

Town of Brookhaven, NY

HOUSING NEEDS ASSESSMENT

July 30, 2025



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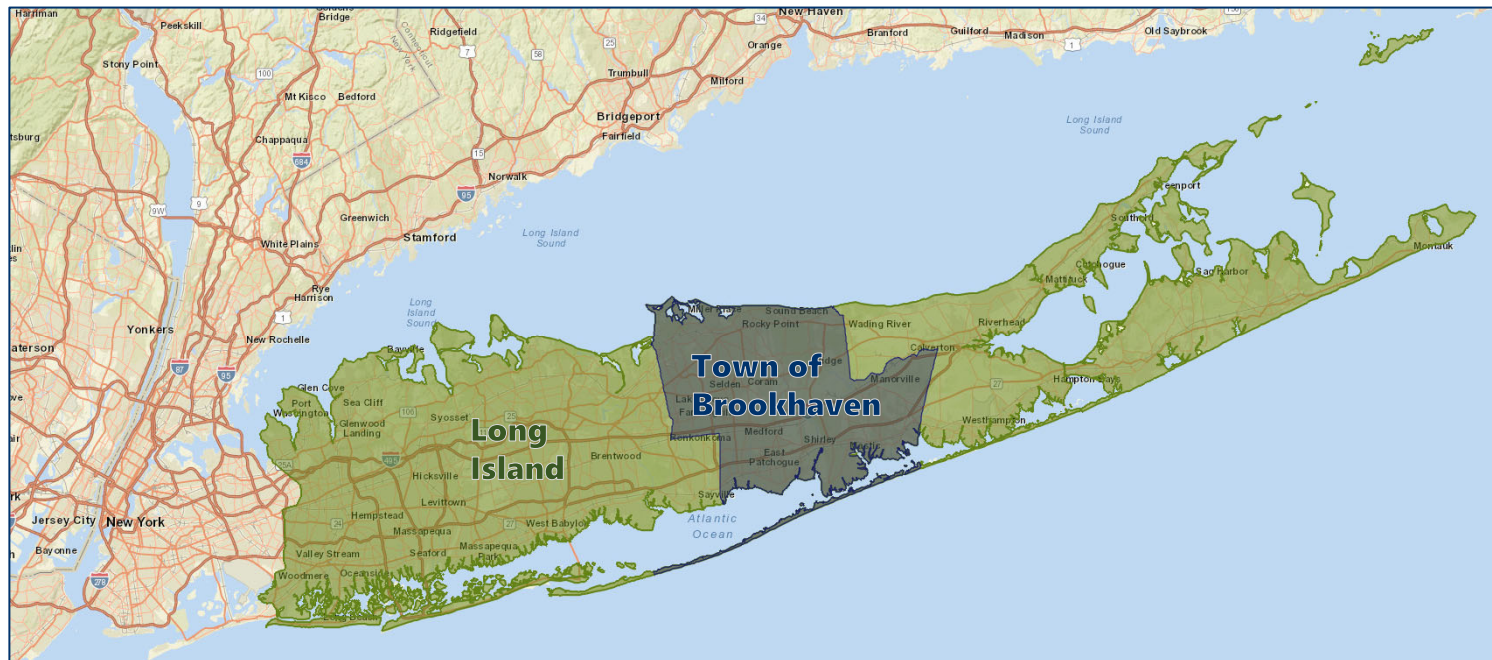
INTRODUCTION

PRODUCT PURPOSE

The Town of Brookhaven Housing Needs Analysis begins by reviewing the area's economic and demographic characteristics. This sets the context for the subsequent review of the existing housing inventory for both owner-occupied and renter-occupied households. A review of current residential development trends profiles the market setting facing homeowners and renters. Finally, a measurement of how affordable the area is for residents provides context for an analysis of existing needs and projected demand for housing within the Town of Brookhaven.

This analysis is provided in full for the Town of Brookhaven, with information presented for Suffolk County, Long Island, New York, and the US for comparison as needed.

Primary Study Area: Town of Brookhaven, NY



REPORT CONTENTS

This report provides the foundation for understanding the Town of Brookhaven's underlying housing market and anticipated requirements. Elements of this report include:

Key Findings:

A summary of overarching trends identified in the data and demand analysis.

Demographic, Geographic, and Economic Data:

Quantitative trends regarding the population, households, employment, and income levels.

Existing Housing Inventory:

Physical and occupancy characteristics of properties currently available in the Town's housing stock.

Housing Development and Market Trends:

Review of historic and recent residential development activity, including rental and for-sale market trends, such as unit pricing.

Housing Affordability Assessment:

Measures of populations with financial hardship exacerbated by housing costs and estimations of income shortfalls for renter and potential buyer households.

Housing Needs Analysis:

Estimates of current unmet demand and projected five-year cumulative need for additional housing units.

Appendix:

Data sources



EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

PURPOSE

The Housing Needs Analysis seeks to identify current residential needs in terms of unit pricing, size, and type. This data can then guide the Brookhaven IDA's decision-making as it fosters housing development in the Town.

DISCUSSION OF FINDINGS

The Town of Brookhaven has experienced steady household growth over the past decade, driven by households getting smaller. While new housing development has often accompanied this growth, rising rents and home values have underscored the need for a more targeted and diverse housing supply.

Currently, two-thirds of all renters and one-third of owners are cost-burdened, spending more than 30% of their income on rent. Though housing cost burden is less prevalent among homeowners, homeownership is becoming increasingly out of reach for first-time buyers due to seniors aging in place, escalating property values, and the recent surge in interest rates.

Despite a disproportionately high degree of housing cost burden, renters have seen rapid income growth over the past decade. Still, this has not been sufficient to bridge the rental affordability gap. Currently, the Town shows an especially high supply gap for renter households earning 50% of AMI or less.

The Town has also seen demographic shifts that will continue to impact future housing demand. Most notably, the population is aging, and the strongest household growth is among single-person households. By contrast, the bulk of the Town's housing supply comprises three- to four-bedroom homes. While new developments will still need to accommodate families, particularly if some empty-nesters prefer to remain in their larger homes, the Town of Brookhaven will benefit from housing options that reflect the community's shifting demographics and economic realities.

Future housing demand will stem from various demographic, economic, and market shifts. In the Town of Brookhaven, new housing development will increasingly need to accommodate:

- An aging population
- Household growth
- Low-income renters
- Single-person households
- Nonfamily households
- First-time or moderate-income homebuyers



KEY FINDINGS

1

The Town of Brookhaven's population is aging. Seniors (65+) account for 19% of the population — up from 12% in 2010. Systemic aging of the population calls for specific residential requirements. (see page 20)

2

Steady household growth over the last decade has been fueled by households getting smaller. Future housing demand may be centered around single-person households. (see pages 23-24)

3

The Town is gaining owner households but losing renter households. This could be a reflection of increased demand for homeownership or a lack of affordable rental units. (see page 27)

4

Employment levels have recovered from the COVID-19 pandemic. While post-pandemic job growth has been strong, expansion has begun to decelerate. (see page 32)

5

The Town is a net exporter of workers. Many workers in Long Island and New York City look to Brookhaven for a place to live. But, many of Brookhaven's workers cannot afford to live near their place of work. (see page 33 and 63)

6

Over the past decade, the housing stock with 2 to 9 units has declined. Although the total number of housing units has increased, "missing middle" homes are important to accommodate low- to moderate-income households. (see page 40).

7

Today's rents, adjusted for inflation, are 10% higher than a decade ago. Though renter incomes have kept pace with rising rents, available rental units are priced well beyond what many households can comfortably afford. (see page 62).

8

Renters are nearly twice as likely to be "cost-burdened" as homeowners. Nearly two-thirds (62%) of renters are housing-cost-burdened compared to one-third (33%) of homeowners. (see page 57).

9

Today's median home sales, adjusted for inflation, have risen more than 50% over their level ten years ago. Rising home prices plus high mortgage rates have moved homeownership beyond the reach of many would-be buyers. (see page 54).

10

The Town will need nearly 2,300 homes built over the coming five years in order to keep up with demand. There is a particular need for homes that are affordable to households earning 50% of AMI or less. (see pages 75-76).

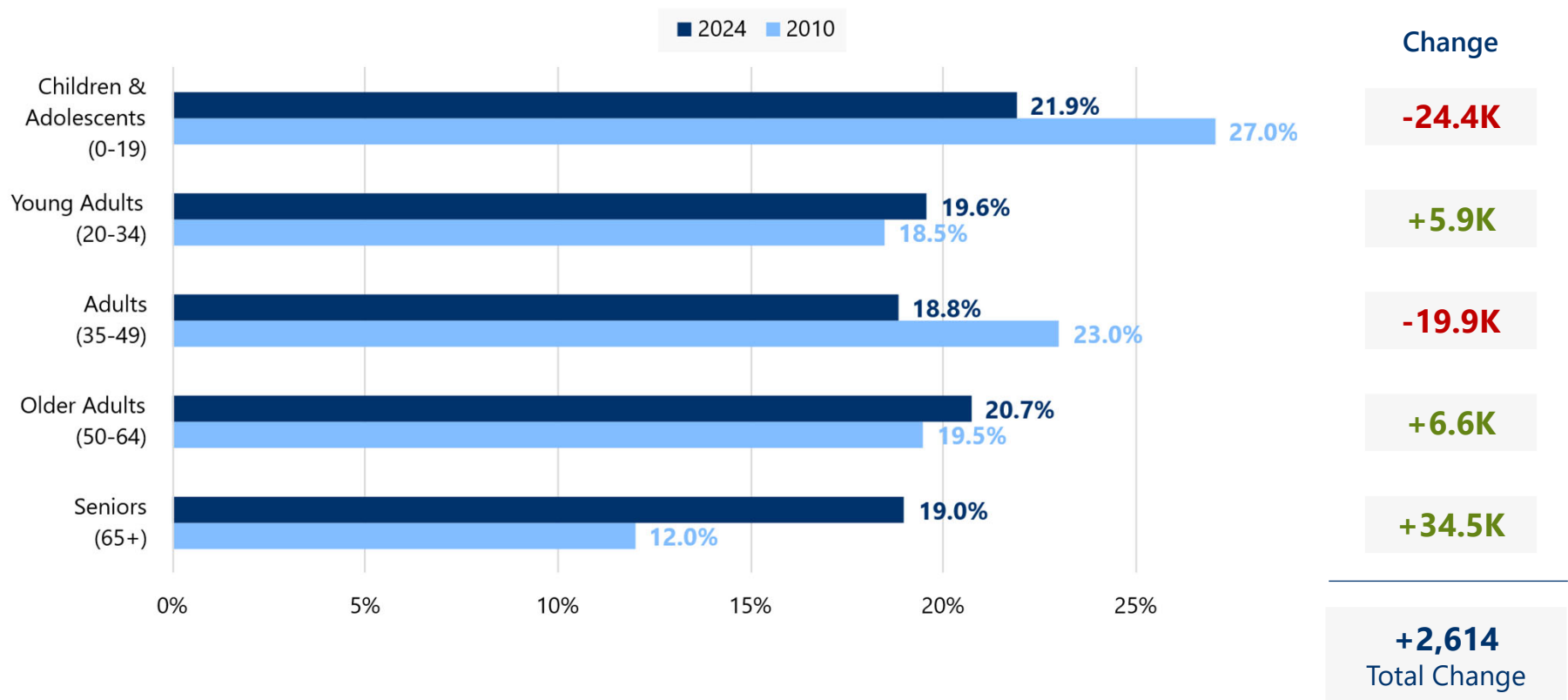


KEY FINDING # 1

The Town of Brookhaven's population is aging.

Though the largest age cohort in the Town remains children and adolescents (0-19), this group has been shrinking over the past decade. Meanwhile, the proportion and number of seniors (65+) has grown. As Baby Boomers (1946-1964) age, their housing decisions heavily influence the overall market. Many own their home outright or are close to paying it off and intend to age in place. Simultaneously, senior renters are the most financially stressed cohort.

Share of Population by Age, 2010-2024



Source: Esri

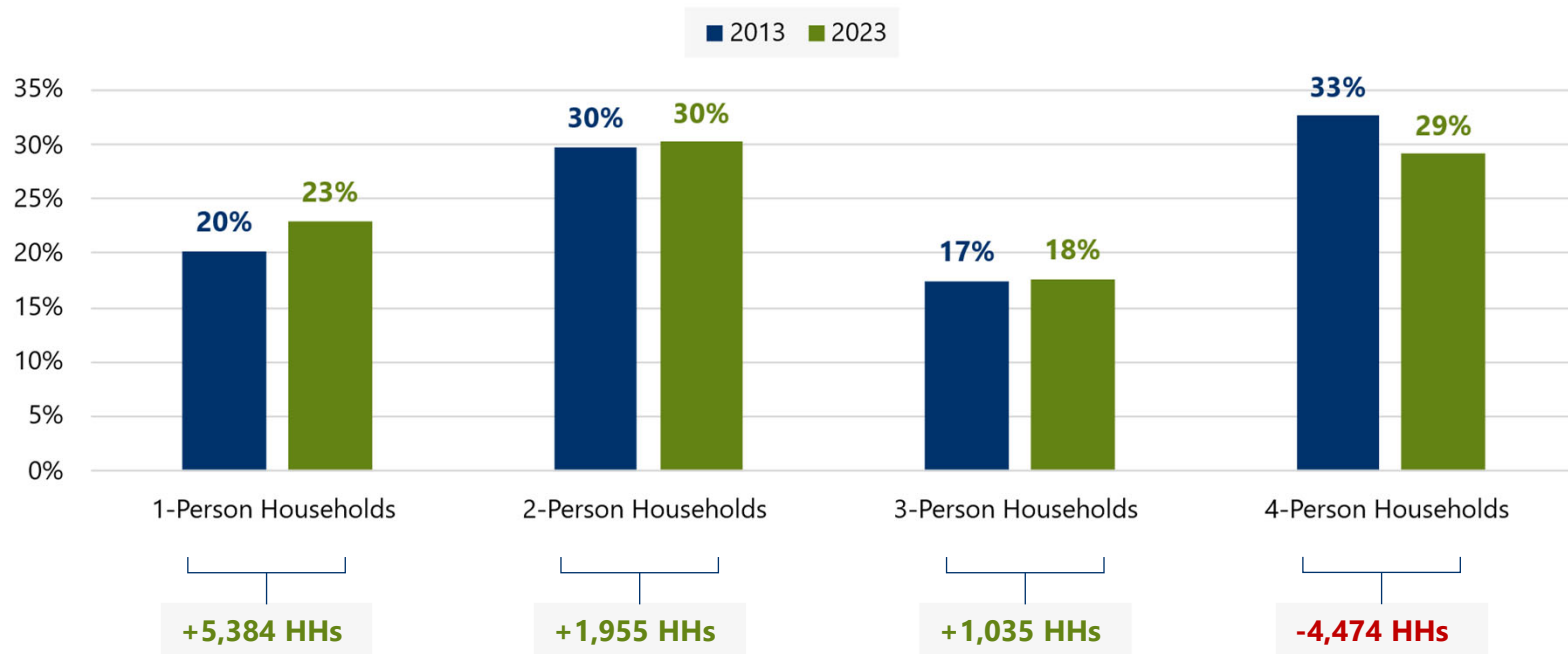


KEY FINDING # 2

Steady household growth over the last decade has been fueled by households getting smaller.

Despite periods of population decline over the past decade, the number of households in Town of Brookhaven has grown. This is partially due to declining household sizes. Household growth in the past decade has been largely driven by 1-person households, while there are fewer 4-person households. Future housing demand may be for smaller one- and two-bedroom units. However, to the extent that empty-nesters prefer to remain in their larger homes, new developments will also need to accommodate larger families.

