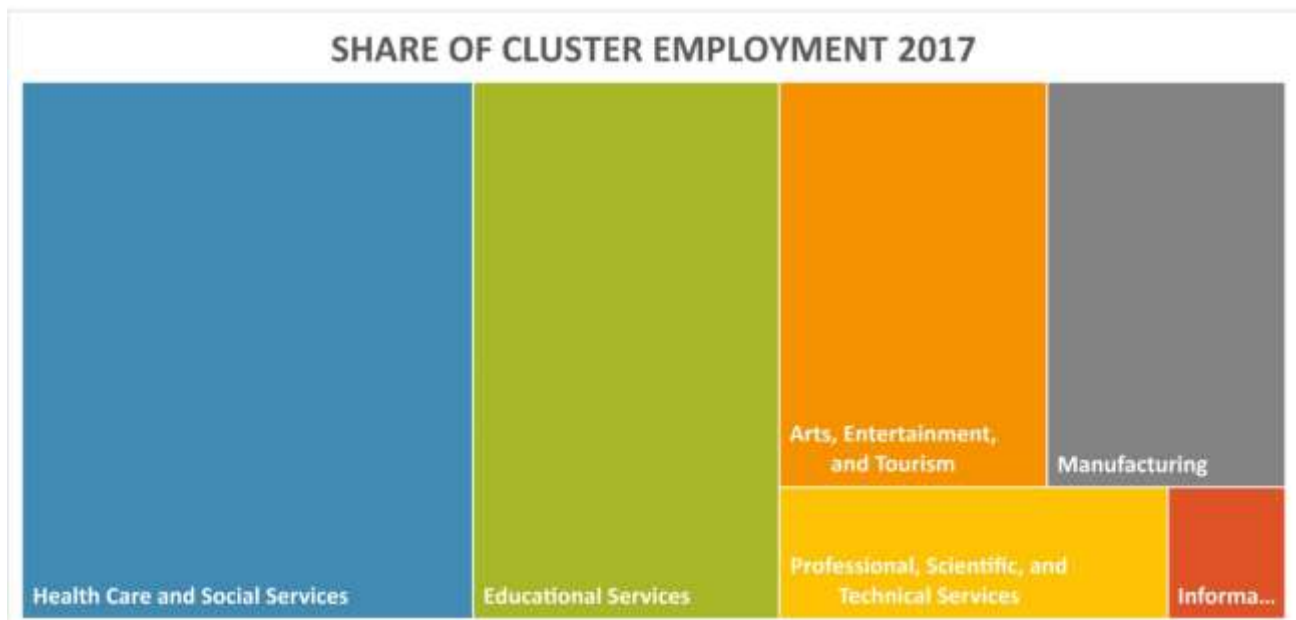
⁵ StatsAmerica, statsamerica.org/USCP, 2018

TOP ECONOMIC DRIVERS

1. Healthcare, Biomedical & Life Sciences
2. Higher Education
3. Arts, Entertainment & Tourism
4. Advanced Materials & Manufacturing

Since the 2018 Update, the top economic drivers are unchanged. In terms of economic resiliency, the region is fortunate to have a diverse economy with no single sector dominating the region.^{6, 7}

Annual Industry Distribution of Jobs by Key Sectors	Jobs	%
Health Care and Social Services	75,462	35.70%
Educational Services	51,232	24.24%
Arts, Entertainment & Tourism	33,787	15.99%
Manufacturing	30,097	14.24%
Professional, Scientific, and Technical Services	15,958	7.55%
Information	4,827	2.28%
Total Number of Jobs in Key Sectors	221,363	



⁶ StatsAmerica, statsamerica.org/USCP, 2018

⁷ StatsAmerica, statsamerica.org/USCP, 2018

HEALTHCARE AND LIFE SCIENCES

Healthcare and Life Sciences serve as major drivers in the local economy. Yale New Haven Health System (YNHHS), one of the largest and highly respected healthcare delivery networks in the country, continues to expand its services and investment in the community. YNHHS is constructing a brand-new regional distribution center that will service its Connecticut, Rhode Island and New York facilities. The site, located in West Haven, will be home to future development by YNHHS.

The Life Sciences also continue to thrive in Greater New Haven. We entered the year more than a little disappointed by Alexion's decision to move its headquarters to Boston. The reality was much less dire. The move relocated the business leadership and administrative staff. The research division remained in New Haven, representing approximately 500 jobs. The space vacated by Alexion has been leased by other companies and institutions focused on bioscience R & D.

Yale University and the Yale School of Medicine continue to draw National Institute of Health Funding on par with Seattle, Boston, Baltimore, Durham, Philadelphia and other cities with advanced bioscience centers.⁸

News

[Valisure Launches First Online Analytical Pharmacy That Chemically Validates Medications; Valisure Expands Capabilities to Test Medications for Cancer Causing Contaminants Implicated in Recent Recalls](#)

As demonstrated by the recent recalls of certain blood pressure medications (including Valsartan and Losartan), the quality of drugs does vary. Valisure provides batch-level testing before distribution.

[Arvinas](#)

⁸ National Institute of Health, report.nih.gov/award, 2018

Arvinas had a banner year with an IPO of \$120 million along with the U.S. Food and Drug Administration (FDA) clearing the company's investigational new drug application (IND) for ARV-110, an oral androgen receptor (AR) PROTAC™ protein degrader, for the treatment of patients with metastatic castration-resistant prostate cancer (mCRPC).

Biohaven Receives Authorization to Proceed from FDA and Doses First Subject with BHV-3500, Third-Generation, Small Molecule CGRP-Receptor Antagonist

Biohaven's initial clinical trial of BHV-3500 will explore a range of doses using intranasal administration. Intranasal BHV-3500 utilizes the Aptar Pharma Unit Dose System (UDS), which is designed to enable systemic delivery of drugs without the need for injection or administration by a healthcare professional. This device is approved with multiple drug products marketed in the United States using the Aptar technology and is used by thousands of people every day.

