



City of Bristol POCD Study

Report of Findings

market research
conducted by ::



Submitted :: November 25, 2014
Confidential & Proprietary

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Research you can trust

GreatBlue provides reliable, actionable research and analytics to help organizations identify, address and improve their offerings to key constituents. With more than 35 years of experience in diverse markets, GreatBlue effectively yokes this knowledge to correlate general attitudes and perceptions with the behavioral trends seen within our clients' studied populations.

At GreatBlue, we foster a corporate culture of “clients first” to not only help our clients think beyond today, but to ensure our account teams anticipate client needs to better and more efficiently serve their expectations.

We consider our clients to be our partners and serving their needs to be paramount - standing behind our research is one way we assist our clients in meeting their compliance and regulatory obligations.



Experience. Professionalism.

Our staff of experienced researchers are trained before each project to ensure they are familiar with the client, the context of the research and the respondents sought.

We are representing your company -
and we take that seriously.

Project Overview

- GreatBlue was commissioned by Planimetrics to conduct comprehensive market research to understand City of Bristol residents' ideas and opinions regarding the City's long range plan.
- In order to service that need, a telephone survey methodology approach was employed to capture a better understanding of existing perceptions and ideas in regards to the City of Bristol, as a whole, as well as better understand existing opinions for the City's future planning .
- The outcome of this research will serve to better define relevant opportunities at hand thus creating a strategic roadmap for the City of Bristol to improve their service to residents while planning for the future.

Areas of Investigation

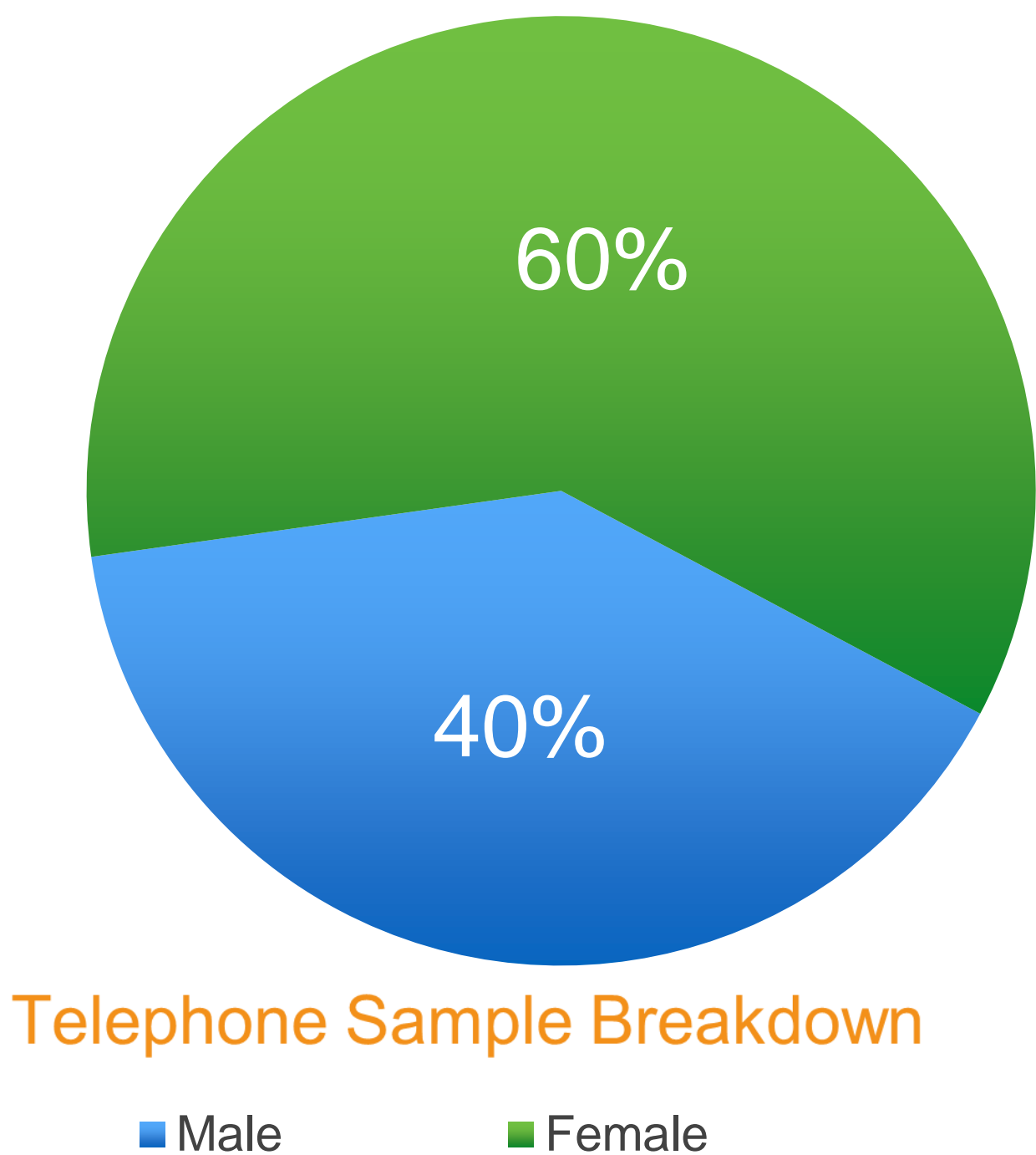
- The 2014 City of Bristol POCD Study employed a quantitative research methodology that addressed the following topics:
 - Reasons for City of Bristol residency and future plans for occupancy;
 - Measuring resources important to the community and what improvements can be made;
 - Measuring the mixture of housing in Bristol today and what residents plans for the future;
 - Overall satisfaction with the types of businesses in the city and suggestions for future planning;
 - Rating services and the overall quality of life in the City of Bristol today; and
 - Demographics.