Share of Households by Household Size, 2013-2023



Source: US Census Bureau, ACS 5-Year Data (Table: B1016)

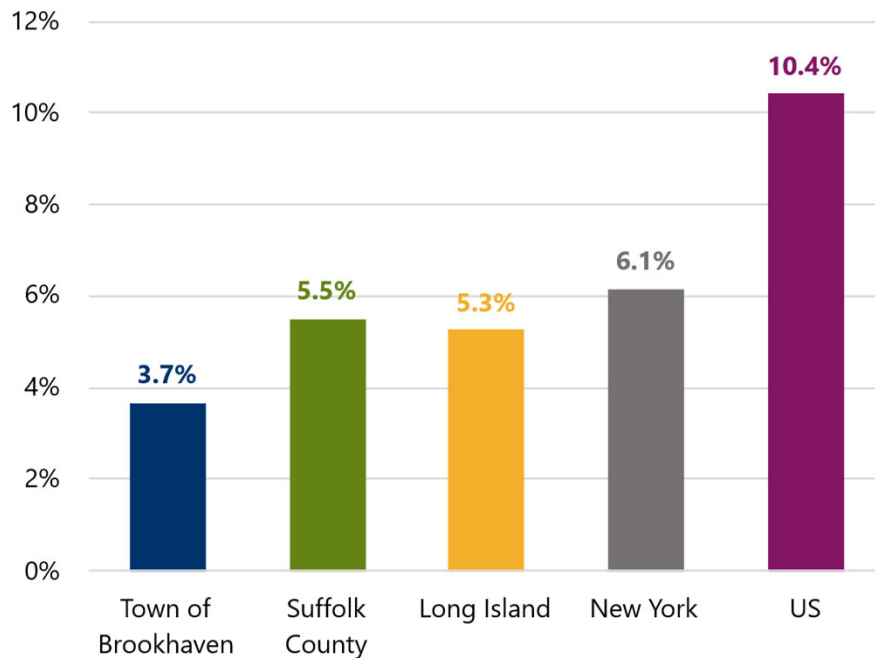


KEY FINDING # 3

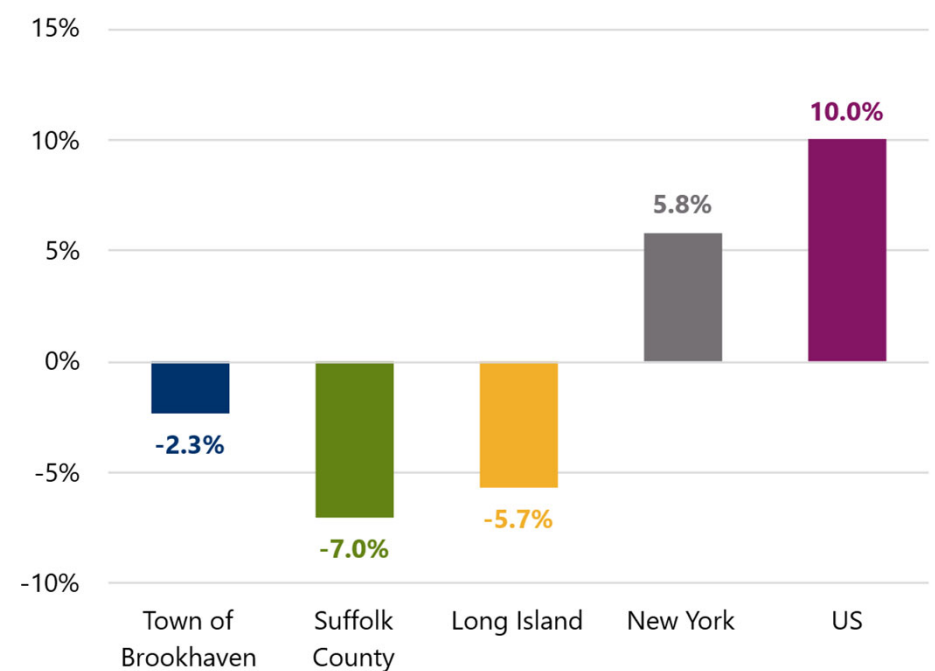
The Town is gaining owner households but losing renter households.

While the Town is losing renter households, it is losing those households more slowly than the rest of Long Island and Suffolk County. The loss of renter households could reflect increased demand for homeownership. It could also indicate unfulfilled renter needs, such as affordability or other housing characteristics, pushing renters elsewhere.

Percent Change in Owner Households, 2013-2023



Percent Change in Renter Households, 2013-2023



Source: US Census ACS 2013, 2023 5-Year Data (Table: B25003)

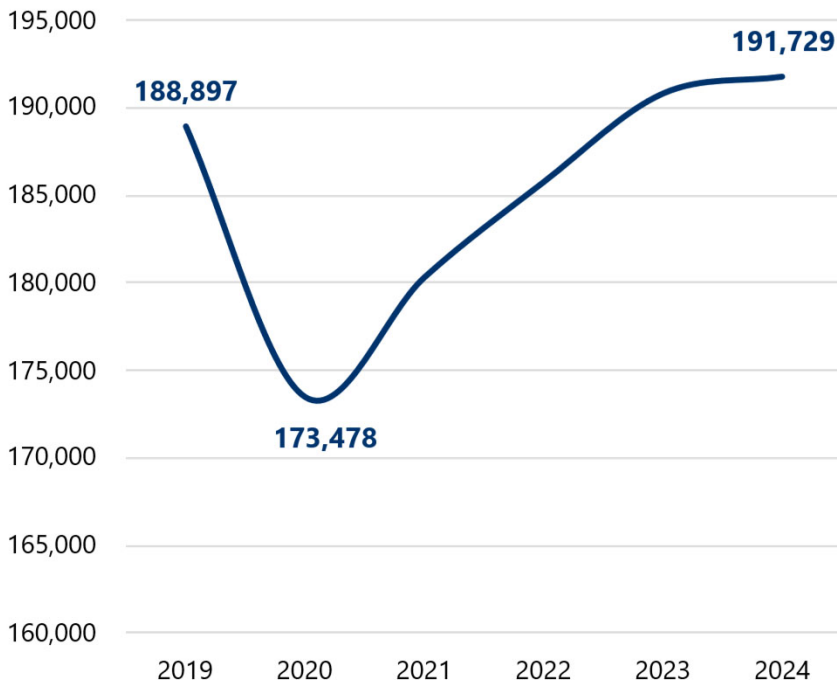


KEY FINDING # 4

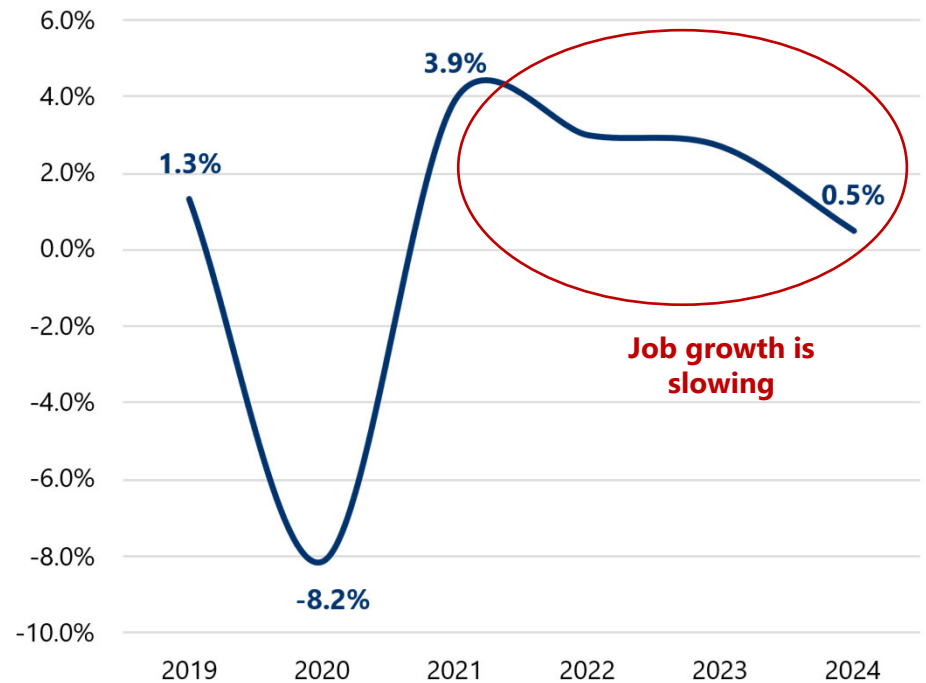
Employment levels have recovered from the COVID-19 pandemic.

Employment growth can drive demand for housing. In the Town of Brookhaven, post-pandemic job growth has been strong, enabling the Town to exceed pre-pandemic employment levels. However, these job gains have begun to decelerate in recent years.

Total Jobs, 2019-2024



Job Growth (% Change from Previous Year)



Source: Lightcast



KEY FINDING # 5

The Town is a net exporter of workers.

In Brookhaven, 56% of Brookhaven’s workers also live in the town. The primary impact of high housing costs is that workers who provide essential services often cannot afford to live near their workplaces. The best-paid workers involved in Food Preparation and Serving and Healthcare Support, those in the 75th percentile of earners, can afford only 18% of all rental units in the market (assuming a 1-worker household). By contrast, high-wage occupations, such as Business and Financial Operations, Healthcare Practitioners, and Managers, can afford nearly all rental units in the market.

Share of Rental Units Affordable to Each Occupation by Income Bracket

10 Largest Occupation Groups Ordered by Lowest to Highest Median Income

Description	Share of Employment	Share of Units Affordable to 25th Percentile Earners	Share of Units Affordable to 50th Percentile Earners	Share of Units Affordable to 75th Percentile Earners
Food Preparation and Serving Related Occupations	8.4%	12%	13%	18%
Sales and Related Occupations	8.2%	13%	18%	50%
Healthcare Support Occupations	5.9%	14%	18%	18%
Transportation and Material Moving Occupations	8.5%	14%	18%	50%
Office and Administrative Support Occupations	10.5%	14%	18%	50%
Construction and Extraction Occupations	5.5%	18%	50%	73%
Educational Instruction and Library Occupations	10.1%	18%	50%	91%
Business and Financial Operations Occupations	5.3%	50%	73%	99%
Healthcare Practitioners and Technical Occupations	6.5%	50%	73%	99%
Management Occupations	6.1%	73%	99%	100%

The Town of Brookhaven is a net exporter of workers

58,149

Employed in Town, but Live Elsewhere

73,615

Workers **Live and Work** in the Town of Brookhaven

149,301

Live in Town, but Employed Elsewhere

Source: US Census OnTheMap, Lightcast, US Census ACS 5-Year Estimates (Tables: B25056 and B25075)

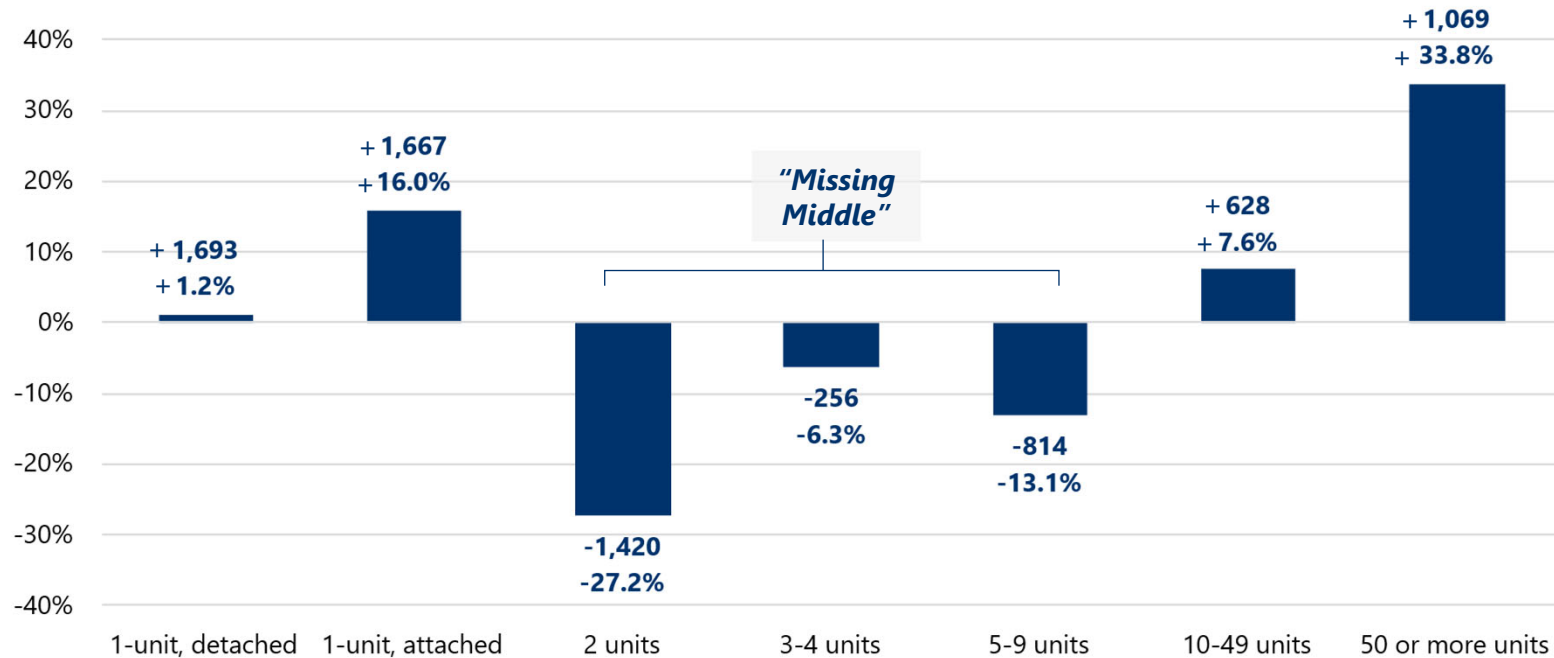


KEY FINDING # 6

Over the past decade, the housing stock with 2 to 9 units has declined.

Over the past decade, the Town has been losing duplexes, triplexes, and fourplexes – often called “[missing middle](#)” homes. These homes are often difficult to build due to potential financing gaps but are important to accommodate low- to moderate-income households. Despite these home losses, the town has seen a net increase (+2,567) in housing units over the past decade, driven by notable increases in the number of single-family attached homes and larger multifamily developments.

Percent Change in Number of Households by Household Size, 2013-2023



Source: US Census ACS 5-Year Data (Table: B25024), [Small Apartment Buildings Can Help Address Housing Shortages, but High Land Costs and Interest Rates Are Limiting Construction](#)

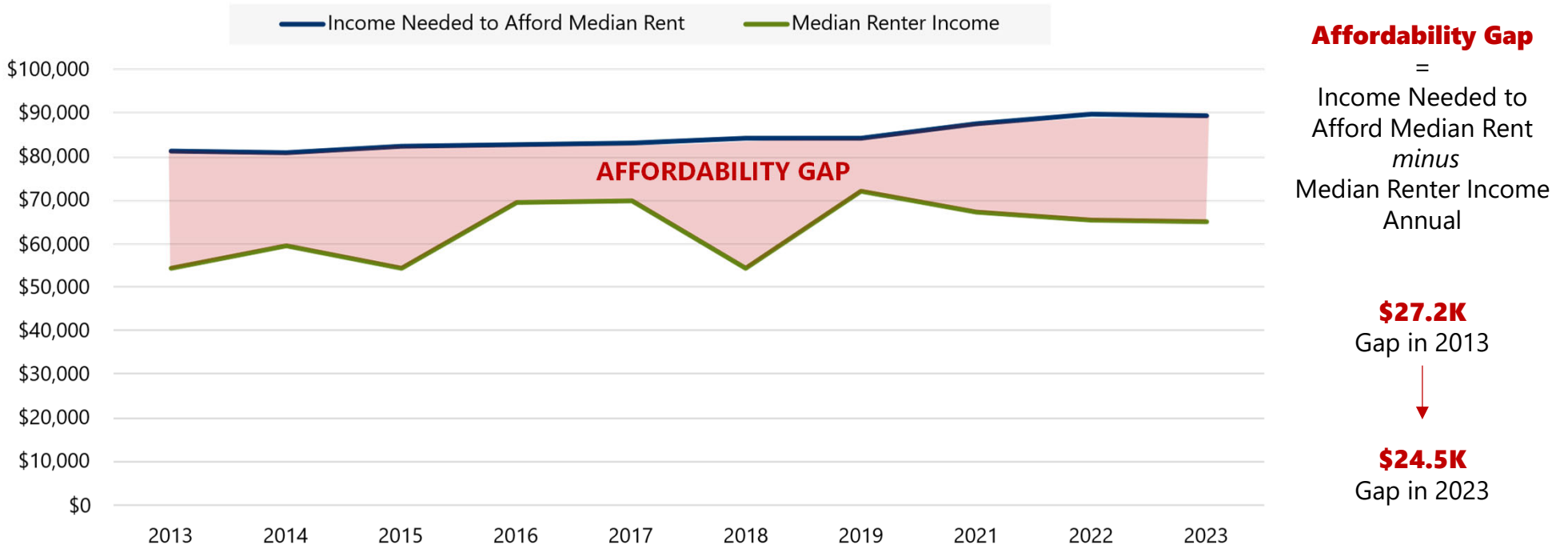


KEY FINDING # 7

Today's rents, adjusted for inflation, are 10% higher than a decade ago.

Although the affordability gap has been narrowed over the past decade as renter incomes have increased, it remains substantial. In 2023, the median-earning renter would still need to earn an additional \$24,527 annually to afford the median-priced rental unit without being cost-burdened.

Change in Median Renter Income vs. Income Needed to Afford Median Rent



Source: US Census Bureau, ACS 1-Year Data

Note: Adjusted to 2023 Inflation

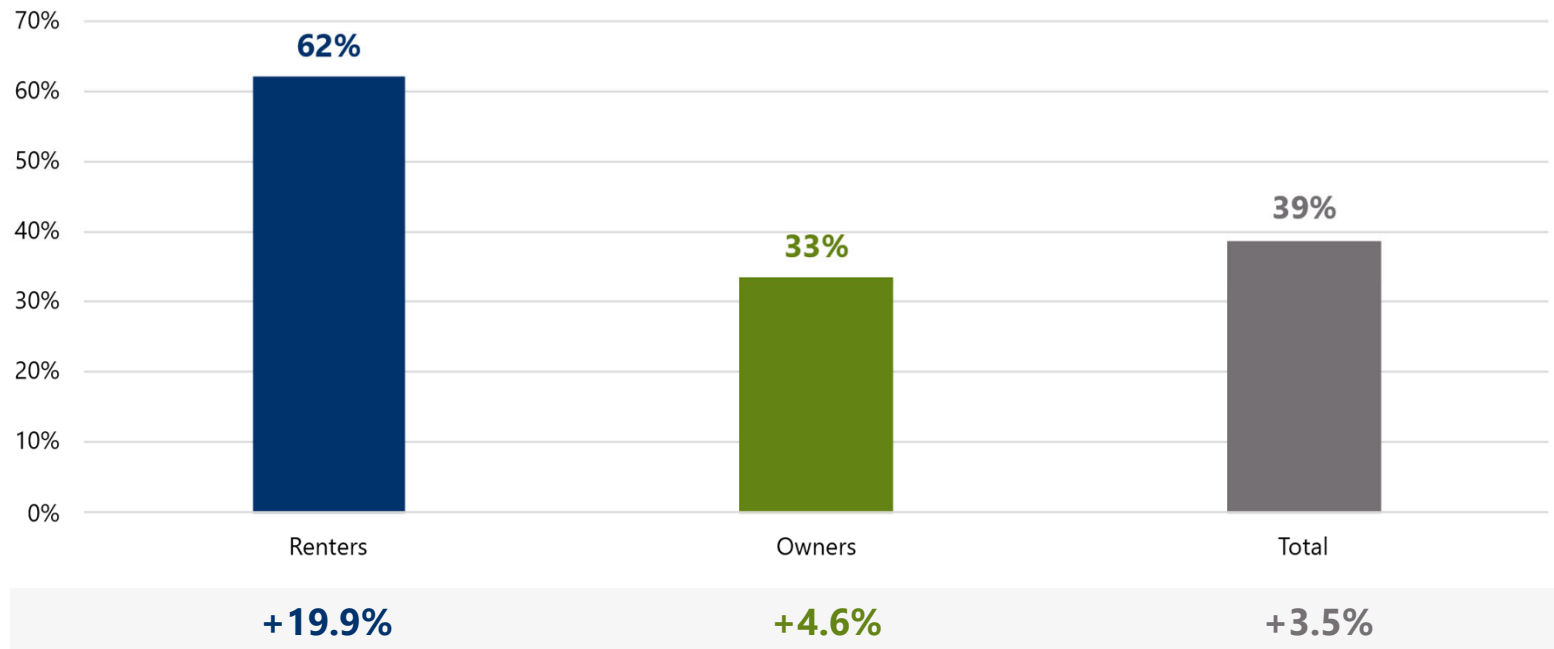


KEY FINDING # 8

Renters are 1.8 times more likely to be cost-burdened than homeowners.