Cybrexa planning first human clinical trial of cancer drug

Cybrexa Therapeutics, a biotechnology company, hopes to start a trial in early 2020 to test its first drug, a therapy that targets the cells of solid tumors to prevent damage to healthy tissue. Cybrexa has now identified a lead candidate for the drug, CBX-11, marking a major milestone for the company.

BioXcel Therapeutics Receives FDA Fast Track Designation for BXCL501 for Acute Treatment of Agitation

The FDA has granted fast track designation for BioXcel's Therapeutics investigational drug BXCL501, a proprietary sublingual film of dexmedetomidine, for the treatment of acute agitation.

Biohaven's Verdiperstat Receives Orphan Drug Designation from FDA for Multiple System Atrophy

Biohaven received orphan drug designation from the U.S. Food and Drug Administration (FDA) for its product candidate verdiperstat (previously BHV-3241), a novel myeloperoxidase (MPO) inhibitor, for the treatment of multiple system atrophy (a progressive neurodegenerative disorder).

HIGHER EDUCATION

The region hosts eight colleges and universities, including two law schools, two medical schools and the world-renowned Yale University. The University of New Haven is home to the Henry C. Lee Institute of Forensic Science. Although not a true cluster, the education sector is a main economic driver, producing a well-educated workforce, while employing over 30,000 people and having a total economic impact of over \$2 billion annually.

These institutions continue to be dynamic partners in solving workforce issues. Recent programs include:

- BioPath (Bachelor's Degree) at Southern Connecticut State University
- Gateway Community College
 - Public Utility Management (Associates Degree)
 - Computer Science Certificate
 - Skill Up for Manufacturing
- Hospitality Careers Initiative Certificate at the University of New Haven

The region's colleges and universities also create many permanent and temporary jobs through facility investment.

- University of New Haven is proceeding with construction of the Bergami Center for Science, Technology, and Innovation, a 44,000-square-foot building that will house engineering and science labs, collaborative classrooms, and space for the Communication, Film, and Media Studies Department.
- Yale University
 - Schwarzman Center (\$150 million investment)
 - Yale Science Building (\$280 million investment)
 - 320 York Street Humanities Project (\$75+ million investment)

HOSPITALITY AND LEISURE

The leisure and hospitality sector is made up of two parts: the arts, entertainment, and recreation sector and the accommodation and food services sector. As of December 2018, statewide employment in the sector was 160,500, up 2% from December 2017.⁹

The lodging business is booming in Greater New Haven with thirteen hotel projects in the pipeline. With a solid mix of business and leisure travelers, the properties range from long-term stay hotels to independent boutiques. To support these properties, and the jobs associated with them, it is essential that destination marketing efforts be appropriately funded.

In recognition of the vital role travel and leisure play in Connecticut's economy, newly-elected Governor Lamont created an arts, culture and tourism transition team to analyze the current state of the industry and to make proposals for moving forward. In addition, the legislature created the Speaker's Blue Ribbon Panel on Tourism. Both initiatives included industry outreach and a final report.

Potential threats to the economic performance in this sector are a proposed hotel occupancy tax hike and uncertain funding for tourism marketing. In FY 2018, the lodging industry generated approximately \$130M in state occupancy tax. Despite the significant return on investment, the funding for tourism marketing is in flux. In 2012, the budget allocated \$15M for tourism marketing, in 2018 \$4.1M.

With the highest hotel occupancy tax in the nation and significantly lower investment in tourism marketing compared to our competitive set (Maine \$20M, MA \$10M, NH \$7.2M and RI \$5.5M), there is genuine concern that these decisions could negatively impact hotel development and employment in the sector.

⁹ Connecticut Department of Labor, www1.ctdol.state.ct.us/lmi/SecEmp.asp, April 2018

Connecticut consistently lags behind the rest of our New England competitive set in terms of RevPAR (revenue per available room). With appropriate tourism marketing funding, there is an opportunity to increase occupancy by drawing travelers from other states.¹⁰

ADVANCED MATERIALS AND MANUFACTURING

The manufacturing sector is facing an employment crisis. Our highly-educated workforce simply does not have the particular skills needed to work in the manufacturing sector.

Workforce Alliance (the local American Job Center) created a Skill Up for Manufacturing certificate program that is largely modeled after the Eastern Connecticut Manufacturing Pipeline which was designed to help Groton-based defense contractor Electric Boat find qualified candidates. The course topics include both general shop skills needed for a beginner level helper as well as apprentice level skills needed to start working independently as a semi-skilled manufacturing employee. The basic program can be completed in as little as five weeks. In April 2019, the Workforce Alliance Manufacturing Careers Partnership – Skill Up for Manufacturing was awarded \$3.45 million in state funding to continue and expand their manufacturing training initiative.

Public schools are engaging students earlier regarding manufacturing careers. North Branford's Project Lead the Way coursework has added engineering opportunities in this STEM program. Both Milford and Hamden have public technical high schools. While Milford has a waiting list, there are openings in Hamden's Eli Whitney Technical School. As part of Hamden's "Everybody Gets a Job" outreach program, career opportunities in various disciplines have been presented in evening sessions. The program has been successful in drawing large crowds to the events and parents, as well as students, are interested in the Skill Up offerings.

With the abundance of good-paying manufacturing jobs, vocational education and direct to career certificate programs are becoming more popular in the region.

¹⁰ 2016 Connecticut State Office of Tourism: Tourism Economic Impact Study

TECHNOLOGY SUPERCLUSTER

In January 2019, Quantum Circuits Inc. officially opened its New Haven development and testing facility for quantum computing. It includes 6,000 square feet of state-of-the-art laboratories and in-house manufacturing and it will house over 20 scientists and engineers. The company plans to grow significantly over the next several years, increasing both the size of the facilities and number of highly-skilled employees in New Haven. QCI is developing the first practical quantum computers. Quantum computing has the potential to enable calculations that are orders of magnitudes faster and more powerful than today's supercomputers for certain types of problems. Applications will include drug design for biotech, materials science, improved processes for industrial chemicals, fintech, logistics, machine learning, and energy. QCI's roots have always been in New Haven. The company is an example of Connecticut as a home for new and innovative technology, often with academic work at Yale contributing to the momentum.¹¹

Greater New Haven's tech sector primarily focuses on biotech and social impact tech.

