CONTENTS

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EXECUTIVE SUMMARY

This Plan, the Downtown Gateway to the Waterfront Phase II, was prepared for the New York State Department of State with funds provided under Title 11 of the Environmental Protection Fund. It has been created at a time of change and opportunity, with redevelopment projects underway at the Glen Cove Creek Waterfront and at the Village Square in the heart of downtown.

This Plan serves to enhance the health and commercial viability of Glen Cove by attracting appropriate retail and integrating existing commercial nodes with those new developments, with an emphasis on the downtown.

This plan builds on the Downtown Gateway to the Waterfront Phase I, completed in September of 2008, which examined physical improvements that would strengthen the connection between the waterfront and downtown. It grew out of recommendations provided in the 2009 Master Plan for the City of Glen Cove and works within the goals of that Plan.

This Plan emphasizes a comprehensive blueprint for action, as a successful downtown and retail attraction effort relies heavily on fulfilling visitor and shopper expectations. When a district is failing to meet visitor expectations, retail attraction efforts flounder and every business suffers. The plan offers a clear and compelling case for specific improvements and actions that will not only strengthen Glen Cove's ability to attract retail to downtown, but ultimately strengthen the business environment for all downtown businesses.

Overview of Process

Magnusson Architecture and Planning, PC, Larisa Ortiz Associates and JGSC Group (the Consultants) were retained by the Glen Cove Community Development Agency (CDA) on behalf of the City of Glen Cove (the Client) in July 2012 to complete Phase II of the City's Downtown Gateway to the Waterfront Project. Building on Phase I, the purpose of this project is to accomplish the following:

- Assess existing real estate uses within the Study Area;
- Develop a marketing approach and implementation strategy that will attract appropriate private investment and;
- Coordinate the uses of the new development areas with established downtown businesses.

The Consultants were retained to complete the following tasks:

- An inventory and assessment of the existing real estate uses within the Study Area
- A market-based analysis, including an identification of market trends and potential
- A comprehensive consumer survey
- Analysis of demographic and trade area market data
- Competitive analysis of nearby retail centers and districts
- Identification of targeted retail categories for recruitment that reflect market potential and consumer demand, and that complement the downtown business mix and current inventory of available and anticipated retail spaces
- Development of recommendations for comprehensive actions that will improve the success of both retail recruitment and retention efforts in the short and long term

Subsequent to the delivery of this report, the Consultants will provide support for retail prospecting, including the delivery of the following:

- Prospect lists, using the targeted retail categories, to help jumpstart early retail recruitment efforts
- A marketing process aimed at the recruitment of retailers within desirable market niches, as well as a marketing materials package

The Consultants presented their findings to the Client at key junctures throughout the process, as well as to an Advisory Committee made up of local community leaders and Glen Cove City employees chosen by the Glen Cove Community Development Agency.

Overview of Findings from Analysis and Market Data

Demographics

A review of demographic data revealed that the City of Glen Cove has roughly half the population density than the average for all of Nassau County, with only 506 households per square mile, as opposed to 990 per square mile for the entire county. There is also a higher concentration of Latino residents in Glen Cove than in nearby areas.

The population of Glen Cove is significantly younger, on average, than in other nearby areas, and the City has a higher percentage of residents in the 20-24 and 25-44 age brackets. These age brackets typically spend more of their disposable income on retail goods and services than other age brackets. Thirty-one percent of households have children in Glen Cove. Median household income stands at $69,429/year.

Retail Categories with Unmet Demand

Consumer demand for retail goods and services measured per household in Glen Cove is $33,359/year, less than in surrounding communities. Categories with unmet demand include: Automotive parts and accessories; furniture stores; specialty food stores; gasoline stations; jewelry, luggage, and leather goods stores; sporting goods, hobby, musical instrument stores; general merchandise; full-service restaurants, limited-service eating places; drinking places (alcoholic beverages); clothing stores; and shoe stores. To determine which of these retail categories are the most appropriate for Glen Cove's recruitment efforts, additional factors have been taken into account, including survey responses, interviews, an analysis of competitive districts, and a physical analysis.

Physical Conditions

The examination of physical conditions in downtown Glen Cove has been done through a retail lens. Physical conditions in Glen Cove provide both opportunities as well as barriers to downtown success. For example, streets serve as important connectors, yet sometimes they also prove to be barriers, particularly for pedestrians. Pratt Boulevard, Brewster Street, and Glen Cove Avenue are wide, fast moving streets providing connections to and from downtown to surrounding communities. Yet Brewster Street forms a barrier between downtown and the Glen Cove Creek Waterfront. Glen Street and School Street are narrower, slower streets with building frontages forming a coherent street-wall, which begins to fray east of Pulaski Street. Downtown parking structures are also easy to access, however the perception of being unsafe in the garages discourages residents from parking there. There are also vacant, underutilized, and inactive spaces throughout downtown Glen Cove and along the connections between downtown and the waterfront, which serve as both deterrents and opportunity sites. Existing open spaces, including Pratt Park, provide excellent opportunities for connecting downtown and the waterfront through programming, and as a network of open spaces.

The Glen Cove Creek Waterfront

At build-out and occupancy of the Glen Cove Creek Waterfront, the combined new office worker, hotel visitor, and new resident consumer demand are conservatively projected to total $33.3 million/year. This represents a more than ten percent (10%) increase in annual consumer demand within the Glen Cove trade area. Expressed in average sales demand per square foot of $180/square foot in the Glen Cove trade area, the new demand could potentially support 185,000 square feet of new retail space.

Overview of Recommendations

Recommendations are divided into Retail Category Recommendations – the types of retailers to bring downtown – and Comprehensive Retail Strategies – programs and interventions that will improve the retail environment and connect downtown Glen Cove and the waterfront.

Retail Category Recommendations

Retail recommendations are based on consumer demand for retail goods and services measured per household in Glen Cove, as well as the level of demand for households in downtown's potential trade area: the 10- and 15-minute drive sheds. The analysis of demand is then layered with the results of a physical analysis, consumer survey and stakeholder interviews.

> **Retail Categories with Unmet Demand**
>
> Glen Cove:
> Furnishings, specialty food, clothing, restaurants
>
> 10-Min Drive Time:
> Auto, furnishings, food, clothing, restaurants
>
> 15-Min Drive Time:
> Auto, food, restaurants

Market data and consumer survey responses reveal that shoppers seek unique and distinctive retailers that complement an entertainment-anchored district. The following retail categories are recommended for downtown: **full-service restaurants, furniture and home furnishings, specialty food and evening entertainment offerings.** While there is an unmet demand for clothing/apparel in both the Glen Cove and 10-minute drive time shed, it is important that any retailer recruited offer **distinctive clothing and accessories** not commonly found in the region. These uses will complement the entertainment and restaurant offerings downtown and help build a unique Glen Cove brand that works to attracts visitors from the larger 15-minute drive shed.

Comprehensive Retail Strategies

The following retail strategy recommendations fall into four main categories and address the factors that retailers and developers take into account when making site selection decisions.

Objective #1: Improve and Manage Tenant Mix

Survey and market data reveal that the downtown retail mix is not meeting the needs of residents and visitors to Glen Cove. With the exception of restaurants, there is no significant cluster in any particular retail category to create a strong retail node, which would help Glen Cove draw from a larger trade area. The following strategies will ensure that Glen Cove will help improve the downtown tenant mix and increase the geographic pull of the district over time.

Strategies:

- Engage in comprehensive retail recruitment
- Develop and enforce design standards
- Preserve public gathering space
- Build a "Restaurant Row"
- Launch a business retention effort
- Reposition and rebrand downtown Glen Cove

Objective #2: Improve Connectivity and Access

Successful downtown retail districts are both convenient and safe places for people to shop, work and run businesses. Standard retail site selection criterion places a high value on convenience and access to target customers. The strategies outlined in this document will help the City address barriers to downtown connectively and access.

Strategies:

- Improve gateway and way finding signage
- Create multi-modal transportation connections to the waterfront
- Address pedestrian access for residential neighborhoods in the immediate vicinity of downtown
- Provide bike paths, bike parking, a bike store, and other amenities

Objective #3: Address Issues of Safety and Perception of Safety

The perception of safety is one of the most significant factors in successful downtown development. Concerns about safety resonate greatly with retailers, and addressing both perception and reality of safety is critical to create a supportive downtown business environment. The strategies outlined here focus the City's efforts on the areas of concern most frequently raised during the course of this study.

Strategies:

- Make parking garages feel safer with staffing, signage, lighting and other targeted improvements.
- Redesign, enhance, and activate alleys with lighting, plantings, and amenities.
- Make pedestrian street crossings safer through crosswalks that are more visible and tactile.

Objective #4: Improve Downtown Foot Traffic

The more places people have to comfortably walk to and from, the more willing they will be to park their car and stroll. Retailers also look very closely at downtown foot traffic when making site selection decisions, so creating incentives for people to come downtown is a critical component of the overall retail attraction effort. The following strategies can bring life to these inactive spaces and create a draw to downtown.

Strategies:

- Increase ambient and impulse entertainment offerings to increase shopping
- Incorporate "sales marketing," i.e. promotional events and activities that drive customer visitation to businesses, such as organized sales events, customer loyalty programs, etc.
- Use public art to fill gaps in the corridor and build on your successes

Conclusion

Downtown's ability to retain businesses and grow into a regional destination, in close coordination with development of the waterfront, will remain contingent on the City's ability to foster a supportive business environment for both new and existing businesses. This study focuses on an approach that combines thoughtful and selected retail recruitment with strategic investments that will make Glen Cove an attractive destination for businesses, employees, visitors and residents looking for a unique and inviting place to spend their time and discretionary dollars.

SECTION 1: INTRODUCTION

Project Goals

The City of Glen Cove has partnered with private developers to carry out development that will have significant impacts on the City, particularly on the downtown and waterfront areas. These redevelopment projects are located on the Glen Cove Creek Waterfront, and in the existing Village Square. The projects will together create approximately 1,000 units of housing, 25,000 square feet of retail and restaurants and over 50,000 square feet of office space. Honoring its commitment to the long-term economic health of the downtown, the City initiated a Downtown Gateway to the Waterfront Plan to ensure that the existing commercial area downtown and the new developments are integrated to enhance the health and commercial viability of the City as a whole (as outlined in the project RFQ).

The Gateway project is split in two phases. The first, completed in September of 2008, examined physical improvements that would strengthen the connection between the waterfront and downtown.

In July of 2012, Magnusson Architecture and Planning, PC, Larisa Ortiz Associates and JGSC Group (the Consultants) were retained by the Glen Cove Community Development Agency (CDA) on behalf of the City of Glen Cove (the Client) to complete Phase II of the City's Downtown Gateway to the Waterfront Project. Building on Phase I, the purpose of this project is to assess existing real estate uses within the Study Area and to develop a marketing approach and implementation strategy that will attract appropriate private investment and coordinate the uses of the new development areas with established downtown businesses. The Consultants sought to answer the following critical questions:

- What types of retail uses can be supported by the market and contribute to the retail mix downtown and in nearby redevelopment projects?
- What are the spending characteristics of both shoppers and non-shoppers in the downtown district?
- What kinds of uses are feasible given the size, location, and condition of existing and proposed retail spaces?
- What will the impact of 25,000 square feet of undefined retail have on the downtown?

Methodology

The Consultants reviewed existing documents, plans, and studies, including:

City of Glen Cove Downtown Gateway Revitalization Plan: Final Plan (Urbitran; Sept. 2008)

City of Glen Cove Study Area Map

City of Glen Cove Zoning Regulations, Article XIV, §280-65 (Central Commercial District) and §280-65.1 (Overlay Commercial District)

Exhibit I-1 through I-25J: FEIS Plan, Glen Cove Creek Mixed-Use Waterfront Development (Vanasse Hangen Brustlin; Saccardi & Schiff; undated)

Exhibit II-PD1 through II-PD 10; FEIS Project Description (Vanasse Hangen Brustlin; Saccardi & Schiff; undated)

Glen Cove Mixed-Use Waterfront Development Project Overview (PowerPoint presentation by RXR Glen Isle Partners, LLC, July 2, 2012)

Glen Cove Waterfront Redevelopment, 2011 Conceptual Site Plan Presentation to Planning Board (Lessard Design, Inc.; M. Paul Friedberg and Partners; RXR Glen Isle Partners, LLC; April 2011)

Glen Cove Waterfront Revitalization Overview Presentation, (Glen Cove Community Development Agency; Glen Cove Industrial Development Agency; 2011)

Master Plan for City of Glen Cove (Phillips Preiss Shapiro Associates, and Turner Miller Group; January 2009)

Nassau County Evacuation Zones and Routes - Nassau County Office of Emergency Management

New York State Environmental Quality Review Act (SEQRA) Findings of the Planning Board of the City of Glen Cove Respecting the RXR Glen Isle Partners Mixed-Use Waterfront Development Project, City of Glen Cove, NY (Volumes 1 through 4 plus attachments, December 19, 2011)

Request for Proposal for MAI Appraiser (Glen Cove Industrial Development Agency, regarding the RXR Glen Isle Partners Waterfront Development; dated June 29, 2012)

Resident Survey Summary (July 2011)

Retail Market Analysis, (Glen Cove Downtown Business Improvement District, Prepared by Barbara J. Cohen, September 1996)

To answer the above questions, with the support and guidance of the Mayor's Office, the Glen Cove Community Development Agency (CDA), and the project's Advisory Committee, the Consultants evaluated the retail marketplace to discover untapped opportunities and provide a fact-based foundation for the development of retail growth strategies that connect downtown Glen Cove to the waterfront and stimulate economic development.

The observations, findings, conclusions, and strategies within this document are based upon the market analysis and retail assessment phase conducted over the past ten months. The following tasks were accomplished:

- **Review Existing Municipal Documents:** A thorough review was conducted of previous plans and studies, zoning and land use documents as they relate to restrictions on the downtown and waterfront, as well as gateways between the two.
- **Evaluate Physical Conditions:** An evaluation of physical conditions and connections were conducted to determine how the infrastructure of the setting affects commerce, access, and opportunities.

- **Evaluate Land Use:** The examination and analysis of land use within downtown Glen Cove, including the understanding of connectivity issues between downtown and the proposed new waterfront redevelopment, was conducted through the lens of the market, consumer, and retail study.
- **Assess Buildings & Vacant Properties:** Every commercial property, occupied or vacant, was examined to develop a database describing each commercial building, business, and vacancy in the district.
- **Interview Community Stakeholders:** With guidance from the CDA staff, key individuals with a stake in the well-being of commerce in the district were interviewed, with the intent of gaining multiple perspectives. The interviews were performed one-on-one with eight individuals to learn their view of the district's present conditions, and their vision for its future.
- **Interview Merchant & Business Owners:** Together with CDA staff, interviews were conducted with 11 merchants and commercial property owners.
- **Survey Shoppers and Non-Shoppers:** A survey was launched on October 4, 2012 and closed on November 20, 2012. Five thousand printed copies of the survey were direct-mailed to households, both within the City of Glen Cove (3,500 households) and in communities adjacent to Glen Cove (1,500 households), accompanied by cover letters signed by Mayor Suozzi. The survey was also made available online at www.glencovesurvey.com. Two-dozen merchants in downtown Glen Cove distributed more than 2,000 flyers with notice of the survey to their customers, and more notices were available for pick-up at City Hall and the City Public Library. Both City Hall and the Library offered copies of the printed survey, and clear Lucite deposit boxes to receive the completed surveys. Over 3,000 flyers were distributed to elementary school children, to take home to their families, and several hundred were distributed to senior citizens at the Senior Center on Glen Street.

  Mayor Suozzi recorded a public service message announcing the survey that was telephoned via "robo-call" to every home in Glen Cove, and he also issued an email blast message to all municipal employees, encouraging them to take the online survey. A press release announcing the launch of the survey was published in the local newspaper, and the Patch, a local news website. A link to the survey was inserted in the city's homepage. In addition, two dozen lawn signs were placed at high traffic intersections in and around downtown Glen Cove. A large banner was installed above Village Square in plain view of all traffic at the Glen Street intersection with School Street, and two other large signs were installed at the community signboards at the major gateways into town. All signs and flyers carried the Mayor's message in bold black type over a bright yellow background: "Participate: Share Your Ideas!" Ultimately, the distribution was extremely effective, achieving a result of 1,272 responses that was more than four times greater than the objective.
- **Define Trade Area:** The survey results were used to inform the trade area from which demographic data was gathered.
- **Analyze Trade Area Demographics and Economics:** A comparative review of syndicated data was conducted across four strata: data for the City of Glen Cove alone; data for the 10-minute drive shed; data for the 15-minute drive shed; and where available, data for Nassau

County. The analysis uncovered demographic trends and spending habits, including how much is being spent on particular retail categories, how much of that spending occurs in the trade area and how much of it "leaks" out of the downtown study area.

Following this introduction, Section 2: Analysis and Findings provides the outcomes of the team's analysis. Section 3: Shopper Survey is dedicated to community feedback. These results, layered onto the analysis and findings in Section 2 become the basis for Section 4: Implementation Strategy, which provides recommendations and strategies for accomplishing the goals of this project.

SECTION 2: ANALYSIS AND FINDINGS

This analysis includes a mix of primary and secondary data sources. Primary sources include a consumer survey, on-site analysis of physical conditions, stakeholder, and merchant interviews and an inventory of businesses in the study area. Secondary data comes primarily from Esri, an international commercial data supplier that ties geographic information systems (GIS) to market data. Esri is recognized by the retail industry, among others, as a reliable source of market data.

Esri provided the following data for this analysis:

- Business Summary by North American Industry Classification System (NAICS) Codes (a listing of a number of businesses and employees of those businesses by category within a defined area);
- Electronics and Internet Market Potential
- Demographic data (Census 2010) and site map:
  - Summary Profile
  - Demographic and Income Profile
  - Tapestry Psychographic Profile (Lifestyles), and site map
  - Retail Marketplace Profile
  - Retail Goods and Services Expenditures
  - Recreation Expenditures
- Market Profile
- Retail Market Potential
- Sports and Leisure Market Potential

Each of the above reports were obtained for the City of Glen Cove geographic area; the area of a 10-minute drive shed from downtown Glen Cove; the area of a 15-minute drive shed from downtown Glen Cove; and for all of Nassau County, for comparison and contrast. Other incidental data was also acquired: listings of regional businesses by category; and AADT[1] maps showing traffic counts (Figure 1) in Glen Cove and the surrounding region.