Households whose housing costs exceed 30% of their total income are considered cost-burdened. These households are, in turn, more likely to face difficulties meeting other needs beyond shelter, such as food, medical care, and transportation. Renter incomes have been increasing faster than owner incomes over the past decade. Still, renters face a disproportionately high housing cost burden, with nearly two-thirds of renter households affected, compared to just one-third of owner households.

Share of Households with Housing Cost Burden by Tenure, 2023



Percent Change in Real Median Household Income, 2013-2023

Source: US Census Bureau, ACS 5-Year Data

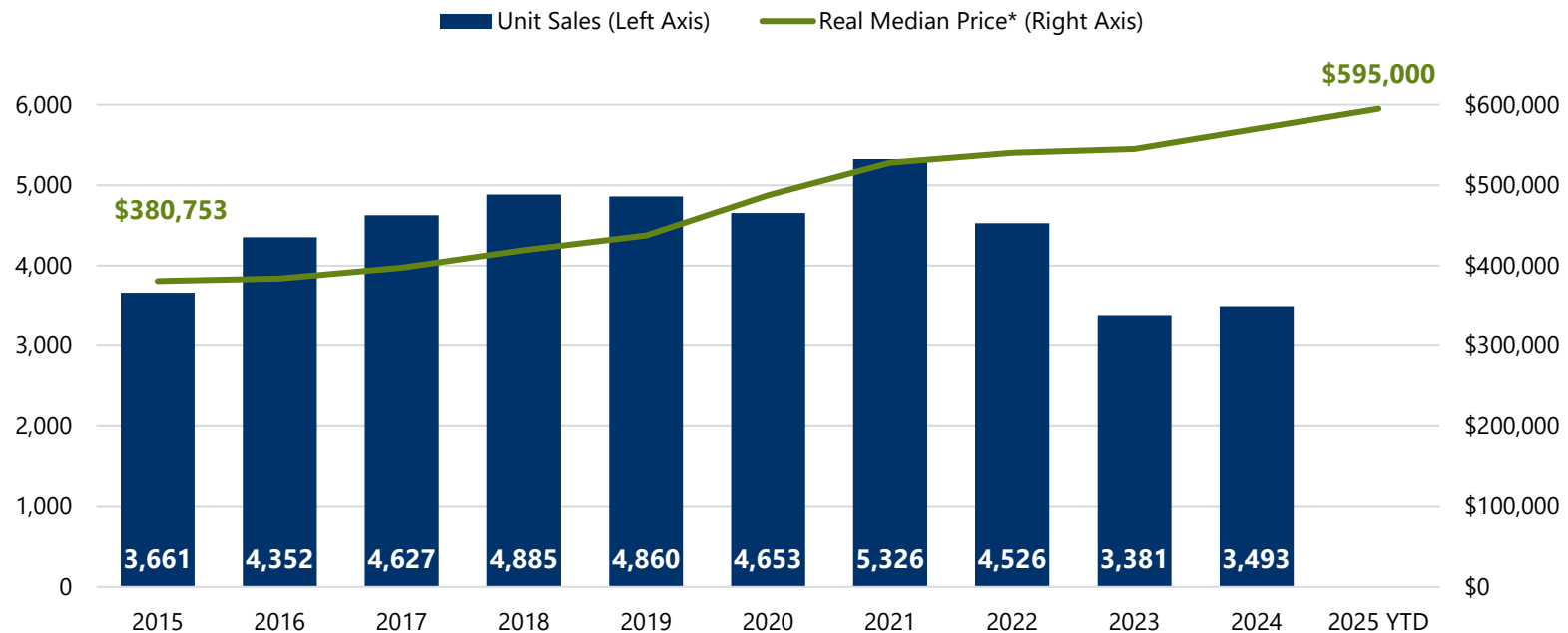


KEY FINDING # 9

Today's median home price, adjusted for inflation, has jumped 50% over the past decade.

At \$595,000, the median home sales price in Brookhaven stands more than 50% above its level in 2015. This increase in value boosts personal wealth for those fortunate enough to own a home. At the same time, these price increases push ownership out of reach for many renters hoping to buy. The Town of Brookhaven saw a particularly sharp increase in home sales prices following the onset of the COVID-19 pandemic in 2020.

Single Family Home Sales, 2015 to 2025 (YTD)



Sources: Redfin, FRED

*Note: Home sales prices are adjusted to 2025 dollars using an average of monthly CPI values to date.



KEY FINDING # 10

The Town will need nearly 2,300 homes built over the next five years to keep up with demand.

The Town of Brookhaven will need nearly 2,300 homes built over the next five years to meet demand. Currently, there is a significant supply gap for households earning 50% of AMI or less. A targeted housing development approach would address this current imbalance going forward.

Net New Housing Needed by 2029

This quantifies housing need *without considering existing shortages*.

AMI Bracket	Total Need
0% to 30% of AMI	405
31% to 50% of AMI	311
51% to 80% of AMI	648
81% to 100% of AMI	333
101% to 120% of AMI	216
121% to 150% of AMI	143
Over 150% of AMI	222
Total	2,278

Aspirational Housing Development by 2029

This quantifies housing *need accounting for existing shortages* by price point.

AMI Bracket	Total Need
0% to 30% of AMI	643
31% to 50% of AMI	493
51% to 80% of AMI	618
81% to 100% of AMI	316
101% to 120% of AMI	104
121% to 150% of AMI	57
Over 150% of AMI	47
Total	2,278

The adjusted distribution of Net New Housing Needed by 2029 to partially address the existing housing shortage for households earning up to 50% AMI

Sources: Camoin Associates analysis of Esri , US Census ACS, and US Census PUMS data



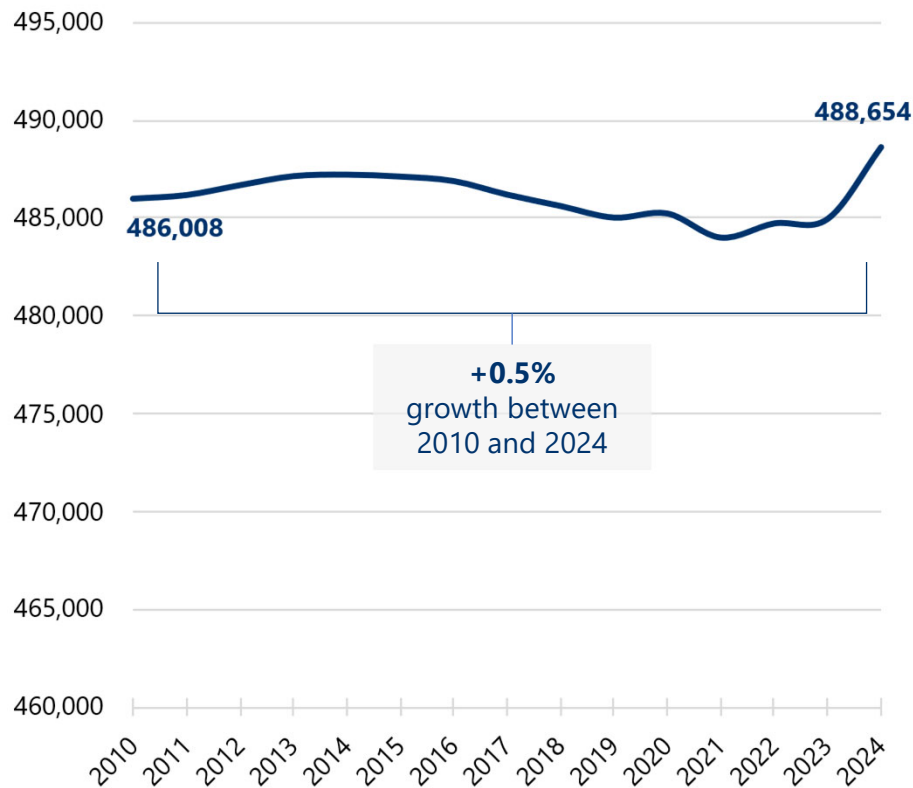
DEMOGRAPHIC, GEOGRAPHIC AND ECONOMIC DATA

POPULATION GROWTH

In recent years, the Town of Brookhaven has experienced accelerated population growth, with the Town's growth outpacing regional growth in Suffolk County and across Long Island.

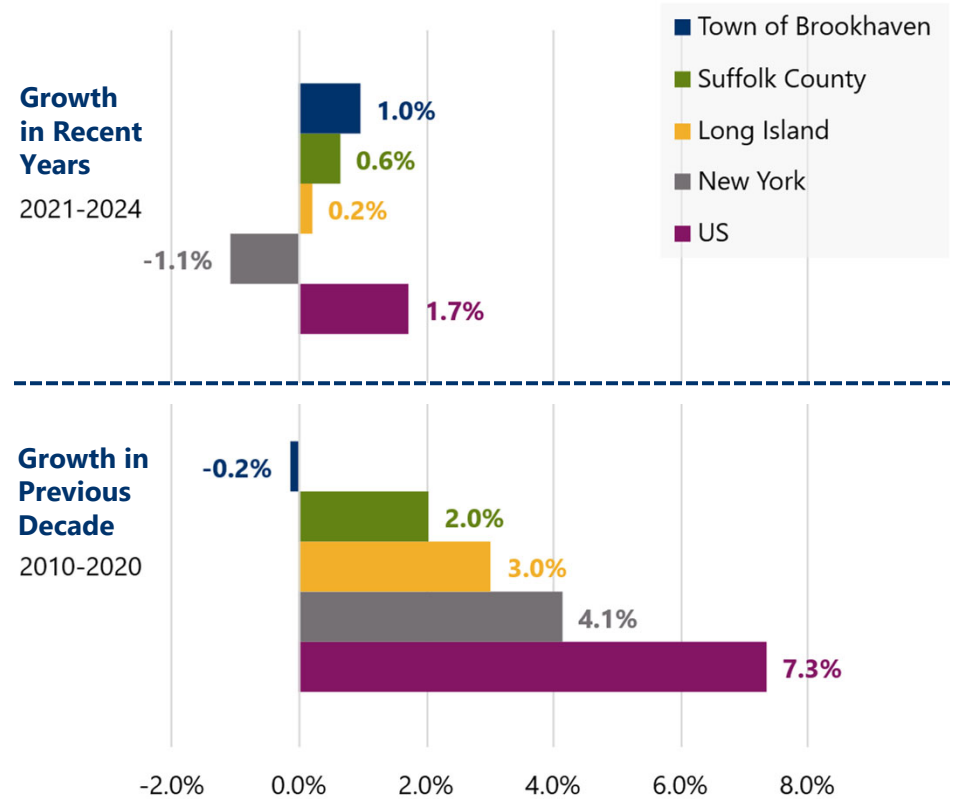
Despite a period of population decline in the previous decade, the Town of Brookhaven's population has grown in recent years. Between 2021 and 2024, population growth in the Town, Suffolk County, and Long Island also outpaced population growth in the state, which declined by 1.1%, but lags population growth in the US, which grew by 1.7%.

Population in Town of Brookhaven, 2010-2024



Source: Esri

Percent Change in Population



Source: Esri

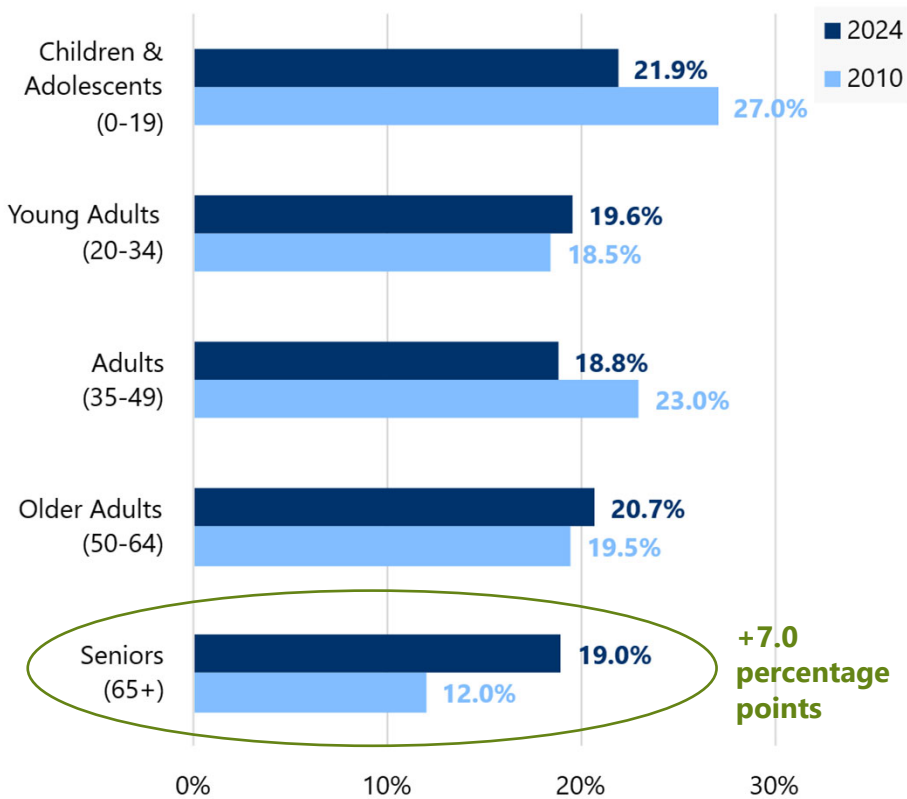


AGE DISTRIBUTION AND MEDIAN AGE

The Town may need to focus more on senior housing in the future. Residents in the Town of Brookhaven are getting older at a faster rate than the rest of the region and state.

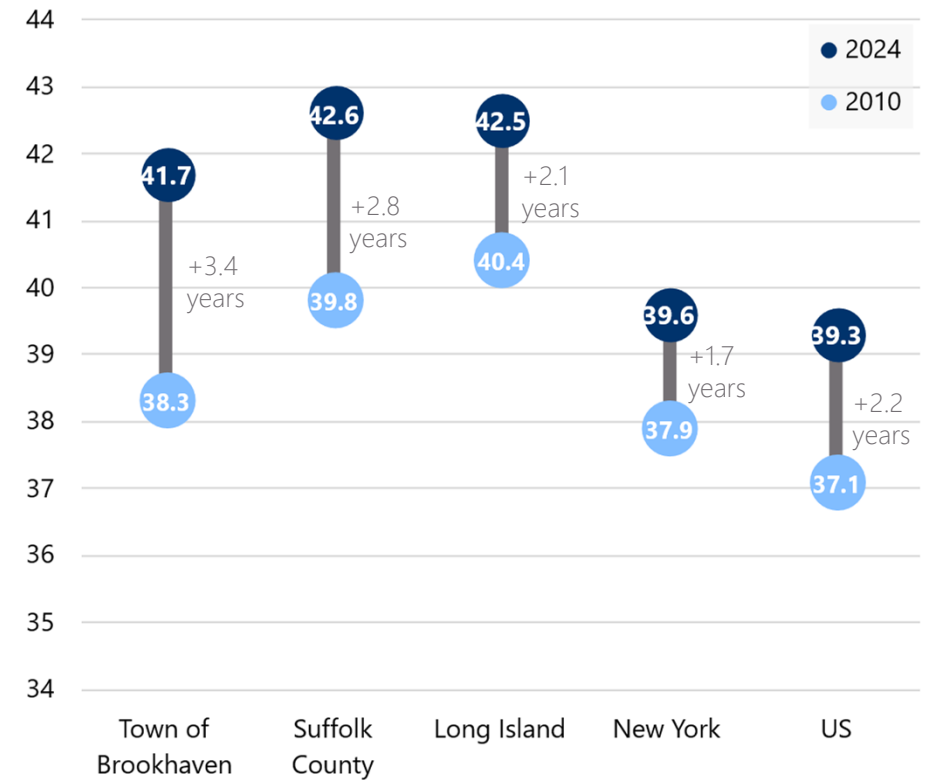
Though the largest age cohort in the Town is children and adolescents (0-19), the share of residents in this age cohort has been shrinking over the past decade. Meanwhile, the proportion of seniors (65+) has increased by seven percentage points. While residents across the region and country are also getting older, the Town of Brookhaven is aging faster, as reflected in the change in median age between 2010 and 2024.

