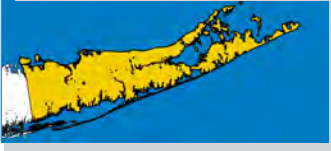


# ANNUAL REPORT OF THE SUFFOLK COUNTY PLANNING COMMISSION

*February 2017*



**SUFFOLK COUNTY DEPARTMENT OF ECONOMIC DEVELOPMENT & PLANNING**

Suffolk County ■ New York

**SUFFOLK COUNTY PLANNING COMMISSION**  
**ANNUAL REPORT**  
**TO THE COUNTY LEGISLATURE AND THE COUNTY EXECUTIVE**  
**February 2017**

**Suffolk County Department of Economic Development & Planning**  
H. Lee Dennison Building - 11th Floor  
100 Veterans Memorial Highway  
P.O. Box 6100  
Hauppauge, New York 11788-0099

**Steven Bellone**  
County Executive

**SUFFOLK COUNTY PLANNING COMMISSION**

**Jennifer Casey ~ CHAIR**  
*Huntington*

**Adrienne Esposito ~ Vice Chair**  
*Village Over 5,000 Population*

**Samuel Chu ~ Vice Chair**  
*Babylon*

Michael Kelly  
*Brookhaven*

Samuel Kramer  
*East Hampton*

Michael Kaufman  
*Village Under 5,000 Population*

Matthew Chartrand  
*Islip*

John Condzella  
*Riverhead*

Nicholas Gould Morehead  
*Shelter Island*

John Finn  
*Smithtown*

Vacant  
*Southampton*

Nicholas Planamento  
*Southold*

Rodney Anderson  
*At Large*

Errol Kitt  
*At Large*

Kevin G. Gershowitz  
*At Large*

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**SUFFOLK COUNTY DEPARTMENT OF ECONOMIC DEVELOPMENT & PLANNING**

**Theresa Ward**  
*Commissioner*

**Louis Bekofsky**  
*Deputy Commissioner*

**DIVISION OF PLANNING & ENVIRONMENT**

*Participating Staff*

**Sarah Lansdale**  
*Director of Planning*

Andrew Freleng  
*Chief Planner*

Carl Lind  
*Chief Cartographer*

Peter K. Lambert  
*Principal Planner*

## **I. Forward by Suffolk County Planning Commission Chair Jennifer Casey**

Suffolk County Administrative Code, Sec. A14-6 requires The Suffolk County Planning Commission to prepare and release an annual report for the County Executive and County Legislature. The report chronicles the activities of the Commission and includes “a survey of conditions in the county.”

2016 was a busy year for the Commission. Reviewed projects included Heartland Town Square, the largest mixed use development in Suffolk County history and Tuckahoe Supermarket a development in the Town of Southampton. Additionally the Commission hosted the East End Transportation Summit to discuss transportation challenges affecting regional development and the Suffolk County Planning Federation to increase local official’s knowledge of planning.

The Commission’s membership experienced the following changes: two farmers from the East End, John Condzella and Rodney Anderson joined as the demand for land to farm increased. Two long-serving commissioners Carl Gabrielsen of Riverhead and Barbara Roberts of Southampton left after many years of valuable contributions to the Commission.

In 2016 the Commission processed 1,463 referrals. These included 167 Change of Zone, a 65% increase from 2015; 499 Variances a 57% increase from 2015; and 0 disapprovals down from 2 in 2015.

Transit oriented development was and continues to be a priority for the Commission to address the regional need for rental housing and loss of the younger population. In Wyandanch, the Town of Babylon, a \$500 MM mixed-use project was assembled adjacent to the railroad station. In Huntington Station, the commercial corridor along New York Avenue near the Long Island Railroad station has seen groundbreaking on a mixed-use building of retail and residential units. These projects will also see activity into 2017-18.

Suffolk County remains one of the most popular places to live, work, and shop in the United States of America. There are significant challenges to continued growth including the high cost of living and the lack of affordable housing for low and middle income families. In September 2016 the median selling price of a home in the County was \$350,000. County home prices in the 2nd quarter of 2016 were approximately 40% higher than the rest of the nation. These statistics point to the need for additional transit oriented development, mixed use projects in the County.

The Commission expresses its gratitude to the County Planning Department Staff for all their thoroughness and willingness to cooperate with the Commission. The Commission would also like to thank its previous Chairman David Calone for his previous years of service ending in January 2016.

2016 was a year of learning for the Commission as it addressed critical countywide land-use needs. 2017 will continue this learning as well as providing guidance to all stakeholders affected by development in Suffolk County.

Jennifer A. Casey  
Chairwoman  
Suffolk County Planning Commission

## II. Planning Commission Overview

The core role of the Suffolk County Planning Commission under state and county law is to identify and promote countywide land use values and planning priorities.