Examples include:

- Butterfly IQ™ - an FDA approved personal ultrasound device designed to democratize medical imaging currently priced under \$2,000
- Veoci – a leader in emergency management and operations software
- SeeClickFix – a communications platform for residents to report non-emergency issues to local governments and resolve these issues in a cooperative and transparent environment

Workforce Development

In the fall of 2018, Holberton School opened its second U.S. location at District, a tech and innovation campus. Holberton School offers a two-year higher-education program which trains students to become highly skilled software and operations engineers through project-based and peer learning. The curriculum is designed for intelligent, passionate, dedicated and open-

¹¹ Quantum Circuits, Inc., quantumcircuits.com, January 2019

mindful students. The admission process is based only on talent and motivation, and not on the basis of educational degree, or programming experience. The school also offers two tuition payment options:

1. Pay tuition upfront
2. Deferred Tuition: Income Share Agreement (ISA) – this option allows students to pay tuition upon obtaining employment after graduation. The payment period is 42 months and is percentage of the student's salary¹²

Commercialization

According to filings made with the U.S. Securities and Exchange Commission, New Haven brings in half of state's startup funding of \$109 million in Q1 2019.¹³

Yale University is the primary source for technology transfer in New Haven. Since 2000, over 50 startups based on Yale IP in the New Haven area have raised over \$1 billion in venture capital and \$11 billion in public markets. In 2018, Yale Office of Cooperative Research and Yale Entrepreneurial Institute reported 1,371 cumulative active patents in 59 countries.¹⁴

EXTERNAL TRENDS & FORCES

Insufficient Developable Land

With our manufacturing past, Greater New Haven is home to many brownfields. The lack of available property for development is impeding on our ability to:

- Provide attainable housing
- Transfer research into production
- Attract businesses

State of Connecticut Budget Woes

¹² Holberton School, holbertonschool.com, April 2018

¹³ Yale Daily News, yaledailynews.com/blog/2019/04/17/new-haven-brings-in-half-of-states-startup-funding-in-q1/, April 17, 2019

¹⁴ Yale Office of Cooperative Research, ocr.yale.edu/sites/default/files/files/2018-infographic.pdf, April 2018

In light of the fiscal situation of Connecticut, many companies are unwilling to open, relocate or expand in Connecticut as they anticipate some of the tax burden will be shifted to corporations directly or indirectly through municipal property taxes. Existing companies are being offered extremely competitive packages to relocate to other states while local officials actively work to retain businesses in the region. The primary reason companies give for remaining in Connecticut are familial ties and the quality of life.

2019 may be a pivotal year in addressing the state's financial concerns, however a final budget is not expected until June.

REGIONAL PROJECTS

- The SCRCOG Agricultural and Cultural Asset Mapping project will be complete in June 2019.
- The SCRCOG Business inventory database will be complete in June 2019.
- The Haven/West Haven, a 100-store development, is moving forward.
- The Amazon Fulfillment Center is set to open in 2019 in North Haven.
- We continue to support Tweed New Haven Airport expansion efforts.
- Undertaking a Port of New Haven freight study with the Army Corps of Engineers.
- There are multiple housing projects (market and affordable) in the development pipeline.
- Elm City Innovation Collaborative provides entrepreneurial assistance with funding from CTNext.
- A Bio Incubator is slated for construction.
- Hotel development projects are planned in the following towns:
 - Branford - 3
 - East Haven - 1
 - Hamden - 1
 - Milford - 1
 - New Haven - 4
 - North Branford - 1
 - North Haven - 1

- West Haven -1
- Meriden Commons I is completed and Phase 2 is under construction.
- University will launch Yale Jackson School of Global Affairs in 2022.

COLLABORATORS/SUPPORTERS FOR ECONOMIC DEVELOPMENT

The list of partners in Economic Development is diverse and inclusive of businesses, municipalities, non-profits, community groups and more. Below is a partial list of REX's partners:

- Arts Council of Greater New Haven
- Arts Industry Coalition
- ABCT
- BioCT
- CBIA
- CEDAS
- CERC
- Community Foundation for Greater New Haven
- Connecticut Department of Economic and Community Development (CTDECD)
- Connecticut Lodging Association/American Hotel & Lodging Association
- Connecticut Office of Tourism
- Connecticut Port Authority
- Connecticut Technology Council
- CTNext
- Discover New England
- Elm City Innovation Collaborative
- Eversource
- Frontier Communications
- Gateway Community College
- Greater New Haven Chamber of Commerce
- MakeHaven
- Market New Haven
- Milford Progress, Inc.
- Municipal Economic Development Staff & Commission Members
- New Haven Festivals
- New Haven Manufacturers Association
- Regional Chambers of Commerce
- Regional Leadership Council
- South Central Regional Council of Governments
- Southern Connecticut Gas
- Southern Connecticut State University
- Tweed New Haven Regional Airport
- United Illuminating Company
- University of New Haven
- US Economic Development Administration

- US Environmental Protection Agency
- Workforce Alliance
- Yale University
- Yale-New Haven Health System

GOAL 1: BUSINESS DEVELOPMENT AND RECRUITMENT

Foster efficient business development, recruitment, access to jobs, wealth creation, and entrepreneurial activity throughout the region.

Objective 1: Actively engage our stakeholder network to support the targeted development and recruitment of high-value businesses in the region.