Age Distribution, Town of Brookhaven, 2010-2024



Source: Esri

Change in Median Age, 2010-2024



Source: Decennial Census; Esri

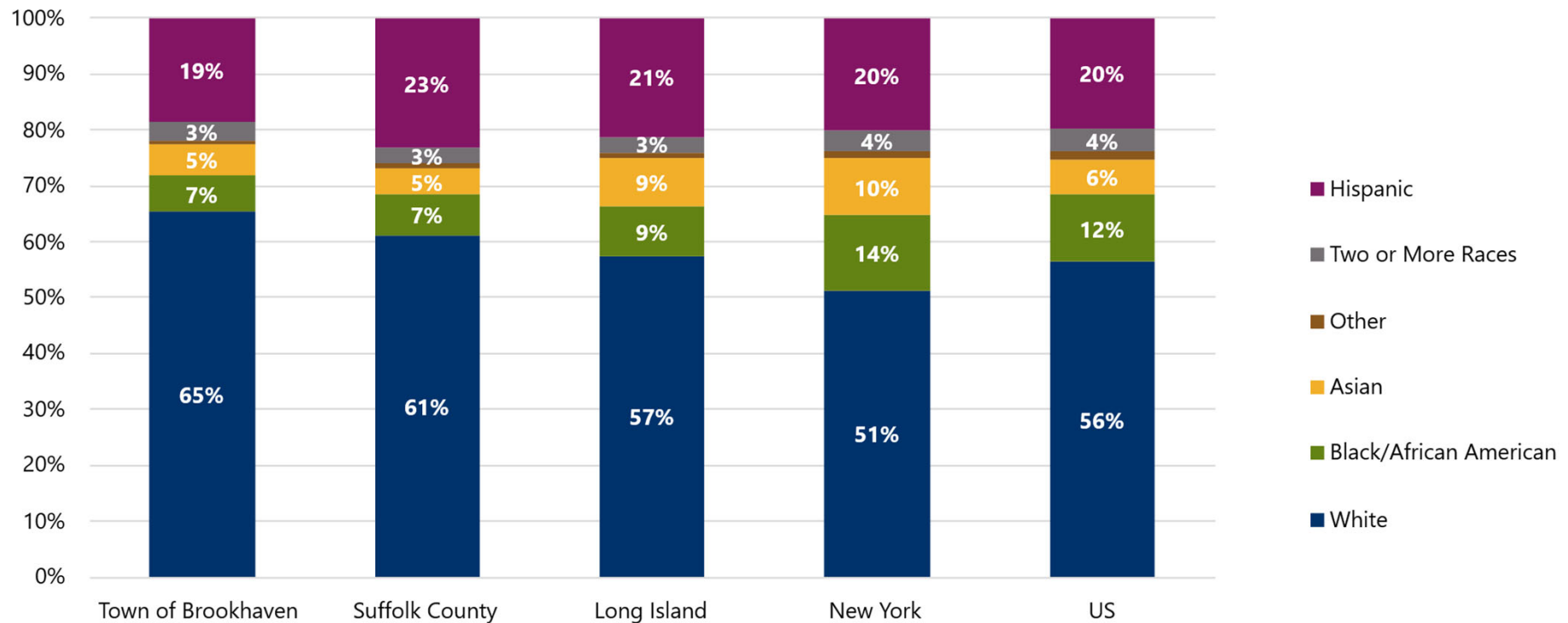


POPULATION BY RACE AND ETHNICITY

Nearly two-thirds of residents in the Town of Brookhaven are white, a slightly higher proportion than seen among the regional geographies and significantly higher than the proportion seen at the state level.

Hispanic residents make up the largest non-white population group, accounting for 19% of the Town of Brookhaven’s population. The Town of Brookhaven, Suffolk County, and Long Island are generally less diverse than the state and US population.

Share of Population by Race and Ethnicity, 2024



Note: Population share for non-Hispanic portion of each race category shown. Hispanic population may be of any race. Data label for 'Other' race category is not shown.

Source: Esri

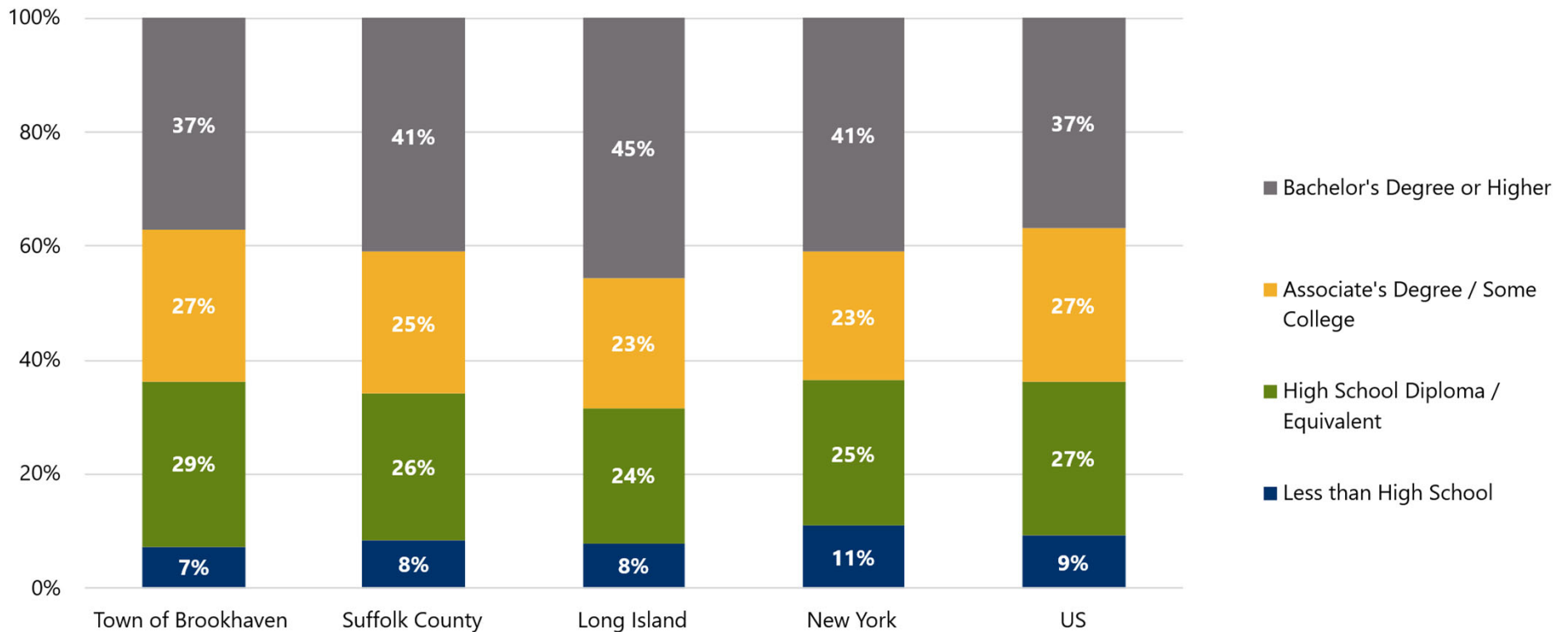


EDUCATIONAL ATTAINMENT

Over one-third (37%) of Town of Brookhaven residents hold a bachelor's degree or higher. This registers below the state (41%) rate and is equal to the national (37%) rate.

While a smaller share of residents in the Town of Brookhaven have bachelor's degrees than those surrounding areas, a higher share of residents in the Town hold associate's degrees (27%) compared to regional geographies (25% in Suffolk County and 23% in Long Island).

Share of Population by Educational Attainment, 2024



Source: Esri

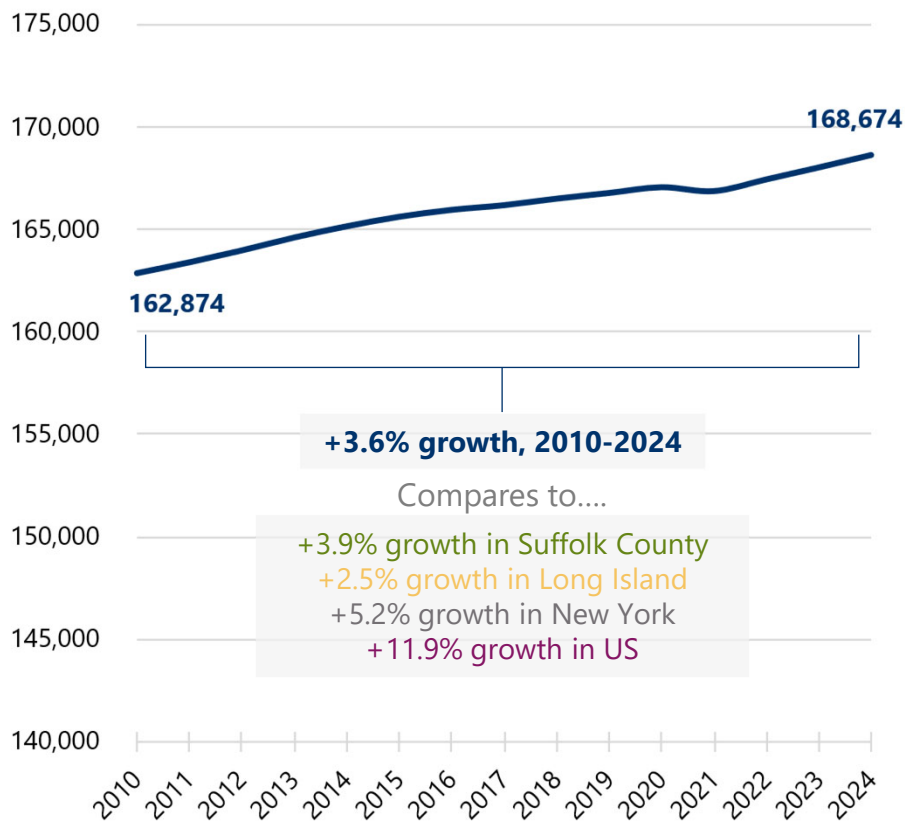


HOUSEHOLD GROWTH

Despite periods of population decline over the past decade, the Town of Brookhaven has gained 5,800 households since 2010. In recent years, household growth in the Town has outpaced the regional rate.

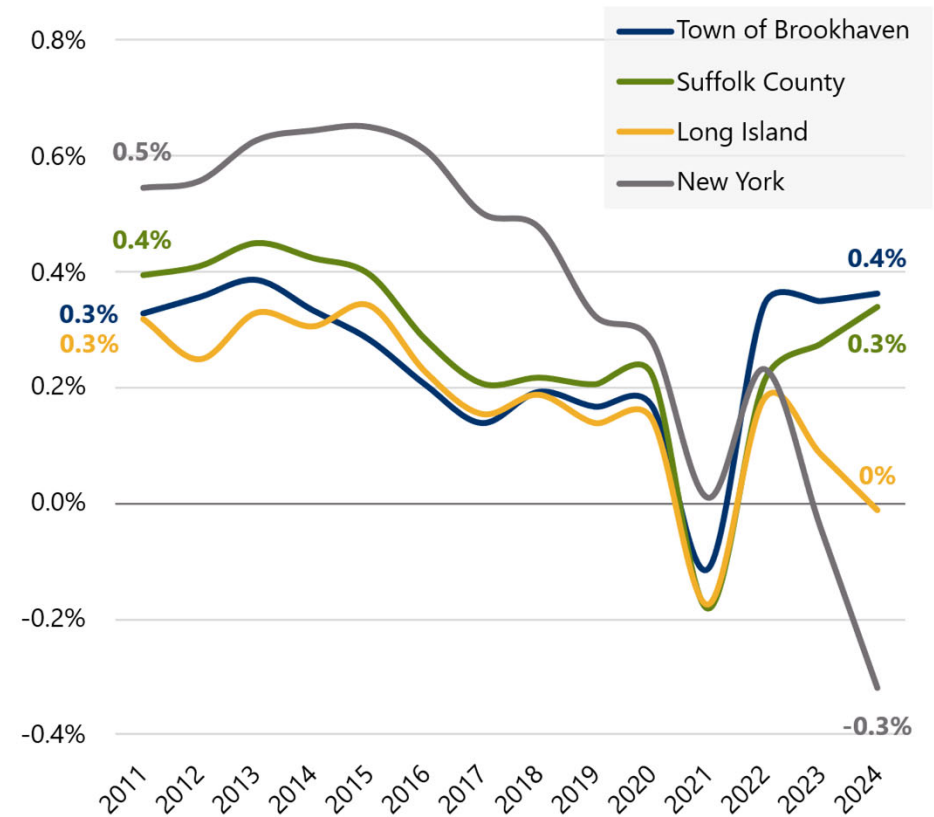
The number of Brookhaven households showed steady gains over the 2010 to 2020 timeframe, though the pace of growth slowed. Following the 2021 setback seen throughout the region and the state, the number of Brookhaven's households surged, outpacing both regional and statewide growth rates. While this pace of growth stabilized in 2024, continued household gains may place increased pressure on the housing market.

Households in Town of Brookhaven, 2010-2024



Source: Esri

Household Growth Rate (From Previous Year)



Source: Esri

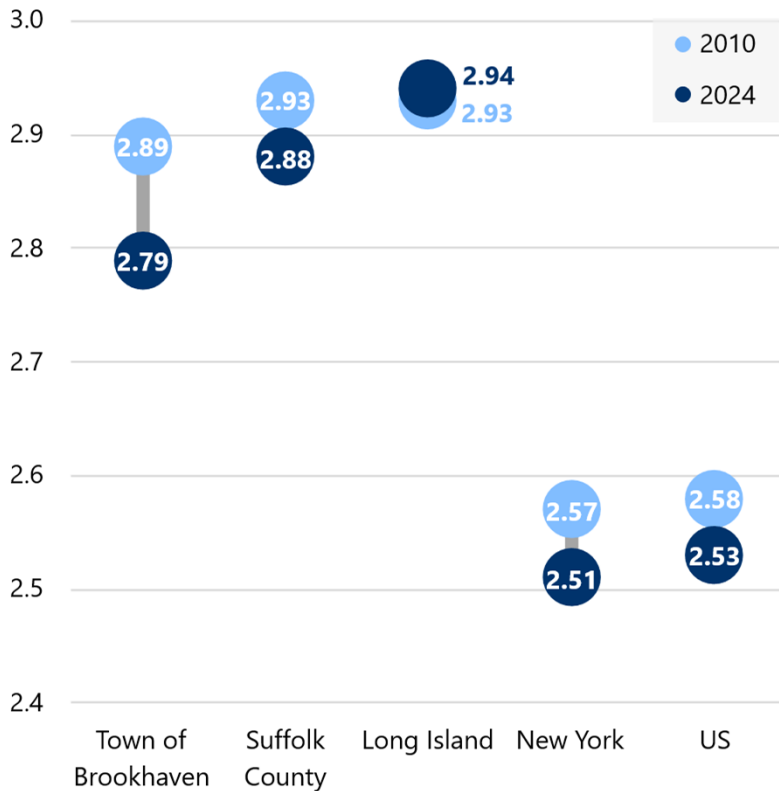


HOUSEHOLD SIZE

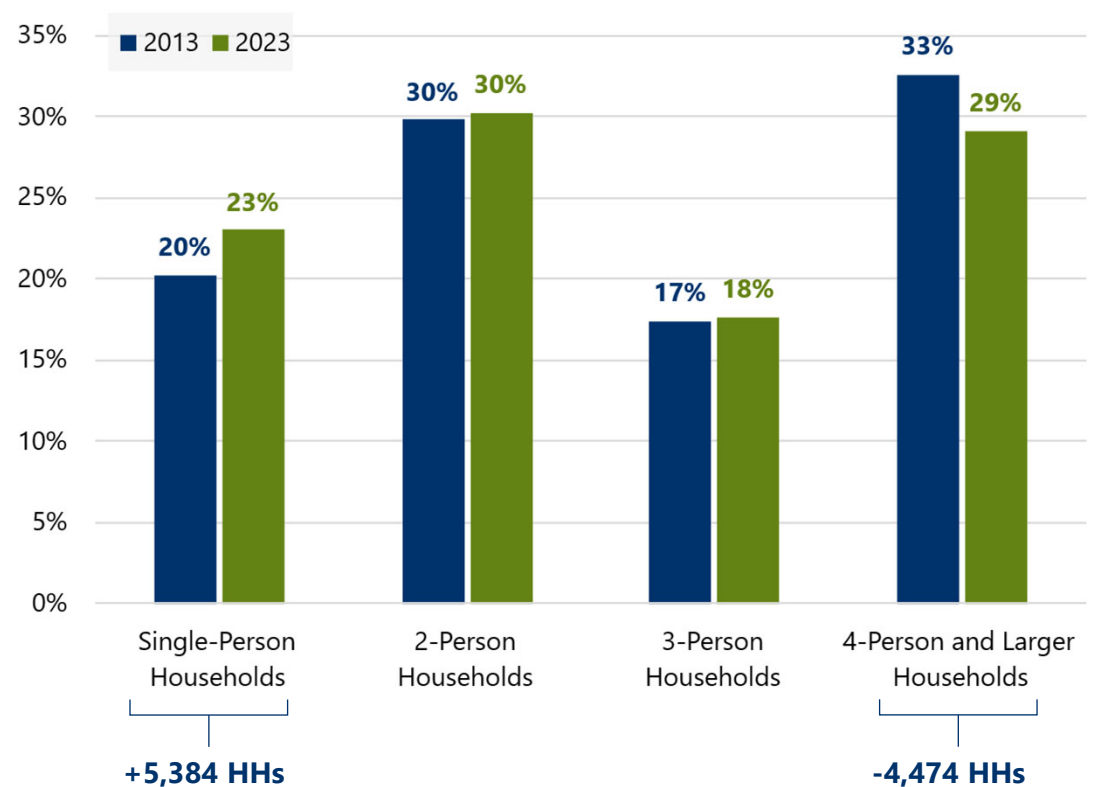
Household growth has been partially driven by the drop in average household size. In the past decade, the Town of Brookhaven has been gaining single-person households and losing households of 4+ residents.