The Suffolk County Planning Commission is comprised of 15 members who are nominated to four-year terms by the County Executive and are confirmed by the County Legislature. Of the 15 Commission members, one represents each of the ten towns in Suffolk, one represents villages with population under 5,000, one represents villages with population over 5,000, and there are three at-large representatives.

During 2016, the Commission's officers were:

Chair            Jennifer Casey  
Vice Chair     Adrienne Esposito  
Vice Chair     Sam Chu

## III. 2016 Accomplishments

In 2016, the Suffolk County Planning Commission processed the following referrals:

	2016	2015	2014
<b>Zoning Referrals:</b>			
Amendments	241	264	247
Change of Zone	167	110	136
Master Plans	0	1	0
Moratoriums	1	1	1
Site Plan Applications	208	192	177
Special Permit Apps	60	73	84
Variances	499	457	545
COU	18	11	11
IMA	17	16	6
SEQRA	163	198	174
<b>Total Zoning</b>	<b>1374</b>	<b>1323</b>	<b>1416</b>
Subdivision Referrals	62	73	91
SCPC Local Determinations	640	642	N/A
SCPC No Action	11	0	0
SCPC Approvals	27	30	37
SCPC Disapprovals	0	2	0
<b>Total Referrals</b>	<b>1463</b>	<b>1426</b>	<b>1544</b>

The Suffolk County Planning Commission hosted an East End Transportation Summit in Riverhead with local town, county and state officials to discuss the unique transportation challenges facing the North and South Forks.

In addition, the Suffolk County Planning Commission hosted its annual Planning Federation to provide professional training opportunities for members of local zoning and planning boards, as well as land use planners.

## **IV. Demographics, Economic, and Development Trends**

Suffolk County Department of Economic Development and Planning  
November 2016 Update

### ***General Overview***

Suffolk County (the “County”) was established on November 1, 1683 as one of the ten original counties in New York State. The County comprises the eastern two-thirds of Long Island and had a population of 1,501,587 in 2015. The County’s western border is approximately 15 miles from the eastern border of New York City. The County is bordered by Nassau County to the west, the Long Island Sound to the north, and the Atlantic Ocean to the south and east. Major population centers within the County are the Towns of Brookhaven, Islip, Babylon, Huntington, and Smithtown, each with populations in excess of 100,000. While land use within the County is predominantly suburban residential, significant amounts of land are also used for commercial, industrial, institutional, parkland, and agricultural purposes. In addition, the Atlantic Ocean, the Long Island Sound and the bays and harbors located within the County are prime attractions, providing swimming, boating and fishing activities for visitors and residents alike. County residents enjoy a high quality of life, supported by high median incomes, relatively low unemployment and crime rates, quality public school systems, and numerous cultural and recreational attractions.

### ***Demographics***

The population of the County is growing slowly. According to the U. S. Census Bureau, the County had a population of 1,501,587 in 2015, an increase of 0.6% over the 2010 Census figure. Between 2000 and 2010, the County’s population increased by 5.2%. A slow rate of population growth is expected to continue into the near future. Census data indicates that Suffolk County’s population is aging. The Suffolk County Comprehensive Plan notes that the population age 65 and over comprised 14.9% of the Suffolk County population in 2013, up from 10.7% in 1990.

The County’s population is the largest of any county in New York State outside of New York City. According to the U. S. Census Bureau, the County ranks 24<sup>th</sup> in population out of all 3,143 counties in the United States, and has a larger population than 11 states.

According to the U.S. Bureau of Economic Analysis, total personal income of all County residents amounted to \$85.3 billion in 2014. The County’s 2014 per capita personal income was \$56,725, ranking 4<sup>th</sup> highest out of the 62 counties in New York State and 179<sup>th</sup> (in the top 6%) out of all counties in the nation. According to the U. S. Census Bureau, the median household income in the County was \$88,340 in 2015, ranking it in the top 1% out of all counties in the nation and placing it 58% higher than the median household income in the nation as a whole. The average annual pay for County residents in 2015 amounted to \$56,185, 8.9% higher than in 2010. This increase was slightly less than inflation over the same period, which increased by 8.2%.

### ***Economic Considerations***

#### ***Overview***

Employment in the Nassau-Suffolk (Long Island) region has consistently increased since April 2010. Total non-farm employment in September 2016 in the Nassau-Suffolk region consisted of 1.33 million jobs, an increase of 14,600 jobs (up 1.1%) since September 2015. The sectors that posted the largest employment gains for the period July 2015 to July 2016 were construction (up 6.9%), education & health services (up 4.8%), and transportation, warehousing & utilities (up 5.5%). Six of the twelve major employment sectors experienced job gains during this period. However, the total number of jobs in the information sector declined by 1.5%, jobs in the retail trade sector decreased by 3.1% and jobs in the wholesale trade sector declined by 1.5%.

As of September 2016, there were 744,300 employed residents in the County. This figure was 1.0% higher than the September 2015 figure but still 1.6% lower than the peak in 2008, due to a lower labor force participation rate. The unemployment rate in the County was 4.3% in September 2016, lower than in September 2015 when the rate was 4.5%.