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[1] "Annual Average Daily Traffic" is the total volume of vehicle traffic of a highway or road for a year divided by 365 days.

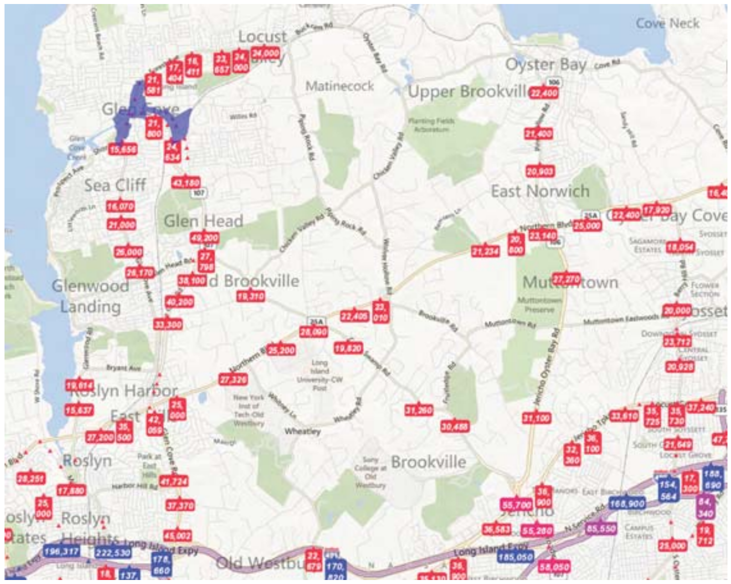

Figure 1 – Annual Average Daily Traffic

The complete sets of original data reports are attached in the appendix.

Trade Area

Retail trade area is defined as a geography from which the vast majority (70% or more) of shoppers derive. Eighty-four percent (84%) of the people that responded to the Glen Cove consumer preferences survey live in the 11542 zip code, which closely parallels the border of the City of Glen Cove. Therefore, the city's primary trade area coincides with its political boundary. This trade area is heavily influenced by ease of access to the district, as well as the offerings of other nearby shopping districts.

The trade area for any business district is dynamic, and will alter with the changing nature of the retail offerings found in the district. For example, districts that feature predominantly convenience-type retail will not draw customers from a wide region, while districts that feature primarily destination-type retail (i.e., bridal shops or distinctive restaurants) draw their customers from a much wider region. While there are a few downtown assets that pull from a larger trade area, notably the Long Island Academy of Fine Arts and the local recording studios, many

What is Retail Leakage

Retail Leakage is calculated as the difference between buying power (demand) and retail sales (supply) with a defined Trade Area. When Retail Leakage is a positive value there is unmet demand by residents in the trade area, representing opportunities for new or existing business to target. When Retail Leakage is a negative value there is either a healthy concentration of retail to build from, or there is a saturation of retail that indicates limited opportunity for business growth or expansion.

Retail such as restaurants, clothing or furniture stores attract shoppers looking for multiple stores. In most cases negative leakage for these categories indicates a business opportunity to start or grow a business to complement what already exists in the market.

Retail such as hardware stores, general merchandise stores, and grocery stores are less likely to grow or expand when there is negative leakage (when there is little or no unmet demand in the surrounding market).

current downtown retailers and service offerings can also be found in other nearby shopping districts, allowing consumers an opportunity to "cross-shop" more effectively than they can in downtown Glen Cove. Improved management of the retail mix, growth of more regionally popular events, and focused marketing of downtown Glen Cove will enable the district to expand its trade area to the 15-minute drive shed in the wider area beyond the city.

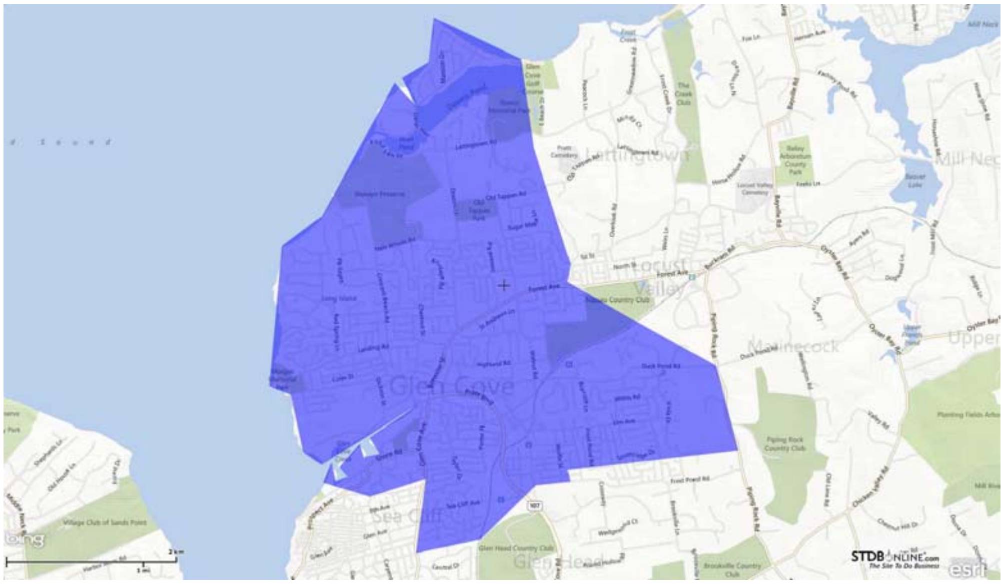

Figure 2 – Trade Area Map

Demographics

In order to put Glen Cove's population into a broader context, the following analysis considers data for four geographic areas: the City of Glen Cove; the 10-minute drive shed; the 15-minute drive shed; and where available, Nassau County.

Summary of Demographics	Glen Cove	10-Min Drive	15-Min Drive	Nassau County
Population (2010)	26,964	53,368	116,978	1,339,532
Households (2010)	9,764	19,091	40,803	448,528
Population / Square Mile	1,397	1,828	1,645	2,957
Households / Square Mile	506	654	574	990
Median Age	40.6	42.4	42.9	41.1
Renter Occupied Households	44%	30%	22%	20%
Average Household Income	$96,950	$127,746	$149,182	$118,295

Population Density

A review of demographic data reveals that the City of Glen Cove has roughly half the population density than the average for all of Nassau County, with only 506 households per square mile, as opposed to 990 households per square mile for the entire county. This presents a concern for retail recruitment, as greater population density facilitates commerce.

Ethnicity

There is a higher concentration of Latino residents in Glen Cove (28%) than in the surrounding areas—the average for the 15-minute drive shed is less than half this number at 11%, and the county-wide average is 15%.

Age

The population of Glen Cove is significantly younger, on average, than in the other areas. The average age of a Glen Cove resident is 40.6 years, while the average age for someone in the 10-minute drive shed is 42.4 years; for someone in the 15-minute shed it is 42.9 years, and for all of Nassau County it is 41.1 years. The age differential occurs in brackets that are helpful to retail in Glen Cove: the City has a higher percentage of residents in the 20-24 and 25-44 age brackets, which typically spend more of their disposable income on retail goods and services than the other age brackets.

Families

Despite the younger average population, Glen Cove has fewer households with children. Thirty-one percent of households have children in Glen Cove, compared with more than one-third of all households in the other areas (Nassau County leads with 37% of all households having children). Glen Cove also has the fewest residents per household on average (2.69), compared with the drive sheds (2.75 at the 10-minute area, and 2.80 at the 15-minute shed), and with Nassau County (2.94 residents per household). This suggests that retailers oriented to families as their consumer base would do well to market their businesses outside of Glen Cove, where the concentration of families with children is significantly higher than in the City itself.

Income

Glen Cove is part of an affluent region, and household income is high enough to attract retailers in most every retail category; however, Glen Cove has the lowest household income—median, or average—of the four areas measured. Median household income stands at $69,429/year. This is only 58% of the median household income of the households within the 15-minute drive shed, and only 73% of the median household income for all of Nassau County. This indicates a concentration of lower-income households in Glen Cove that are not present at as significant levels in the other areas. This dichotomy of household income levels begins to explain the apparent contradiction of demands expressed in the consumer survey for clothing stores: some for discount family clothing; others for more exclusive clothing and accessories.

Like median household income, average household income is lower in Glen Cove than elsewhere among the four areas examined. The average household income for Glen Cove is $96,950; in the 15-minute drive shed it is more than 1.5 times greater at $149,182/household. Glen Cove is a community with greater income diversity than its surrounding affluent neighbors.

Psychographics

Esri has created a psychographic categorization system called Tapestry Segmentation, which divides residential areas into segments based on socioeconomic and demographic characteristics. This analysis paints a more vivid picture of who is living in and around the trade area and what their habits and preferences are. There are 65 unique segments in total.

The Tapestry Segmentation chart shows the categories in which most residents in and immediately surrounding Glen Cove fall. Fifty-one percent of Glen Cove's residents fall into the category of "City Lights" and 15% are classified as "Wealthy Seaboard Suburbs." The remaining 34% of the population is distributed between five categories, which are listed in the Appendix. "Top Rung" makes up a significant portion of the populations in the surrounding areas, but does not make up any portion of the population in Glen Cove.

Tapestry Segmentation

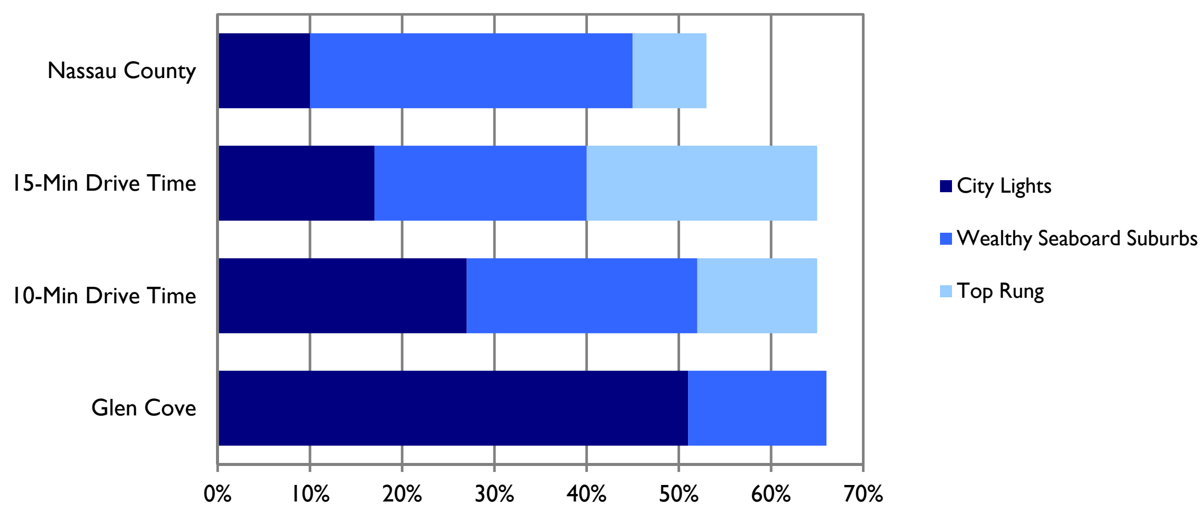

Figure 3 – Major Tapestry Segmentations In and Around Glen Cove, Source: Esri

City Lights

Demographic

The City Lights segment is composed of diverse neighborhoods situated primarily in the Northeast. This dense urban market is a mixture of housing, household types, and cultures that all share the same city space. Households include families and singles, similar to the U.S. distribution by household type. The population is not much older than that of the United States, with **a median age of 37.5 years**. Compared to the U.S. population, there are **fewer children and slightly more people aged 75 or**

older. The ethnic or racial diversity is slightly higher than the U.S. level, with **higher ratios of Asian, Hispanic and multi-racial populations**.

Socioeconomic

City Lights residents earn a good living working in white collar and service occupations. The **median household income for this market is $63,322**. Labor force participation is at 64 percent, similar to the U.S. level. Household income is derived primarily from wages but includes some investment income. The median net worth is $144,239.

Residential

Housing ranges from single-family homes or townhomes to apartments in buildings with two to 50 or more units. Thirty-five percent of housing is apartments in buildings with two to four units, approximately four times the national level. Unlike U.S. housing, the proportion of single-family homes in the City Lights market is only 36 percent of the household inventory. Housing is also much older than the U.S. average, because nearly two-thirds of the structures were built before 1960. The homeownership rate of 57 percent is lower than the national average. The median home value is $420,302.

Preferences

City Lights residents lead an urban life and take advantage of the opportunities presented by life in the city. **They buy household furnishings, groceries (including fast food and takeout), personal goods, and entertainment. They are more likely to buy household furnishings than home maintenance. They shop for clothes, shoes, jewelry, and toys at a variety of stores such as Macy's, the Disney Store, Gap, and BJ's Wholesale Club. They shop for groceries at Pathmark and A&P.** They usually buy books and CDs online. A typical resident owns U.S. savings bonds and stock, has an education loan, and carries renter's insurance. City Lights residents take vitamins and play soccer to stay fit. They also watch soccer on TV. **Leisure activities include foreign travel, going to the movies**, watching science fiction movies on DVD, playing chess, going to horse races, and taking adult education courses. In addition to visiting Atlantic City to gamble, they also like to play the lottery. They listen to news, variety programs, and jazz on the radio. They read two or more daily newspapers and prefer fashion magazines. Residents prefer to watch an assortment of news programs. A favorite cable station is the Movie Channel.

Wealthy Seaboard Suburbs

Demographic

Wealthy Seaboard Suburbs are older, established, affluent neighborhoods characteristic of US coastal metropolitan areas. Two-thirds of the population aged 15+ years is married; more than half of the married couples have no children. The median age is 43.3 years. Ethnic diversity is low; most residents are white.

Socioeconomic

Wealthy Seaboard Suburbs neighborhoods are **affluent**; the **median household income is $96,498**. Income is derived from a variety of sources; approximately **60 percent of the households received supplemental income** from interest, dividends, and rental properties; **23 percent collect retirement income**. More than half of those who work **hold professional or management positions**. The **median net worth is $401,516, more than four times that of the US median of $93,084**.

Residential

Wealthy Seaboard Suburbs neighborhoods are located primarily along the California, New York, New Jersey, and New England coasts. Three-fourths of the housing units were built before 1970. Single-family structures comprise 89% of the households, with a **median home value of $415,546**. The vacancy rate is five percent. Slow to change, Wealthy Seaboard Suburbs homeowners are **the least likely to have moved in the last five years**. This segment ranks in the top five for residents who commute out of state to work.

Preferences

Not do-it-yourselfers, these residents **hire lawn and maintenance services** to care for their property and contractors to remodel their homes. The top market for remodeling expenditures, this segment **spends more than $5,000 a year on home improvements**. A typical resident holds a home equity line of credit, holds life insurance policies worth $500,000 or more, uses a brokerage firm, owns stocks, and donates to charities, or non-profits. **They love to shop**—online, and by phone from high-end catalogs—and **especially at Macy's, Nordstrom, and warehouse stores**.

Wealthy Seaboard Suburbs residents take nice vacations, and go to Las Vegas and Atlantic City. They go **saltwater fishing, skiing, and ice skating and attend the theater**. They read two or more daily newspapers; biographies; and **epicurean, travel**, business, and finance magazines. They **listen to classical music, jazz, all-news and sports radio programs. Cable movie channels are favorites, but residents will watch one or two drama series shows each week. This is a top segment for watching home shopping channels.**

Top Rung

"Top Rung" was found in the other three regions, but was not found in the City of Glen Cove at all, further demonstrating how Glen Cove differs from the surrounding region.

Demographic

Top Rung residents are uniformly mature, married, highly educated, and wealthy. The median age is 41.9 years. Nearly one-third of the residents are in their peak earning years of 45–64. Approximately 77 percent of these households are composed of married couples, half of them with children. **This is a monochromatic market with little diversity, except for the presence of children.**

Socioeconomic

Top Rung is the wealthiest consumer market, representing less than one percent of all U.S. households. The median household income of $185,415 is more than three and one-half times the U.S. median, while the median net worth of $614,206 is more than five times the national level. Residents' wealth is derived from investments, such as income from interest, dividends, and rental properties, as well as remuneration from management, professional, and sales positions, particularly in the finance, education, legal, and health care fields. The proportion of households receiving self-employment income is twice that of the national level. The population is highly educated: more than 70 percent of residents aged 25 years and older hold a bachelor's or graduate degree.

Residential

The enclaves of the wealthy are dotted throughout major U.S. cities, with higher concentrations located on the East and West coasts. **Top Rung residents own at least one single-family home, with a median home value approaching $1,078,501, the highest, by far, of all the Community Tapestry markets.** Travel is part of their lives including the highest rate of interstate commuting.

Preferences

Top Rung residents have the **purchasing power to indulge any choice**. Aside from the obvious investments, such as stocks valued at more than $75,000, money market accounts and funds, mutual funds, annuities, and life insurance policies valued above $500,000, **they spend money on domestic and foreign travel. They travel frequently and always in style**. For home and property upkeep, residents hire professional cleaning and lawn maintenance services, and for home improvement and remodeling work, they hire contractors. **This is the top market for owning or leasing a luxury car. Residents favor new imported vehicles, especially convertibles.** Top Rung residents are shoppers. **Favorite places to shop are Nordstrom, Macy's, Banana Republic, and Eddie Bauer as well as warehouse/club stores.** They also use the Internet to make purchases, especially books, concert or sports tickets, computer hardware and airline tickets. Laptop computers and cell phones are necessary for them to network and keep up with their busy lives. They own three or more cell phones and generally have two phone lines in their homes. **Top Rung residents are avid readers of newspapers (usually two or more daily), magazines (especially airline, epicurean, business, finance, and fashion), and books (particularly history and biographies). They listen to classical music and jazz as well as all-news, public, sports, all-talk, and news/talk radio. They prefer to watch BBC America, Independent Film Channel, Bravo, the Golf Channel, CNBC, CNN, and MSNBC News on TV.** Residents **enjoy going to the theater, attending dance performances**, visiting museums, watching foreign films on DVD, and playing backgammon. They are active in their communities, joining charitable organizations, working for political parties or candidates, writing to elected officials, and contributing to PBS. Health conscious, **they exercise (do yoga and aerobics, play tennis, ski, ice skate, and snorkel), take vitamins, and buy low-fat food. Their interest in tennis and skiing** extends to watching it on TV also.