Research Methodology

Item	Quantitative Interviews (N=408)
Methodology	Telephone survey
Instrument Length	66 possible questions
Instrument Structure	Primarily close-ended with variable open-ended questions
Incentive	None
Sample	Procured Random Digital Dial Land-Line and Cell Phone Records
Quality Assurance	Personnel and Computer-Aided platform
Margin of Error	+/- 4.8%
Confidence Level	95%
Fielding	Nov 7 - Nov 18, 2014

Telephone Sample Distribution

Representing 8 unique age categories, these categories reflect a proportionate to population contribution based on recent census data for the City of Bristol.



Ages	Totals (N=408)
20 to 24	6.1%
25 to 34	15.9%
35 to 44	17.6%
45 to 54	22.3%
55 to 64	17.6%
65 to 74	10.3%
75 to 84	6.6%
85 or over	3.4%

Key Learnings



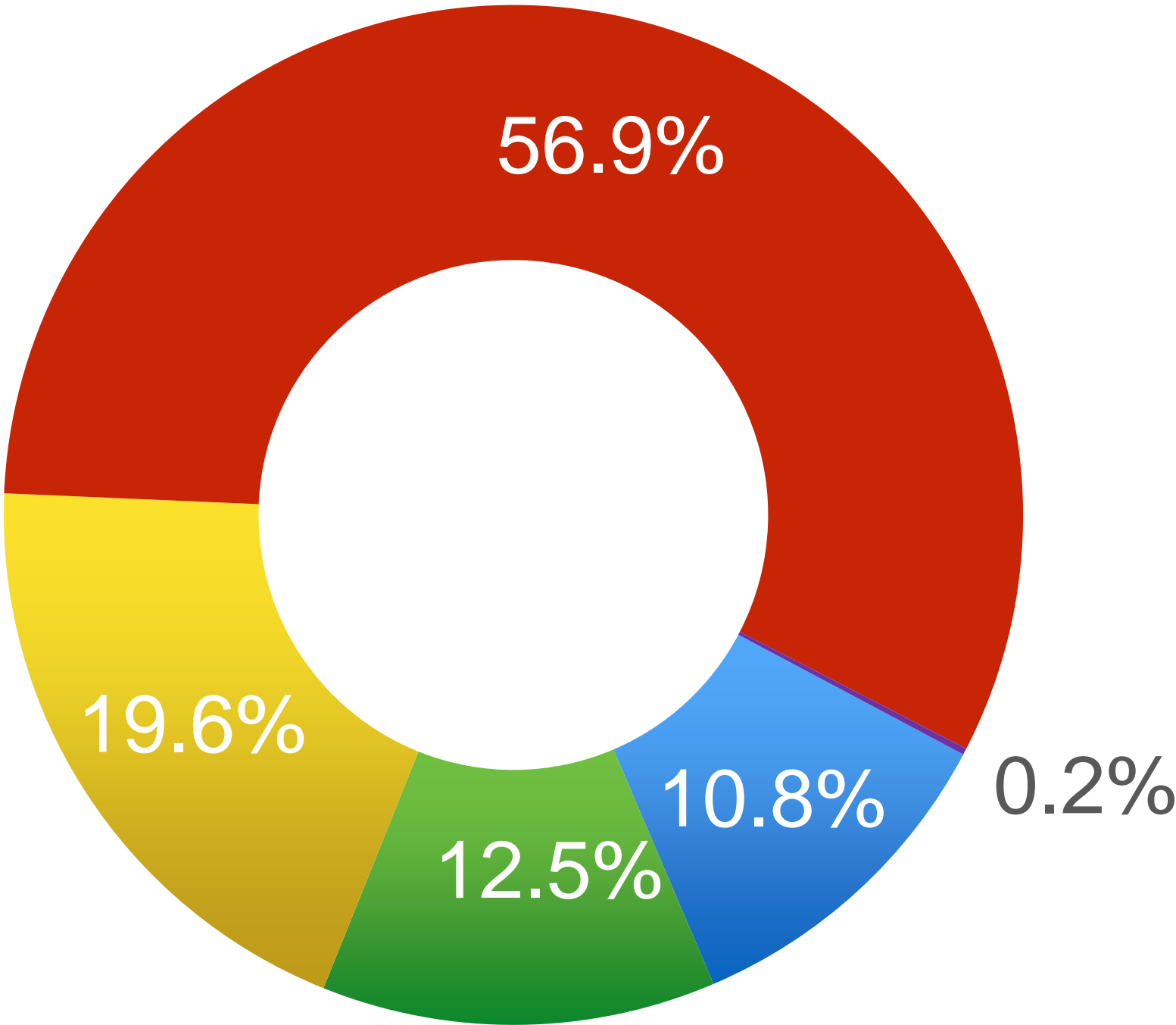
Summary Learnings

- While a majority of respondents cited that they see themselves living in Bristol five or ten years from now, a quarter of respondents said that they would not be living in the City. Similarly, slightly over one quarter of respondents cited that the quality of life in Bristol is either declining or has not changed, but remained poor.
- It was noted throughout the study that respondents saw importance in the revitalization of the Downtown area through additional entertainment, recreational activities, and small retail stores or shops being brought to the Downtown area.
- Additionally, it was noted that renovation of blighted buildings, and the reduction of crime (especially in the West End) would improve the quality of life in the City of Bristol, and help the success of a Downtown revitalization.
- Taxes were determined to be one of the most important issues facing the town; and lowering taxes was reported as one of the top agenda items the town could address to improve the quality of life.
- Findings suggest that there may be an opportunity to develop more affordable housing for first time buyers and the elderly. Findings also suggested that respondents feel there may be too many lower end houses, apartments and condominiums.
- A high frequency of respondents cited that they are planning to move to a single family home that is either smaller or larger within the next five to ten years.