Moreover, the County's unemployment rate remains lower than the overall rate in New York State and the nation for the same period.

The number of businesses situated in the County continues to rise modestly. As of the 1<sup>st</sup> quarter 2016, there were 51,872 private business establishments located in the County. This represents an all-time high for the County and a 5.2% increase in the five years since 2011. Small businesses comprise a large portion of the County's business establishments – 63% of the businesses with payroll in the County employ fewer than five persons and 78% employ fewer than 10 persons. There are 21 businesses in the County that employ 1,000 or more persons. In addition, in 2014, the County had 126,453 “non-employer” firms, mostly self-employed individuals, the most recent year with such information available. The number of these businesses increased by 6.0% in the five years between 2009 and 2014.

Sales tax collections continue to increase modestly in the County, indicating an increase in retail sales. County sales tax revenues in 2016 through September were 1.3% higher than the same period in 2015. County sales tax receipts in calendar year 2015 were up 0.9%, compared to 2014. This increase is smaller than the 1.3% increase in 2014 and the 6.9% increase in 2013.

### *Technology*

The County is well positioned to support the growth of the technology industry. It is home to Brookhaven National Laboratory (BNL), a multi-purpose institution advancing research in physics, chemistry, biology, medicine, applied science, and a wide range of advanced technologies that employs 3,150 people and the source of several Nobel Prizes. BNL's 87,000 square foot \$66 million Interdisciplinary Science Building for energy research opened in 2013. BNL was chosen by the U. S. Department of Energy as a site for the National Synchrotron Light Source II (NSLS II) facility, which opened in 2015. The \$912 million NSLS II employs more than 500 persons and provides unprecedented precision high-intensity light beams for use in medical, energy, and materials research. According to BNL, \$678 Million in economic impacted was generated by BNL and its visitors in 2012.

Stony Brook University manages the Long Island High Technology Incubator, a 62,000 square foot facility and laboratory that provide new technologically innovative companies with support services and resources to foster their growth. Stony Brook University also operates two New York State Centers for Advanced Technology: one in Medical Biotechnology and another in Sensor Technologies. The University's Stony Brook Research and Technology Park includes its Advanced Energy Research and Technology Center, a partnership of academia, research institutions, energy providers and industrial corporations that perform innovative energy research. In 2014, New York State established the Center for Clean Water Technology at Stony Brook University, which is tasked with developing and commercializing the next generation of nitrogen removal technology for on-site septic systems and cesspools.

A number of technology firms are located in the County, including those in the information sciences such as CA Technologies which employs 1,300 people at its Islandia facility in the County. Broad Hollow Bioscience Park at Farmingdale State College, a 102,000 square foot incubator for biotech companies, has been authorized for expansion by the State Legislature. This business incubator and the incubator at Stony Brook University were recently approved by the State as START-UP NY state tax-free zones. Accelerate Long Island, an initiative created by the Long Island Association (LIA), connects the region's research institutions with business to aid local technology startups. Efforts by tech firms to commercialize new technologies in areas such as advanced materials, superconductors, advanced semiconductor devices, artificial intelligence and biotechnology have been successful and are expected to spur future employment growth in the County.

### *Office*

The County has a substantial office building market. There are 26.4 million square feet of non-government office buildings located in the County. This figure includes 2.9 million square feet of new office space constructed in the 10 years since 2006. An additional 3.0 million square feet of office space has been proposed for future construction. The office vacancy rate in the County has improved since 2009, although rental rates have decreased slightly. According to CBRE, a multinational real estate firm, the office vacancy rate in the County was 16.4% in the 2<sup>nd</sup> quarter of 2016, an improvement from the 18.5% rate in the same period in 2015, and significantly lower than the vacancy rate in 2009-2010.

The average office space rental rate in the County was \$23.26 per square foot in the 2<sup>nd</sup> quarter of 2016, down 3.1% from the 2<sup>nd</sup> quarter 2015 figure.

The Route 110 Corridor in western Suffolk County is a hub of the Long Island business community. Melville, located on Route 110, has 9.7 million square feet of office space. There are also over 1,500 acres situated in Melville and East Farmingdale that are developed with light industrial uses. Fougera Pharmaceuticals plans to spend \$88 million to upgrade its Melville manufacturing facility by 2020. Melville is also home to large corporate headquarters, such as *Newsday*, the 12<sup>th</sup> largest newspaper in the United States in circulation, and Henry Schein, a Fortune 500 distributor of healthcare products and services. Melville is also a regional headquarters for several major banks, including Capital One, TD Bank and Bank of America. In 2013, Canon USA opened a new 668,000 square foot office building in Melville. After Melville, the next largest concentrations of private office space in the County are located in Hauppauge (3.7 million square feet), Islandia (1.9 million square feet), Ronkonkoma (900,000 square feet), and Bohemia (800,000 square feet).