Action Items

- Identify best practices from towns that are described as “business-friendly” and share with all towns within the region. Completion: Ongoing
 - CEDAS is rolling out a best practices program in 2019. REX will promote the program to our towns.
- Act upon short-term recommendations obtained through interviews and outreach meetings, including increased support for anchor institutions, additional public relations efforts to promote the region, and building the workforce pipeline. Completion: Ongoing
 - See Workforce and Housing, Marketing, Communications, and Stakeholder Education for additional details.
- Provide entrepreneurial support in all sectors, directly and through referrals to other organizations. Completion: Ongoing
 - REX/EDC cohosts/sponsors entrepreneur events, including Startup Grind New Haven.
 - REX/EDC works directly with the Elm City Innovation Collaborative.
- Continue to engage key sectors and businesses through one-on-one conversations, professional meetings and networking events. Completion: Ongoing
 - REX actively participates in partner events.
 - REX actively participates in key industry events.

- Maintain communication with town economic development administrators and commissions through the Regional Economic Development Forum meetings.

Completion: Ongoing

- 2018-2019 REDFO presenters:
 - Jamison Scott, New Haven Manufacturers Association: Sector needs
 - Michael Harris, Elm City Innovation Collaborative: Bio sector needs
 - Dale Kroop, Town of Hamden: Defining our role as economic development professionals
 - Lynn Madden, APT Foundation: Opioid crisis
 - David Salinas, District: Site visit
 - Scott Dolch, Connecticut Restaurant Association: update
 - Emanuela Ceber, MGM Resorts: Proposed development projects
 - David Kooris, CT DECD: Statewide economic development update
 - Michelle Riordan-Nold, CT Data Collaborative: Resources for towns
 - JR Logan, MakeHaven: Site visit to recently expanded maker space

Objective 2: Collaborate with regional partners to provide access to and actively disseminate complete and accurate information on available resources and incentives.

Action Items

- Review and update the Regional and State Resources page on the REX website.
 - Completed.
- In conjunction with the Greater New Haven Chamber of Commerce, finalize the GNH Biz Resource online database.
 - Project discontinued.
- Increase the REX newsletter list by 2%. Completion: Ongoing
 - Achieved goal in 2018-2019.
- Post events, programs and media announcements on social media a minimum of three times per week. Completion: Ongoing
 - Achieved goal in 2018-2019.
- Continue active participation in associations, chambers of commerce and municipal economic development initiatives. Completion: Ongoing
 - Achieved goal in 2018-2019.

Objective 3: Advocate for business-friendly initiatives at the federal, state and local level that will encourage economic growth and vitality.

Action Items

- Support business-friendly initiatives through legislative outreach and community involvement. Completion: Ongoing
 - We receive monthly updates from representatives of our Congressional offices, Connecticut Conference of Municipalities (CCM) and Connecticut Council of Small Towns (COST) at SCRCOG meetings.
 - We co-hosted Tourism Works for Connecticut Gubernatorial Forum at the Connecticut Convention Center.
 - We met with Commissioner of the Department of Revenue Services regarding a short-term online booking tax model.
 - We met with Commissioner of Department of Economic and Community Development regarding the proposed increase in occupancy tax to 17% (B&Bs to 13% and apply the state sales tax on campgrounds) and decrease in statewide tourism marketing.
 - We met with DECD Deputy Commissioner David Kooris and the State Office of Tourism Director Randy Fiveash for update on statewide tourism marketing.
 - Visit New Haven participated in the Speaker's Blue Ribbon Panel on Tourism events and submitted written responses from VNH/REX.
 - Visit New Haven attended the Connecticut Office of Tourism Strategic Input and Planning Session.
 - Visit New Haven attended Connecticut Legislative Tourism Caucus meetings.
 - We attended CT Human Trafficking Council Meetings.
 - We attended Tourism Coalition meetings.
- Testify on relevant economic development issues. Completion: Ongoing
 - We provided testimony for:
 - Tweed New Haven Regional Airport
 - Hotel occupancy tax
 - Tourism marketing funding
 - The Graduate Hotel (formerly Hotel Duncan)

Participate as members of the Greater New Haven Chamber of Commerce Government Affairs Committee. Completion: Ongoing

- We participated in creating the Chamber's legislative agenda.
- We participated in monthly meetings.
- We attended the Annual Legislative Breakfast.

Objective 4: Expand global opportunities by forging economic and cultural ties in conjunction with our community partners.

Action Items

- Regularly attend national and international trade shows to promote our key economic drivers. Completion: Ongoing
 - We attended the following tradeshow:
 - 2018 BIO International Convention (Boston) in partnership with the Town of Branford and BioCT
 - Hannover Messe Tradeshow for Industrial Technology (Hannover, Germany)
 - IMTS 2018: International Manufacturing Technology Show (Chicago) with lead generator Andrew Clutz
 - International Council of Shopping Centers (ICSC) Tradeshow at the Javits Center (New York)
 - Medica Trade Fair (Dusseldorf, Germany)
- Host international travel writers and tour operators to familiarize them with the arts, culture, recreational and tourism assets of the region. Completion: Ongoing
 - At the Discover New England Annual Tourism Summit for international tour operators, we met with 45 travel and tour operators from the United Kingdom, Germany, Australia, Japan, The Netherlands, China, France, Italy and Ireland.
 - We hosted seven tour operators from Aer Lingus (Ireland).
 - We hosted Fairfax Media with tour operators from Ireland and Australia.
- Meet with visiting foreign delegations to promote the region. Completion: Ongoing
 - We attended an event hosted by the City of New Haven for a Chinese manufacturing company considering relocation opportunities in New Haven.

- We are connecting Yale New Haven Hospital with a manufacturer from Poland who is seeking a location for their US operation. This lead was generated from attending Medica in 2018.
- We attended the GNHCC Indonesian Business Development luncheon.
- We attended DECD Bio/Life Science Luncheon with the Hungarian ambassador.

GOAL 2: WORKFORCE AND HOUSING

Identify, stimulate and coordinate programs and services, ensuring that the region's residents have affordable access to the high quality training, education and housing opportunities they need to be productive members of emerging industry clusters in the regional economy.