Similar patterns have been seen elsewhere, but the Town of Brookhaven maintained stronger household growth than its neighboring counties or the state in part due to the rapid decline in household size. This shift towards smaller households directs home builders to focus on smaller homes when planning new developments.

Change in Average Household Size, 2010-2024



Share of Households by Household Size, Town of Brookhaven, 2013-2023



Source: Decennial Census; Esri

Note: This data is not available for 2024.



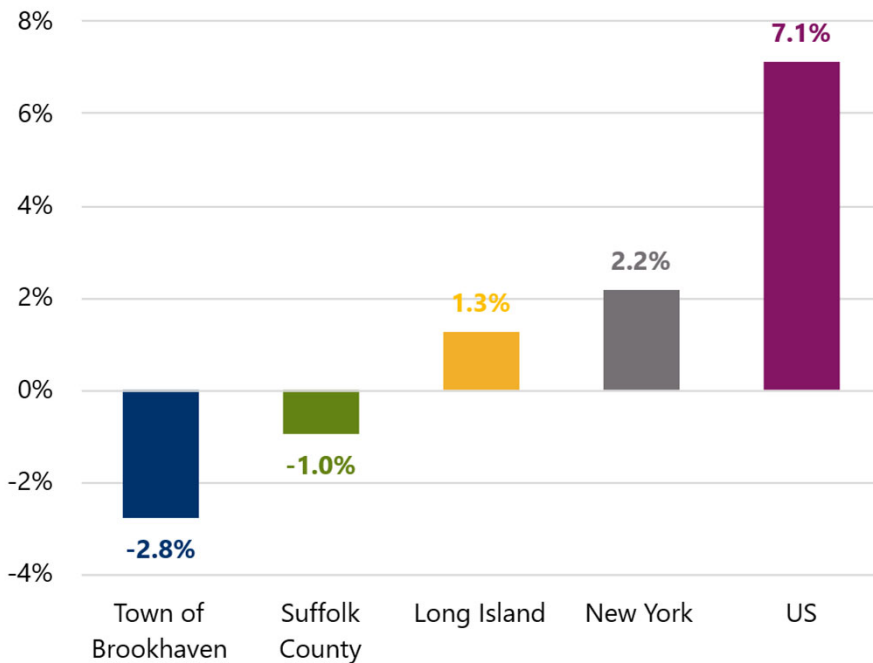
CHANGE IN FAMILY HOUSEHOLDS

While the Town of Brookhaven has seen an increase in the number of nonfamily households, it has also been losing family households at a faster rate than seen regionally or nationally.

In general, the Town of Brookhaven has a higher share of family households (75%) than the state (64%) and country (66%). However, unlike the state and country, the Town has also seen a decline in the number of these households. Meanwhile, between 2013 and 2023, the number of nonfamily households increased by 18%.

Percent Change in Family* Households, 2013-2023

*Two or more individuals related by birth, marriage, or adoption

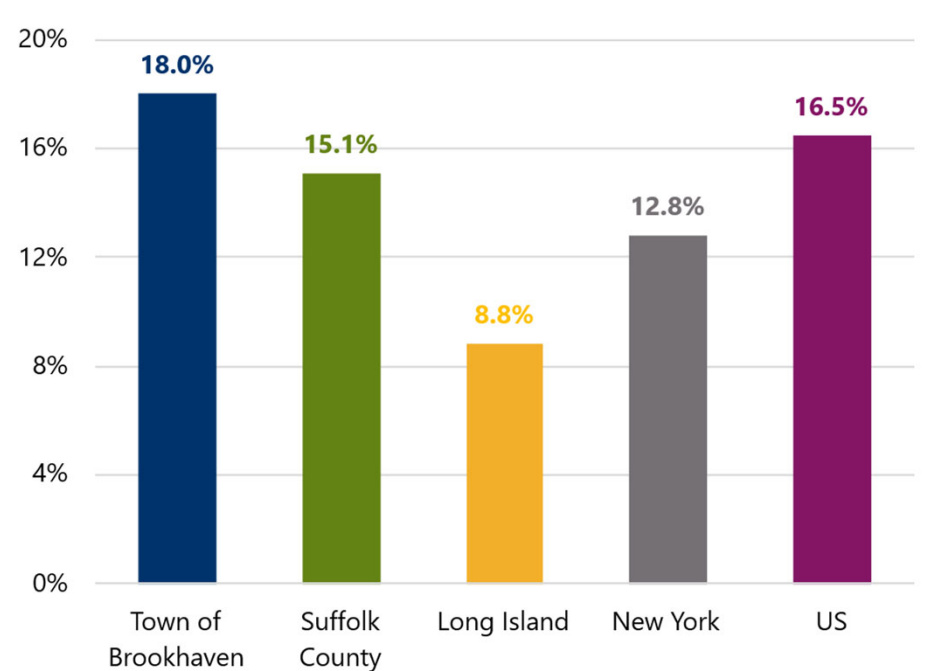


71% of households in the Town of Brookhaven are family households compared to **64%** in the US.

Source: US Census ACS 2013, 2023 5-Year Data (Table: B11016)

Percent Change in Nonfamily* Households, 2013-2023

*People who live alone or share their residence with unrelated individuals



29% of households in the Town of Brookhaven are nonfamily households compared to **36%** in the US.

Source: US Census ACS 2013, 2023 5-Year Data (Table: B11016)

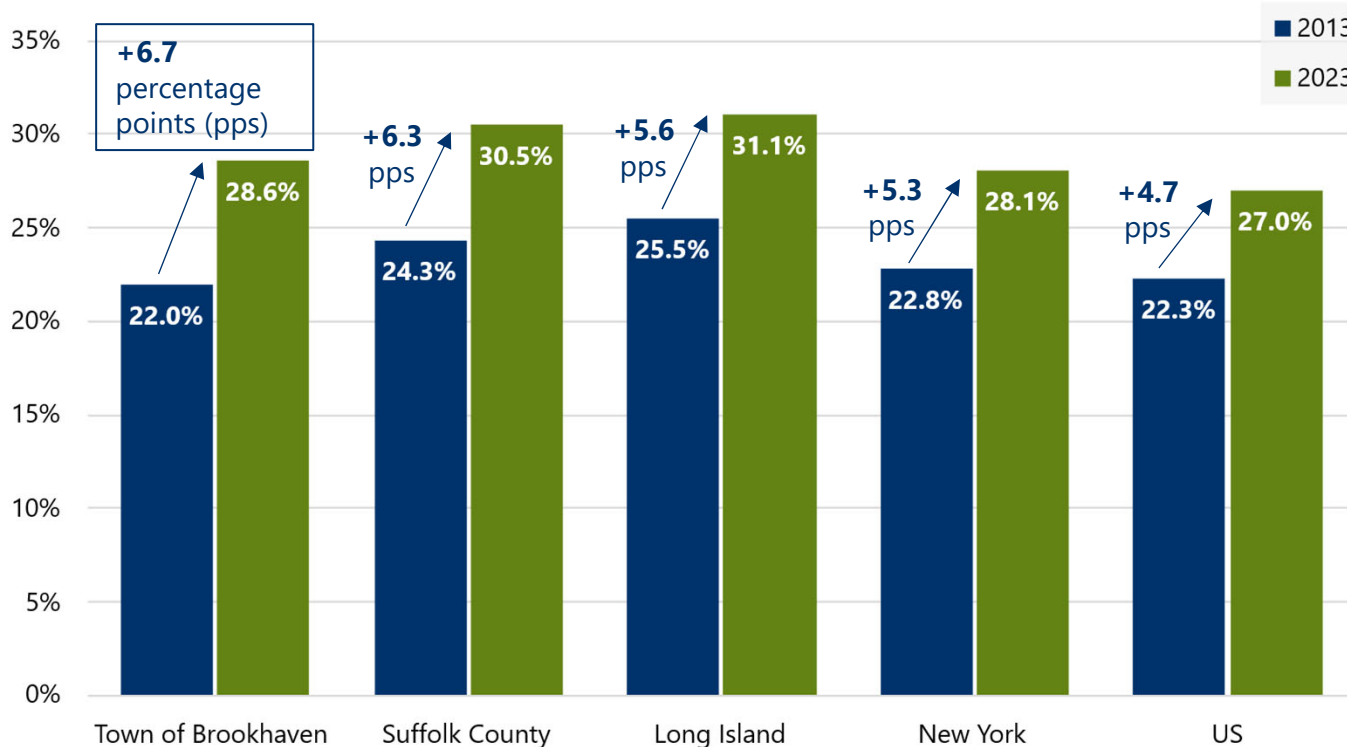


SHARE OF SENIOR HOUSEHOLDS

Over one-quarter (28.9%) of all Town of Brookhaven households include a senior (age 65+), up from 22% a decade prior.

The share of households with a senior is growing regionally and nationally as well, but this share is increasing more quickly in the Town of Brookhaven. Of those senior households, 41% live alone, and the median income for *senior* households is \$69,600, more than \$44,000 below the *overall* median household income (\$114,000) for the Town. This points to a market that is shifting towards a higher concentration of older households that have specific preferences and needs in their choice of residence.

Share of Households with a Senior (65+) Householder, 2013-2023



Source: US Census Bureau ACS 2013, 2023 5-Year Data (Table: B19037)

Town of Brookhaven Senior Householders...

41%

Live Alone (2023)

\$69,619

Median Household Income (2024)

Compares to...

\$113,944

Median Household Income for All Households (2024)

Source: Esri, US Census ACS 2023 5-Year Data (Table: B25011)

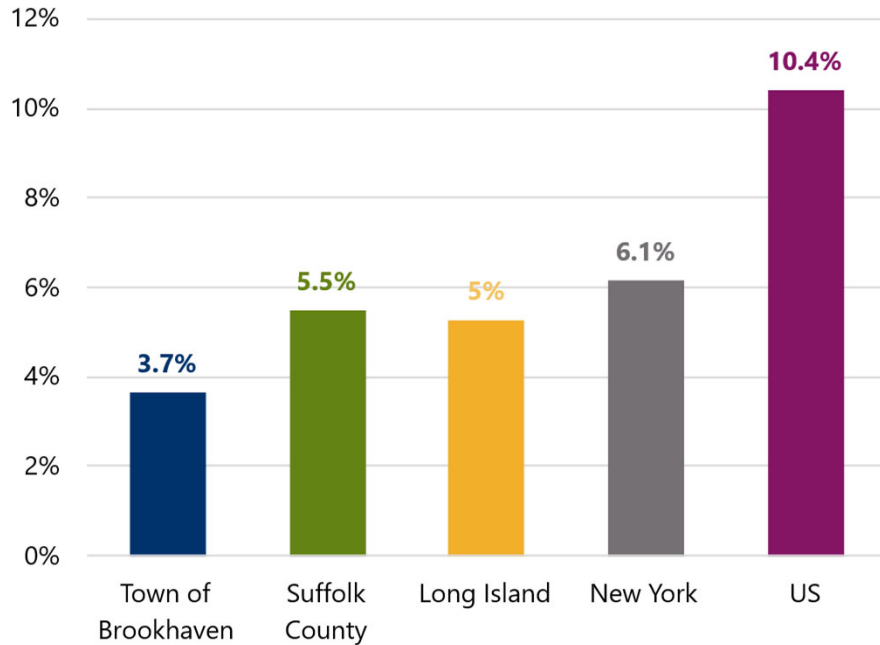


CHANGE IN HOUSEHOLDS BY TENURE

The Town of Brookhaven is losing renter households. Though this aligns with regional patterns, it contrasts national and state trends.

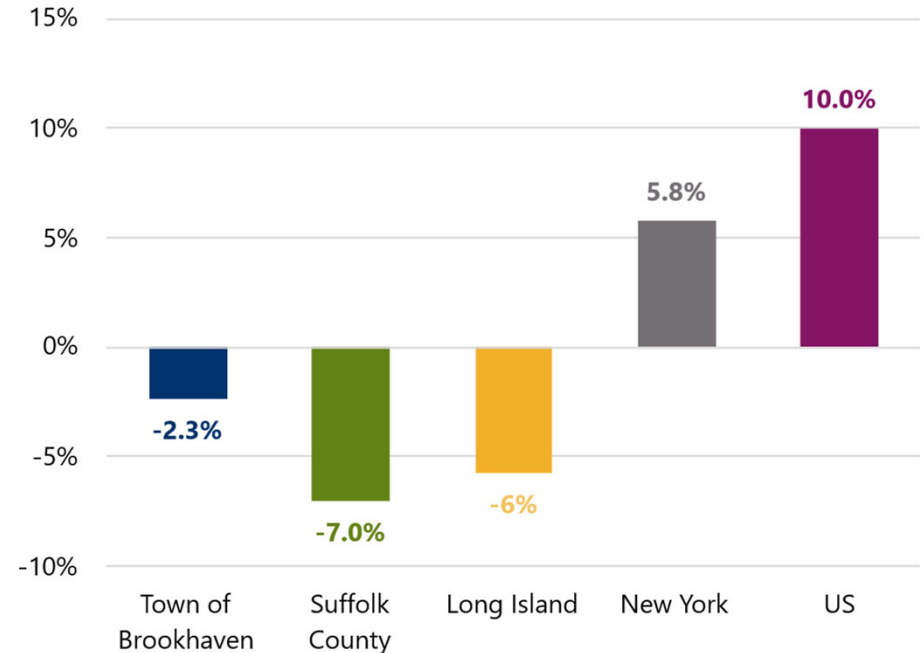
In general, the Town of Brookhaven has a lower share of renter households (19%) compared to the US (35%) and the State of New York (46%). While the number of renter households in the Town has seen declines, the loss of these households is less sharp than seen throughout the rest of Long Island and Suffolk County. This loss of renter households could reflect increased demand for homeownership. It could also indicate unfulfilled renter needs, such as affordability or other housing characteristics, pushing renters elsewhere.

Percent Change in Owner Households, 2013-2023



81% of households in the Town of Brookhaven are owners compared to **65%** in the US

Percent Change in Renter Households, 2013-2023



19% of households in the Town of Brookhaven are renters compared to **35%** in the US

Source: US Census ACS 2013, 2023 5-Year Data (Table: B25003)

Note: Tenure refers to the nature of occupancy of a housing unit (renter-occupied or owner-occupied).

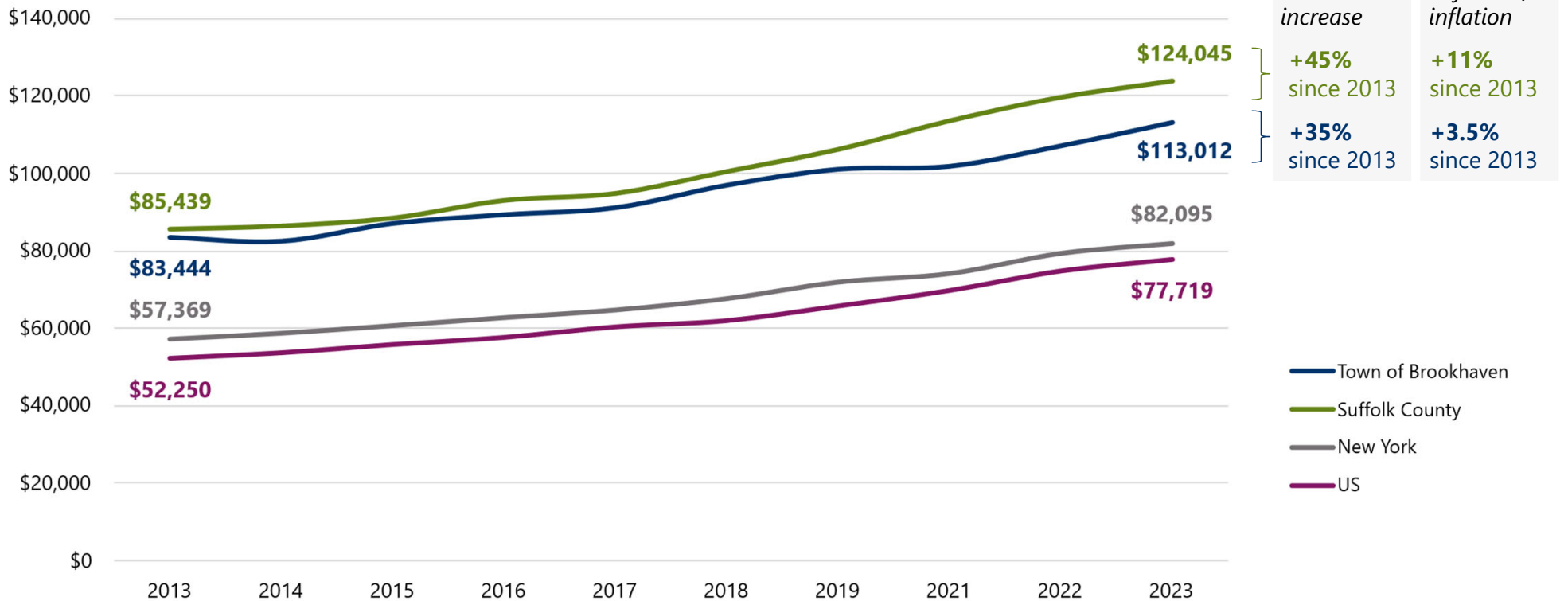


MEDIAN HOUSEHOLD INCOME

Adjusted for inflation, the median household income in the Town of Brookhaven has grown by 3.5% over the past decade, rising from \$109,200 in 2013 to \$113,000 as of 2023.