Bristol Cultivates Life-Long and Long-Time Residents



Please tell me approximately how long you have lived in Bristol?



- Five years or less
- Eleven to twenty years
- Six to ten years
- More than twenty years
- Don't know/refused



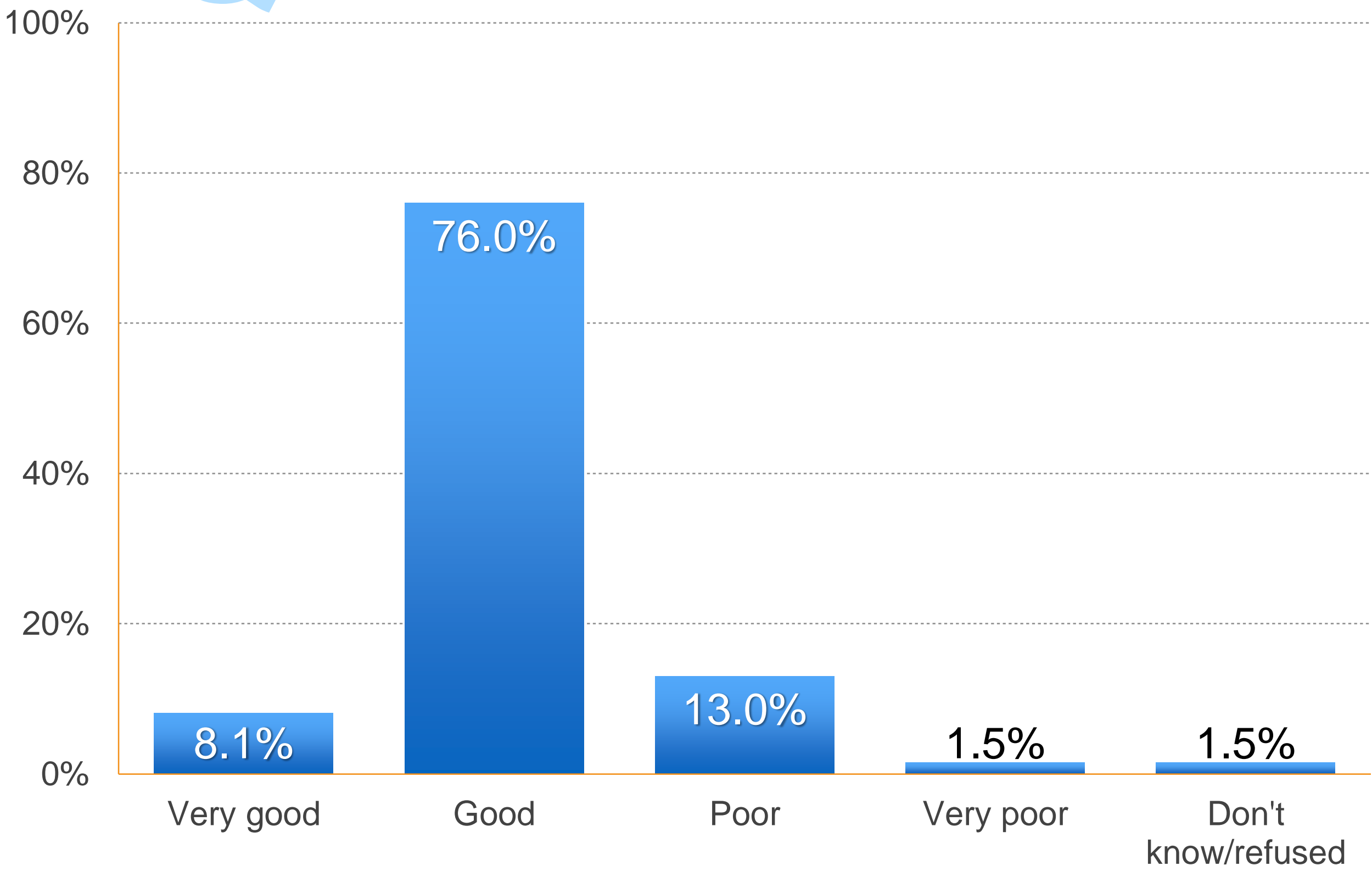
What was the main reason for you moving to Bristol?

Reason for moving to Bristol	Total (N=408)
Location (close to work/close to family/close to highways)	49.3%
Was born here	31.9%
Affordability	6.4%
Neighborhood (Nice neighborhood)	5.4%
Amenities (Education system/recreational facilities)	3.4%
Community (Character, feeling)	2.0%

Good Quality of Life; With Opportunity to Improve



How would you rate the overall quality of life in Bristol?