The above passages indicate the types of activity and shopping preferences that would most appeal to this segment of the population, and could be accommodated in Glen Cove. Their interest in luxury cars lends itself to the kind of offerings already in the automotive sector of Glen Cove. The upscale chain stores that appeal to this group (Nordstrom, Eddie Bauer, etc.) are not appropriate for the downtown, but distinctive local operators with those categories and quality of merchandise would appeal to this group, and advance the mix for downtown Glen Cove. The same is true of the specialty grocery category that would satisfy this group's demand for healthy food choices. Finally, these Tapestry descriptions are also helpful references to indicate where to advertise in order to best reach these groups (in this case, newspapers, magazines, BBC America, Golf Channel, etc.).

These lifestyle distinctions demonstrate that there is greater cultural and economic diversity among the residents of Glen Cove than there is in the communities immediately around it.

Retail Categories with Unmet Demand

A review of consumer demand per household reveals why the merchants of downtown Glen Cove need to reach and attract customers that live beyond the boundaries of the city. Consumer demand for retail goods and services measured per household in Glen Cove is only $33,359/year, little more than half of the level of demand for households in the 15-minute drive shed ($63,624/year/household).

The following retail categories have unmet demand in the City of Glen Cove, the 10-minute drive shed, the fifteen-minute drive shed, and/or Nassau County:

- Automotive parts and accessories, with unmet demand ranging from $2.7 million within Glen Cove, to $23.5 million in the 15-minute drive shed, and $85.8 million in Nassau County;
- Furniture stores, with unmet demand of $3.3 million/year in the City, $9.1 million in the 10-minute drive shed (dropping to only $4.6 million in the 15-minute shed) and up to $26.5 million in Nassau County;
- Specialty food stores, with unmet demand in Glen Cove of $1.43 million, rising to $11.4 million in the 15-minute shed, and $34.2 million in Nassau County;
- Gasoline stations, which are not desirable for the walkable downtown area, but are nevertheless high in unmet demand in the City ($25.9 million/year) to the 15-minute shed ($162.7 million), to nearly one billion dollars/year ($984.6 million) in Nassau County;
- Jewelry, luggage, leather goods stores reach nearly $1 million in unmet demand in Glen Cove ($823,332/year), to $2.3 million in the 10-minute shed (but dropping to under $1 million in the 15-minute shed) and rise still further to $21.2 million in Nassau County;
- Sporting goods, hobby, musical instrument stores have more than $1 million/year in unmet demand in Glen Cove, rising to $6.3 million in Nassau County;
- General merchandise stores have $8.3 million in unmet demand in the City, rising to $87.0 million in Nassau County;
- Full-service restaurants range from $3.6 million in unmet demand in Glen Cove, rising to $48.2 million in the 15-minute drive shed, and $356 million in Nassau County. Assuming a 25%-30% capture rate (the market share of the total unmet demand for the 15-minute drive shed that

could reasonably be captured by restaurants in Glen Cove), this would be enough to support eight to twelve new restaurants.

- Limited-service eating places are also in demand, ranging from $5.1 million in Glen Cove, to $279 million in Nassau County;
- Drinking places serving alcoholic beverages (taverns, pubs) showed unmet demand from a low of $337,921 in Glen Cove, to nearly $9.2 million throughout Nassau County.
- Clothing stores would be supported with unmet demand in all but one area, which is the 15-minute drive time (in which there is a $12.6 million over-supply). The unmet demand is sufficient to support several clothing stores ($9.2 million in Glen Cove alone; $22.5 million in the 10-minute drive time area; and $129.9 million in all of Nassau County), but in order to be successful in Glen Cove, clothiers will have to avoid direct competition with national and regional clothing stores found in malls and shopping centers within the 15-minute driving area, and instead focus on specialty categories of clothing (custom dress boutiques, accessories, bridal, men's custom shirts, infant wear, uniforms, etc.) that will draw shoppers from the 10- and 15-minute drive areas to supplement the local population.
- Shoe stores would be supported with unmet demand at every level except for Nassau County (the county has a slight over-supply of $191,516). The peak of unmet demand exists at the 10-minute drive time level, in which there is $1.7 million in unmet demand; enough for five family shoe stores of 1,500 square feet or less.

An overview of leakage and surplus for some of the key retail categories mentioned above are included in the table below.

Unmet Consumer Demand	Glen Cove	10-Min Drive	15-Min Drive	Nassau County
Full-Service Restaurants	$3,663,240	$2,777,834	$48,218,353	$356,021,981
Limited-Service Eating Places	$5,109,406	$28,981,480	$69,040,663	$279,726,426
Special Food Services	($2,130,974)	($6,799,609)	($14,032,271)	$24,976,293
Drinking Places - Alcoholic Beverages	$337,921	$1,291,244	$3,645,480	$9,194,039
Clothing Stores	$9,229,882	$22,506,396	($12,611,398)	$129,954,784
Shoe Stores	$1,123,128	$1,724,075	$562,643	($191,516)

Furthermore, the data indicates that a number of retail categories are **not** being satisfied within the city or outside of the city, forcing some consumers to travel outside of the immediate region to satisfy their demand. However, this unmet demand does not necessarily signify that these categories are a good fit for downtown. To determine which of these categories are a good fit, this data is layered with the physical analysis, consumer survey results and stakeholder interviews presented in the Section 4 of this report.

The analysis also reveals very positive indicators in restaurant market potential. Seventy-three percent of Glen Cove's potential consumer audience (at the 10-minute and 15-minute drive times), and as many as 75% (at Glen Cove, and in Nassau County), went to a family restaurant in the past 6 months. Even higher numbers of people went to fast food/drive-in restaurants in the same period (Glen Cove-86%; 10-minute drive time-85%; 15-minute drive time-83%; and Nassau County-86%).

Restaurant Market Potential	Glen Cove	10-Min Drive	15-Min Drive	Nassau County
Went to Family Restaurant in Last 6 Months	75%	73%	73%	75%
Went to Fast Food/Drive-In in Last 6 Months	86%	85%	83%	86%

The entertainment market potential is also good, especially for movie theaters. At least 67% of the residents of Glen Cove, the 10-minute drive time and Nassau County attended movies in the last 6 months; the 15-minute drive time revealed 68% did so. Live theater was not as well-attended, but still scored sufficiently high numbers to indicate good market potential: 20 to 24% of residents went to a live theater production in the last 6 months in the four studied areas. The range for bar/nightclub attendance in the last 6 months was similar: 20% in the 10 and 15-minute drive times, and 21% in Glen Cove and Nassau County, and this is sufficient to indicate good market potential.

Entertainment Market Potential	Glen Cove	10-Min Drive	15-Min Drive	Nassau County
Attended Movies in Last 6 Months	67%	67%	68%	67%
Attended Live Theater in Last 12 Months	20%	22%	24%	20%
Went to Bar/Nightclub in Last 12 Months	21%	20%	20%	21%

Physical Conditions

Downtown Gateway Land Use Introduction

The examination and analysis of land use within downtown Glen Cove, including the understanding of connectivity issues between downtown and the proposed new waterfront redevelopment, has been done through the lens of the market, consumer, and retail study. The following questions surfaced for the Consultant team during the course of the analysis:

- What are the land use issues that support an active and healthy downtown –both economically and socially – and what are the issues to be overcome?
- How can land use be understood in its relationship to the new proposed development along the waterfront and how can a market balance be achieved between downtown and the waterfront?
- What will facilitate movement, both pedestrian and vehicular, between downtown and the waterfront?
- What has to be programmed along the path of connection, to support movement, repose, and activity?
- What are the assets and how can the uniqueness of Glen Cove be supported through physical interventions so that Downtown Glen Cove can become more of a destination for residents as well as attracting outsiders?
- Are there zoning or urban design standards that need to be adopted to support the downtown revitalization efforts?

Downtown Gateway Study Area

Downtown Glen Cove is comprised of a diversity of land uses (Figure 4). Within the downtown study area there are businesses, government offices, institutional uses (including health care, senior services and library), retail, dining, parks, municipal parking, and residential occupancies. Commercial zoning overlays the bulk of the land within the study area with institutional/government uses also accounting for a significant portion of the land use. In addition, there are three residential neighborhoods that abut the study area.

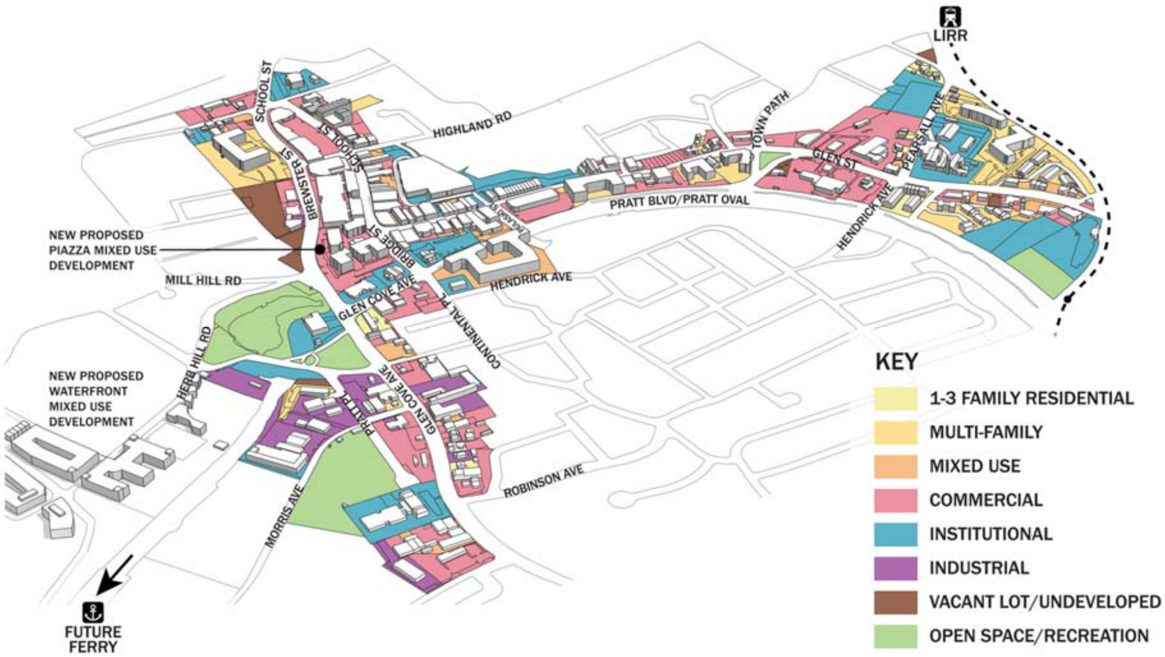

Figure 4 – Physical Conditions: Land Use

The downtown is also serviced by public transportation: the Glen Street LIRR station, a branch line that connects Oyster Bay to the mainline at Mineola, the #27 bus that travels along Glen Street and connects to Hempstead, and the #21 bus that travels along Glen Cove Avenue and connects to Roslyn.

The downtown study area presents itself as four different physical components with Glen Street as its spine (Figure 5):

1. The LIRR Station (Glen Street) to the Town Path
2. Town Path to Pulaski Street
3. Pulaski Street to School Street
4. The length of School Street from Glen Cove Avenue to its intersection with Forest/Brewster Street

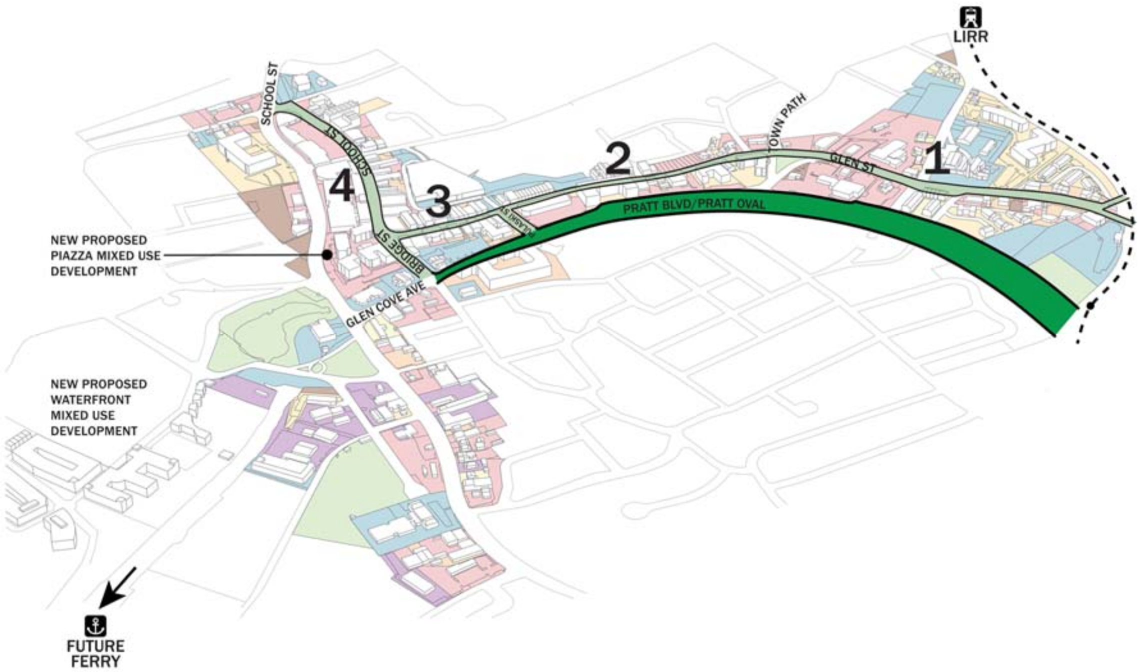

Figure 5 – Physical Conditions: Circulation Spine

The visual center of downtown is the plaza on the west side of School Street at its intersection with Glen Street. This intersection is also the activity hub of downtown particularly during festival times, such as the annual summer concert series. The commercial buildings located here are vacant. This space will become downtown Glen Cove's most significant development project – The Piazza @ Glen Cove. This mixed-use project features ground level commercial space, 142 rental apartment units, a 107-car underground garage, and a 12,000 square feet decorative brick public plaza.

Free parking is readily available with parking structures located on either side of School Street (with one of the garages providing access to Glen St. as well) easily accessible via pedestrian alleyways to downtown shops and businesses.

Regional Streets/Local Streets

Pratt Boulevard, Brewster Street, and Glen Cove Avenue are wide, fast moving streets providing connections to and from downtown to surrounding communities (Figure 6). These streets are for automotive movement and convenience. Brewster Street, which bypasses downtown, connecting Forest Avenue with Glen Cove Avenue, due to the lack of safe pedestrian crossings, forms a barrier to movement in connecting downtown with Pratt Park as well as the new proposed waterfront redevelopment.

Figure 6 – Physical Conditions: Regional and Local Connections

Glen Street and School Street, the 'Main Street' of downtown Glen Cove, are narrower, slower streets with building frontages forming a coherent street-wall and distinctive sidewalks with trees. This visual delineation of Glen Street begins to fray as you walk east of Pulaski Street. Building walls, storefronts and entrances give way to parking lots with buildings set back behind them. As you walk past Town Path towards the LIRR station, Glen Street completes its transition from a comfortable pedestrian environment to one in which automobile movement and convenience clearly dominate and influence the form of the streetscape.

Downtown Gateway Land Use and Connectivity Issues

Although downtown Glen Cove has a diversified mix of uses (retail, dining, business, and institutional, government, residential) and is surrounded by three distinct residential neighborhoods, there is a significant reduction of use after 5:00 PM (Figures 7 & 8).

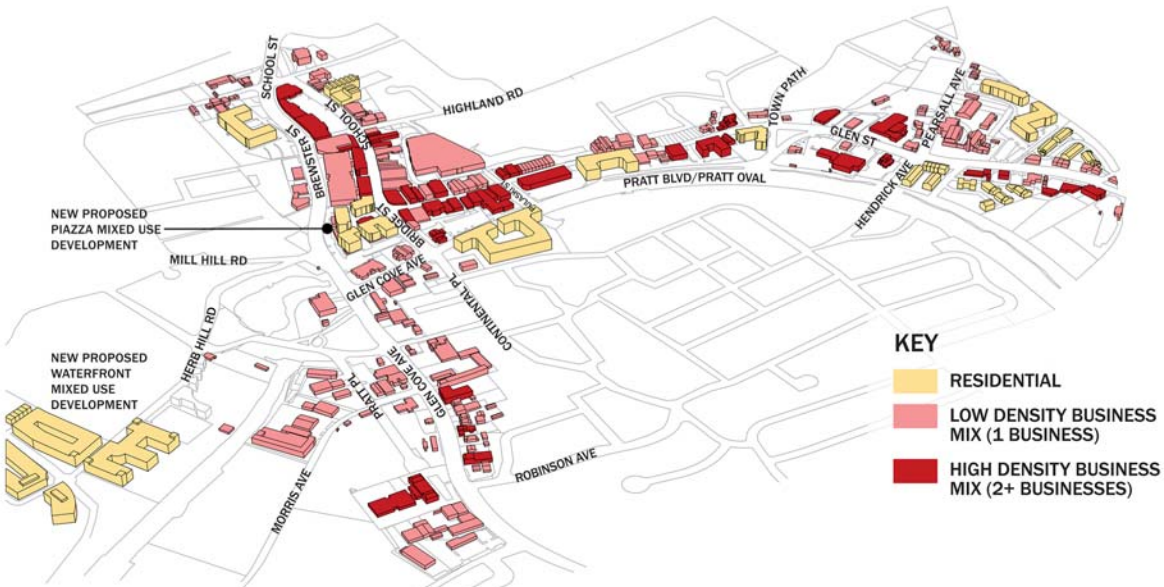

Figure 7 – Density: Daytime

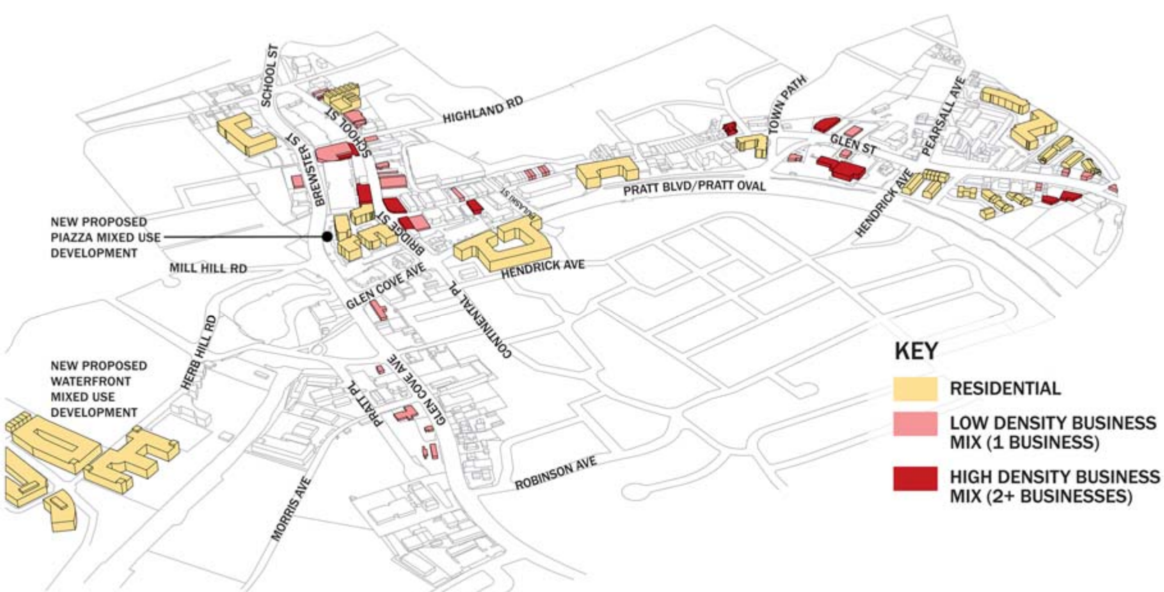

Figure 8 – Density: Evening

Density of Activity

- Increase retail, dining, and entertainment diversity to broaden downtown use from late afternoon hours through the evening hours.