### *Industrial*

The industrial market in the County remains strong. According to Newmark Grubb Knight Frank, a commercial real estate advisory firm, the County has significant industrial space totaling 105.4 million square feet. While most of this space is characterized as general industrial space, a large portion is comprised of warehouse and distribution facilities and a smaller portion is research and development/flex space. According to Newmark, the County's 2.7% industrial vacancy rate in the 3<sup>rd</sup> quarter of 2016 was among the lowest in the nation. The largest concentration of industrial space in the County is located in Hauppauge, with more than 13 million square feet of space. Significant light industrial space is also located in the area around Long Island MacArthur Airport in Ronkonkoma and Bohemia. Further east, significant new industrial space has been developed over the last 20 years in the Yaphank area. In addition, the County has selected a developer to develop 58 County-owned acres at Gabreski Airport in Westhampton for light industrial and research & development office space at the "Hampton Business District." This proposed \$43 million, eight building campus-style corporate center will total 439,000 square feet when completed, will include a 145 room hotel and is expected to employ 1,100 people. The first building of the project was completed in 2016.

### *Hospitality*

There are 268 hotels, motels and inns located in the County. Together these lodging properties have 11,400 rooms. Approximately one-fifth of these rooms are seasonal, since they are only open for half the year in the warmer months, and these seasonal rooms are located primarily in the eastern end of the County. According to Smith Travel Research, the occupancy rate of the County's hotels was 70.0% in 2015, an improvement over the 68.5% figure in 2014 and average daily room rates in 2015 increased by 4.5% to \$141. In the 10 years since 2006, there has been an increase of more than 1,300 lodging rooms in the County, primarily in western Suffolk, increasing the total number of rooms by 12% in that period.

### *Retail*

The County is a major retail market, as evidenced by \$23.7 billion in sales reported in 2012, according to the most recent U.S. Census of Retail trade. 2012 retail sales per household in the County amounted to \$47,750, ranking it among the highest markets in the country. These figures exclude eating and drinking establishments. According to calculations by the Suffolk County Division of Planning & Environment, shopping center space in the County totals 40.6 million square feet. There are three regional malls and two regional outlet shopping centers located in the County. The newest regional outlet shopping center is the 803,000 square foot Tanger Outlet Center at the Arches located in Deer Park which opened in 2008. In the 10 years between 2000 and 2010, large retailers dramatically expanded their presence in the County. In that time, 5 million square feet of new retail space was added. Currently, an additional 4.0 million square feet of new space is proposed. Major retailers continue to add stores in the County.

Data collected in 2010 by the Suffolk County Division of Planning & Environment found a softening of the retail market since 2005, but not as large a decline as might have been expected in a challenging economy. In shopping centers, the percentage of stores that were vacant increased from 7.8% in 2005 to 12.4% in 2010. In downtown areas, the percentage of stores that were vacant increased from 7.6% in 2005 to 10.9% in 2010. Many of the shopping centers in the County have been renovated in recent years, and many of the County's downtowns have emerged as attractive and vibrant centers



for dining and entertainment, helping to keep downtown vacancy rates relatively low in the County. Ground floor retail space in the County's downtown centers totals 8.9 million square feet.

### *Healthcare*

There are 11 full service hospitals located in the County. Several of these hospitals have spent or are spending hundreds of millions of dollars on major construction projects to expand and modernize their facilities.

### *Agriculture*

Agricultural production in the County was valued at \$240 million in 2012 (the most recent figure available), ranking third highest out of 62 counties in the State. This high value of agricultural production is partially due to the large-scale production of higher value crops such as sod, grapes, nursery plants, and other diverse crops. The County experienced a dramatic decline in farm acreage between 1950 and 1990, when substantial amounts of farmland were sold to residential developers. However, since the early 1990s the amount of farm acreage located in the County has remained fairly steady and has increased slightly since 2002. As of 2012, there were 35,975 acres of active farmland in the County. In 1974, the County implemented the nation's first Farmland Preservation Program, whereby the County would purchase the "development rights" to agricultural land for the purpose of preserving open space and working farms. Under this program, the County pays the landowner an amount equal to the difference between the land's value as farmland and its value as subdivided residential property and also grants the landowner property tax relief. In return, the landowner is required to maintain the agricultural character of the land. To date, the County has purchased the development rights to 10,750 acres of farmland under this program. In 2015, the County updated its *Agricultural and Farmland Protection Plan* for the first time since 1996. The plan aims to support public policy to protect, encourage and sustain agriculture in the County. The County also participates in the New York State Department of Agriculture and Markets' Agricultural District Program. This program is based on a combination of landowner incentives and protections designed to encourage the continued use of farmland for agricultural production and forestall the conversion of farmland to non-agricultural uses. As of 2011 (the most recent data available), there were 23,000 acres of farmland located in the County that are protected by this program. In addition, the County has an open space acquisition program, whereby a portion of the County's sales tax is devoted to the acquisition of open space located within the County. (See "Drinking Water Protection, Environmental Protection and Property Tax Mitigation Programs" herein.)