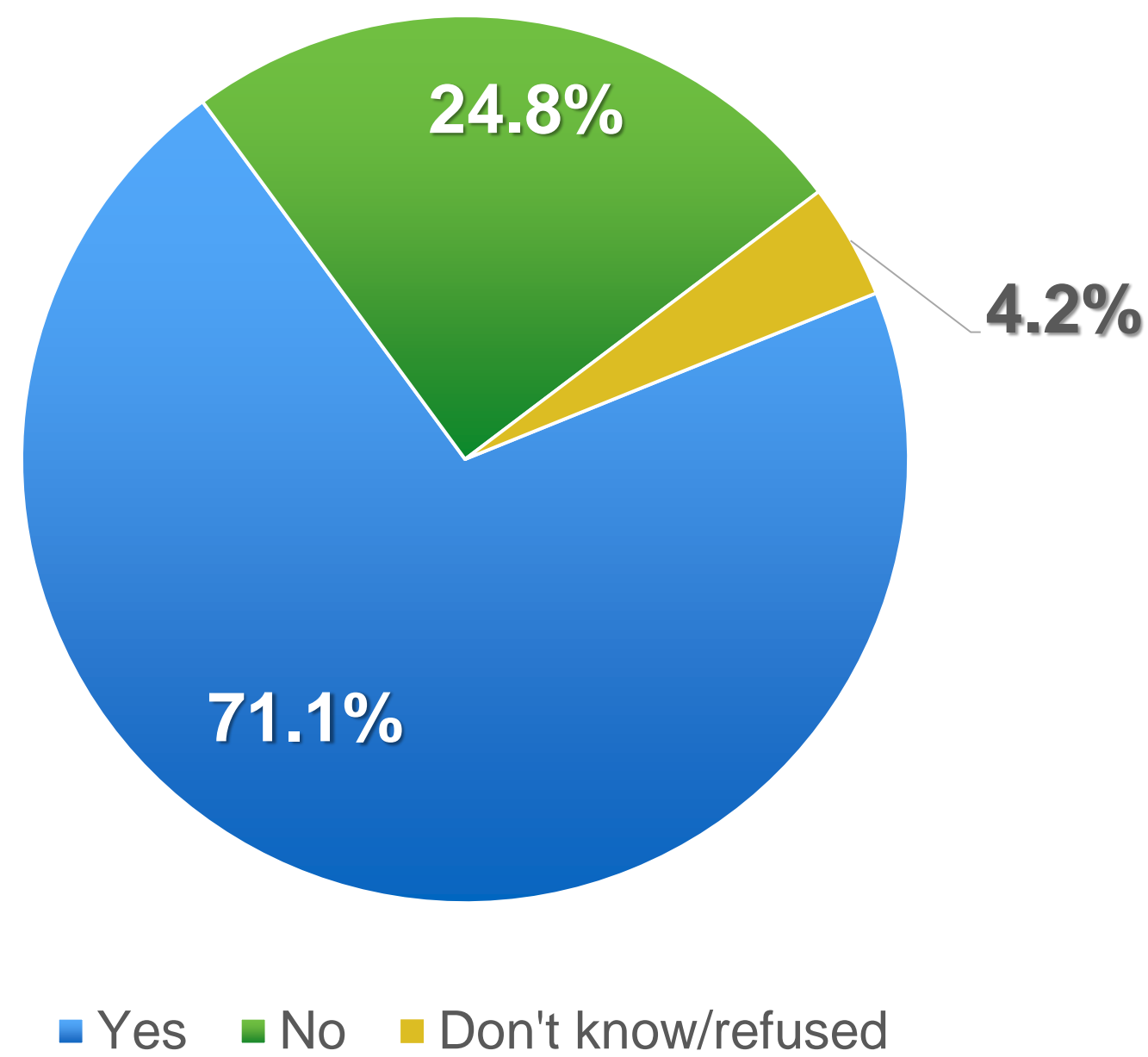
If there was one thing you could change in Bristol, what would it be?

Change	Total (N=408)
Downtown development/improvement	12.0%
Nothing/no improvements needed	10.8%
Crime rate/ drug selling/safety	8.6%
Lower taxes/tax structure	7.8%
The roads/route 6/overall infrastructure	7.4%
Local government/city management/resource allocation	5.6%
Additional recreational activities	5.1%
Business development/more stores	5.1%