Downtown use peaks during the business and drops off considerably after 5:00 PM. As per the consumer survey and marketing study, there needs to be a greater diversity in what downtown has to offer in order to become a more frequented destination for the existing assets (i.e. dining) and needs to expand to entertainment and other venues of choice that will separate and make distinctive Glen Cove from its surrounding market areas (Figure 9). This is important, both for the health of downtown, but also to establish a balance with the proposed new developments.

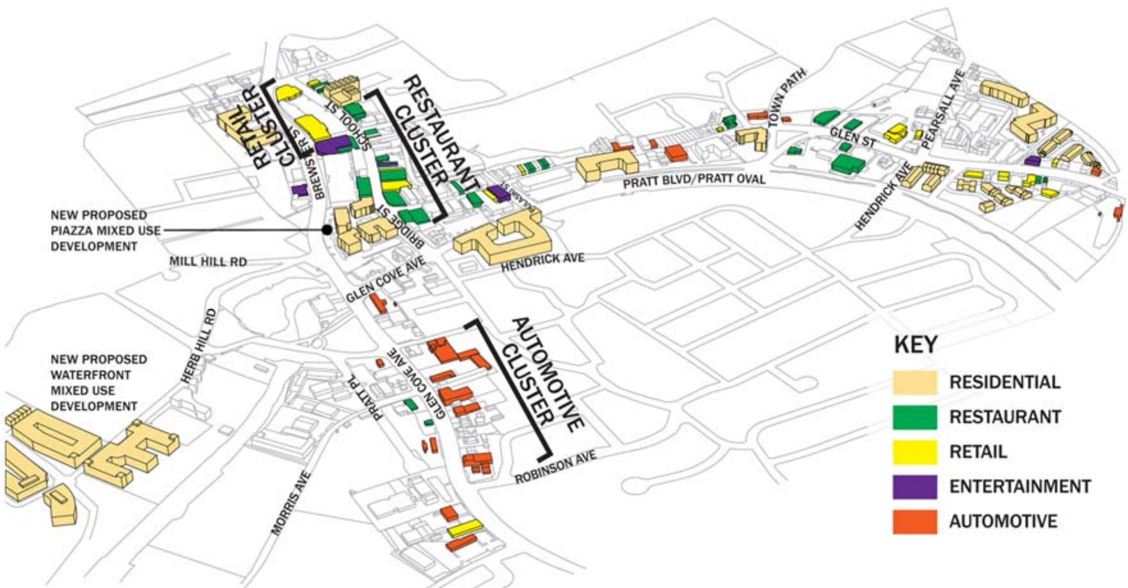

Figure 9 – Density: Types of Uses

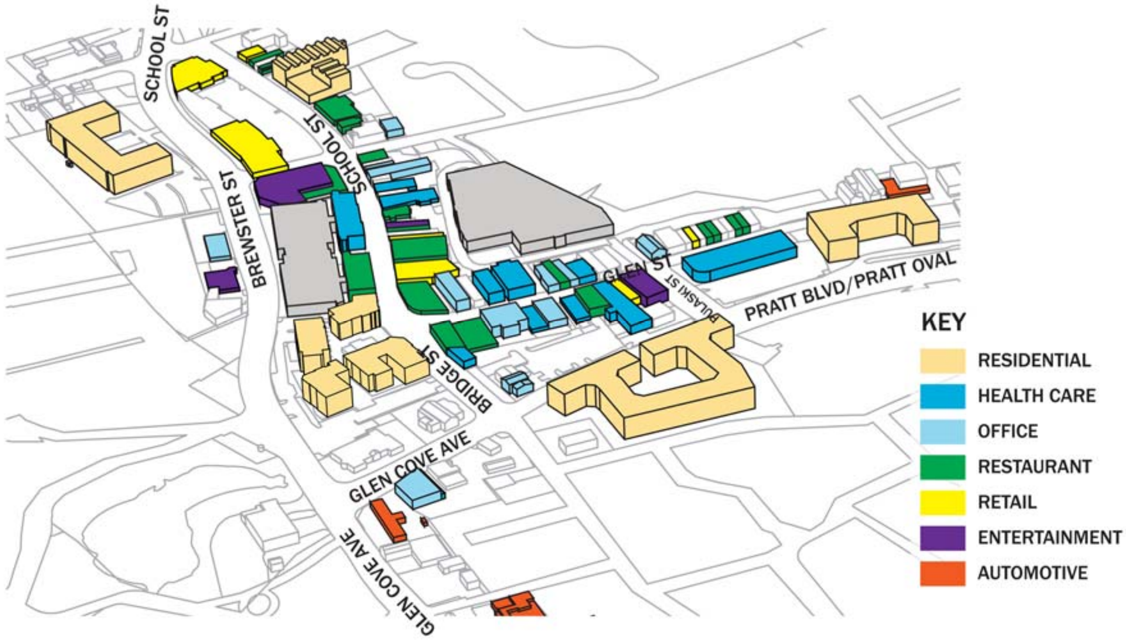

Figure 10 – Density: Types of Uses, Focused Area

The residential neighborhoods that surround downtown should make for easy access to downtown activities that are not car dependent, however, the pathways and entry points need to be more clearly delineated (Figure 11). Bicycle connectivity and bicycle parking should be made friendlier.

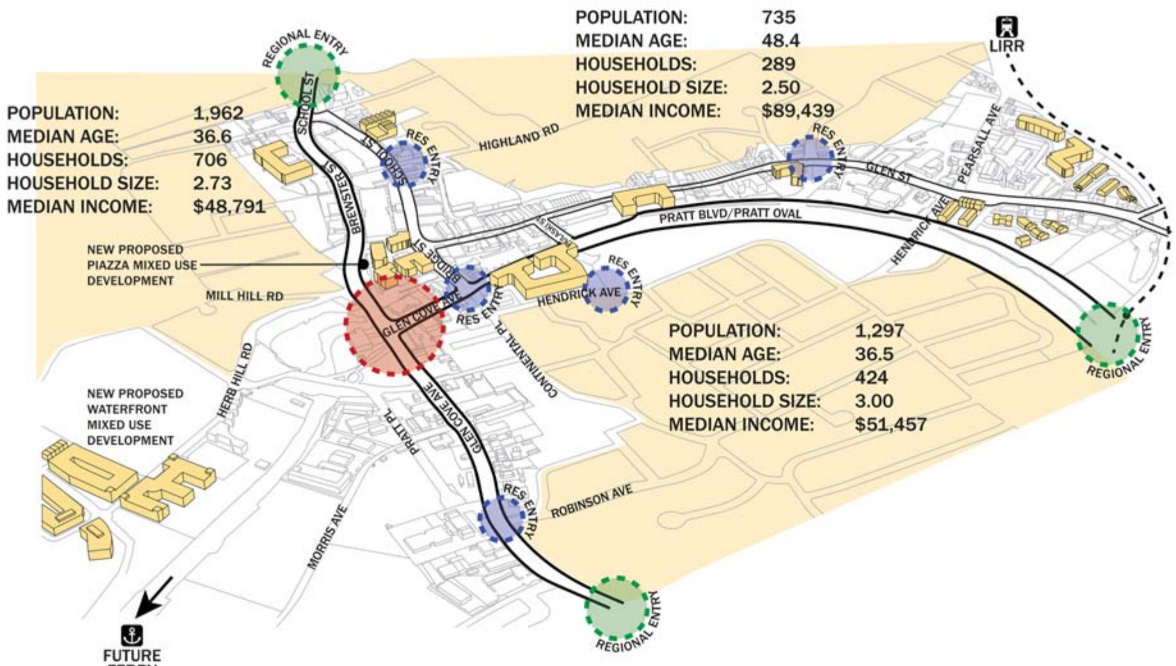

Figure 11 – Physical Conditions: Residential Connections

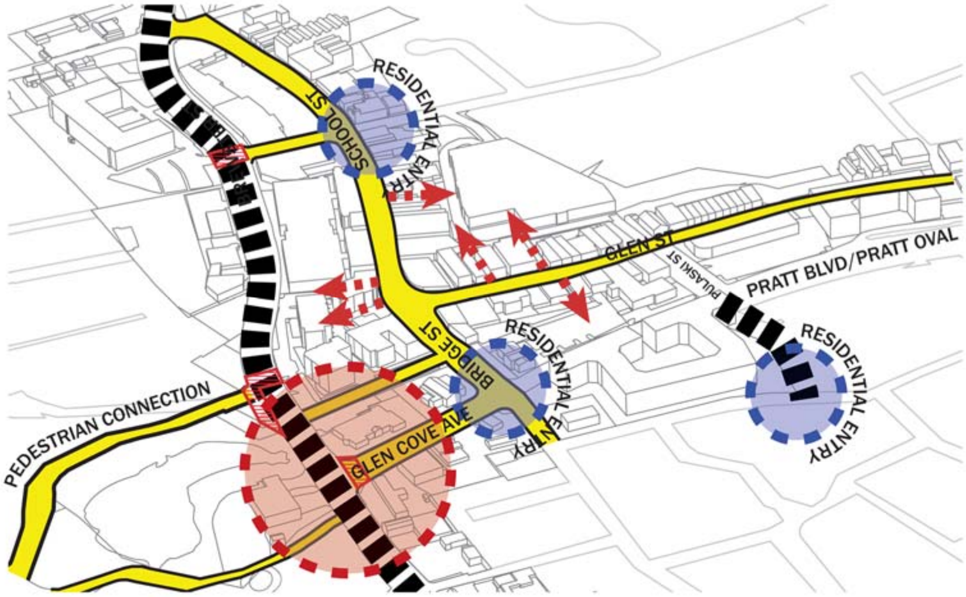

Figure 12 – Physical Conditions: Pedestrian Connections and Barriers, Focused Area

Vacancies

- Continued erosion of foot traffic coupled with and causing vacancies is creating a decline in downtown (Figure 13).

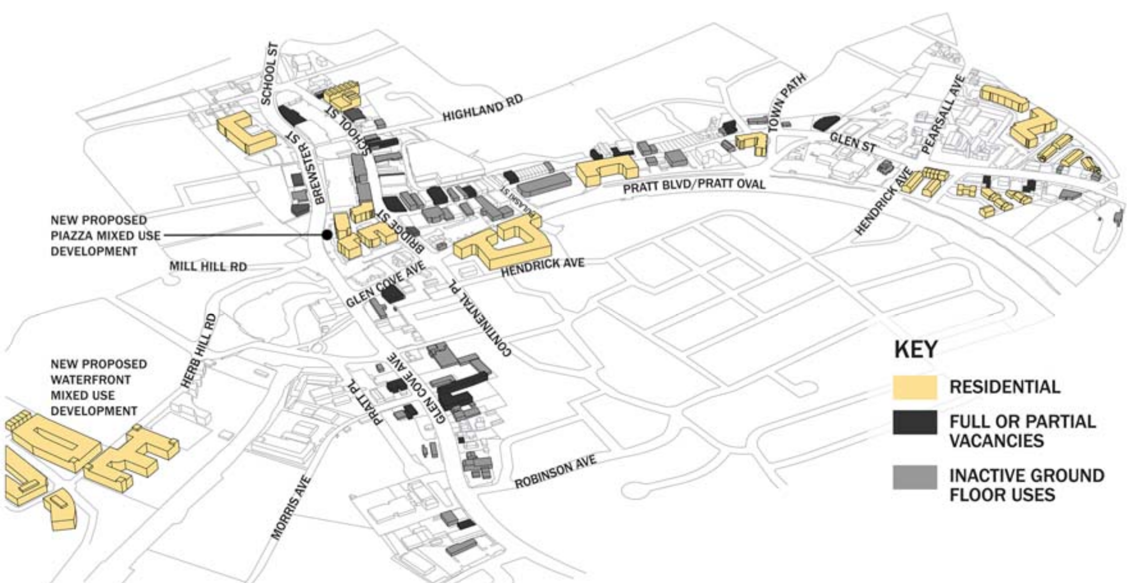

Figure 13 – Physical Conditions: Vacancies and Inactive Uses

There are vacant, underutilized, and inactive spaces throughout downtown Glen Cove and along the connections between downtown and the waterfront. Inactive spaces may include ground floor office spaces that do not generate foot traffic, stores whose windows and entrances do not face the street and non-pedestrian friendly uses such as auto shops. These uses clustered together create a significant barrier to comfortably moving from one place to another. These spaces threaten the connections between downtown retailers, as well as the connection between downtown and the waterfront.

Movement, Barriers and Connectivity

A long-term issue is the coming of the new mixed use developments along the waterfront and the proposed ferry and the impact that will have on downtown. Ideally these new developments will work with downtown in the sense of a classic mall – downtown hub on one side; waterfront hub on the other; with movement between (both vehicular and pedestrian) because there is a reason to go between the two and there are opportunities for people to interact and there is a clear path that is pleasant to move along with places of repose that will aid in the linkage (Figure 14).

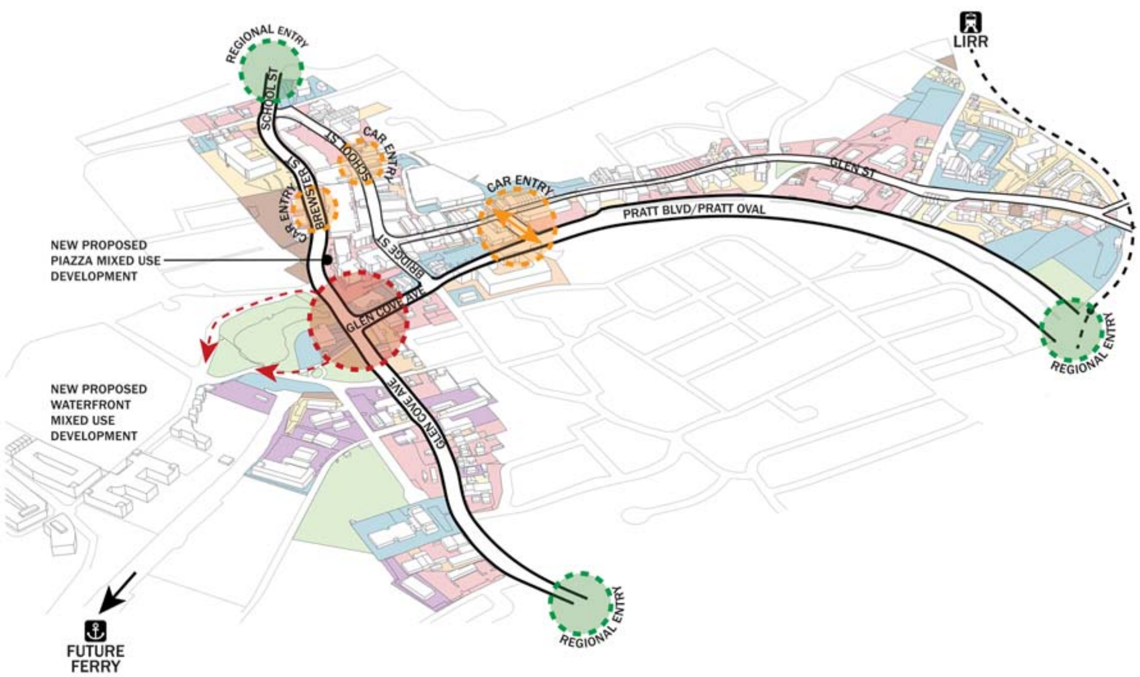

Figure 14 – Physical Conditions: Vehicular Connections

The barriers that need to be overcome in order to accomplish an effective connection between downtown and the waterfront are several (Figure 15):