Like agriculture, commercial fishing is a heritage industry in the County that provides quality of life benefits, economic benefits, and tourism revenue. The fishing industry and the shellfish industry (primarily clams and oysters) are important sources of employment and income in the east end of the County. In 2014, there were 724 commercial fishing establishments in the County, having revenues of \$35 million. Vibrant fishing communities such as Montauk, Greenport, Port Jefferson, and Hampton Bays are located in the east end of the County, and local seafood also enhances dining experiences in restaurants in communities throughout the County.

### *Projects of Regional Significance*

Major construction and redevelopment projects completed or currently taking place in the County include the long-term redevelopment of the former Central Islip Psychiatric Center. Projects built on this site include a ballpark (home to the Long Island Ducks baseball team) and a federal courthouse; the \$35 million, 180,000 square foot Touro Law School building; the renovation of a former hospital building into a 175,000 square foot office building; and more than 1,500 units of rental and owner-occupied townhouses. A new Marriott Residence Inn opened there in 2013 and another hotel is under construction. InvaGen Pharmaceuticals and AlphaMed Bottles plan to build a \$47 million manufacturing facility in two adjacent buildings totaling 340,000 square feet on former Psychiatric Center property. Also in Central Islip, a \$43 million 300,000 square foot indoor sports complex has been approved for development, and in 2012 a food distributor opened a new \$75 million 400,000 square foot refrigerated warehouse.

A 452-acre surplus portion of the Pilgrim State Psychiatric Center in Brentwood, located at the intersection of the Long Island Expressway and the Sagtikos Parkway, was sold by the State to a developer, and a \$4 billion mixed-use development, Heartland Town Square, has been proposed for the site. At completion, the development is proposed to include: 1,030,000 square feet of lifestyle retail space, 9,000 units of mid-rise rental housing, 3,239,000 square feet of office space, a hotel, and an aquarium. The project is proposed to be constructed in phases. Phase 1A is proposed to

include 308,200 square feet of office space, 488,100 square feet of retail space, 85,500 of civic space and 1,225 residential units. The final generic environmental impact study of this major development proposal was accepted by the Town of Islip in 2014.

In Yaphank, a \$450 million 350 megawatt gas-powered electric power plant came online in 2009. Significant new industrial space has been added in Yaphank in recent years, including a \$100 million, 400,000 square foot expansion to Amneal Pharmaceuticals' industrial building in Yaphank completed in 2015. The County opened a \$185 million expansion to its correctional facility in Yaphank in 2013. The \$40 million privately funded Brookhaven Rail Terminal in Yaphank opened in 2011 and an expansion of the facility is proposed. The facility receives and ships tons of freight (construction aggregate, lumber and other commodities) via a newly constructed 3.4 mile rail spur. The Meadows at Yaphank's 'The Boulevard', a large development consisting of retail, office, and residential units is currently under construction near the intersection of the Long Island Expressway and William Floyd Parkway in close proximity to Brookhaven National Laboratory.

In Riverhead, development of major commercial space along the Route 58 corridor is continuing. Presently, 2.7 million square feet of shopping center space is located on Route 58, including 500,000 square feet that opened in 2014. Another 200,000 square feet of retail space has been proposed on the corridor. The Tanger Outlet Center, which was built on Route 58 in the 1990s, is nearly 800,000 square feet in size and is one of the nation's largest outlet shopping centers. In addition, a 131-room Marriott Residence Inn on Route 58 is under construction. Calverton Airport, located in the Town of Riverhead and formerly owned by the U. S. Navy and used as an aircraft test site by the Grumman Corporation, continues to be redeveloped as the Enterprise Park at Calverton. Many of the former Grumman buildings are now being used for various light industrial purposes. The remaining airport property is zoned for various light industrial, recreation and office uses.

In Wyandanch, the Town of Babylon assembled properties necessary to complete a \$500 million mixed-use transit-oriented redevelopment project adjacent to the railroad station. Private investment in the development was supplemented with \$59 million in local, state, federal, and philanthropic funding. Sewer service was extended to the downtown area and the development's \$137 million first phase was completed in 2015. The initial development included a 920-space Metropolitan Transportation Authority (MTA) parking facility, as well as 40 Station Drive – a five-story mixed-use building with 91 residential units above 17,500 square feet of retail space, and 10 Station Drive – a four-story mixed-use building with 86 residential units above an additional 17,500 square feet of retail space. Of the 177 residential units, 121 are designated as affordable units. Between the two buildings lies a one acre intermodal transit plaza including open-space, a fountain, multiple performance stages, and a seasonal ice rink. Future development at the site will include a revamped Long Island Railroad (LIRR) station and a commercial office building which will include the Long Island Music Hall of Fame and approximately 150,000 square feet of office space.