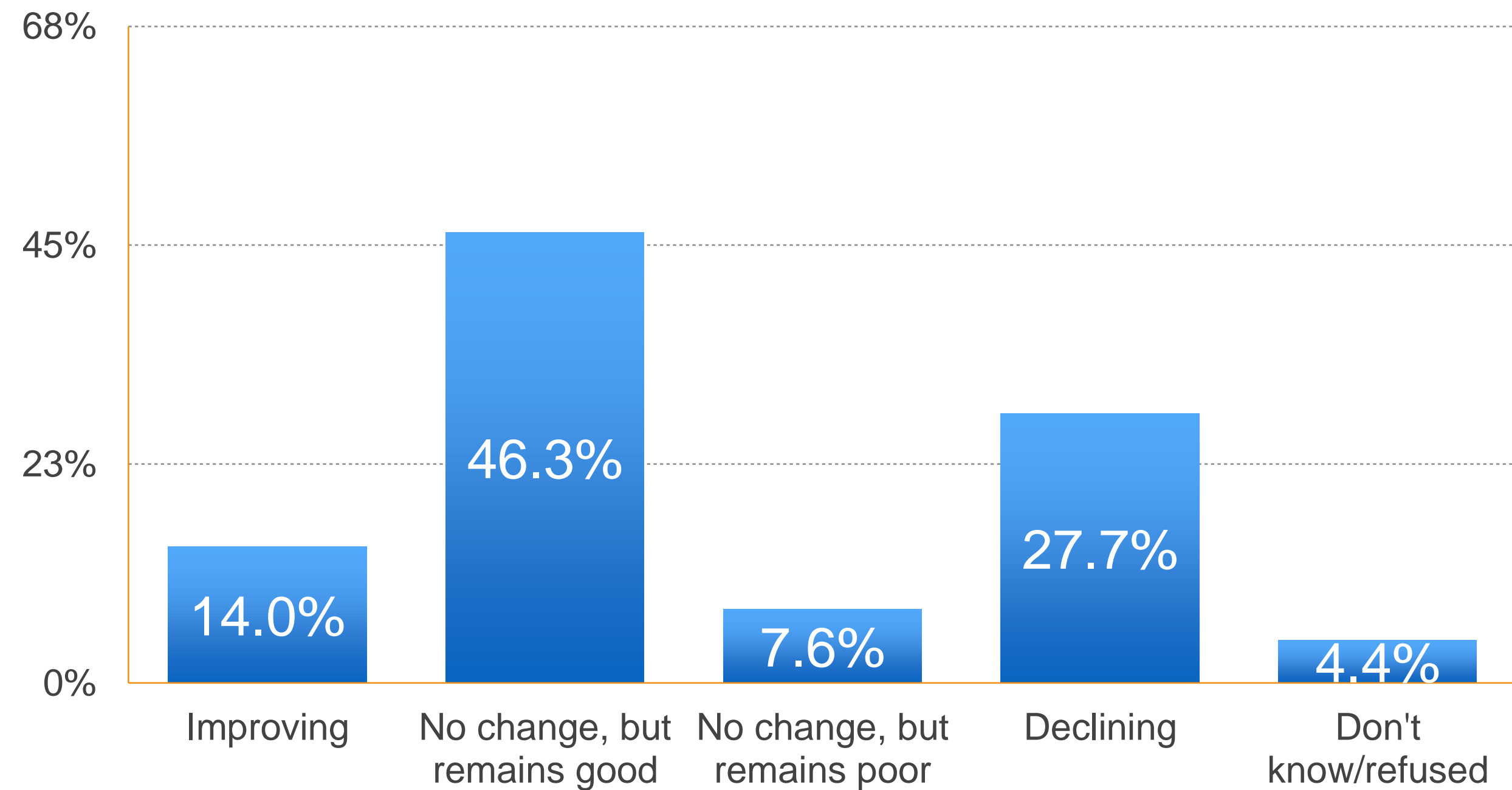
Overall Quality of Life Linked with Future Plans

While the majority of respondents reported an overall good or improving quality of life in Bristol; a similar percentage of respondents who reported that the quality of life was poor or declining in Bristol also said they could not see themselves living in Bristol in the next ten years.

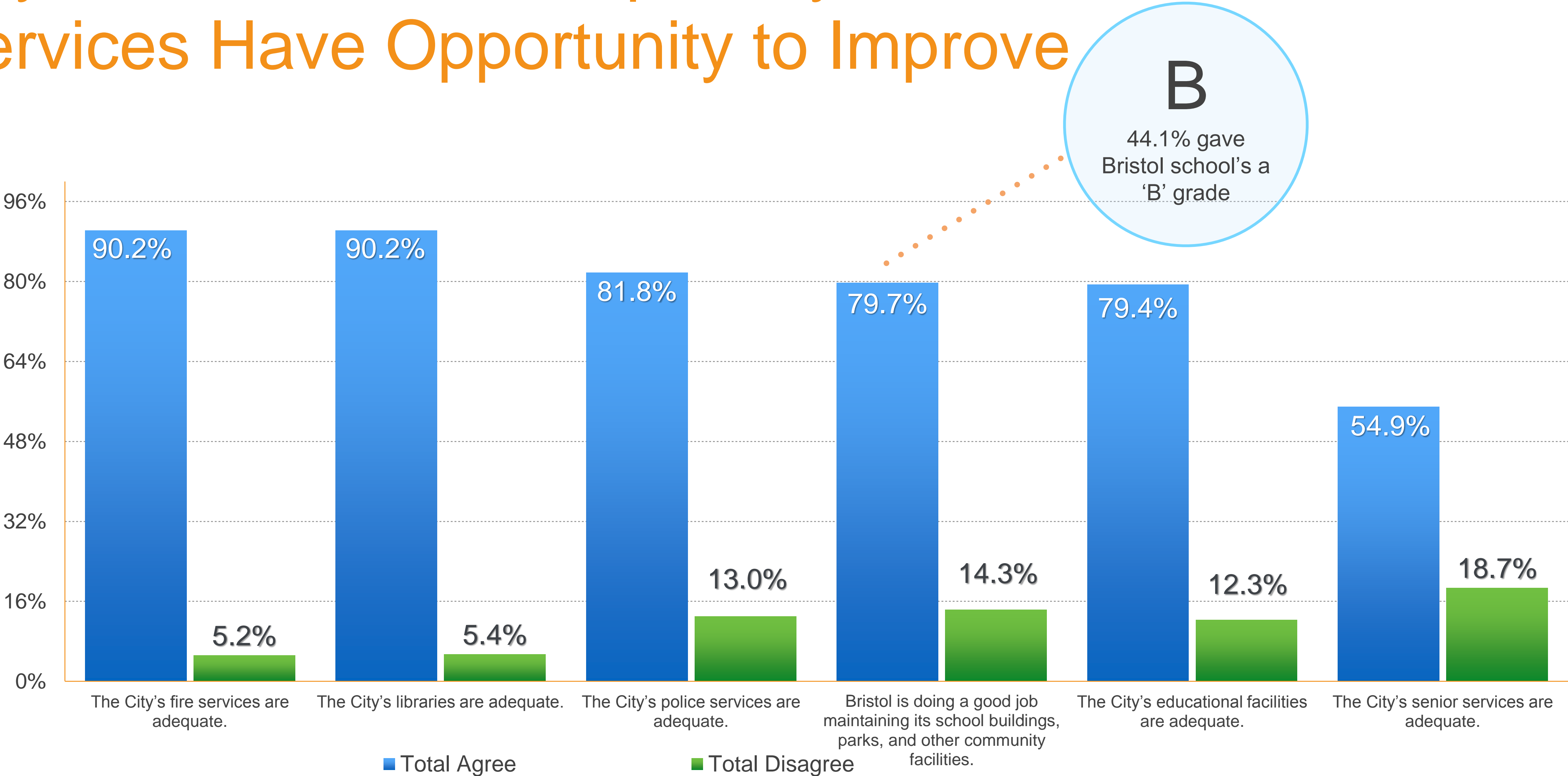
Q Do you see yourself living in Bristol five to ten years from now?