Objective 1: Create a broad spectrum of career pathways within our key industry clusters to provide the opportunity for all to earn a livable wage.

- Create database of training and education resources for local economic development professionals and/or town planners. Completion: Ongoing
 - The committee is on its way to achieving this goal. Members are already reaching out to the other communities in the region to gather this information.
 - Regional Key Industry Cluster Meetings:
 - Workforce Alliance Manufacturing Pipeline
 - Bioscience Clubhouse speaker/workshop/network events held in collaboration with BioCT
 - Regional tourism meetings with the Governor's tourism transition team and the Speaker's Blue Ribbon Panel on Tourism
 - Develop marketing campaign for distribution to the public school system
 - Committee has initiated this program.
 - Workforce Alliance is identifying training gaps and opportunities for program expansion. Expected completion is late summer 2019.
 - The Town of Hamden has implemented an eight part series on workforce readiness. Information and videos of the events have been made available to economic development officials in each of the towns.
- Retain and attract young professionals. Build upon and promote Chamber and regional young professional organizations to develop additional programs, policies and

mentorships to attract, engage and retain young professionals in the CEDS region.

Completion: Ongoing

- Encourage Chambers of Commerce with young professional organizations to develop a SWOT analysis for retaining young adults in the region.
- Existing groups:
 - Emerging Professionals Inspiring Change (Milford)
 - Pulse (Greater New Haven)
 - SCYPE (Shoreline)
 - The Curve (Hamden)
 - Young Professionals' Alliance (Middlesex)
- Encourage the development/enhancement of mentoring programs within Chambers of Commerce.
- Prioritize education and training opportunities in collaboration with the evolving economy and prioritize the needs of the local and regional industry clusters.

Completion: Year 2

- Continue collaboration with private industry to make them a part of the town's workforce development initiatives.
 - Chambers of Commerce internship and career fairs.
 - Workforce Alliance's Project CEO, a work readiness/career development program for older youth.
- Utilize available public and private resources to support incumbent worker training for lifelong learning to assure marketable skills are maintained and earning potential is increased. Completion: Year 3

- All new Workforce Alliance programs must include career pathways. Currently planned are Metatronics and Welding programs for incumbent manufacturing workers.
- Workforce Alliance and regional partners will meet emerging workforce needs within priority industry clusters by publicizing innovative workforce development efforts at Gateway Community College, Middlesex Community College, Southern Connecticut State University, Albertus Magnus College, and area middle and high schools.

- Create and market collaboration among public and private sector partners to engage in discussion of critical school-to-work issues, such as STEM, Artificial Intelligence (AI), Internet Technology (IT) related education at all levels. Completion: Year 5
 - Workforce Alliance will conduct quarterly meetings in each school district between industry clusters and career counseling departments and parent organizations. This is currently being done in Hamden and Wallingford. The Amity Manufacturing Program will soon be added.
 - Regional partners will advocate for collaboration in each community with local chambers and trade organizations. Hamden and Wallingford, who have such programs, can assist with defining best practices.
- Prepare primary and secondary school students for college, internships, externships, apprenticeships or vocational/technical programs to meet existing, anticipated and emerging employment needs. Completion: Year 5
 - North Branford has implemented a manufacturing training program at its high school.
 - Eli Whitney Technical High School and Platt Technical High School offer a number of direct to career programs in manufacturing, automotive and healthcare.
 - Proposed tactics by Workforce Alliance:
 - Create database of existing career pathways programs in the public school system with completion by Year 5 in all school districts that cooperate. Wallingford's program is underway.
 - Develop Memorandums of Understanding between public schools, colleges and trade organizations for internship programs in workforce development in cooperation with colleges and universities.
 - Directly involve the local school systems, including vocational and parochial systems, into the Workforce series.

Objective 2: Enhance opportunities for attainable and affordable housing for all income and demographic levels.

- Create a data base for distribution that includes housing options related to location, cost and type. Completion: Ongoing

- There is an existing website, lowincomehousing.us/CT, that provides partial information.
- Create database and marketing plan for transportation options. Completion: Year 2
 - This will be a deliverable from the Move New Haven study due for completion in September 2019.
- Improve the quality, affordability, quantity and diversity of housing in the region. Seek design and funding opportunities for the region's communities to help the municipalities address the region's critical housing shortage at price points for service and technical workers, low and middle income families as well as for the Millennial-aged workforce. Completion: Year 2
 - In April 2019, the South Central Regional Council of Governments created a housing taskforce with representatives from each of the towns.
- Create a marketing plan for housing opportunities for all workers. Completion: Year 3
 - Pending funding.
- Create fundable strategy with stakeholders for improving public transportation through the region with state, federal and local partners for key clusters and considering east to west routes for workforce. Completion: Year 5
 - This will be a deliverable from the Move New Haven study due for completion in September 2019.
- Encourage real estate developers, municipalities, residents and local businesses to invest in and support diverse housing options for singles, couples, families, millennials, baby boomers and seniors in integrated communities. Completion: Year 5
 - Integrated housing is a priority for much of the transit oriented development in the region.
- Develop a transportation strategy aligned with priority clusters for the region and the towns. Completion: Year 5
 - In April 2019, the governor created a new position, senior coordinator to the governor on housing and transit-oriented development.

GOAL 3: INFRASTRUCTURE

Develop, maintain and effectively utilize a robust, integrated, multi-modal transportation, communications and information system that facilitates the efficient and convenient movement of people goods and data intra-regionally, inter-regionally and internationally.

Objective 1: Enhance multi-modal transportation network.

Support a variety of transportation options that are conducive to regional growth, including rail, bus, and air travel. Promote expansion of transit-oriented development (TOD) surrounding the region's multi-modal transportation hubs. Replicate existing bicycle and pedestrian infrastructure throughout the region.