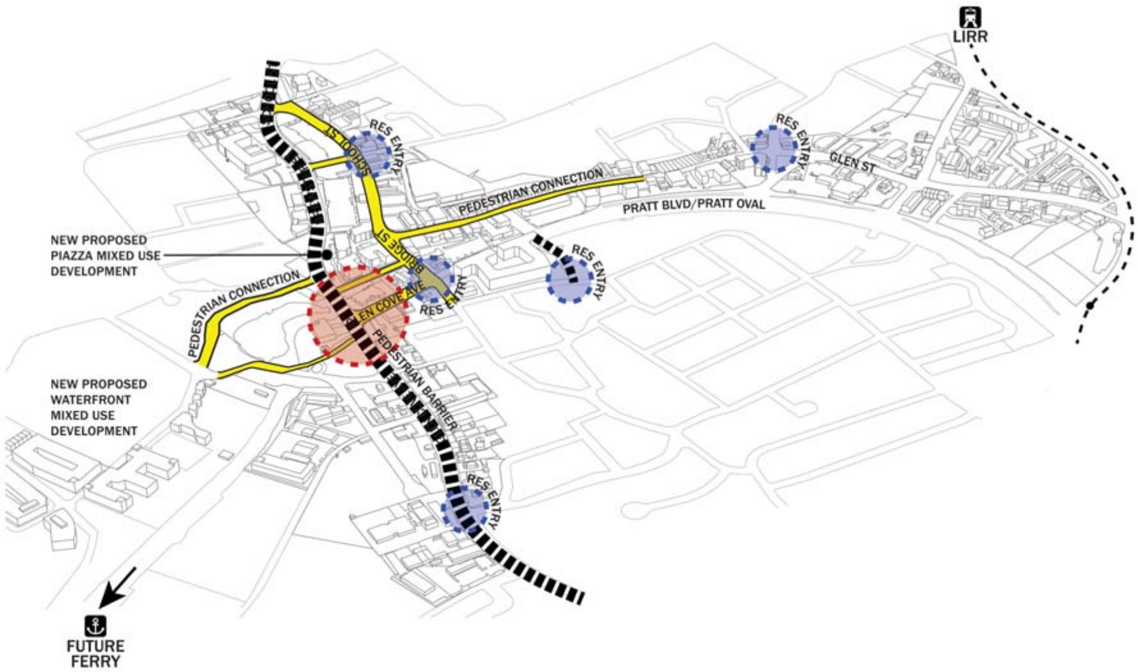

Figure 15 – Physical Conditions: Pedestrian Connections & Barriers

- Brewster Street, which forms the northern boundary of downtown Glen Cove, is the continuation of Forrest Avenue to the east (the street name changes after its intersection with School Street) and becomes Glen Cove Avenue at the intersection where the Glen Cove Fire Department is located. Brewster Street, from its intersection with Herb Hill Road through its continuation as Glen Cove Avenue separates downtown Glen Cove from Pratt Park.
- Brewster Street forms a barrier to pedestrian movement from the downtown to Pratt Park and Herb Hill Road to the proposed new waterfront redevelopment, due to the poor condition of the pedestrian crossings. The crosswalks are not clearly delineated and the crossing time for pedestrians is approximately 30 seconds, insufficient time for most people, especially families with young children and senior citizens, to comfortably and safely cross the street.
- The signage along Brewster Street needs improvement. It should be made clearer to motorists that they are in downtown Glen Cove. This would also include better delineation of the turning lane on Brewster Street that allows entrance to one of the public parking garages that provide access to School Street.
- The intersection of Brewster Street and Glen Cove Avenue is a vehicle-only intersection allowing an ease of connection between Brewster Street and Glen Cove Avenue and for the accommodation of emergency vehicles responding to situations from the Glen Cove Fire Department located on the north side of the intersection. The vehicle-only aspect of this intersection is also a barrier to pedestrian movement, further disconnecting downtown from Pratt Park and the proposed waterfront redevelopment.

A longer term issue is the connectivity with the LIRR station. Although this is a branch line with service frequency issues, it is the major public transportation connection to New York City and other Long Island communities. Increasing residential densities and bringing buildings to the street front along Glen Street (with parking in the rear) from Pulaski Street to the station, with street level commercial and community facility uses, will over time, support a more walkable and perceivably safer pedestrian environment.

Parking and Signage

- The perception of safety in movement from parking to School and Glen Streets and clear signage for motorists and pedestrians are issues that need to be addressed.

The parking structures are easy to access and provide an easy connection to downtown activities. However, the perception of being unsafe in the garages and in walking through to the street discourages residents from parking there. Additionally, there is a lack of signage informing motorists where the garages are located, discouraging visitors from using them.

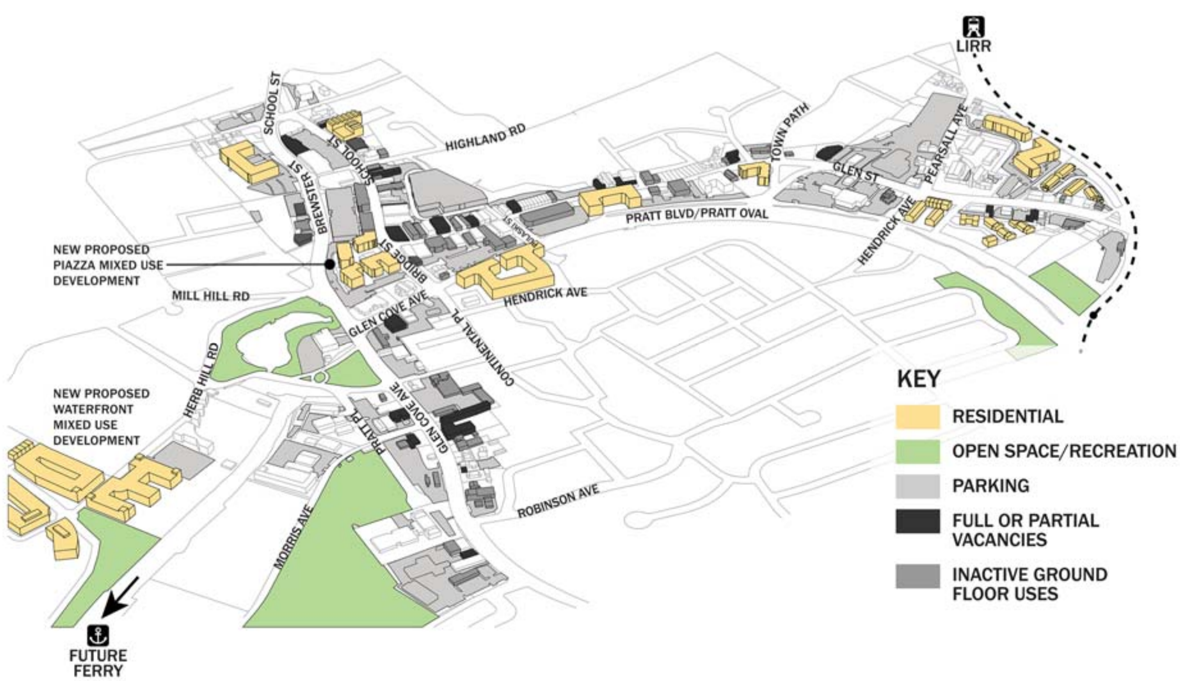

Figure 16 – Physical Conditions: Parks, Parking, Vacancies, and Inactive Uses

The parking structures, particularly the one that connects to both School Street and Glen Street, need better lighting and clearer signage to appropriate parking levels as well as to stairways. In addition, the pedestrian alleys that connect this area to both School and Glen Streets are unique elements in downtown Glen Cove and could be made to feel safer with lighting, planting, and art.

The environment surrounding the parking garages, what was once the back door to the government offices and businesses along School and Glen Streets has become another "front door." Workers take their breaks in these areas and people who are familiar with their destinations connect to their entrances from the back. The same condition exists at the parking lot at the back of the library (located at the intersection of Glen Cove Avenue and Brewster Street). If these areas were softened with better paving, lighting, and planting, they will support the informal uses that are already happening. There is space to provide bicycle parking as well as wayfinding information appropriate for downtown visitors.

The parking structure that is accessible from Brewster Street is in a good position to receive automobile traffic from Glen Cove Avenue and from Forest Avenue. Its entrance and turning lanes need to be made more visible.

Public Space

Public space is a critical element in the composition of active downtowns. The experience of downtown is not just shopping, eating, entertainment, and business. It is about being able to stand back and enjoy the social experience of being downtown and watching the passing parade of people and activities. Public space allows workers and shoppers to relax, eat outdoors during good weather and supports informal meetings and conversations making downtown a more sociable place.

Downtown Glen Cove has a good proportion of these public spaces. There are existing public spaces along School Street particularly along the western side of School Street, from the Village Square to the Staples parking lot, including the garage access areas and the pedestrian path alongside the movie theater. Located along the east side of School Street, as well as the north side of Glen Street, the alleyways that connect to the public parking garage also function as public spaces. In addition, the parking lots, particularly at the public library and at the Staples shopping strip, as well as the open area behind the School Street and Glen Street buildings that connect to the public parking garage, are already functioning as places of informal meetings and conversations.

Development Parcels

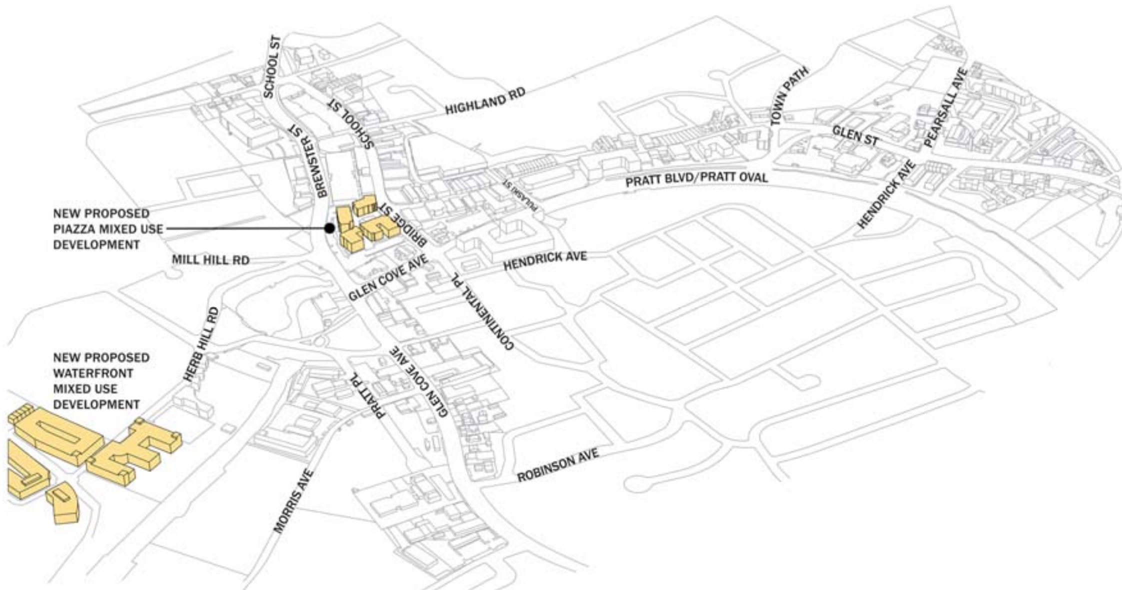

Figure 17 – New Development Map

Downtown Glen Cove's most significant development project is The Piazza @ Glen Cove. This mixed-use project features ground level commercial space and three to four stories of housing above 27,000 square feet of retail. There will be 142 rental apartment units ranging in size from 750 square feet for a one-bedroom, to 1,200 square feet for a two-bedroom. Additionally, the project will include a 107-car underground garage. The centerpiece of The Piazza @ Glen Cove will be a 12,000 square foot decorative brick public plaza. The addition of residential units in the downtown will help build residential demand for goods and services.

The project, located at a pivotal physical juncture point between downtown and the waterfront, presents both opportunities and challenges with respect to connecting these two areas. The project could impede or enhance connections to the waterfront. As currently designed, the project seems to emphasize the visual connection to the waterfront from Glen Street, and ideally this will remain a part of the project.

Land Use Recommendations

Downtown Glen Cove has a physical infrastructure and diversified land use that is an asset and with long-term strategies of preservation of what works, change of what does not work, and new development that will support a distinctive marketplace, the downtown can become a healthier economic and socially interactive place. This can be supported by:

- A set of urban design standards (lighting, planting, awnings, signage, trash cans, shuttle bus stops) that will unify the physical core of downtown, visually unifying the two hubs – downtown and the waterfront.

- The open parking lots that front the streets need to be visually controlled and when they must remain they should be bordered by planting and low walls that define the sidewalk edge. This will give visual coherence to the street and will support safer pedestrian movement.
- Pratt Park needs to be better physically connected to downtown. Parks are the "lungs" of downtown and Pratt Park can become a more usable asset. This space will be the fulcrum between downtown and the waterfront and can become the common meeting ground between the two hubs.
- On Glen Street, between Pulaski and the LIRR station, encourage mixed-use development with storefronts or building entrances replacing the existing parking lots along the sidewalk. This will support a safer pedestrian environment and help delineate downtown Glen Cove from the existing regional public transportation connection.
- All forms of movement need to be supported and an understanding of where the different modes–automobile, pedestrian, shuttle bus and bicycle–take precedent need to be understood.
- Pedestrian crosswalks need to be delineated more effectively (better visibility for both pedestrians and drivers) and at the Brewster Street pedestrians crossings the timing of the traffic lights needs to be adjusted so that pedestrians, particularly families with children and senior citizens, have more time to cross the street.

Impact of New Waterfront Redevelopment

Glen Isle Partners, LLC proposes to include 25,000 square feet of new retail within the commercial space at grade in the cluster of buildings to be created on the north side of Glen Cove Creek. This new development will also include 50,000 square feet of new office space, a new commuter ferry terminal (with direct ferry service to Manhattan), a 250-room hotel, and 860 units of new housing. Once occupied, it is projected that these additional features will increase local demand for retail goods and services by the following amounts:

An additional 50,000 square feet of new office space will likely accommodate up to 250 workers who in turn will add a projected $1.83 million in annual spending on retail goods and services to the existing demand in Glen Cove. This is based on research conducted by the International Council of Shopping Centers (ICSC) that found that office workers in a suburban setting spend on average $117.66 per week on retail goods and services, and $28.86 per week on meals, in the district where their office is located. Based on a 50-week work year, this amounts to $7,326/office worker/year on expenditures on retail goods and services, including meals for the anticipated workers coming from the new Waterfront redevelopment.

The 250-room hotel may bring as many as 59,300 visitors in a year, assuming an average occupancy rate of sixty five percent (65%). A conservative average expenditure of $50/person for retail goods and services (including meals) will add $2.96 million/year to local consumer demand.

Finally, the addition of 860 new households to the City will increase demand for consumer goods and services by $28.6 million/year, based on the current actual rate of consumer demand per household in

Glen Cove (total consumer demand in Glen Cove is $325,721,303, divided by the total of 9,764 households, yields annual consumer demand of $33,359 per household).

At build-out and occupancy of the Waterfront project, the combined new office worker, hotel visitor, and new resident consumer demand are conservatively projected to total $33.3 million/year. This represents a more than ten percent (10%) increase in annual consumer demand within the Glen Cove trade area.

Expressed in average sales demand per square foot of $180/square foot in the Glen Cove trade area, the new demand could potentially support 185,000 square feet of new retail space. Therefore, from the perspective of economics alone, the impact of 25,000 square feet of new retail space will be negligible to downtown retail, considering the dramatic increase in consumer demand that will accompany it.

From the perspective of potential retail mix, however, the impact of 25,000 square feet of new retail space could have a negative effect upon the retail plan for the downtown. The recommendations to follow in Section 4 serve to avoid this effect, and coordinate downtown retail with the waterfront retail.

Merchant and Stakeholder Interviews

The Consultants completed eight in-depth interviews with local stakeholders and 11 interviews with merchants in the downtown business district. Interviewees were identified by the Client. The list of interviewees can be found in the appendix. Interviews were conducted on a confidential basis and every effort was made to ensure the anonymity of individual responses. Many of these interviews echo feedback that was given in the 2008 Downtown Gateway Revitalization Plan.

Stakeholder Interviews

The Consultants asked City staff to provide a list of stakeholders with a vested interest in the success of Glen Cove. In total, the team interviewed community leaders, business owners, members of the real estate community, representatives of non-profit groups and local public officials. The interviews served to reveal perceptions from key individuals who represent larger constituencies. Specifically, interviews aimed to answer the following questions:

- What is the inter-relationship of three (3) groups that are key to commerce: residents, business community, and local government? Would business people call government here "business friendly"?
- How would your ideal vision for the future of downtown Glen Cove differ from the way the downtown is today?
- What are the strengths, weaknesses, opportunities for growth, and threats to growth in downtown Glen Cove?
- Can you describe for me the types of efforts that have been mounted in the past to try to improve downtown commerce? What worked? What didn't work?

- Thinking again of your vision for a better downtown Glen Cove, what resources will be required to achieve that vision? Of those resources, which ones does this community have, and which ones will they need to find?

The following are key ideas that emerged throughout the interview process:

Business Mix / Retail Offerings

Make downtown an economic driver for the City by bringing in small grocery stores, apparel and instrument and art supply stores.

Nighttime Activity

We need businesses that stay open late and nighttime uses like bars, entertainment venues, coffee shops and more restaurants.

Identity

Brand Glen Cove as the music capital of Long Island – capitalize on the recording studios that are here. Promote downtown as an arts and dining destination.

Demographics / Residents

Attract younger professionals and creative types – give these residents the retailers and services they want in Glen Cove so they don't have to leave.

Streetlife

Make downtown more user-friendly. Make it a place you want to be. Enhance walkability and connect downtown to the waterfront.

Strengths:

- Walkability
- Waterfront
- Diversity
- Parking structure
- Programming and Events (i.e. Downtown Sounds, Seafaire, etc)
- Pratt Park
- Restaurants

Weaknesses:

- Downtown does not have a major draw
- Connection between the waterfront and downtown does not exist yet

- Retail offerings are inadequate
- Train line is antiquated and slow
- There is a shortage of affordable housing for recent graduates, teachers, etc.
- Businesses close at 5PM - if you work late everything is closed.
- Walking and biking are a challenge.
- There is a tension around immigrant community. Some streets are integrated but not always comfortable.