Q Would you say that the overall quality of life in Bristol is ...



City Infrastructure Adequate, yet Education + Senior Services Have Opportunity to Improve



Development + Revitalization Tied to Quality of Life

While taxes and cost of living remained a paramount concern, opportunities exist to improve the quality of life by revitalization and economic development throughout the City and in the Downtown area.

Q What do you feel is the most important issue facing the City of Bristol today?

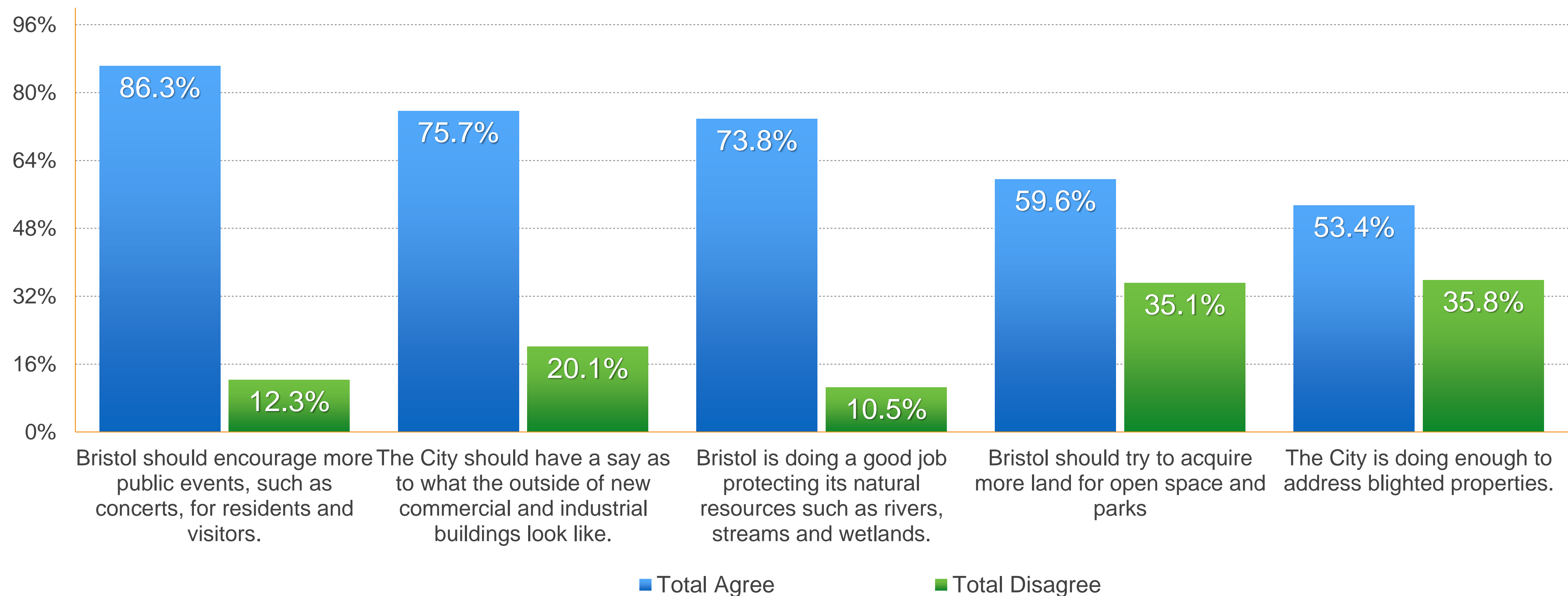
Most Important Issue	Total (N=408)
Downtown revitalization/development	18.4%
Taxes	15.7%
Don't know/refused	13.7%
Crime rate/drug problem/poor emergency response	11.0%
Economic development/job creation	8.1%
Education/school system	5.1%
Politics/poor management/lack of urgency	3.2%
Improve roads/route 6/overall infrastructure	3.2%

Q What do you feel is the one thing the City could be doing to improve the quality of life in Bristol?

Improving Quality of Life	Total (N=408)
Don't know/refused	27.0%
Lower taxes/cost of living	14.7%
Revitalize downtown/more stores	13.5%
Reduce crime/better police presence/clean up the city	11.3%
Additional recreational activities	7.4%
Economic development/increased job creation	6.4%
Improve the roads/route 6/overall infrastructure	3.9%
Improve education/school system	2.9%

Development Should Focus on Entertainment + Renovation of Blighted Property

Findings suggest that respondents would like the City to do more to address blighted properties; and were split on the purchase of open land. They would also encourage more opportunities to increase entertainment options in the City.



Additional Entertainment Options Wanted

Q Tell me if there are too many, or about the right amount, or too few of the following types of businesses in Bristol today.