- Completion of the Move New Haven study by CTTransit to create more frequent and efficient bus service. Completion: Year 2
 - The Move New Haven study to create more frequent and efficient bus service is on-schedule and due for completion in September 2019.
- Continue to participate in NEC Future to create a high-speed rail network in the region, supporting. Completion: Ongoing
 - The region has ongoing participation in the NEC Future Northeast Corridor Rail Project.
- Continue efforts to modernize and expand Tweed New Haven Airport and provide advocacy for collaborations with the State and other regional airports. Completion: Ongoing
 - In 2018, American Airlines added a weekly flight to Charlotte and increased the number of available seats on their daily Philadelphia service. Annual enplanements increased by more than 35% from 28,511 in 2017 to 38,668 in 2018. In addition, Shoreline Aviation provides service to New York's 23rd Street seaplane base during the summer.

Attraction of additional carriers and more robust service requires the paving of the runway safety areas. The runway length restrictions can be eliminated by a court judgment or removal of a statute. Both processes are underway. The Connecticut Airport Authority and the Tweed New Haven Airport Authority set up a working committee to explore the possibility of having the CAA either

acquire or enter an operating agreement for Tweed New Haven Regional Airport.¹⁵

- Discussions are underway with the Connecticut Airport Authority to explore management possibilities.
- Market the region's commuter rail and TOD assets to attract potential businesses/investors. Completion: Ongoing
 - The New Haven-Hartford-Springfield rail line opened in June 2018. June through October 2018 saw 222,000 passenger trips. Greater than anticipated demand issues are being addressed to reduce overcrowding.

Increased replacement of train services with bus service has negatively impacted usage of Shore Line East. The Connecticut Department of Transportation is working to restore full service.

- Coordinate with CTTransit to evaluate upgrades and the potential for service improvements. Completion: Ongoing
- Continue engagement of public and private partners in planning an economic development strategy around the NHHS, Shoreline East, and Metro-North rail corridors, highlighting opportunities for TOD. Completion: Ongoing
- Engage CT Transit and private sector to evaluate opportunities to increase transit ridership. Completion: Ongoing
- Encourage the design and development of Complete Street policies. Completion: Ongoing
- Support upcoming projects in West Haven including Allintown conversion to College Village, The Havens, Stiles and TOD along with the replacement of the Kimberly Avenue Bridge. Completion: Ongoing

Objective 2: Expand freight capacity of the region.

Continue to support the expansion of the Port of New Haven, which currently has a channel depth of 35 feet and width of 400-800 feet. The U.S. Army Corps of Engineers is studying the

¹⁵ transtats.bts.gov/Data_Elements.aspx?Data=1 Bureau of Transportation Statistics

potential of deepening the channel to 42 feet, which would increase the economic potential of the port.

- Support investments in the Port of New Haven to expand freight capacity through dredging of the channel, as well as economic development opportunities in Milford and West Haven. Completion: Ongoing
 - Connecticut Port Authority Five Year State Maritime Strategy released in August 2018 is consistent with the objectives set forth in the region's CEDS.
 - A study by the Army Corps of Engineers is underway to determine the value of deepening the Port of New Haven to 40+ feet, providing better rail access and the development of the area surrounding the port.
- Garner support and advocate for continued federal funding to perform shipyard improvements and ship repairs. Completion: Ongoing
- Continue supporting the State and port land owners in connecting the Port of New Haven with the Providence and Worcester Railroad. Completion: Ongoing
- Coordinate site development projects with transportation improvement plans contained in the region's Long-Range Transportation Plan. Completion: Ongoing
- Support efforts to establish dependable funding sources for State Special Transportation Fund. Completion: Ongoing
 - The state legislature is looking to secure funds for a transportation lockbox to increase investment in transportation throughout the state.
 - To establish dependable funding sources for State Special Transportation Fund, the state is increasing the portion of the rental care tax to transportation funding in 2021.

Objective 3: Support continued Investments in roadways and bridges.

- Support significant regional transportation projects such as the reconfiguration of the 1-91/1-691 merge and rehabilitation of the West Rock Tunnel. Completion: Ongoing
 - Hero's Tunnel, located in West Rock, is undergoing exploratory drilling and planning for route alterations during repairs.
- Maintain balance between local and regional interests in considering approval of infrastructure projects and when advocating for infrastructure funding. Completion: Ongoing

Objective 4: Optimize water infrastructure and partnerships for maximum economic impact

- Identify municipalities that are ready and able to fund, or regionally partner in funding water system expansion into unserved areas. Completion: Ongoing
 - Regional Water Authority is working with a municipality that is currently in the design phase.
- Determine if state or federal funds are available for economically-driven water system expansion. Completion: Ongoing
- Identify and target industries that are water-use intensive and develop a long-term marketing strategy to attract these industries. Completion: Ongoing
 - Regional Water Authority is researching target industries.
- Determine the areas within the South Central Connecticut Regional Water Authority's (RWA) service area that have the potential for commercial and industry growth but are not currently served by RWA's distribution system. Completion: Ongoing
 - Regional Water Authority is looking to improve service in Cheshire and North Haven. Adding a second line is in the longer term budget for Rt. 10

Objective 5: Ensure the entire region has adequate telecommunications infrastructure to support modern communication and information systems.

- Determine access and infrastructure requirements in the region. Completion: Year 3
 - Internet Access Rankings: Connecticut ranked #18 overall, #1 for broadband access, #42 ultra-fast internet access in 2018 for connectivity by US News¹⁶
- Organize partners to develop regional access. Completion: Ongoing
- Support and promote efforts to enhance faster and cheaper broadband service to the region. Completion: Ongoing
 - Access to highspeed internet access, particularly in cities, is a high priority for state government.

Objective 6: Support the expansion of natural gas mains and explore green energy options

- Continue to advocate and educate for natural gas use throughout the region. Completion: Ongoing
 - Connecticut Natural Gas and Southern Connecticut Gas have completed 10,000 conversions each year since 2014 in the state.