While the median household in the Town of Brookhaven is wealthier than the median household in New York or the US, the Town's median household income falls short of Suffolk County's overall level. Suffolk County's median household income gained 11% over the past decade (adjusted for inflation), well beyond Brookhaven's 3.5% pace of growth.

Median Household Income, 2013-2023



Source: US Census Bureau, ACS 1-Year Data (Table: S1901)

Note: Not adjusted for inflation

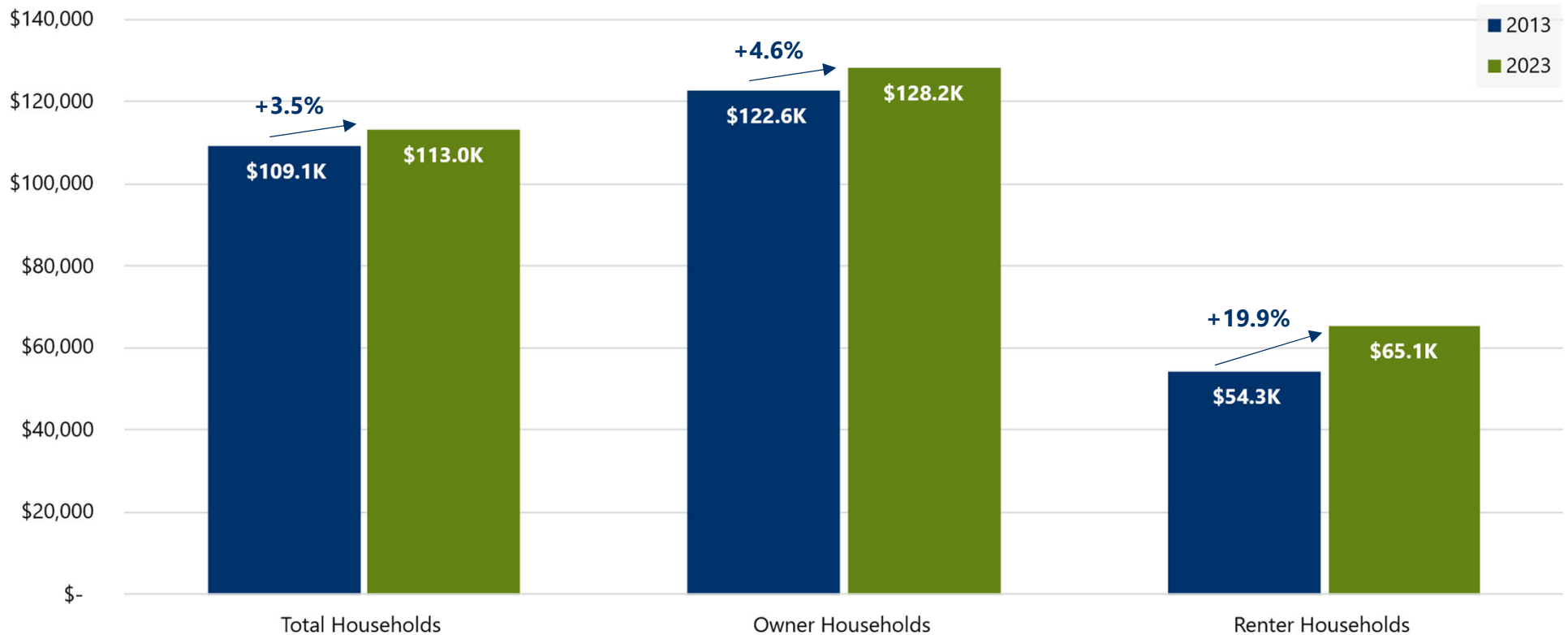


MEDIAN HOUSEHOLD INCOME BY TENURE

The median owner household earns nearly twice as much as the median renter household in Brookhaven, but renter household incomes have increased faster.

Renter households tend to earn less than owner households. However, over the last decade, the median renter household income has grown by nearly 20%, while the median owner household income has grown by less than 5%.

Real Median Household Income by Tenure, Town of Brookhaven, 2013-2023



Source: US Census ACS 2013, 2023 1-Year Data (Table: B25119)

Note: Tenure refers to the nature of occupancy of a housing unit (renter-occupied or owner-occupied). Adjusted to 2023 dollars

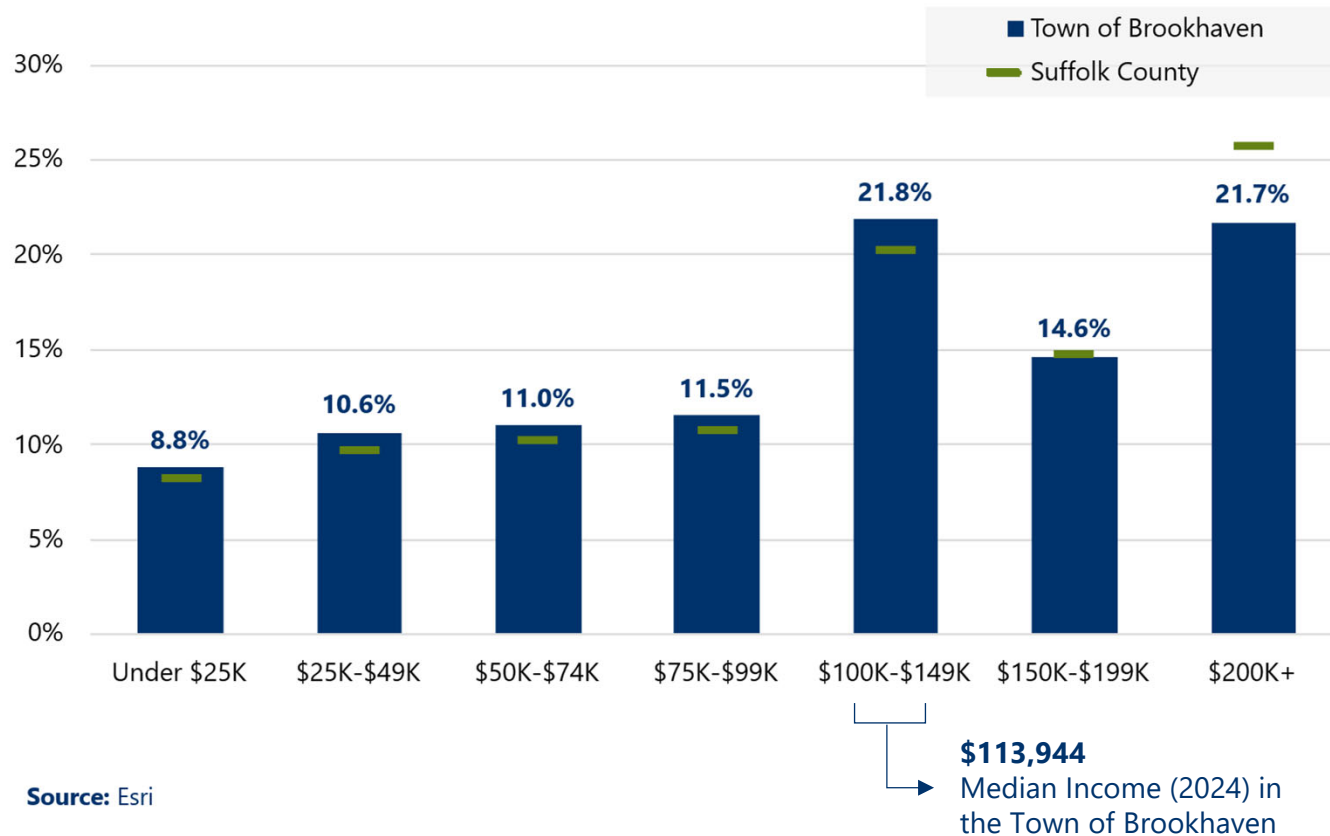


HOUSEHOLD INCOME DISTRIBUTION

Nearly 60% of households in the Town of Brookhaven earn more than \$100,000 annually. Still, within Suffolk County, over one-third of households cannot afford the essentials, including housing.

While the Town of Brookhaven's income distribution skews towards higher incomes, nearly one-third of Suffolk County households do not earn enough to pay for essentials such as housing, childcare, food, transportation, and health care. This indicates that, despite being a relatively high-income community, there remains a strong need for housing for households within a broad range of income levels.

Income Distribution, 2024



Source: Esri

Financial Hardship in Suffolk County, 2022

64%
Households Above ALICE* Threshold

29%
Between Poverty and ALICE Threshold

7%
At Poverty Threshold

**Asset Limited, Income Constrained, Employed (ALICE)* households earn more than the Federal Poverty Level, but less than the basic cost of living for the county.

Source: United for ALICE
Note: This data is not available at the county subdivision level.

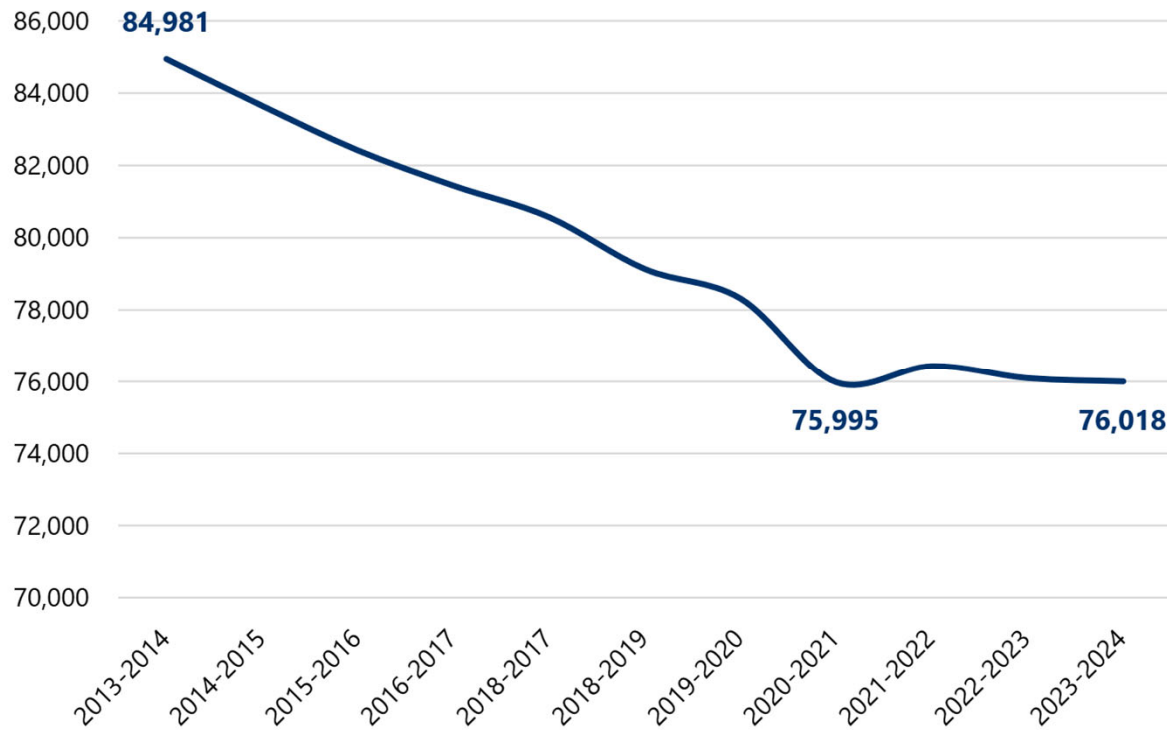


PUBLIC SCHOOL ENROLLMENT

Enrollment in the Town of Brookhaven’s public schools from kindergarten to grade 12 has been trending downward for over a decade.

While school enrollment has been relatively stable since the 2020-21 school year, it has declined by 11% since the 2013-14 school year. This state-wide trend reflects declining birth rates, net domestic outmigration, and parental decisions on school enrollment, such as increased interest in homeschooling.

K-12 Public School Enrollment, 2013-14 – 2023-23 School Years, Town of Brookhaven School Districts



Source: New York State Education Department (NYSED), [Empire Center](#)

Note: The following school districts are included: Three Village, Port Jefferson, Brookhaven-Comsewogue UFSD, Mount Sinai, Miller Place, Rocky Point, Shoreham-Wading River, Middle Country, Longwood, Eastport-South Manor CSD, East Moriches, Sachem, Patchogue-Medford, South Country, William Floyd, Center Moriches, Fire Island

Does multifamily development impact enrollment trends?

A common concern is that multifamily development increases school enrollment, which strains public funding. But, multifamily project revenue, including PILOT revenue, tends to exceed student costs.

Two Long Island-based studies have found that multifamily development has a minimal impact on school enrollment:

- An average of less than 1 student per 11 units enrolled in Long Island Schools ([Stony Brook College of Business](#))
- Multifamily development constituted less than 20% of new students in districts where enrollment increased ([4ward Planning](#))

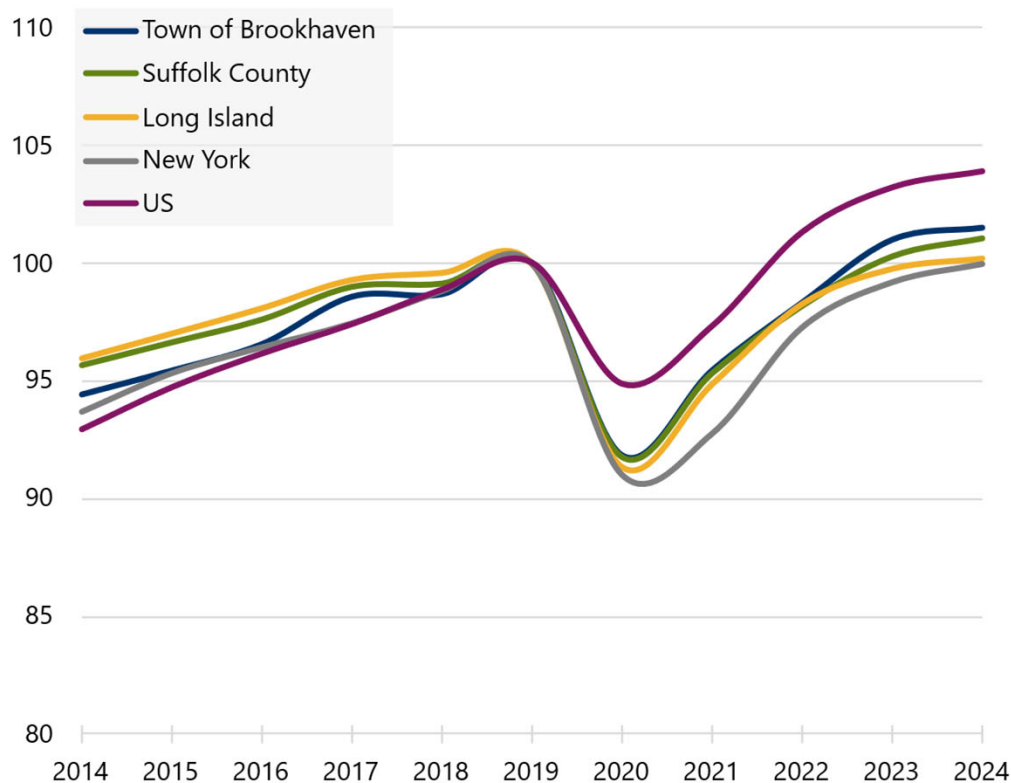


EMPLOYMENT GROWTH

Post-pandemic job growth has been strong within Brookhaven and throughout the region, with employment levels now higher than their pre-pandemic levels. This growth, however, has begun to decelerate.

Pandemic-related job losses in the Town of Brookhaven (-8.2%) were on par with the rest of the region and slightly lower than the state, with job losses notably steeper than seen in the US (-5.1%). In 2021, job growth for the Town rebounded sharply, outpacing gains seen for the state overall and for the US. In the past year, job growth has continued across all geographies, though at a slower rate than seen in 2021, 2022, and 2023.

Total Employment Index (2019 = 100)



Source: Lightcast

Total Jobs, 2020-2024

	2019	2020	2021	2022	2023	2024
Town of Brookhaven	188,897	173,478	180,296	185,725	190,767	191,729

Job Growth (From Previous Year), 2020-2024

	2019	2020	2021	2022	2023	2024
Town of Brookhaven	1.3%	(8.2%)	3.9%	3.0%	2.7%	0.5%
Suffolk County	0.8%	(8.2%)	3.9%	3.0%	2.2%	0.8%
Long Island	0.4%	(8.6%)	3.9%	3.6%	1.5%	0.4%
New York	1.2%	(9.0%)	1.9%	4.9%	2.0%	0.8%
US	1.2%	(5.1%)	2.6%	4.1%	1.9%	0.7%

Source: Lightcast

Total Employment Index

The Index sets employment in 2019 to 100 for each of the geographies. Changes are then reflected in the index relative to the base year (2019).

This allows for the comparison of job growth, relative to 2019, across multiple geographies.



COMMUTING IN-AND-OUT OF BROOKHAVEN

The Town of Brookhaven is a net exporter of workers, meaning many residents work outside the Town.

This indicates that many workers in Long Island and New York City look to the Town of Brookhaven for a place to live.