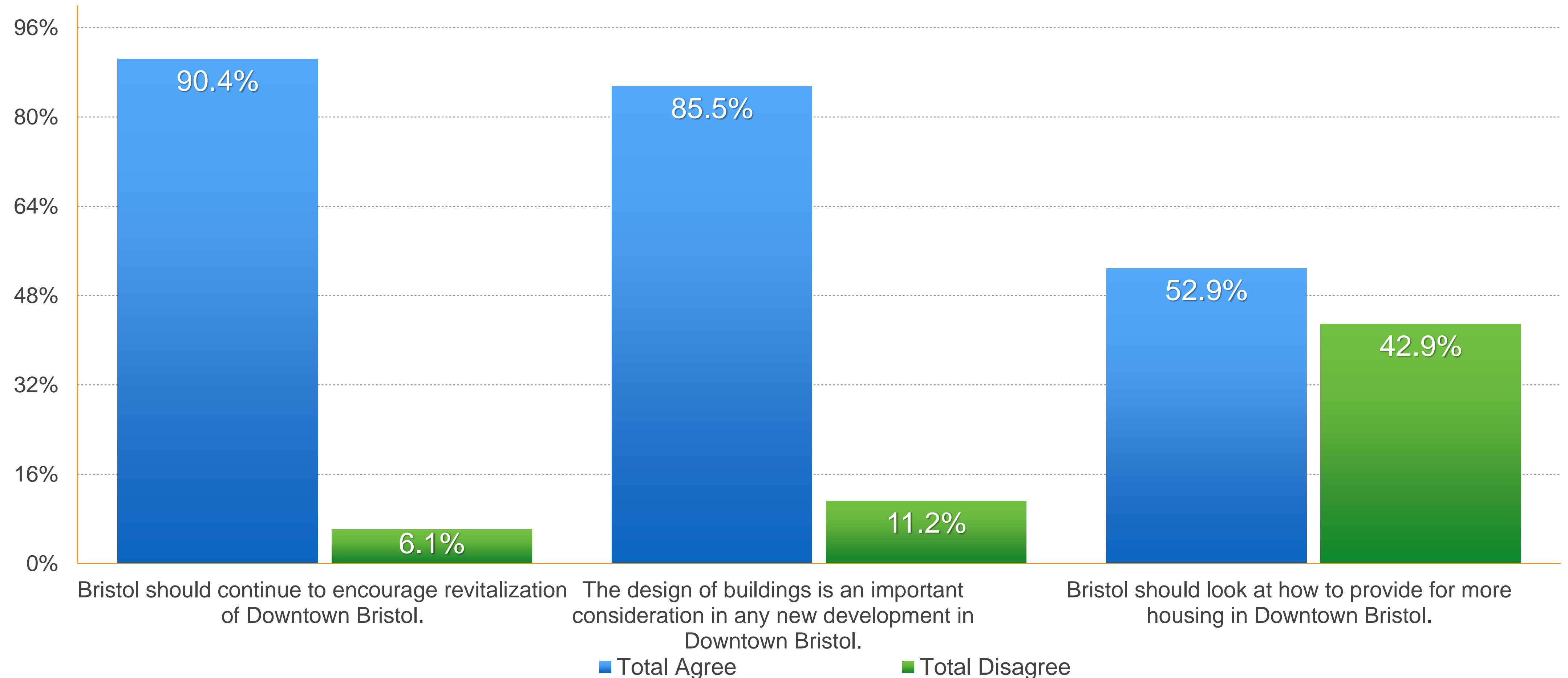
Respondents went on to report that there are “too few” entertainment options in the City of Bristol.

It was also cited that small retail stores and tourist attractions would be welcome additions to the city as well. These avenues of development are not mutually exclusive and can aid in each other’s success.

Business types	Too Many	About Right	Too Few	Don't Know
Entertainment options (music, movies, plays, etc.)	---%	13.2%	84.3%	2.5%
Small retail stores or shops	4.9%	24.5%	68.9%	1.7%
Tourist attractions	0.2%	34.8%	60.5%	4.4%
Large retail stores	10.0%	31.9%	55.6%	2.5%
Technology related firms	2.5%	25.2%	53.4%	18.9%
Hotels	2.9%	44.4%	47.8%	4.9%
Light industrial facilities	3.4%	33.8%	45.6%	17.2%
Heavy industrial facilities	4.9%	34.1%	42.9%	18.1%
Small business offices	3.4%	42.4%	41.4%	12.7%
Large business offices	6.1%	40.0%	40.2%	13.7%