Opportunities:

- Waterfront redevelopment may attract younger residents, creative types, and will make the area a destination.
- The plans for the Piazza will bring a positive change
- Opportunity to brand downtown Glen Cove with a "music" theme
- Plans to make a better connection from downtown to the waterfront are off to a strong start
- Exploration with B.I.D. to improve perception of safety in the alleyways
- The planned ferry will make Glen Cove more accessible

Threats:

- Young intellectual property is fleeing because there is not access to jobs
- People perceive Glen Cove as having no parking downtown. They do not know about garage.
- The local economy thrived when people would walk more and stay in town. Now everyone drives elsewhere to get what they need since it isn't here.
- Downtown is facing competition from malls and the web.
- The gap between the downtown and the waterfront is significant.

Merchant Interviews

To gain additional insight from the merchant community, interviews were conducted with downtown retailers. These 10-15 minute interviews took place over the course of the Study with 11 retailers from a mix of store types and varying lengths of time in business in Glen Cove. They were asked general background information on their businesses, specific questions on the local business environment, as well as what the City can do to help.

Overall, many merchants expressed that the lack of retail downtown, particularly apparel stores, has led to minimal foot traffic throughout the district, and that stores close before people are out of work, making the downtown feel "dead" after 5PM. There were also polarized views on the Business

Improvement District and the Chamber of Commerce. Many felt that one or the other was a positive presence downtown but that they were not getting back as much as they put in.

The following comments and themes also emerged throughout the interviews:

Obstacles to Success:

- Not enough stores/Too many vacancies
- Isolation
- Not enough foot traffic
- Town shuts down after 5PM
- Loitering and perceived issues of safety and security
- Not enough on-street parking
- Commercial real estate taxes drive up rents
- Cars drive too fast
- Events downtown may not be "working"

How Can They Help?

- Better waste management–people pile garbage around trash bins.
- Coordinate daytime and evening events that reflect the music and art scene.
- Stop giving parking tickets to customers
- Encourage businesses to stay open later
- Tax incentives for façade restorations would make downtown more attractive
- Address loitering
- Give people reasons to walk around
- Slow traffic down
- Update the transportation pattern to improve access to downtown

Competitive Districts Analysis

The Consultants examined other nearby downtown areas and nearby shopping centers to determine the competitive environment in which downtown Glen Cove operates. The analysis was done through the following four lenses:

- Where is retail located in the general area (in and around Nassau County)? Is this retail a competitor to Glen Cove's efforts to revive the downtown area?
- In the absence of a vibrant and inviting downtown in Glen Cove, are other downtown areas

attracting Glen Cove's shoppers?

- Does the existence of retail in other areas of Glen Cove create competition for the downtown area?
- Based upon the survey results, what retailers do shoppers want that aren't available in Glen Cove? Are these retailers pulling shoppers out of Glen Cove?

Where is retail located in the general area (in and around Nassau County)? Is this retail a competitor to Glen Cove's efforts to revive the downtown area?

- In 2012, Nassau County and western Suffolk County contained approximately 124 million square feet of total retail space, with 454,000 square feet under construction. Of that total, 330,000 square feet of construction was at the recently opened Gallery at Westbury Plaza, in Westbury.
- Roosevelt Field Mall, located in East Garden City, contains 2.2 million square feet of retail space. The center is going through a transition as it replaces expiring leases with higher-end upscale retailers. Roosevelt Field is located 8.5 miles from downtown Glen Cove.
- The Mall at the Source is a 733,000 square feet lifestyle center also located in East Garden City. The mall is located close to Roosevelt Field Mall and in the general proximity of two other shopping centers, which comprise an additional 600,000 square feet of space.
- The next largest mall in the area after Roosevelt Field is Broadway Mall, a 1.2-million square foot super regional mall located in Hicksville, NY.
- The mere presence of so much retail near downtown Glen Cove does not mean that it represents competition. The vast majority of the retail described above doesn't compete with downtown Glen Cove because it offers a merchandise mix that is not currently available in downtown Glen Cove. Moreover, most of this retail offering wouldn't work in Glen Cove's downtown setting and is not recommended as part of the strategy for downtown.

In the absence of a vibrant and inviting downtown in Glen Cove, are other downtown areas attracting Glen Cove's shoppers?

The results of the consumer survey included shoppers' preferences for shopping locations. Consumers identified three preferred locations for shopping and dining: Manhasset, Westbury, and Huntington, NY. Each of these areas has been examined to better understand the retail offerings and why they appeal to consumers.

- Manhasset has at least two large shopping centers in the community. One is the Americana at Manhasset, which is a 220,000 square feet lifestyle center with a mix of upscale clothing retailers. The second is Manhasset Center, an 188,000 square feet open-air center anchored by grocery and discount department stores. Again, the retail offering available in Manhasset area does not appear to pose a competitive threat to downtown Glen Cove. There are not sufficient restaurant offerings along Plandome Road and Northern Boulevard to pose any threat to the creation of a restaurant row in downtown Glen Cove although some restaurants, such as Edison's Ale House, might be attractive candidates for recruitment.

- Westbury Village has a downtown that runs along Post Avenue and offers a collection of retail stores and restaurants. Additionally, there are retail stores located in Westbury next door to Roosevelt Field Mall. In the Village, restaurants are mostly independent operators that are housed in freestanding 2-story buildings. There is an abundance of surface parking adjacent to or behind the stores. The mix of restaurants, which could be serving as a draw for shoppers, does not appear to be so unique that it can't be replicated in downtown Glen Cove. Westbury Village is located about 9 miles from downtown Glen Cove just south of the Northern Parkway.
- Huntington Village offers a quaint, walkable downtown setting that covers a 14-block area along Route 25A and a few side streets. The village offers a good mix of retail stores with a heavy presence of restaurants and boutique stores. Huntington Village is clearly a competitor of significant value. However, it is located 12.5 miles to the east of downtown, which means some trips could be redirected back to the downtown provided there is a somewhat comparable offering of dining choices.
- Although other downtowns exist within the area (Oyster Bay, Port Washington), they do not appear to be attracting shoppers from the Glen Cove trade area.

Does the existence of retail in other areas of Glen Cove create competition for the downtown area?

The downtown area currently faces competition from restaurants that are located in Glen Cove, but outside of the downtown area. Shoppers named a number of these Glen Cove restaurants as being among their favorites (La Pace, Cedar Creek, and Wild Fig). As a result, these restaurants attract shoppers to the community, but away from the downtown area.

Based upon the survey results, what retailers do shoppers want that aren't available in Glen Cove? Are these retailers pulling shoppers out of Glen Cove?

- Dining: Consumers stated a strong preference for TGI Friday, Ruby Tuesday, Applebee's, and Panera Bread. Of the four restaurants, and based only on space and parking requirements, only Panera Bread would be a possible candidate for downtown. Ruby Tuesday had an operation in Glen Cove but closed that location. The closest Applebee's and Ruby Tuesday are located at the Mall at the Source in East Garden City. The closest TGI Friday is located on Northern Boulevard in Manhasset, while the closest Panera Bread is at the Broadway Mall in Hicksville. It is doubtful that these restaurants are currently drawing much traffic from Glen Cove, given their distance from the downtown.
- Entertainment: Shoppers want more entertainment. During the analysis, the movie theater in Glen Cove was identified by the team as an underperforming asset. Nevertheless, it was viewed as a potential retail anchor; given its capacity to attract more visitors who could in turn support restaurants and other retailers. During the drafting of this report, that theater closed operations. The cause of the closure is a private contractual matter among the operator, the owner, and the lender, and is not amenable to the intervention of local government. Given the importance of this asset to the well functioning of other retail commerce downtown, and the potential that other nearby movie theaters in Roslyn and Manhasset and the multiplex cinema at the Roosevelt Field mall may have to attract visitors that might otherwise come to downtown Glen Cove; the status of Glen Cove's theater is significant to downtown retail. In light of

current developments, this plan recommends that where possible, the city facilitate negotiations among the private parties in an effort to achieve the re-opening of the facility. It is also recommended that the City be prepared, in the event of failure of that negotiation, to recruit potential new owners and/or operators of the facility.

SECTION 3: SHOPPER SURVEY

Summary of Survey Results

Total Responses; Margin of Error

1,272 surveys were received (948 online, and 324 on paper), yielding a 2.8% margin of error and far exceeding the goal of 300 completed surveys. A margin of error of 5% or less is essential in order to be able to apply the data with any reasonable certainty to the wider population of the survey area, and expect that retailers will accept the data as statistically significant. By compiling a body of data that was randomly accumulated and that is representative of the population in the trade area, and by achieving a margin of error level of 2.8%, we have ensured that this is a highly reliable representation of the opinions of this community that will be of value to retailers, developers and investors considering business in Glen Cove.

Who Participated in the Survey?

- Among all responses, 84% live in the 11542 zip code.
- Two-thirds of all respondents have lived in Glen Cove for more than 10 years.
- Compared to the census data for Glen Cove and Nassau County: 60% of all respondents are female compared to 51% for Glen Cove and 52% for Nassau County.
- 71% of all respondents are age 45 or older, compared to 47% for Glen Cove and 49% for Nassau County.
- 45% of all respondents are age 55 or older, compared to 36% for Glen Cove and 36% for Nassau County.
- 58% of all respondents reported annual household income of more than $100,000, compared to 35% for Glen Cove and 48% for Nassau County.
- Respondents reported living in a somewhat larger household, with 3.35 persons per households compared to 2.69 persons for Glen Cove and 2.94 persons per household for all of Nassau County.
- In summary, respondents are more likely to be long-term residents that are older females with higher household incomes and more persons per household than the community average.

What is most important to accomplish?

The survey provided a series of 14 choices that respondents could define as "very important," "somewhat important," or "not important." Listed in order below are the choices that respondents considered to be "very important." Only 5% of respondents said "do nothing. Glen Cove is fine as it is." The vast majority—95%—wants to see change and improvement in downtown Glen Cove.

Very Important To:

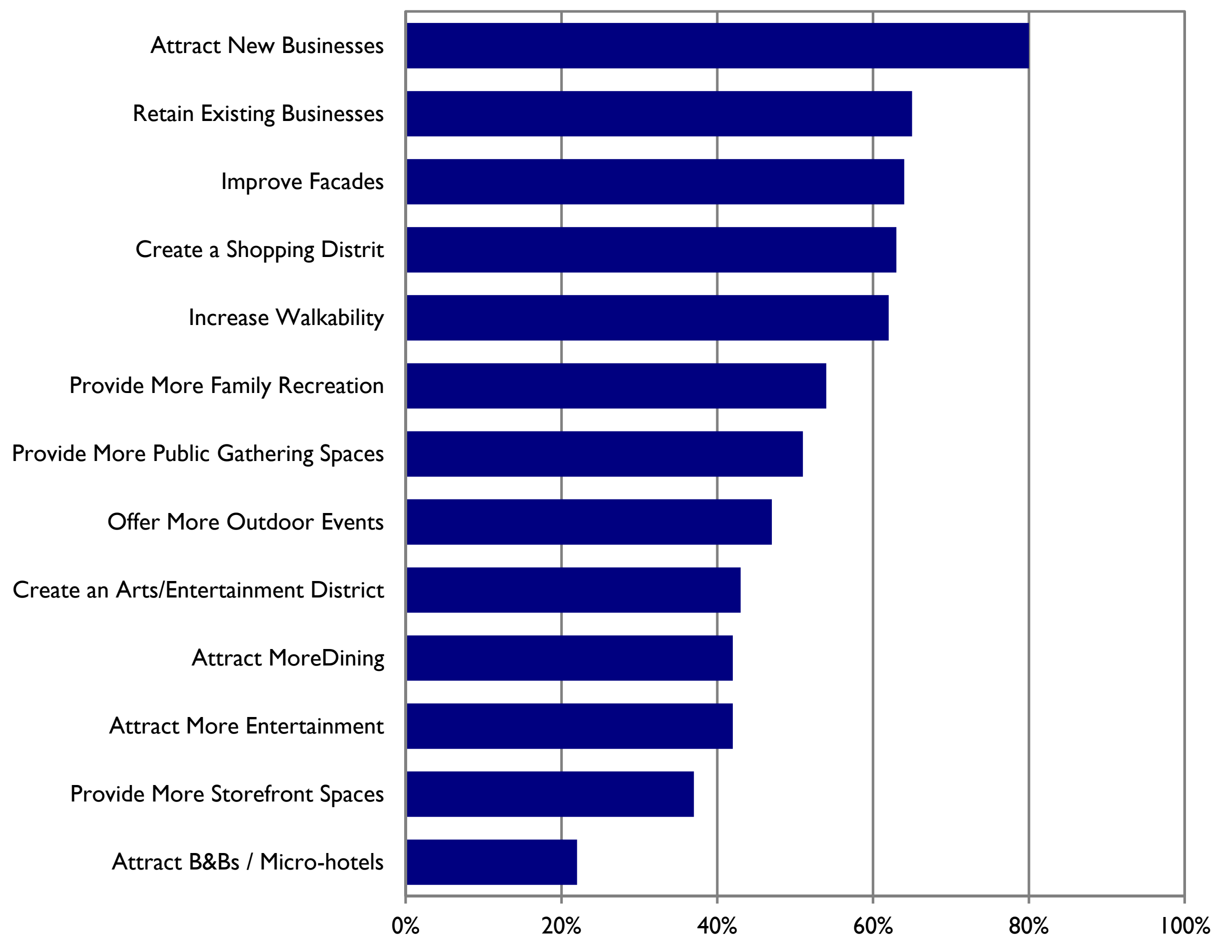

Figure 18 – Choices Ranked "Very Important" for Downtown Glen Cove, Source: Shopper Survey

Several of the themes raised by this question were repeated throughout the survey, and consistently scored a high response. Survey respondents indicated a high dissatisfaction with the current retail mix; people want new stores, more restaurants, and more storefront spaces to have additional retail. They do not like the way that the downtown looks today, and they want it not only to look better, but to function better with more public space, creature comforts, and more outdoor events to provide more reason to go there. They want to walk, browse-shop, and be entertained in the downtown district. Interestingly, they want the district to be promoted to outsiders so that more people visit the downtown; enough new visitors to support places of public lodging so that they stay for more than a few hours.

Survey respondents indicated a high dissatisfaction with the current retail mix; people want new stores, more restaurants, and more storefront spaces to have additional retail.

Who Shops Here and Who Doesn't ("Shoppers" vs. "Non-Shoppers")?

- 84% of all respondents live in the Glen Cove zip code, indicating a small trade area that is not attracting consumers from outside the immediate area.
- Of the 967 respondents who indicated their frequency of shopping visits, 39% are shoppers (more than once a month) and 61% non-shoppers (once a month or less).

> 61% of respondents are "non-shoppers" (visit once a month or less). 85% of "non-shoppers" live in Glen Cove.

- Among all non-shoppers, 85% live in the Glen Cove zip code, as do 84% of shoppers.
- Glen Cove retailers capture 36% of visits and 35% of spending from shoppers, but just 13% of visits and 22% of spending from non-shoppers.
- Glen Cove restaurants capture 47% of visits and 44% of spending from shoppers, and 34% of visits and 45% of spending from non-shoppers.
- Among all responses, 59% said the primary reason the come to Glen Cove is to visit the restaurants.
- The main reason why respondents do not visit more often is too few stores and shops (70%), followed by poor selection/quality of merchandise (54%). Among respondents who said "other reason," 40% mentioned concerns about safety.

Sense of Security in Downtown

- Respondents voiced safety concerns visiting downtown, or using the parking garage or parking lots. This warrants serious consideration, as shoppers will not come to places where they don't feel safe.
- There were numerous mentions about loiterers on the streets during the day, teens hanging near the theaters at night, and lack of security lighting in the area.

When questioned about their sense of safety and security at various locations, respondents said:

- 58% feel "very secure" in their homes compared to 35% when visiting downtown, 25% when using public parking lots and 18% when using the parking garages.
- 10% said they are "somewhat insecure" or "very insecure" in their home, compared to 22% when visiting downtown, 30% when using public parking lots and 41% when using the parking garages.

> 41% of respondents reported feeling "somewhat" or "very insecure" when using the downtown parking garages.

- Despite the fact that 71% of all respondents say they can "always" or "usually" find parking when visiting downtown, numerous responses asked for more on-street parking. It is likely that this reflects reluctance to use the parking garage.

Reasons to Visit

The survey asked which uses would make respondents visit more often:

66% of respondents said they would visit more for arts, music, and food festivals.

Would Visit More For:

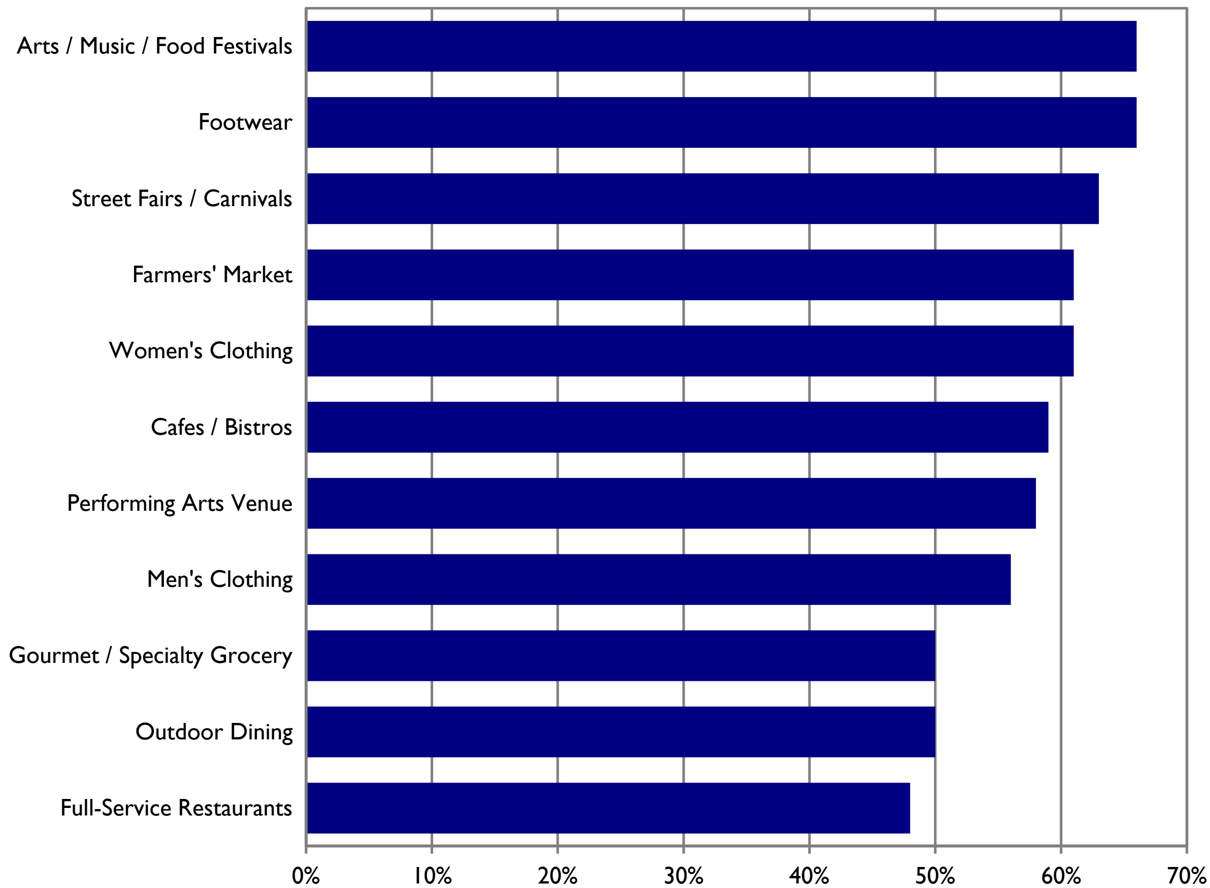

Figure 19 – Reasons You Would Visit Downtown Glen Cove More Often, Source: Shopper Survey

Consumer Retail Preferences

- Dining options (19%) was the thing that respondents liked best about Glen Cove, while the limited retail options (27%) and safety concerns (23%) was what they liked least.
- Among the "difficult to find" items, 53% of respondents named clothing (men's, women's and children's).
- Among the types of restaurants wanted are casual/upscale (16%), particularly those offering American fare.
- Among the types of retail stores wanted are discount department stores (21%), and clothing

stores (25%), which includes family and women's clothing.