In Huntington Station, there is a proposal to revitalize a commercial corridor along New York Avenue near the LIRR station. Proposed development includes the construction of Gateway Plaza, a three-story mixed-use building with 66 residential units and 16,500 square feet of commercial space on the ground floor with an anticipated Spring 2017 groundbreaking, and Northridge, a three-story mixed-use building of 16 residential units and 6,000 square feet of retail space on the ground floor with an anticipated groundbreaking at the end of 2016. Future phases would include 49 affordable artists' lofts, a proposed hotel, and a 100,000 square foot medical office building. In the same vicinity, 14 affordable condos for veterans are currently under construction, known as Columbia Terrace.

In Lake Ronkonkoma, a 54-acre area adjacent to the Ronkonkoma LIRR station is proposed to be redeveloped with 1,450 apartments with 20% designated as affordable units, 195,000 square feet of retail space, and 360,000 square feet of office space over a ten-year period. This \$475 million mixed-use transit oriented development is known as the Ronkonkoma Hub and Phase I – 489 residential units in six buildings – is expected to break ground in 2017. An extension of sewer service to the area has been designed to accommodate this proposal and \$50 million in State funding has been earmarked for infrastructure at the site.

In downtown Patchogue, a \$110 million development known as New Village was constructed in 2014, which included 291 rental apartments and ground floor retail space. In Holbrook, Islip Pines, a 136-acre, \$300 million development including apartments, retail space, office space, a movie theater and a hotel has been approved for construction. Wincoram

Commons, the \$53 million residential and retail redevelopment of a 17-acre movie theater site in Coram is currently under construction. A \$44 million expansion at the life-care community Peconic Landing in Greenport is underway.

In the Town of Southampton, the Riverside Revitalization Action Plan calls for the re-zoning of 468 acres of Riverside that could result in 2,267 new housing units as well as 133,517 square feet of retail space and 62,000 square feet of professional and medical offices, with half of the new housing units designated as affordable or workforce housing.

In 2015, Governor Cuomo announced the approval of \$383 million in State and Federal funding to expand sanitary sewer service in the County in four areas advanced by County Executive Bellone. This project, under the Federal Emergency Management Agency's Hazard Mitigation Grant Program, represents the first step in instituting extensive measures to mitigate flooding and septic system failure in the County caused by Superstorm Sandy. The initial design and environmental review phase of the project was estimated to be financed through \$22 million in funding from the New York State Environmental Facilities Corporation's State Revolving Fund, which will be providing another \$61 million in low-interest loans. The United States Department of Housing and Urban Development's Community Development Block Grant-Disaster Recovery Program will be providing \$34 million, and \$266 million will come via the Federal Hazard Mitigation Grant Program.

In 2016, Suffolk County passed legislation that amended the Suffolk County Sanitary Code (Article 19, "Management of Innovative and Alternative Onsite Wastewater Treatment Systems") and allows the Department of Health Services to monitor new sewage treatment technologies in the 39 homes that were awarded a free wastewater treatment system as part of the County's Septic Demonstration Pilot Program.

### ***Housing***

As of 2014, there were 481,796 households situated in the County. In 2015, 80% of the County's occupied housing was owner-occupied. This rate of owner-occupied housing is significantly higher than the 63% of owner-occupied housing in the nation as a whole. The County's owner-occupied housing percentage has remained at around 80% for more than 40 years.

New residential construction in the County decreased considerably after 2008 but has rebounded somewhat. The number of new housing units authorized by building permits totaled 1,396 in 2008 and declined to a low point of 856 units in 2011. The number of building permits for new housing units increased in 2012 and again in 2013 but decreased in 2014 by 12% to 1,217 units. In 2015, building permits for 1,218 housing units were issued in the County, virtually unchanged from the 2014 figure. Residential construction in 2015 was valued at \$691 million in the County, up 116% from the low point in 2011 but still 40% lower than the record high value which was recorded in 2005.

The housing market in the County has improved notably since 2012. As reported by the New York State Association of Realtors, home prices in the County declined by 15% between 2008 and 2011. In 2012, home prices in the County held steady at 2011 levels and then increased by 3% between 2012 and 2014. Housing prices in the County increased by 3.5% in 2015 and in September 2016, the median selling price of a home in the County was \$350,000, an increase of 5.4% compared to the median price in September 2015 (but 13% lower than the peak September median price in 2006). County home prices in the 2<sup>nd</sup> quarter of 2016 were about 40% higher than the national median. Home values in the County are expected to remain high relative to national figures, as the area remains a desirable residential location. According to data provided by RealtyTrac, 0.17% of homes in the County are in some stage of foreclosure, compared to 0.08% nationwide.