¹⁶ U.S. News & World Reports, [usnews.com/news/best-states/rankings/infrastructure/internet-access](https://www.usnews.com/news/best-states/rankings/infrastructure/internet-access)

- Eversource Energy added 21,292 new natural gas customers between 2014 and 2017 statewide.¹⁷
- Market energy efficient programs. Completion: Ongoing
 - The 2018 State Energy Efficiency Scorecard by the American Council for an Energy-Efficient Economy ranked Connecticut 5th in the nation.¹⁸

GOAL 4: REAL ESTATE, LAND USE AND SUSTAINABILITY

Developable land is an extremely limited resource for the region. It is critical that the region continue to embrace and adopt strategies that focus on cleaning-up contaminated sites, support effective and efficient development plans, and protect resources that add to the region's overall sustainability.

The actions recommended by the committee align with SCRCOG's regional Plan of Conservation and Development that are available for review at scrcog.org.

Overall Activities

- The Brownfield Revolving Loan Fund has distributed over \$1.1 million to current brownfield projects. The total fund is \$1.2 million.
- We followed up on the Atlantic Wire Project with a progress meeting.
- The ground-breaking ceremony at Mill River occurred.
- The ribbon-cutting for Phase II of the Hamden Business Incubator occurred.
- We attended a site visit to 169 Henry Street.
- The Town of Hamden is collaborating on the Connecticut Brownfields Initiative. 201CBI is a dedicated, engaged coalition of industry, academic, community, and government partners to advance remediation of Connecticut's brownfields and benefit community development and environmental quality. REX provided our 2014 brownfield inventory.
- The South Central Regional Council of Governments (SCRCOG) completed the 2018-2028 update to the Plan of Conservation and Development in July 2018.

¹⁷ New Haven Register, July 2018 nhregister.com/business/article/Natural-gas-conversions-less-than-originally-13086472.php

¹⁸ American Council for an Energy-Efficient Economy, The 2018 State Energy Efficiency Scorecard, aceee.org/sites/default/files/publications/researchreports/u1808.pdf/

The annual update will be completed in July 2019. The full report can be found at scrcog.org.

- o Branford created \$1M fund to counter sea level rise.
- o Sustainable CT (sustainablect.org) offers a voluntary certification program to recognize thriving and resilient Connecticut municipalities based on the following criteria:
 1. Thriving Local Economies
 2. Well-Stewarded Land and Natural Resources
 3. Vibrant and Creative Cultural Ecosystems
 4. Dynamic and Resilient Planning
 5. Clean and Diverse Transportation Systems and Choices
 6. Efficient Physical Infrastructure and Operations
 7. Strategic and Inclusive Public Services
 8. Healthy, Efficient and Diverse Housing
 9. Inclusive and Equitable Community Impacts
 10. Innovation Action

Of the region's fifteen municipalities, four have bronze certification, six are registered to participate and five have not registered.

Objective 1: Support brownfield redevelopment.

- Identify properties within the region with the greatest potential for return on investment that are vacant or underutilized due to environmental contamination and would have strong market demand for reuse if remediation occurred. Criteria should include the potential for development and private investment and proximity to public transit. Completion: Year 2
- Develop Best Practices Guide and facilitate regional information meetings on Brownfield redevelopment through REX/REDFO. Completion: Year 2
- Identify opportunities for inter-local collaboration on large Brownfield redevelopment projects. Completion: Ongoing
- Identify and advocate for funding opportunities for environmental assessment and clean-up and seek to aggregate resources for use in the region and promote those resources region-wide. Completion: Ongoing

- Partner with local, regional, state and federal agencies/organizations to open discussions and identify strategies for reuse with property owners of key contaminated sites including the use of Brownfield Land Banks, Municipal Development and Redevelopment Plans. Completion: Ongoing
- Actively market target sites. Completion: Ongoing

Objective 2: Define and encourage next generation mixed-use and transit oriented development.

- Opportunity Zones provide substantial tax benefits to investors who invest in “opportunity funds.” The opportunity fund model encourages investors to pool their resources, increasing the scale of investments being made in historically underserved areas. These funds may invest equity into businesses, real estate or infrastructure. Capital gains invested via an opportunity fund as equity in qualified projects or businesses will defer capital gains taxes on the initial gains invested and will be exempt from capital gains on the investment in the Opportunity Zone Fund. Four South Central Connecticut municipalities have designated opportunity zones. Completion: Ongoing

Municipality	Number of Zones
Hamden	1
Meriden	3
New Haven	7
West Haven	2

- Through a series of events, share the resource list of next generation mixed-use and TOD opportunities with partners. Completion: Year 2
- Develop a marketing plan for sites that could support these types of development. Completion: Year 2
- Develop a resource list of next-generation mixed-use combinations and TOD that take advantage of unique municipal characteristics and target emerging industry needs. Completion: Year 2
- Create Resource Team of professionals to define next generation mixed-use combinations and TOD and provide technical assistance to municipalities. Completion: Ongoing

Objective 3: Develop regional resource use and awareness.

- Increase awareness of and support preservation of open space including working farms. Completion: Ongoing
- Develop resources to support a sustainable, diverse, and equitable local food system that includes production, food processing and distribution infrastructure and encourages food based business development as well as creative reuse of existing infrastructure. Completion: Ongoing
- Monitor use and support the development of recreational land use assets including parks, greenways and bicycle/pedestrian trails. Completion: Ongoing
- Encourage connectivity of trails and of recreational assets to transportation nodes and centers for economic activity including commercial centers and downtown areas. Completion: Ongoing
- Monitor and support energy usage and reliability and encourage development of renewable energy assets for residential, commercial, and agricultural uses. Completion: Ongoing
- Facilitate coordinated efforts and information sharing among municipalities, organizations, and agencies toward improved storm preparation along the coastline and climate change resilience.

GOAL 5: MARKETING, COMMUNICATIONS AND STAKEHOLDER EDUCATION

Harness collaborative and resourceful marketing and communications opportunities and partnerships that support economic success while raising the awareness of stakeholders in and outside of South Central Connecticut.