- Among the entertainment/leisure activities wanted are clubs/dancing/night-time entertainment (17%), and more concerts and live music venues (12%).
- Among respondents' favorite places to visit are Huntington (5.3%), Page One restaurant (4.6%) and Downtown Café (4.0%).

Downtown Preferences

- Nearly 1-in-2 responses say they would definitely (22%) or possibly (27%) bicycle to downtown if there were bike lanes/racks.
- Downtown Sounds is very popular and 64% say they attend the concerts.
- There is some preference for buying or renting a home in downtown.

49% of respondents said they would definitely or possibly bicycle to downtown if there were bike lanes / tracks.

Strong to Moderate Interest in Living Downtown

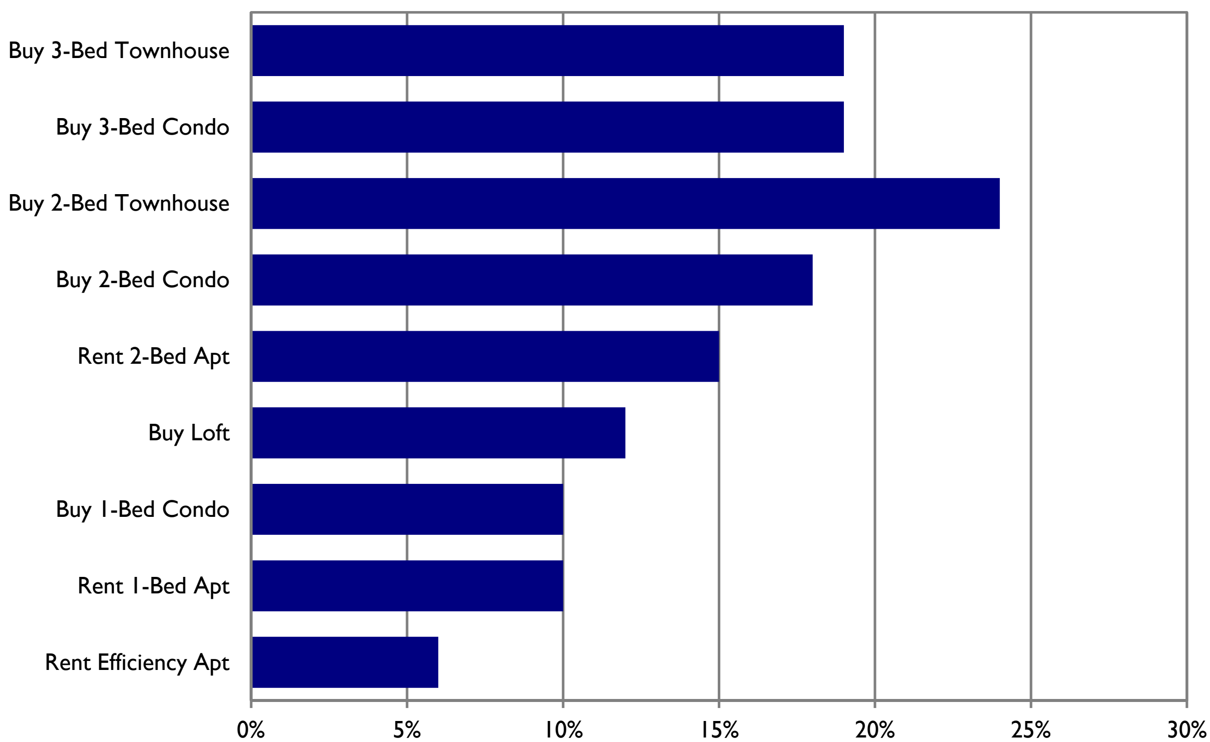

Figure 20 – Strong to Moderate Interest in Living in Downtown Glen Cove, Source: Shopper Survey

Conclusions

The survey found that while many respondents have an appreciation for downtown, they recognize the opportunities to improve key elements, most notably a narrow selection of retail offerings and safety concerns.

The major conclusions are as follows:

- The downtown doesn't attract people from outside of the immediate area and even many of those living in the area don't shop here frequently.
- The major obstacles appear to be the limited retail offering, lack of entertainment activities, and safety concerns about parking in the garage and the presence of loiterers in the daytime and congregations of teens in the evening.
- Many people like the movie theater, but wish it were more appealing and had a better film offering. [Since compiling these survey responses, the theater has closed due to a contract dispute. This plan recommends that the City facilitate private negotiations as possible, but to also be prepared to recruit another owner and/or operator, working in concert with the property owner, should negotiations fail.]
- There is a good appreciation of the existing events and activities, and strong support for additional downtown events, parks, and outdoor family activities.
- The existing restaurants appear to be a strong draw and additional consideration should be given to enhancing the dining and nighttime entertainment offering.
- Respondents miss Sweezey's and there is preference for basic clothing needs (socks, underwear) as well as men's, women's and children's clothing.
- Attention needs to be dedicated to enhancing the appearance of storefronts, facades, and lighting in order to create a more appealing and secure environment.

NOTE: The complete set of survey questions and responses are included in the appendix.

SECTION 4: IMPLEMENTATION STRATEGY

A comprehensive strategy to ensure the competitiveness of Glen Cove's downtown as a visitor destination means not only engaging in targeted retail recruitment and prospecting, but also taking necessary steps to improve the overall environment for retailers – directly addressing issues that may have plagued the downtown for years. This plan offers the City a tactical blueprint for action that, if followed, will result in a thriving downtown that offers an appealing environment for business and investors alike.

This section outlines a retail strategy that will accomplish the following:

- Retail Category Recommendations: Provide the City and its partners with a clear and compelling directive for immediate, targeted, and strategic retail attraction.
- Retail Strategy Recommendations: Provide the City and its partners with a comprehensive blueprint for action that will address issues that are keeping both customers and potential businesses from visiting or locating in downtown Glen Cove.

Marketing Glen Cove to Prospective Tenants

Through this Study, the City will be able to identify opportunities in the current market that will assist investors to make site location decisions. For investors without access to sophisticated site selection tools, namely small and mid-size retailers, this site information is extremely valuable.

Helping retailers paint a clearer picture of investment opportunities through marketing is a critical component of the comprehensive retail attraction program outlined in this Study. Retailers, particularly small to mid-size retailers, rarely take full advantage of advanced site selection technology, leaving them without a full picture of current population trends or where the opportunities are within a community. Moreover, some retailers will build ahead of the market if you can demonstrate rapid growth. The Waterfront redevelopment, including the new housing, hotel and ferry terminal, and the additional visitation that these projects will drive to Glen Cove, are all growth indicators that should be highlighted. It is important to keep in mind that while these are marketing opportunities for some retailers, many retailers will need to justify a new location based on current demographics rather than on anticipated population growth. The marketing materials given to the Client will take these opportunities and realities into account.

Retail Category Recommendations

Market data and consumer survey responses reveal that shoppers would like places in town where they could make all their clothing purchases, from simple socks and underwear, to more specialized categories of clothing and accessories for men, women, juniors, youth, children, and infants. While it would be inappropriate for the merchants of Glen Cove to engage in direct competition with the clothiers of the nearby malls, big-box retailers, and shopping centers that cover many of these categories, it would be possible to recruit a national or regional discount family clothier to accommodate basic needs, so long as that clothier were not located in the downtown. The Forest

Avenue corridor may be a suitable alternative location, together with other neighborhood or convenience retail.

It is necessary to reserve retail space downtown for distinctive retailers to contribute to a brand for downtown Glen Cove that will make it a unique browse-shopping experience worthy of the trip for outside visitors. This will require retail offerings of an individuality and quality not commonly found in the region. **Distinctive clothing and accessories retailers would include custom bridal; custom dress shops; custom men's shirt makers; uniforms supplier; custom leather accessories; imported shoes; monogrammed infant merchandise; and other unique retail.**

Specialty food is a promising category for downtown Glen Cove, as well, to cater to the unmet demand for grocery, and to serve as a destination category to attract visits of "Top Rung" and "Wealthy Seaboard Suburbs" shoppers from the 15-minute drive shed for healthy, low-fat, organic foods, as well as high-quality imported specialties.

Furniture and home furnishings are also in demand across the region, and Glen Cove could build upon the foundation it has already established with Safavieh Furniture Store, and attract complementary stores that could make Glen Cove a browse destination for furniture, ancillary furnishings, decorators, and other related categories (carpeting, draperies, etc.).

The effort to recruit new businesses into Glen Cove must begin with **full-service restaurants**. As indicated, the level of unmet demand could support as many as eight to twelve new restaurants in the downtown, particularly if these were clustered together in an attractive "Restaurant Row" on School Street. Unlike other forms of retail, good restaurants do not require foot traffic or even car traffic to survive. A good dining experience can stand alone and survive without other supportive retail, as people are willing to travel for a good dining experience. The restaurant can become a regional draw, and a cluster of restaurants can become an even greater draw. Some of the restaurants recruited should include evening entertainment features: dancing, live performers, comedy clubs—as both the consumer survey results and the lifestyle analysis supported the recruitment of more evening entertainment for downtown Glen Cove.

In summary, there are seven major categories of retail that are appropriate for the City of Glen Cove, listed below. (Please note that among the sub-categories that are provided within each major category, only one is unsuitable and not recommended for the downtown, as indicated.)

1. **Clothing**: women's boutiques; men's clothing; children's clothing; specialty apparel (bridal, infant, custom shirt makers, etc.); budget family clothing (not for downtown)
2. **Clothing Accessories/Other**: footwear; accessories; jewelry; luggage/leather goods
3. **Entertainment**: taverns/pubs; nightclubs/venues with dancing; comedy clubs
4. **Grocery**: gourmet/specialty grocery; ethnic grocery
5. **Home décor**: furniture; home furnishings/decorations; housewares; kitchen/bath design

6. **Recreation retail**: sporting goods; hobby stores; musical instruments; instruction/enrichment (dance, martial arts, yoga, graphic arts, pottery, music lessons, etc.)
7. **Restaurants**: full service restaurants (casual upscale with alcohol; casual family without alcohol); limited service eating places (cafés, delicatessens, etc.)

Of the above seven major categories, it is recommended that the recruitment effort focus initially on three: entertainment, recreation retail, and restaurants. These are the types of retail that can stand alone and survive before the rest of the downtown retail fills in, and these will allow the City of Glen Cove to promote the downtown as a destination. Once these categories have been established, the downtown has developed its brand, and foot traffic has risen in the downtown, it will be easier to pursue recruitment of retailers in the remaining four major categories.

Retail Strategy Recommendations

Comprehensive retail strategies will help Glen Cove identify where targeted interventions will make downtown Glen Cove a more attractive destination for retail businesses by addressing fundamental site selection criteria. The following recommendations address the factors that retailers and developers take into account when making site selection decisions, notably distance and convenience, retail density, and overall tenant mix.

When expectations are not met downtown, visitors shop and eat elsewhere, resulting in a loss of revenue for businesses. In addition, if visitors do not view the waterfront and downtown Glen Cove as places to visit in the same afternoon, the downtown will not benefit from a greater number of residents and visitors along the waterfront. In order to ensure that new retailers succeed in the short term, the following recommendations are focused on tangible, short-term activities that will make an immediate difference. Helping existing businesses is a critical retail leasing strategy because successful businesses are ultimately the best calling card for business recruitment.

Objective #1: Improve and Manage Retail Mix

Retail density and retail mix are two important factors in the success of a commercial district. Retail density refers to the number of places to shop and the proximity and distance between complementary stores. Retail mix refers to the type and kind of goods sold downtown. Survey and market data reveal that downtown retail mix is not meeting the needs of residents and visitors to Glen Cove. With the exception of restaurants, there is no significant cluster in any particular retail category to create a strong retail node, which would help Glen Cove draw from a larger trade area. Clusters of complementary retailers strengthen retail nodes and help to build a shopping destination; a synergy is achieved by a density of complementary tenants, improving a consumer's ability to "cross-shop." The attractiveness of cross-shopping means more interest in downtown as a shopping destination. This helps improve the geographic pull of a district and increases the effective size of the trade area.

Engage in comprehensive retail recruitment

Recruitment of new retailers is needed to fill vacancies and to enhance the current retail mix. Engaging in targeted retail recruitment will help the City better reflect its current identity, and perhaps more importantly, its aspirational identity. In the next phase of this project, the Consultants will work with the City of Glen Cove to create this retail recruitment program, which will enable the City carry out the effort over time. Elements of this recruitment effort will include the creation and distribution of marketing materials to prospective tenants and leasing agents, ongoing identification of prospective tenants, and events such as storefront strolls and broker breakfasts.

Develop and enforce design standards

The City can take steps toward making the area more appealing and inviting by developing an enforceable design standard (for storefront elements: awnings, lighting, signage; as well as urban design elements: lighting, plantings, trash cans, shuttle bus stops). Offering incentives, such as matching grants, will stimulate owners to meet standards. This will allow the City to visually unify the physical core of downtown with the future waterfront redevelopment.

A significant urban design challenge downtown is the presence of open parking lots that front the streets (Staples, for example), breaking up the feeling of a pedestrian-friendly downtown. A short-term strategy is to visually control these lots by using small interventions such as planting and low walls to define the sidewalk edge. This will give visual coherence to the street and will support safer pedestrian movement. Over the long term, these configurations must be prohibited from downtown, and we note that this is consistent with a recommendation of the Master Plan[2]. It is necessary to identify funding sources for any streetscape improvements through grants, corporate contributions, City funds, and/or from BID fees.

Preserve public gathering space.

Public gathering space is crucial to encourage visitation through events and activities. The Glen Cove Business Improvement District attracts thousands of visitors a year to "Downtown Sounds" and similar events are an important component of an overall strategy to attract and retain visitors.

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[2] "Quality design should be utilized to keep the pedestrian-friendly nature of the streets, including consistent setbacks…" Master Plan for the City of Glen Cove, Recommendation #1 "Protect and enhance Downtown's historic scale and character," Phillips Preiss Shapiro Associates, Inc., Turner Miller Group, January 2009, at page 99.

Build a "Restaurant Row"

Building on downtown's current strengths; work with downtown managers and commercial property owners to develop a restaurant row. Activities and businesses that fit into this vision include full-service restaurants, outdoor dining/festival space, and entertainment (nightclubs/comedy clubs, live performances, and venues for dancing, outdoor art, events and activities and an enhanced movie theater). Strengthening this node will enable downtown to become an effective destination that will draw more visitors into the district. This is a long-term effort that will need to begin with the strengthening of relationships of the downtown management organizations with the commercial property owners and the existing restaurants. The implementation of this plan will be facilitated by the cooperation of these owners, and that will not be obtained unless they are persuaded as a group that this strategy will be effective at stimulating more outside visitors to come to Glen Cove, and ultimately will increase commercial property values.

Launch a business retention effort

Launching a business retention effort will serve to support the existing businesses downtown. This is an important piece to ensure that downtown retailers are able to remain healthy as new development occurs along the waterfront. [As previously noted, one facet of this strategy will be facilitation of the re-opening of the Glen Cove movie theater, either through positive resolution of the private dispute that has closed the theater, or with the City's intervention in recruiting a new owner and/or operator for the theater.]

The process of beginning a retention effort begins by interviewing all merchants to:

- Identify those at risk of imminent failure, and provide triage support for desirable businesses at risk of failure;
- Identify merchants in need of succession planning, and to provide it;
- Identify cooperative marketing opportunities;
- Determine level of e-commerce penetration to help those in need of websites and email; encourage development of social networking where practicable; explore internet sales as alternate revenue where practicable; and
- Determine local best practices that may be shared.

Another important piece is to create a continuous marketing effort to regularly promote the downtown merchants and restaurants to consumers in the 15-minute drive shed, highlighting unique festivals or events in the downtown, as well as positioning the downtown as an alternative shopping experience for consumers during all regular selling seasons of the year (Super Bowl; President's Days; Valentine's Day; Easter; Mother's Day; Father's Day; Graduation; Back-to-School; Halloween; Thanksgiving; Holiday).

Reposition and rebrand downtown Glen Cove

Defining the district's brand or identity is an important first step that will help make Glen Cove a distinctive destination in its own right. Because Glen Cove is off the beaten path, visitors need a reason to make the trip. It is important that the downtown offer an environment that is unique to Glen Cove and not easily replicated within a 15-minute drive. Cultivating a retail mix that cannot be found elsewhere will help the district remain competitive with nearby downtowns and shopping destinations.