### ***Transportation***

There are five active airports located in the County. The vast majority of the County's air passenger traffic occurs at Islip MacArthur Airport in Ronkonkoma, as this is the County's only airport with regularly scheduled carrier service. The airport is the 8<sup>th</sup> busiest in the State, based on passenger volume. In 2015, the airport had 604,000 passenger enplanements, a 7% decline since 2014 and a 48% decrease since the peak in 2007. In addition to flights provided by Southwest Airlines and Elite Airlines, the airport offers scheduled flights between Islip MacArthur Airport and Philadelphia by American Airlines. At Republic Airport in East Farmingdale, construction has begun on a new \$55 million, 210,000 square foot aircraft hangar and terminal.

The County's highway network includes the Northern and Southern State Parkways, which are located in the western portion of the County, and the Long Island Expressway (I-495) which extends eastward from New York City to the eastern portion of the County. Other major highways include Sunrise Highway, which connects the County's western border to its eastern town of Southampton, and the Sunken Meadow/Sagtikos Parkway which connects the north and south shores in the western part of the County.

The State is currently reconstructing portions of three arterial highways located within the County (Routes 110, 112 and 347), to improve traffic flow and increase safety. All of these projects were partially funded through monies made available under the American Recovery and Reinvestment Act of 2009.

The residential and major employment centers in the County are widely dispersed, making it difficult to effectively provide the population with a mass transit system. Consequently, as of 2015, 79% of employed County residents drove alone to work. However, the County operates a public bus system and statistics indicate that bus patronage has increased in recent years.

The County's extensive commuter rail system, the Long Island Railroad (LIRR), is managed by the New York Metropolitan Transportation Authority (MTA). There are 41 Long Island Railroad stations located in the County. The LIRR provides public transportation between the County and New York City and is used by both commuters and leisure travelers. The LIRR is the busiest commuter railroad in the nation, serving 87.6 million customers in 2015.

The MTA continues work on the \$10.8 billion East Side Access project, currently the largest infrastructure project in the country. When fully completed in 2022, this project will connect the LIRR's main line to Grand Central Station in Manhattan, providing a more direct trip between Long Island and the east side of midtown Manhattan. The LIRR has also partially completed work on a second electrified track along 17 miles between Farmingdale and Ronkonkoma. This second track, a \$430 million project anticipated to be completed by 2018, will help to ease rail congestion in the County. The plan includes rebuilding a train station near Republic Airport in East Farmingdale that would link to a proposed bus rapid transit system along Route 110. The expanded rail service will help facilitate transit oriented development planned near the Republic, Wyandanch, and Ronkonkoma train stations in the County.

Ferry service to Connecticut is available from two ferry terminal sites located in the County, one in Port Jefferson and one in Orient Point. High-speed ferry service is also available between Orient Point and New London, Connecticut.

In 2012, County Executive Steven Bellone introduced Connect Long Island, a regional transportation and development plan. Connect Long Island expects to create an innovation economy and sustainable growth by supporting transit oriented developments and building a 21<sup>st</sup> century transportation infrastructure that connects these development hubs to the County's major research and educational institutions and innovation zones for emerging hi-tech companies. The County's north-south Bus Rapid Transit (BRT) initiative continues to move forward. In 2014, the County completed a countywide BRT Feasibility Study identifying the Route 110, Nicolls Road, and Sagtikos Parkway as priority BRT corridors. In 2015, an alternatives analysis was completed for the Route 110 corridor by the Town of Babylon and subsequently in 2016, an alternatives analysis was completed for the Nicolls Road multi-modal corridor by the County. The Nicolls Road multi-modal corridor is one of the components of the County's innovation zone ("I-Zone") initiative and the project has progressed into the preliminary engineering and design/environmental phase, with a detailed, corridor-wide parking analysis happening concurrently.

The I-Zone is a plan to transform Nicolls Road into a multi-modal corridor that will connect the County's key assets. The plan was formed in 2015 at a meeting of the Long Island Regional Planning Council, where leaders of the County, the Town of Brookhaven, the Town of Islip, Patchogue Village, Stony Brook University, Brookhaven National Laboratory, the MTA and the LIRR, Cold Spring Harbor Laboratory and the Suburban Millennial Institute came together to develop and support a regionally transformative plan to make the County a more attractive place for young people and high-tech businesses. The I-Zone is anchored by the four following projects:

- A multi-modal Nicolls Road Corridor with BRT and a hiking/biking trail.
- A "train to plane" connection between a new airport terminal on the north side of MacArthur Airport and the Ronkonkoma LIRR Station, providing BRT access to Nicolls Road.
- The proposed Ronkonkoma Hub development, including sewer connections and structured parking.

- Relocation of the Yaphank LIRR Station to Brookhaven National Lab.

### ***School Facilities***

There are 70 public school districts located in the County. The combined spending of these public school districts amounted to \$6.4 billion for the 2016-2017 school year. In the 2015-2016 school year, public school enrollment in school districts in the County was 238,577, a 5% decrease in the five years since 2010-2011. Current enrollment is 28% lower than the peak level reached in 1976. Public school enrollment is expected to decline further by 5% during the next three years. Birth rates have slowly decreased in the County, which will lead to slowly declining school enrollments for the foreseeable future.