Objective 1: Encourage local economic activity by educating stakeholders about resources and funding opportunities.

- Establish a quarterly, regional marketing meeting with economic development professionals and business leaders to disseminate information to other stakeholders. Completion: Ongoing
 - We host Regional Economic Development Forums (REDFO).
 - We participate in the Regional Quarterly Marketing Meeting at CERC.
 - We attend monthly Economic Development Committee meetings at Greater New Haven Chamber of Commerce.
- Partner with the Greater New Haven Chamber of Commerce to launch a new website dedicated to sharing resources with regional businesses. Project discontinued.

- Share best practices from the CEDS Strategic Planning Committee on a dedicated webpage via REX Development. Completion: Ongoing
 - We will promote the CEDAS best practice program (2019 release).
 - We sponsored 7 Startup Grind events.
 - We distributed bi-weekly e-newsletters with relevant news and events.
 - We managed the Brownfield Revolving Loan Fund.
 - We actively participated in a wide variety of community meetings.
 - We maintained on-line calendar of events.
 - We participated in, and promoted to our constituents, Economic Development webinars including EDA 101 with Chivas Grannum.

Objective 2: Market the region to attract and retain businesses at the local, state, national and international level.

Develop a regional "pitch" to share at meetings, trade shows, and conferences.

Completion: Year 2

Partially complete

- Design an impactful one-page handout that conveys the strengths of region to the business community as outlined in the CEDS. Completion: Year 2
- Solicit formal feedback from students, young professionals, start-ups, and established business entities who have elected to or are planning to relocate outside of Connecticut. Similarly, collect feedback from stakeholders who have recently relocated to Connecticut. Completion: Year 2
 - We have initiated communications with young professional groups at regional chambers.
- Additional Actions:
 - Global recruitment brochure
 - International Council of Shopping Centers (ICSC)
 - 2019 Greater New Haven Visitors and Relocation Guide
 - Cultural and agricultural asset brochures
 - We worked with CT DECD to provide all Greater New Haven content, images and video for their new business recruitment website, choosect.org.

- Our media hits and inquiries included AAA World, Focus on Connecticut, French Guide Vert by Michelin, Hartford Courant, Hotels Online, Reader's Digest, WhereTraveler.com, Group Tour Magazine, Milford Mirror, NBC Connecticut, New Haven Biz, New Haven Independent, New Haven Register, Popular Mechanic, Smart Meetings magazine, The Day, The Sunday Times (Ireland), This Magnificent Life, Westfair Online, WSHU, and WTNH.
- Our communications outreach delivered the following results:
 - Newsletter subscribers, 7% increase in 2018
 - Social media – Economic Development & Tourism, 6.85% increase in 2018
 - Website visits – visitnewhaven.com and rexdevelopment.com (June-December 2017 vs. June-December 2018), 17% increase in traffic
 - CT Visit webpage views – (June-December 2017 vs. June-December 2018), a 4.86% increase

Objective 3: Grow tourism marketing in conjunction with the State of Connecticut Office of Tourism.

- Refresh/replace the REX Development website. Completion: Year 2
 - The project has been initiated.
- Refresh/replace the Visit New Haven website. Completion: Year 2
 - The project has been initiated.
- Establish a brand for Greater New Haven to strengthen State brand. Completion: Ongoing
 - The State Office of Tourism is responding to Governor's tourism transition team and Speaker's Blue Ribbon Panel on Tourism recommendations.
 - We represented the region at 4 tourism marketing meetings for the Speaker's Blue Ribbon Panel on Tourism.

EVALUATION MEASUREMENTS

Each committee identified specific tasks and timeframes to support their goals and objectives. The measures of success of these efforts will be collective as there is tremendous interdependency between the sectors, external factors and available resources.

- Increase the number of new businesses by 2% annually.
The number of new businesses registered with Secretary of State increased by 8.95% in 2018 over 2017.¹⁹
- Reduce regional unemployment to not exceed the national unemployment rate.
 - The regional annual average unemployment rate was 4.0% while the U.S. unemployment rate was 3.9%.
- Dredge the Port of New Haven to 42 feet by 2020.
 - The Army Corps of Engineers is currently performing a study on the Port of New Haven.
- Increase median household income by 2% annually.
 - The regional median household income increased 1.8% (using US Census data for 2015-2016).
- Decrease number of people living below the poverty level by 1% annually.
 - The number of people living below the poverty dropped from 13.6% in 2016 to 11.0% in 2017, a 19.11% drop in poverty.²⁰
- Increase enplanements at Tweed New Haven Regional Airport by 5% annually.
 - Annual enplanements increased by more than 35% from 28,511 in 2017 to 38,668 in 2018. Although the number of flights did not increase, American Airlines increased the number of available seats with larger aircraft based on market demand.
- Increase number of airline carriers at Tweed New Haven Regional Airport to 3 by 2020.
 - Tweed currently has one year-round and one seasonal airline.
- Increase the REX/EDC/VNH newsletter subscription list by 2% annually.
 - Newsletter subscribers increased by 7% in 2018.
- Increase website visits to REX, VNH and Greater New Haven section on ctvisit.com by 5% annually.

¹⁹ Connecticut Data Collaborative, ctbusiness.ctdata.org/#/compare-towns

²⁰ StatsAmerica, statsamerica.org/USCP, 2018

- visitnewhaven.com and rexdevelopment.com experienced a 17% increase in traffic in June-December 2017 vs. June-December 2018.
- CT Visit Greater New Haven webpage experienced a 4.86% increase in views in June-December 2017 vs. June-December 2018.
- Increase housing starts by 2% annually.
 - The number of housing starts decreased from 712 in 2016 to 482 in 2017.²¹
- Increase number of trade shows by two events per year.
 - Added one tradeshow in 2018, Medica in Dusseldorf, Germany

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²¹ https://portal.ct.gov/DECD/Content/About_DECD/Research-and-Publications/01_Access-Research/Exports-and-Housing-and-Income-Data