A successful district brand must be rooted in reality. It should initially reflect what is happening in Glen Cove now – a brand that allows the community to deliver on a brand promise. But it must also serve as inspiration for where Glen Cove is headed. This includes proposed developments, population trends, and community aspiration. The Piazza and Waterfront redevelopments, coupled with downtown's strong brand as a restaurant destination, are an excellent basis for both current and aspirational brand identity.

<u>Downtown Glen Cove's Positioning</u>

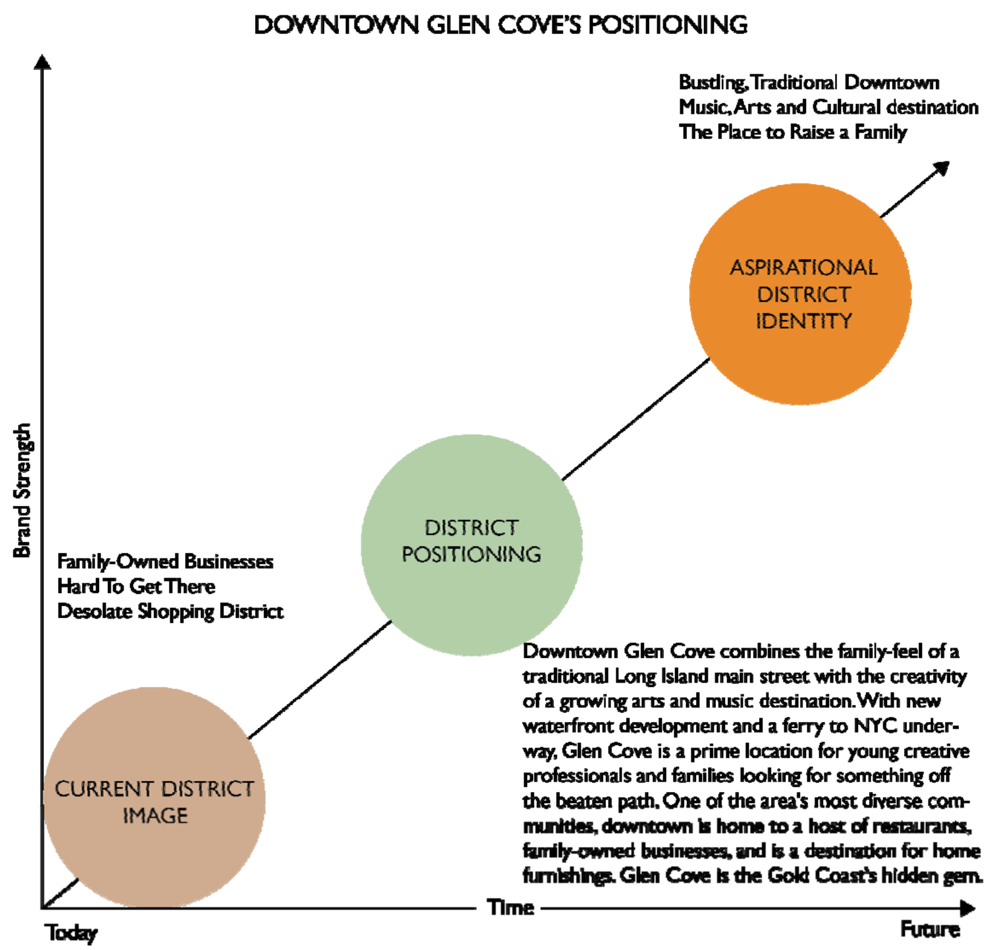


Figure 21 – Downtown Glen Cove's Positioning

This brand or vision is a starting point, and should be developed with input from local stakeholders, then shared with developers, retailers or real estate brokers with an interest in Glen Cove to show them where the community is going, and to get them on board.

Objective #2: Improve Connectivity and Access

A downtown retail district will not succeed if physical barriers make it difficult for people to shop or conveniently (and safely) reach their destinations from their point of origin (typically their cars). Interventions that are targeted at minimizing physical barriers and retail gaps, and that eliminate a sense of insecurity, are critical to improving downtown and allowing for ease of access between downtown and the waterfront. The waterfront and downtown must be perceived as equal halves of a whole. Without these improvements, retail attraction efforts will fall flat.

Downtown Glen Cove's physical infrastructure and diversified land use are assets. With long term strategies of preservation of what works, change of what does not work, and new development that will support a distinctive marketplace, downtown can grow into a healthier economic and socially interactive place.

Improve gateway and wayfinding signage

Wayfinding, gateway, and directional signage are needed to guide visitors (both in their cars and on foot) to downtown, parking, individual stores, restaurants, and attractions—including the waterfront. This signage must be visible and readable for pedestrians as well as motorists. Equalization of the street names is also needed to avoid confusion for outside visitors.

Create multi-modal transportation connections to the waterfront

It is important that people have access to a path between downtown and the waterfront regardless of their mode of transportation. Pedestrians, cyclists, drivers, and passengers must each be able to make the trip safely and comfortably.

A shuttle system (trolley or jitney bus) would add a much-needed form of transportation to make the trip easier between nodes throughout Glen Cove, particularly for seniors and children who may not be able to drive, walk, or ride bicycle. Shuttle routes would be most beneficial to residents and visitors by linking the two train stations, downtown, the waterfront, and parking decks to one another. By making it easier for people to get around, a trolley will lengthen shopping visits, stimulate browse-shopping and get people to visit more stores per trip. The Glen Cove Senior Center, which currently has a shuttle system and the managers or developers of new residential developments, may be potential partners in creating this system.

Improve bicycle infrastructure and amenities.

Address pedestrian access, especially for residential neighborhoods in the immediate vicinity of downtown

The residential neighborhoods that surround downtown should have easy access to downtown activities without having to depend on a car; however, the pathways and entry points need to be more clearly delineated for this to happen safely. Interventions that would support this, and further promote access between downtown and the waterfront are:

- **Create a pedestrian pathway alongside the Avalon Glen Cove** to better connect the neighborhood south of Pratt Blvd. to downtown;
- **Make a better connection between Pratt Park and downtown.** Parks are the "lungs" of downtown and this one can become a more usable asset. This space will be the fulcrum between downtown and the waterfront and can become the common meeting ground between the two hubs;
- **Reduce the speed limit and slow signal crossings along Brewster Street.** Brewster Street, connecting downtown with the surrounding communities, acts as a bypass for cars and a barrier to pedestrians. Traffic must be slowed so that drivers recognize that they have entered downtown Glen Cove and there are downtown opportunities as well as parking available. This includes having the traffic lights timed to permit people more time to cross the street, making it safer for senior citizens and families with young children. This change will also make access into downtown safer for cyclists. Additionally, crosswalks must be clearly delineated and visible to pedestrians and motorists.
- **On Glen Street, between Pulaski and the LIRR station, encourage mixed-use development** with storefronts or building entrances replacing the existing parking lots along the sidewalk. This will support a safer pedestrian environment and help delineate downtown Glen Cove from the existing regional public transportation connection;
- **Address the longer term issue of connectivity with the LIRR station.** Although the branch line has service frequency issues, it is the major public transportation connection to New York City and other Long Island communities. Increasing residential densities and bringing buildings to the street front along Glen Street (with parking in the rear) from Pulaski Street to the station, with street level commercial and community facility uses, will over time, support a more walkable and perceivably safer pedestrian environment.

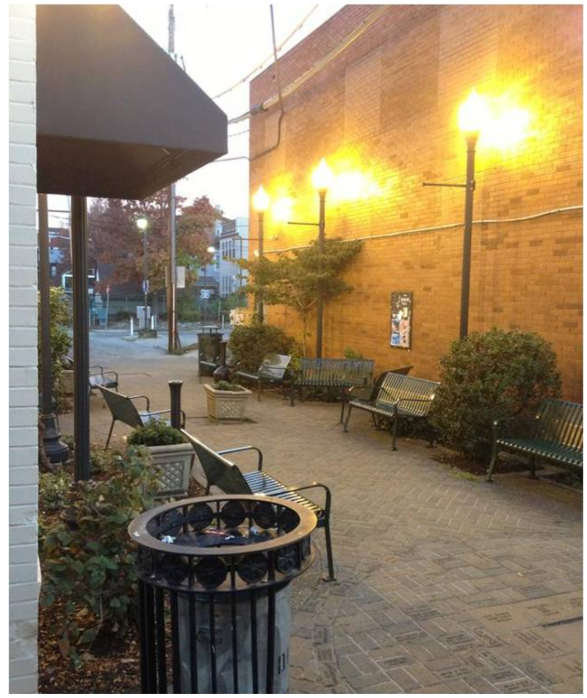
Case Study – Opportunity for Community Support

Workers without Wheels run by the United Church of Christ in Patchogue originally began as a program to give undocumented Latino workers a bicycle to get to their jobs, but became a resource after Hurricane Sandy for people who were unable to get to work. More info at www.ucc.org/news/bicycle-workers-without.html.

The distance from the waterfront to downtown and many of Glen Cove's residential areas is well-suited for a person on bicycle. The Glen Cove Master Plan calls for a bicycle plan for Pratt Boulevard and Glen Cove Avenue (County Route 21). The Plan advises that,

> "County and State support should be sought in improving these two corridors for bicycling, which ideally would have dedicated bicycle paths for safety reasons. This is likely to be intermittent, and created in conjunction with adjoining development and / or roadway reconfigurations."

With the planned bicycle paths along the waterfront esplanade, implementing bicycle lanes that connect downtown to the waterfront and bring those riding to the waterfront through downtown and past downtown businesses is critical. Providing bicycle infrastructure can serve to increase ridership, reducing vehicular congestion and emissions on the roads, promote pedestrian and cyclist safety, and slow vehicular speeds, which have been cited as a concern among residents and businesses. Additionally, for 40% of Glen Cove residents traveling less than 15 minutes to get to work, a safe network of bicycle lanes would allow many of these commuters to bike to work, addressing congestion, and environmental concerns.



An alley in Shadyside, PA connecting a thriving downtown retail district to parking lots located at the rear of buildings.

In addition to concerns about connectivity, bicycles have proven to be a reliable form of transportation in the wake of a storm or hurricane. Hurricane Sandy left residents of Long Island with limited access to gasoline. After the hurricane, businesses in communities with strong alternative transportation networks fared extremely well. Residents without access to their cars walked and biked to neighborhood serving stores – even when national chains remained closed. Glen Cove would be well served to seize the opportunity to build stronger bike connections to downtown and the waterfront – not only for recreation and quality of life, but also for emergency planning purposes.

Case Study – Alleys to Parklet

One successful example of an alley-turned-parklet is the Walnut Street alley in Shadyside, PA. Benches, street lamps, and plantings have been used to make the alley inviting and open. The positioning of the amenities makes the space visible – a deterrent to illegal behavior.

Objective #3: Address issues of safety and perception of safety

The perception of safety is one of the most significant factors in successful downtown development. Concerns about safety resonate greatly with retailers, and addressing both perception and reality of safety is critical to create a supportive downtown business environment.

Make Parking Garages Feel Safer

Safety in the downtown parking garage is a significant concern for Glen Cove residents. According to survey results, 41% of all respondents reported feeling "somewhat insecure" or "very insecure" when using the parking garages downtown. In addition, retailers will not locate in areas where their customers don't feel safe getting from a parking lot to their storefront. The security cameras that the city has already installed are a step in the right direction, but other improvements are needed. The following interventions would address these concerns:

- A staffed security booth within or outside of the garage so that people know that they can be heard or report any safety concerns
- Improved lighting
- Security mirrors in stairwells
- An overall "spruce up" so the garages feel maintained and monitored
- Improved signage to show exits clearly
- Establishing a Parking Authority to manage the above improvements and provide staff and resources.

Redesign, enhance, and activate alleys with lighting, plantings, and amenities.

As outlined in Gateway Phase I, alleys are a deterrent to shoppers if they make the pedestrian feel unsafe. Surveys and interviews reveal that loiterers can be found downtown, at times occupying these spaces. These alleys also leave gaps between opportunities to shop. There are different strategies that can be used to activate, camouflage, or redesign these spaces, varying in cost and scope. One relatively low-cost intervention that has been used in communities to activate alleyways and other underutilized public space is the creation of "parklets" – by adding amenities and greening that gives the look and feel of a small park.

Amenities should also be used to soften parking areas that are frequently used as pathways to store entrances and as gathering spaces by workers taking breaks throughout the day. Better paving, lighting, and planting will make these areas feel safer, managed, and like more formal places to gather.

Objective #4: Improve Downtown Foot Traffic

The more places people have to comfortably walk to and from, the more willing they will be to park their car and stroll. While improvements to the physical environment are crucial to maximize a sense of comfort, safety and security for pedestrians, minimizing gaps along a corridor through programming, public art and special events can have a similar effect. Inactive properties along key downtown corridors, and alleyways with minimal design features or lighting each have a negative impact on the street – they give no reason to stop, browse, or walk by, and make areas feel desolate or possibly unsafe. Planet Fitness is one example where the main entrance opens to the back parking lot, instead of School Street causing a gap in retail or activity. The following strategies can bring life to these inactive spaces and create a draw to downtown.

Increase ambient and impulse entertainment offerings to increase shopping

The Glen Cove Master Plan identifies creating an arts and entertainment district as an objective for downtown. Glen Cove has a number of music, arts, and cultural destinations that pull people into downtown; in particular the area's recording studios. However, these studios are not visible or open to the public. The annual Downtown Sounds event series coordinated by the BID has collaborated with the local recording studios to feature their artists, but the event series and studios cannot stand on their own as the driver of this brand.

Painters in public spaces offer a form of ambient entertainment. This idea could be explored in partnership with the Long Island Academy of Fine Art, based in Glen Cove.

Ambient and impulse entertainment can be used as a tool to build the district's image as a place to come to experience music and arts, while at the same time improving downtown foot traffic and linking downtown to the open spaces along the waterfront. This can be particularly effective in a family-oriented community like Glen Cove. The Glen Cove Sea Faire, a family-friendly event that is planned to take place at the waterfront in July of 2013, is a positive step. The festival will include both ambient and impulse entertainment, with locally-sourced food, local entertainment, arts and crafts artisans, amusement rides, sailboat rides, and a fireworks display.

Wrapped columns in Downtown Brooklyn.

By developing a network of entertainment activities at and between the downtown and waterfront nodes, the distance between the two will seem shorter, especially for people with children. This will encourage families to include activities downtown and along the waterfront in their itineraries. Events will also encourage people from other towns or those living in the new waterfront redevelopment to visit downtown Glen Cove. These "trial visits" will expose visitors to what the district has to offer.

Ambient entertainment includes activities that are free to the public, including street musicians, performing artists, light shows, and so on. These activities, often run and managed by local groups, including the Business Improvement District, give visitors and families a reason to come to downtown, and increased downtown foot traffic will in turn drive retail sales for stores and restaurants. There may be opportunities for partnering with the Long Island Academy of Fine Arts, for example, to bring art students outdoors to paint in the Piazza or along the pathway in Pratt Park on a weekly basis during the summer as a form of ambient entertainment. This type of activity would highlight the creative activities taking place in the community, while at the same time increasing foot traffic and activating pathways between nodes.

Case Study – Public Art Meets Retail Attraction

The Downtown Brooklyn Partnership in Brooklyn, NY wrapped the columns of an arcade of an office and retail building (similar to One School Street) with banners to draw attention to the storefronts along the block which were activated with temporary art galleries to attract new tenants.

These banners also contained contact information for leasing agents so that any prospective tenants interested in the spaces could get more information.

Impulse entertainment is another form of event marketing that focuses on low-cost activities such as face painting or portrait artists, which may be another opportunity to partner with the local art school. In some communities, such as Oak Bluffs on Martha's Vineyard, MA, a restored downtown carousel that started out as an impulse entertainment offering has quickly turned into the main reason why many visitors go downtown. In turn, they patronize local businesses.

Other examples of programming that can be used to shorten the distance between downtown and the waterfront and increase downtown foot traffic include:

- Yoga in Pratt Park
- Food trucks along the pathway from downtown to the waterfront
- Outdoor studio classes run by the Long Island College of Fine Arts

Incorporate sales marketing

Events and entertainment must be coordinated with business input so that activities that encourage shopping take place when stores are open. Downtown retailers downtown tend to close by 6PM so events should be planned for the daytime unless merchants are willing to stay open later. During any event, it is important to use the opportunity to distribute sales marketing materials such as shopping guides, or other district-branded materials. Sales marketing also includes sidewalk sales, or other events designed specifically to promote retail offerings. No event should occur downtown without a strong and coordinated effort to engage local merchants.

Use public art to fill gaps in the corridor and build on your successes

Public art installations – from sculptures to murals to light installations – can be used to create destinations between downtown and the waterfront, and on blank walls or underutilized spaces throughout downtown. Public art can be temporary or permanent. A temporary installation is ideal for a location like the Piazza, as it is slated for development, but currently situated in an important downtown gateway, making a central space feel desolate.

There are many ways to fund public art. Partnering with a property owner of an underutilized space and a local arts organization to produce a site-specific installation is one strategy. Issuing a call for local artists to display their existing work is another solution for bringing art into the public realm at low-to-no cost. Alternatively, the National Endowment for the Arts (NEA)'s Our Town program provides grant money to communities annually to go toward public space, public art, cultural district planning, and other art related programs in the amount of $25,000 to $250,000.

SECTION 5: ADDENDA

(refer to separately bound package titled *Final Report - Addenda*)

1. Data set for Glen Cove (all data sets include the following):
    a. Site Map
    b. Census 2010 Summary Profile
    c. Demographic and Income Profile
    d. Lifestyle Report
    e. Tapestry Site Map
    f. 2010 Retail Marketplace Profile
    g. Retail Goods and Services Expenditures
    h. Recreation Expenditures
    i. Market Profile
    j. Electronic and Internet Market Profile
    k. Business Summary by SIC Codes
    l. Business Summary by NAICS Codes

2. Data set for 10-Minute drive shed

3. Data set for 15-Minute drive shed

4. Data set for Nassau County

5. Building and Business Inventory for Study Area

6. Survey Tools
    a. Survey Questionnaire
    b. Survey Results

7. Asset Analysis spreadsheet

8. Enlarged Maps