Based on data from the 2015 American Community Survey, the County has a relatively well-educated population. Among residents age 25 and over, 90% were high school graduates, and 35% held a bachelor's degree or higher. These figures compare to 87% and 31%, respectively, for the nation as a whole. The County ranks in the top 10% of the nation's counties with respect to the percentage of adults that have earned a Bachelor's or higher degree.

Many institutions that offer a variety of higher education opportunities are located in the County. There are four four-year colleges and one law school (Touro Law Center) which together had a total undergraduate enrollment of approximately 31,000 students and a total graduate enrollment of about 11,000 students during the 2014 school year. Farmingdale State College continues to expand, with a new \$25 million student campus center that opened in 2013 and a new \$19 million School of Business building that opened in 2015. St. Joseph's College in Patchogue acquired 25 acres of land on which it built a new \$14 million athletic complex in 2012 and also plans to construct a \$30 million residence hall. Suffolk County Community College services approximately 27,000 students on three campuses and continues to expand its facilities with the 2014 completion of a \$30 million life sciences building at its Selden campus and the 2011 completion of a \$14.5 million new library at its eastern campus. Numerous other professional and technical schools are also located in the County.

Stony Brook University is the largest university located in the County with a Fall 2016 enrollment of 17,000 undergraduate and 8,700 graduate students. The University continues to expand its facilities. Two new residence halls with a total of 759 dorm rooms are under construction and will be completed in January 2017. In 2013, the University built a new building for its School of Marine and Atmospheric Sciences at the Southampton campus which contains laboratories and classroom space. The University's Research and Technology Park opened in 2008 with the completion of a 100,000 square foot, \$50 million building housing the Center for Excellence in Wireless Information Technology, a partnership of government, industry and academia. The second building in the Park, completed in 2011, was funded with a \$35 million appropriation from the State, and is home to the 50,000 square foot Advanced Energy Research and Technology Center. The University's new \$41 million, 70,000 square foot computer science building opened in 2015.

### ***Tourism & Recreation***

According to Discover Long Island, tourism in the County is a \$3.0 billion industry in 2015. Twenty New York State parks, which together welcome millions of visitors each year, are located in the County. According to the New York State Department of Parks and Recreation, the State parks on Long Island had 20 million attendees in 2014. The State parks located in the County that were most frequently visited in 2014 were Robert Moses State Park (with 4.0 million visitors), Sunken Meadow State Park (with 2.2 million visitors), Heckscher Park (with 1.2 million visitors) and Captree State Park (with 1.2 million visitors). Many of the other State, County, Town and Village parks are located inland and on beaches which attract hundreds of thousands of visitors each year. Moreover, one beach in the County has been ranked number one on a list of the top ten beaches in the United States based on 50 factors rated by a professor at Florida International University. With 986 miles of shoreline, industries such as recreational boating, boat sales and service, marinas, and charter boat fishing are prominent in the County. Each summer thousands of visitors are transported by ferry to the various summer communities located on Fire Island.

Presently there are 68 golf courses located in the County. The U.S. Open will be held at the Shinnecock Hills Golf Club in Southampton in 2018 and 2026. The Women's US Open golf tournament was held at Sebonack Golf Club in the County in 2013, and the PGA Championship and the Ryder Cup are coming to Bethpage in 2019 and 2024, respectively.

The County's 6,000-seat ballpark in Central Islip is home to the Long Island Ducks independent league baseball team. Hundreds of thousands of patrons attend games there every year and nearly every Ducks game is sold out. Significant numbers of wineries on the North Fork of the County and the Atlantis Marine World aquarium in Riverhead help serve the large tourism industry on the County's east end. Other recreational attractions include Splish Splash, a large water park located in Riverhead, and Adventureland, a traditional amusement park located in Farmingdale that has been entertaining Long Islanders since 1962. The County boasts several performing arts theaters including the Paramount Theater in Huntington, which opened in 2011, and the Suffolk Theater in downtown Riverhead, which reopened in 2013. The County also has 21 movie theatres, which together contain 159 screens, and three additional theaters are proposed for construction in the future.

Eastern Suffolk County is a popular tourist destination. In addition, the County is home to one of the largest concentrations of second homes of any county in the nation. There are 38,000 second homes in eastern Suffolk, which draw approximately 160,000 part-time residents to the area during the summer months and on weekends. Only ten counties nationwide have more seasonal homes than the County. There are more than 5,000 lodging rooms located in eastern Suffolk, ranging from luxurious boutique hotels and bed & breakfast inns to traditional motels. These lodging properties draw thousands of tourists to the County's east end throughout the year, but primarily in the summer months. The Suffolk County Division of Planning & Environment estimates that the population in eastern Suffolk increases by more than 240,000 people during peak summer times due to tourism, which more than doubles the year-round population. Due to its proximity to New York City, the County is well situated to serve the vacation needs of this market.