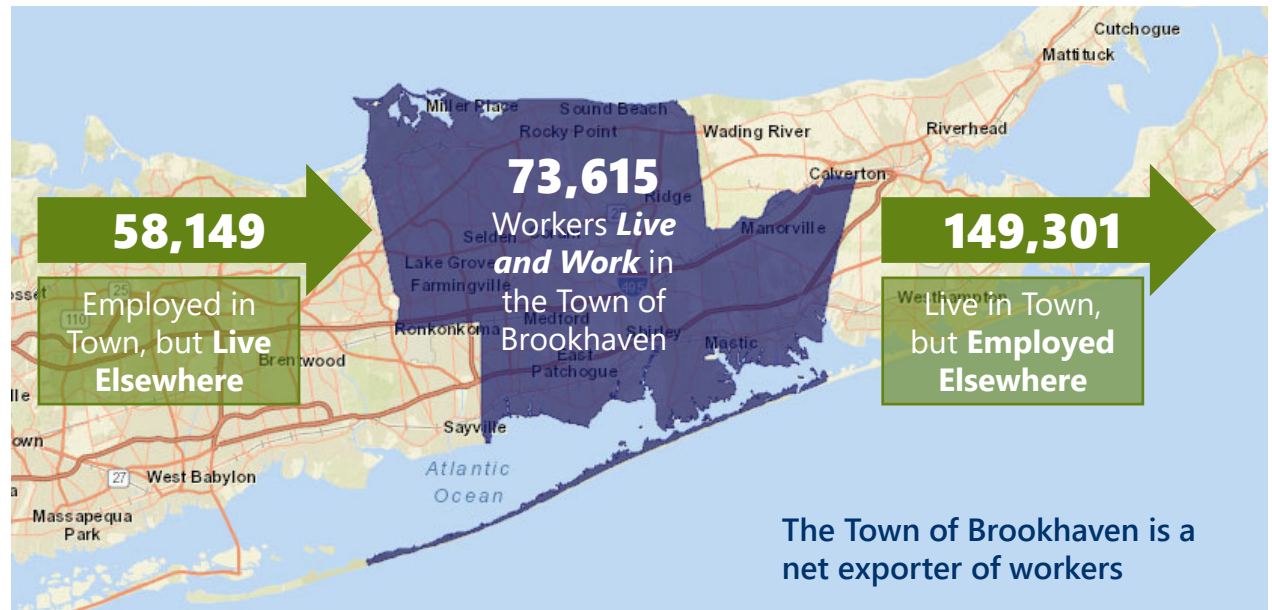
Where Brookhaven Workers Live

- There are nearly 132,000 workers (primary jobs only) in the Town of Brookhaven, 56% of whom are also Town residents.
- The remaining 44% primarily live elsewhere on Long Island, while 4.5% live in New York City.

Where Brookhaven Residents Work

- There are nearly 223,000 working residents in the Town of Brookhaven, 33% of whom are employed within the Town. The remaining two-thirds of resident workers commute out of the Town to work elsewhere.
- While many work in neighboring towns on Long Island, about 15% work in New York City.

Labor Force Efficiency, Town of Brookhaven, 2022



Where Brookhaven Workers Live

Town	Count	Share
Brookhaven Town	73,615	55.9%
Islip Town	15,653	11.9%
Smithtown Town	5,112	3.9%
Queens Borough	3,447	2.6%
Hempstead Town	3,358	2.5%
Babylon Town	3,346	2.5%
Huntington Town	2,955	2.2%
Brooklyn Borough	2,525	1.9%
Riverhead Town	2,348	1.8%
Oyster Bay Town	2,055	1.6%
Other	17,350	13.2%
Total Primary Jobs	131,764	100.0%

Source: US Census OnTheMap

Where Brookhaven Residents Work

Town	Count	Share
Brookhaven Town	73,615	33.0%
Islip Town	29,264	13.1%
Manhattan Borough	18,348	8.2%
Smithtown Town	18,299	8.2%
Huntington Town	8,742	3.9%
Hempstead Town	8,032	3.6%
Queens Borough	7,642	3.4%
Babylon Town	7,515	3.4%
Oyster Bay Town	7,175	3.2%
Brooklyn Borough	6,137	2.8%
Other	38,147	17.1%
Total Primary Jobs	222,916	100%

Source: US Census OnTheMap



JOBS IN BROOKHAVEN BY INDUSTRY

Government is the Town of Brookhaven's largest employment sector, followed by Health Care and Social Assistance, and Retail Trade.

The Government Sector employs over 48,000 people, accounting for nearly 25% of Brookhaven's total workforce. Workers in this sector earn an average annual salary of \$136,156, well above the average income across all industries.

By contrast, Health Care and Social Assistance, and Retail Trade workers tend to earn below the area's average income across all industries (\$88,361 and \$57,472, respectively).

This likely influences the proportion of Town of Brookhaven workers who can afford to live in the Town.

Jobs by Industry, Town of Brookhaven

Description	2024 Jobs	2024 Share of Jobs	2014-2024 % Change	Average Annual Earnings
Government	48,129	25.1%	14.4%	\$136,156
Health Care and Social Assistance	30,754	16.0%	14.7%	\$88,361
Retail Trade	21,003	11.0%	(8.9%)	\$57,472
Accommodation and Food Services	15,502	8.1%	16.1%	\$38,146
Construction	13,134	6.9%	14.9%	\$94,748
Other Services (except Public Administration)	11,967	6.2%	8.6%	\$46,807
Professional, Scientific, and Technical Services	11,137	5.8%	(1.2%)	\$108,675
Transportation and Warehousing	9,005	4.7%	18.8%	\$73,194
Manufacturing	6,232	3.3%	7.5%	\$102,925
Administrative and Support and Waste Management and Remediation Services	6,144	3.2%	0.4%	\$72,384
Wholesale Trade	5,506	2.9%	(11.1%)	\$110,217
Finance and Insurance	3,183	1.7%	3.5%	\$199,116
Arts, Entertainment, and Recreation	2,505	1.3%	11.1%	\$46,481
Educational Services	2,148	1.1%	(33.3%)	\$43,388
Real Estate and Rental and Leasing	1,482	0.8%	19.9%	\$87,675
Information	1,086	0.6%	(30.4%)	\$127,809
Unclassified Industry	1,020	0.5%	476.5%	\$68,560
Management of Companies and Enterprises	787	0.4%	(39.0%)	\$146,938
Agriculture, Forestry, Fishing and Hunting	740	0.4%	0.8%	\$56,496
Utilities	228	0.1%	306.2%	\$197,526
Mining, Quarrying, and Oil and Gas Extraction	38	0.0%	(47.3%)	\$159,887
Total	191,729	100.0%	7.5%	\$91,856

Source: Lightcast, Esri

Note: Wage data are only available at the county level.



JOBS IN BROOKHAVEN BY OCCUPATION

Office and Administrative Support Occupations is the largest occupation group, followed by Educational Instruction and Library Occupations, and Transportation and Material Moving Occupations.

Nearly 11% of the Town of Brookhaven’s workforce are Office and Administrative Support workers. This group, along with the other largest occupation groups in the town, see a median wage well below the Town’s overall median household income level.

Only two occupations — Management Occupations and Architecture and Engineering Occupations — have a median annual wage above the Town’s median household income.

This may impact the number of Town of Brookhaven workers who can afford to live in the Town.

Jobs by Occupation Group, Town of Brookhaven

Description	2024 Jobs	2024 Share of Jobs	2014 - 2024 % Change	Median Annual Earnings
Office and Administrative Support Occupations	20,196	10.5%	(14%)	\$47,924
Educational Instruction and Library Occupations	19,435	10.1%	8%	\$69,414
Transportation and Material Moving Occupations	16,288	8.5%	20%	\$46,075
Food Preparation and Serving Related Occupations	16,160	8.4%	23%	\$33,376
Sales and Related Occupations	15,628	8.2%	(13%)	\$40,679
Healthcare Practitioners and Technical Occupations	12,486	6.5%	17%	\$99,273
Management Occupations	11,626	6.1%	24%	\$136,852
Healthcare Support Occupations	11,362	5.9%	15%	\$41,994
Construction and Extraction Occupations	10,469	5.5%	12%	\$64,193
Business and Financial Operations Occupations	10,247	5.3%	41%	\$89,778
Installation, Maintenance, and Repair Occupations	7,567	3.9%	23%	\$59,675
Building and Grounds Cleaning and Maintenance Occupations	7,021	3.7%	3%	\$40,298
Personal Care and Service Occupations	5,835	3.0%	5%	\$34,340
Protective Service Occupations	5,154	2.7%	(9%)	\$41,345
Production Occupations	4,701	2.5%	(1%)	\$42,797
Computer and Mathematical Occupations	3,777	2.0%	14%	\$110,478
Community and Social Service Occupations	3,656	1.9%	6%	\$58,949
Arts, Design, Entertainment, Sports, and Media Occupations	2,959	1.5%	(3%)	\$66,106
Life, Physical, and Social Science Occupations	2,727	1.4%	3%	\$78,474
Architecture and Engineering Occupations	1,777	0.9%	(5%)	\$86,565
Legal Occupations	1,632	0.9%	15%	\$128,751
Military-only occupations	588	0.3%	(4%)	\$34,410
Farming, Fishing, and Forestry Occupations	437	0.2%	(4%)	\$36,820
Total	191,729	100%	7.5%	\$113,944

Source: Lightcast, Esri

Note: Wage data are only available at the county level.



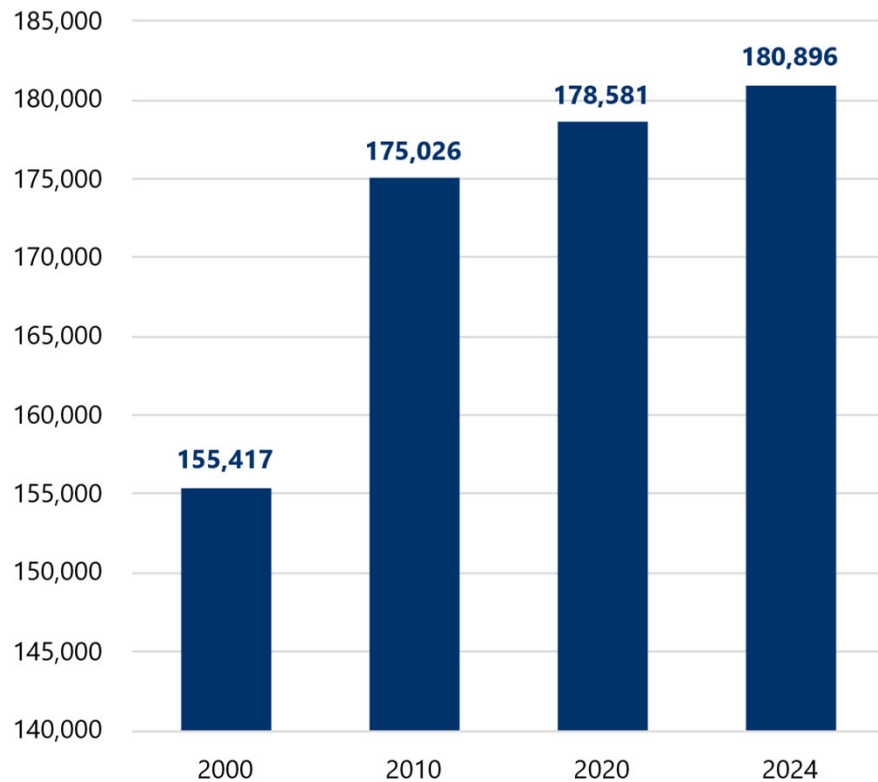
EXISTING HOUSING INVENTORY

CHANGE IN HOUSING STOCK

The Town of Brookhaven has added 5,870 new housing units since 2010. However, between 2010 and 2020, household growth outpaced housing unit growth.

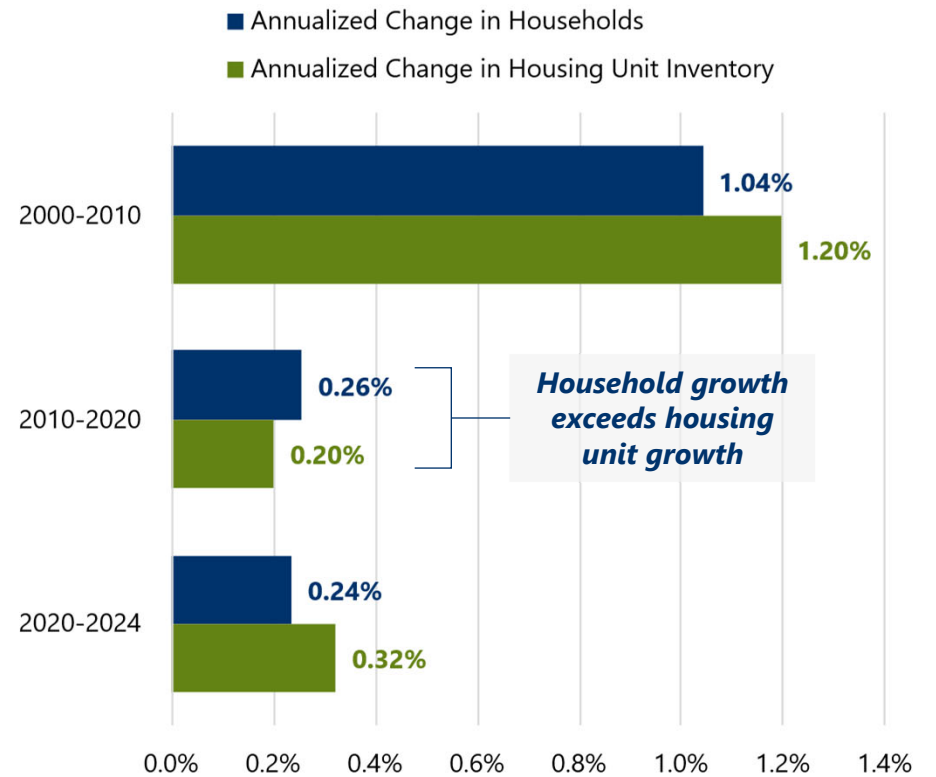
Between 2000 and 2010, housing unit growth was strong in the Town, with additions to the housing stock outpacing overall household growth. In the next decade, however, this was reversed with household growth outpacing the expansion in housing units. This lag creates lasting supply constraints in the Town. Still, between 2020 and 2024, housing inventory growth began to pick up again, with inventory growth once again outpacing total household growth.

Housing Units, Town of Brookhaven, 2000-2024



Source: Decennial Census; Esri

Annualized Change in Households vs. Units, Town of Brookhaven



Source: Decennial Census; Esri

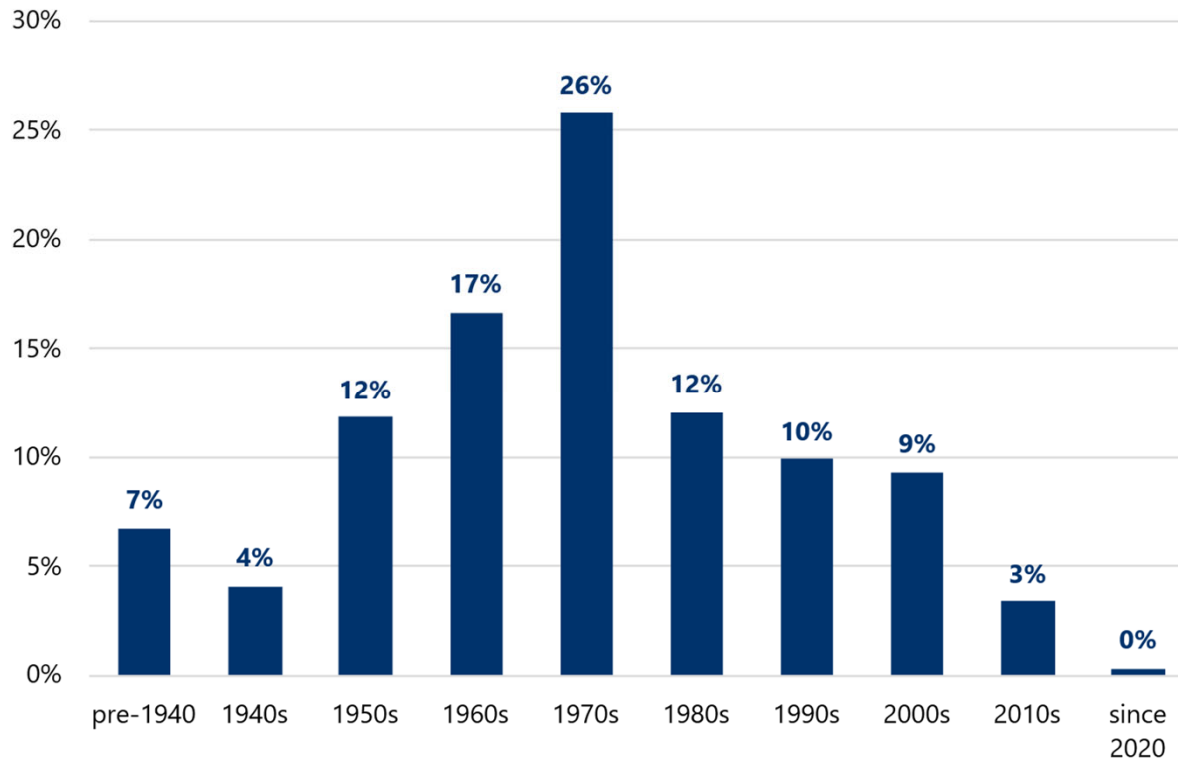


AGE OF HOUSING STOCK

The Town of Brookhaven has an aging housing stock, with 87% of units built before 2000. However, this is not unique to the Town.