Downtown Could be Focal Point of Development

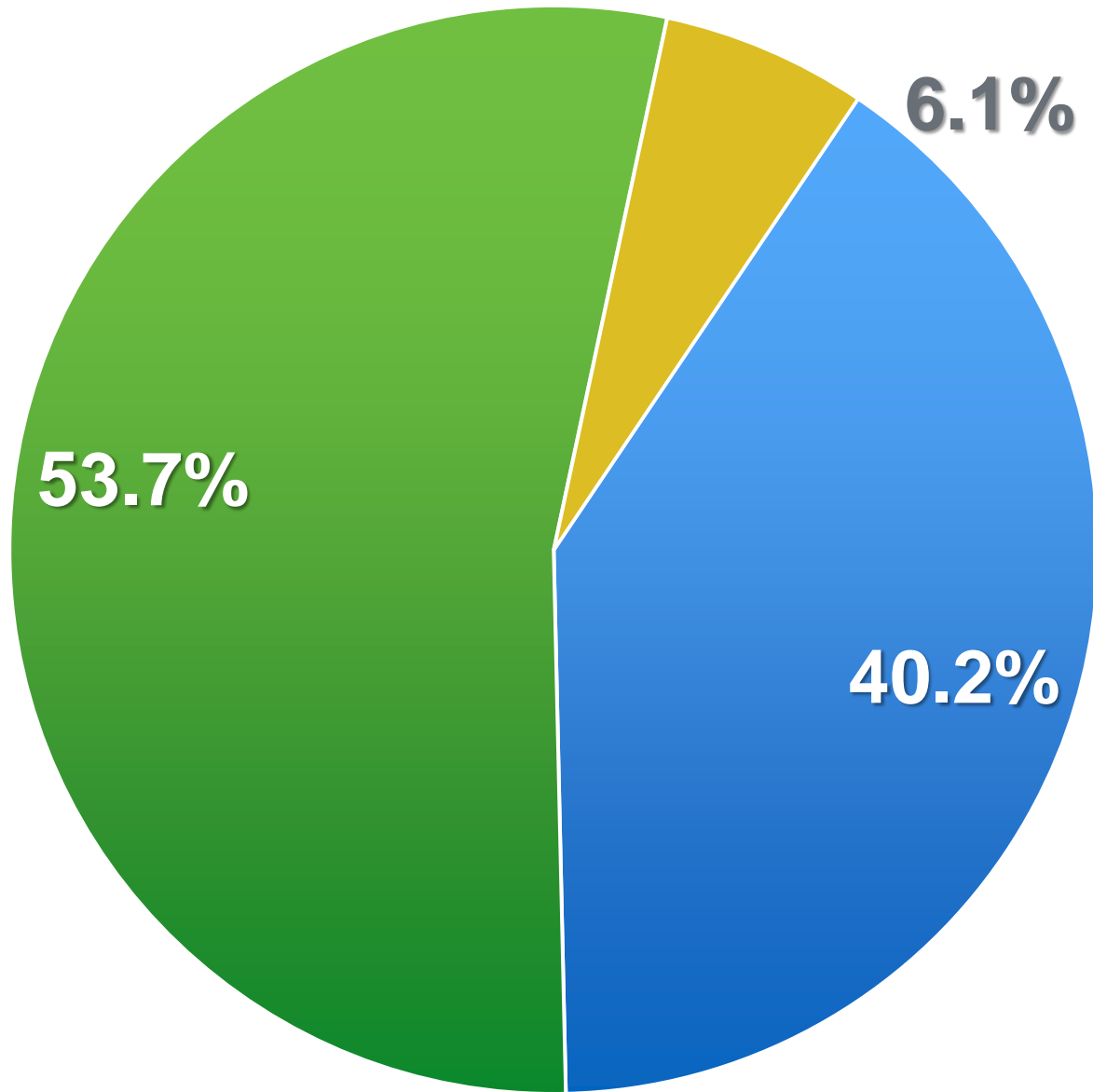
An overwhelming majority of respondents continued to cite that the revitalization of the City's Downtown is critical to them. Development should be focused on commercial space, while housing in the Downtown area should be less important.



Housing Trending Towards Single Family Homes

The top two responses for respondents citing that they would consider moving within the next five to ten years was either to a larger or smaller single family house. While respondents did report a need for further senior services and housing, most did not envision themselves moving into an active adult community. This implies they too could be looking for single family homes.

Q Are you considering moving to a different home within the next five to ten years?



■ Yes ■ No ■ Don't know/refused

Q Please tell me what you think your next housing choice will be.

Next housing choice	2014 (N=189)
Move to a larger single family home	30.2%
Move to a smaller single family home	23.8%
Don't know unsure	12.2%
Move to a rental apartment/townhouse	11.1%
Move to an active-adult (55+) community	6.3%

Housing Opportunities on Both Ends of the Spectrum



Tell me if there are too many, about the right amount, or too few of the following in Bristol today.

“Affordable housing for first time buyers” was the housing unit with the second highest frequency of “too few” responses, following only “Affordable housing for elderly persons.”

Small, yet single family homes may have opportunity to capture both young families and empty nesters looking to relocate.

Bristol Housing Mixture	Too Many	About Right	Too Few	Don't Know
Affordable housing for elderly persons	4.2%	36.0%	43.6%	16.2%
Affordable housing for first-time buyers	4.9%	38.2%	39.7%	17.2%
Apartments	20.8%	46.1%	22.1%	11.0%
Lower end homes	22.3%	42.4%	19.6%	15.7%
Upper end homes	15.0%	48.5%	19.4%	17.2%
Single family homes	9.1%	62.0%	18.5%	10.5%
Condominiums	18.9%	51.2%	18.4%	11.5%

Considerations

Continue with the revitalization of Bristol's Downtown area. Findings suggest that residents would like to see Bristol's Downtown area become more of an entertainment destination, with small shops and recreational activities that are family friendly to support those entertainment options.

Develop or renovate on land with vacant or blighted buildings, which may aid efforts to lower the crime rate throughout the City especially in the West End neighborhood. In order for Bristol's Downtown to become a location that attracts not only residents in the City, but also drives residents from surrounding towns, Bristol needs to look and feel as secure as possible.

Taxes were brought up as a major issue facing the City. Also, "lowering taxes" were cited as one of the top responses for how the City could improve the quality of life. While many respondents eluded that they would like to see more small retail stores or shops in the town, a large frequency also reported that they would like to see more large retail stores. Attracting both large and small retail to the city can serve the purpose of both lessening the tax burden on the City as well as growing the culture.

Encourage the development of affordable single family housing for first time buyers without creating additional lower-end housing units. This will aid in maintaining both first time home-owners as well as empty nesters looking to downsize living in the City.

Thank you for selecting us!

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