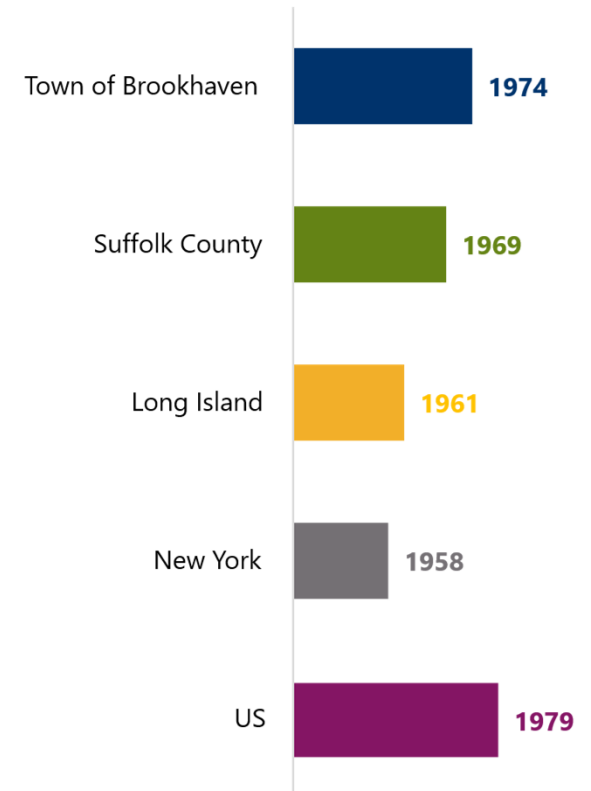
Fewer new housing units were built in each decade after the 1970s. As a result, the Town has an aging housing stock, and only 3% of all housing units were built after 2010. However, this trend is not unique to the Town of Brookhaven. Rather, the median year built for housing units in the Town is more recent than in Suffolk County, Long Island, and New York.

Share of Housing Units by Year Built, Town of Brookhaven, 2022



Source: Esri

Housing Stock Median Year Built



Source: Esri

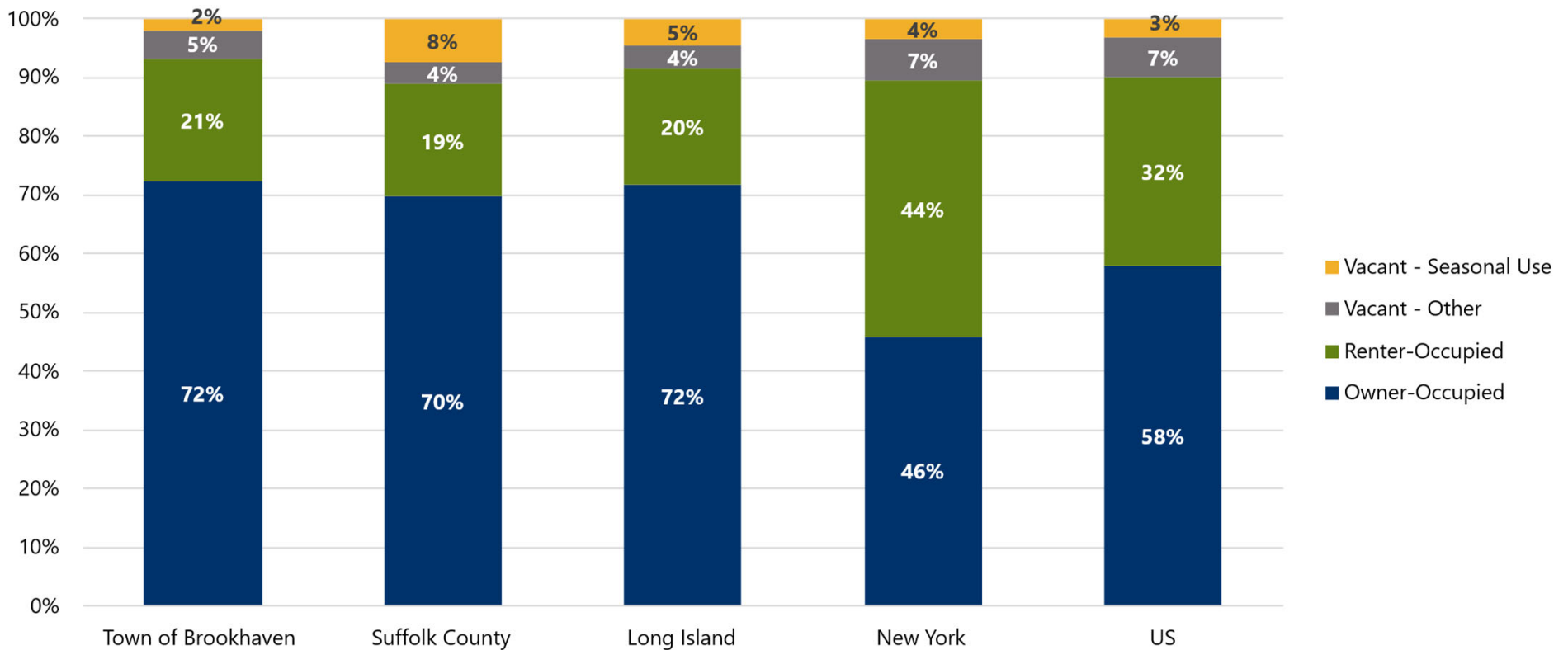


VACANT AND SEASONAL UNITS

The Town of Brookhaven has a comparable percentage of rental and owner-occupied units to its neighboring areas but maintains a lower vacancy rate because fewer units are designated for seasonal use.

Approximately 7% (12,222 of the Town's 180,896 housing units) are vacant, a lower vacancy rate than is found in Suffolk County (11%) or Long Island (9%). Of these vacant units, a modest 2% are dedicated to seasonal or recreational use, a notably lower share than is seen in Suffolk County or elsewhere in Long Island.

Housing Inventory by Use Type, 2024



Source: Esri 2024, US Census ACS 2023 5-Year Data (Table: B25004)

Note: Tenure refers to the nature of occupancy of a housing unit (renter-occupied, owner-occupied, or vacant). These numbers will vary from those shown on page 27, which focuses on tenure among occupied housing only.

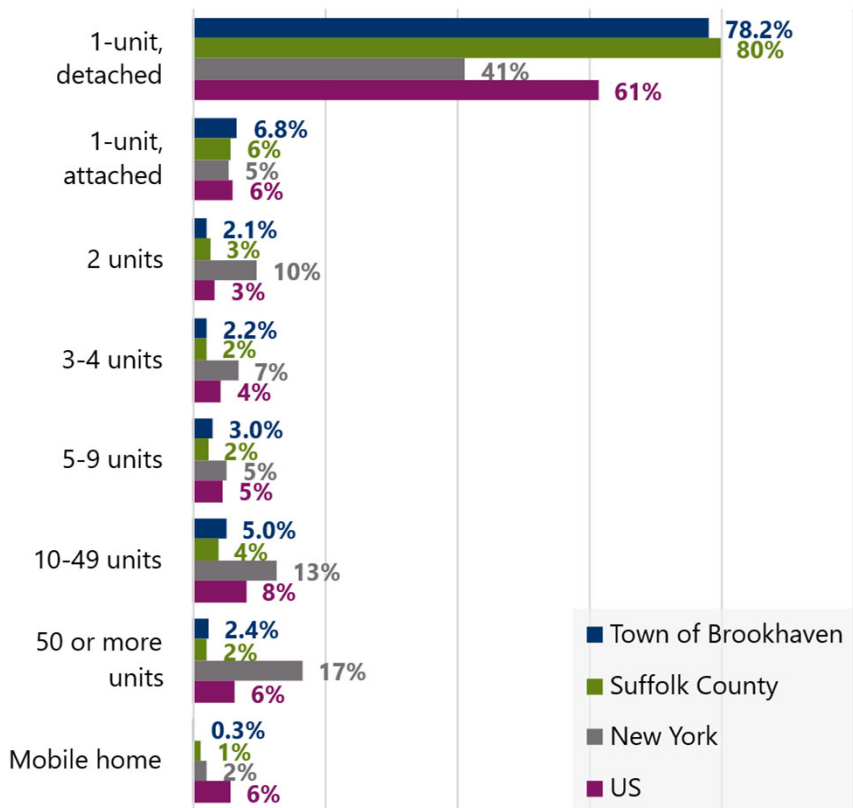


HOUSING STOCK BY STRUCTURE TYPE

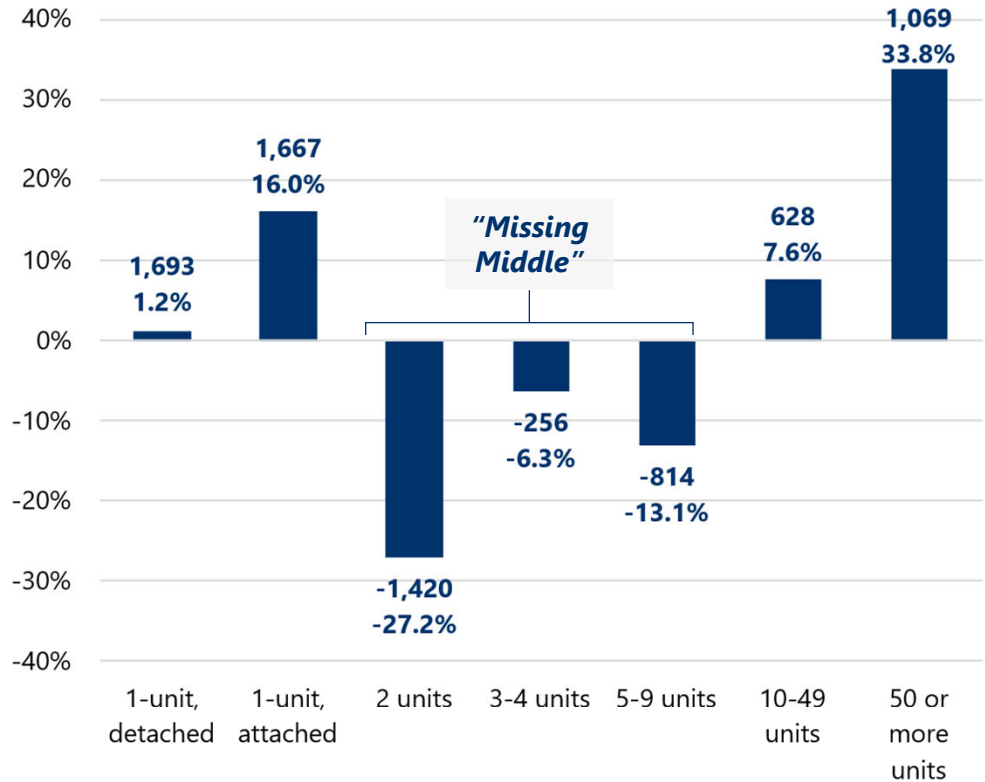
In the last decade, the Town of Brookhaven has been building large multifamily buildings and single-family homes but has lost duplexes, triplexes, and fourplexes.

As of 2023, single-unit structures accounted for most (85%) of the Town’s housing stock – a similar share in Suffolk County but higher than in the state and US. Over the past decade, the Town has been losing structures with 2-9 units – often called the “missing middle” of homes. These homes are often difficult to build due to potential financing gaps but are important to accommodate low- to moderate-income households. Despite the loss of “missing middle” homes, the town has seen a net increase in housing units over the past decade.

Share of Housing Units by Structure Type, 2023



Percent Change in Housing Units by Structure Type, Town of Brookhaven, 2013-2023



Source: US Census ACS 5-Year Data (Table: B25024), [Small Apartment Buildings Can Help Address Housing Shortages, but High Land Costs and Interest Rates Are Limiting Construction](#)

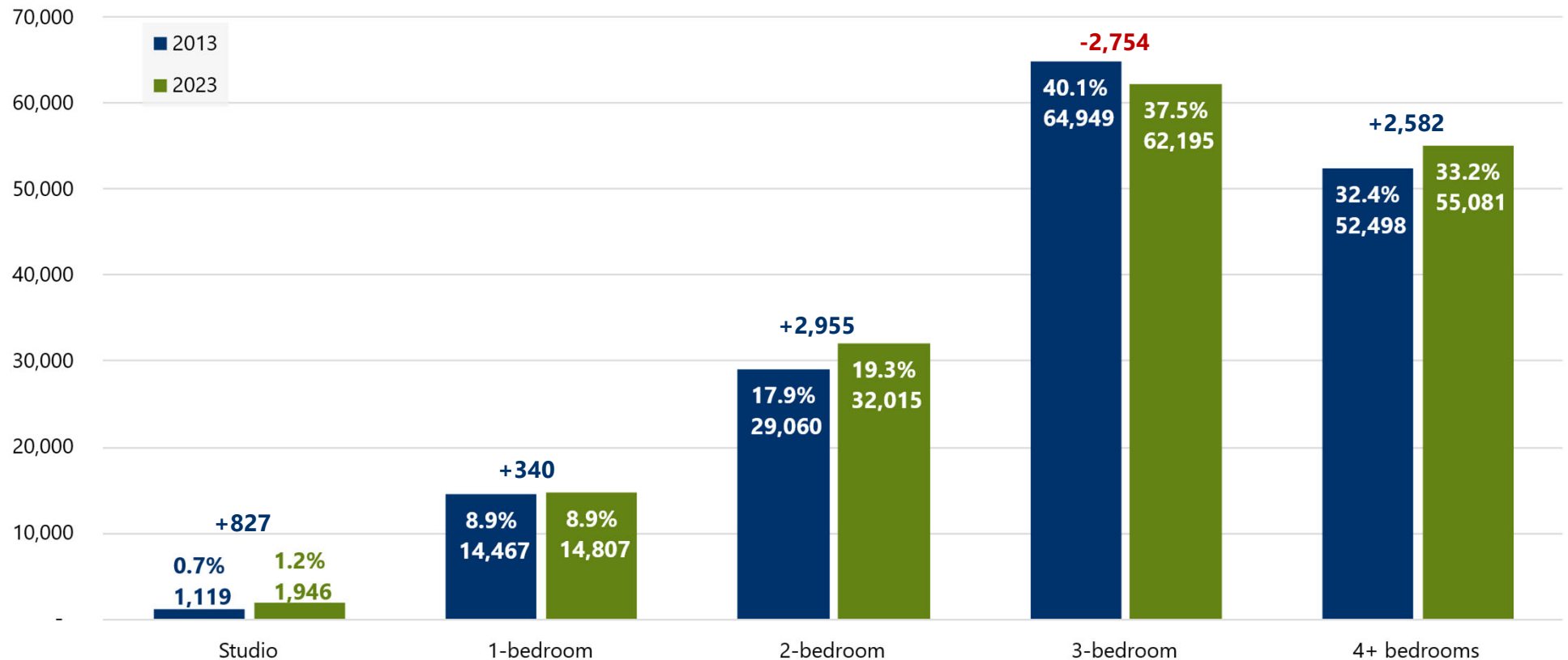


HOUSING STOCK BY BEDROOM TYPE

In the past 10 years, the Town of Brookhaven has lost nearly 3,000 3-bedroom housing units. However, this loss has been offset by gains in units with 4 bedrooms and 2 bedrooms or less.

Despite large gains in 4+ bedroom housing units, the Town of Brookhaven is losing households with four or more people and gaining one-person households. This indicates that some households may be over-housed, meaning they have more bedrooms than people, while others are overcrowded.

Share of Housing Units by Number of Bedrooms, Town of Brookhaven, 2013-2023



Source: US Census ACS 2013, 2023 5-Year Data (Table: B25042)



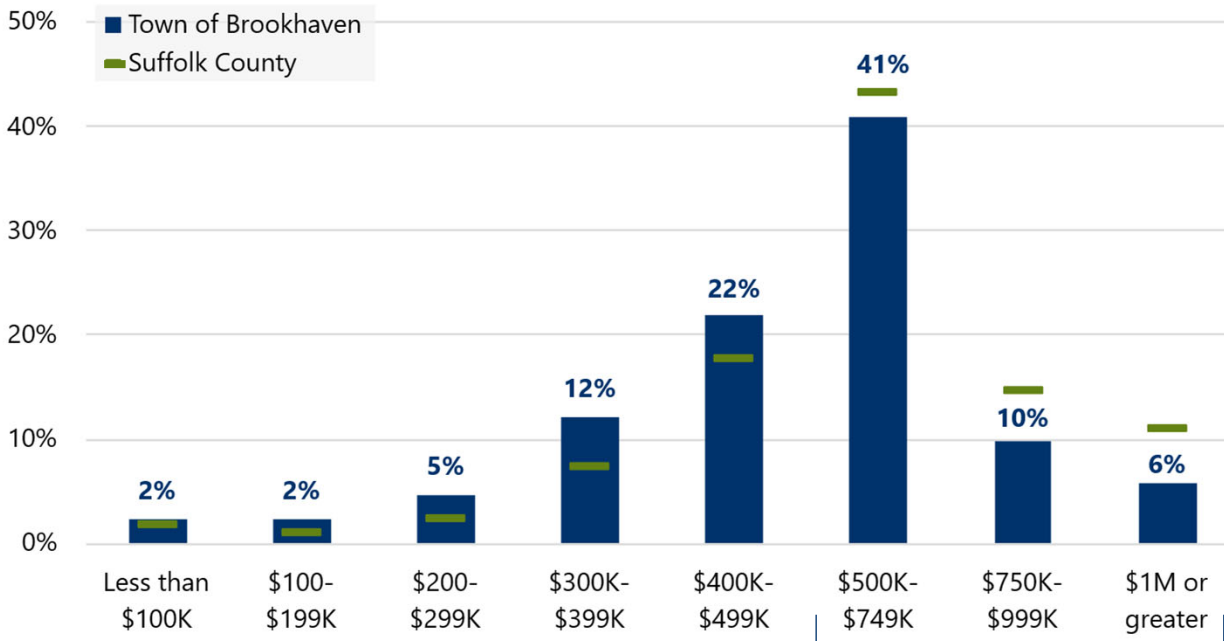
HOME VALUES

The Town of Brookhaven has high median home values compared to New York State and the US, but lower median home values than elsewhere in the region.

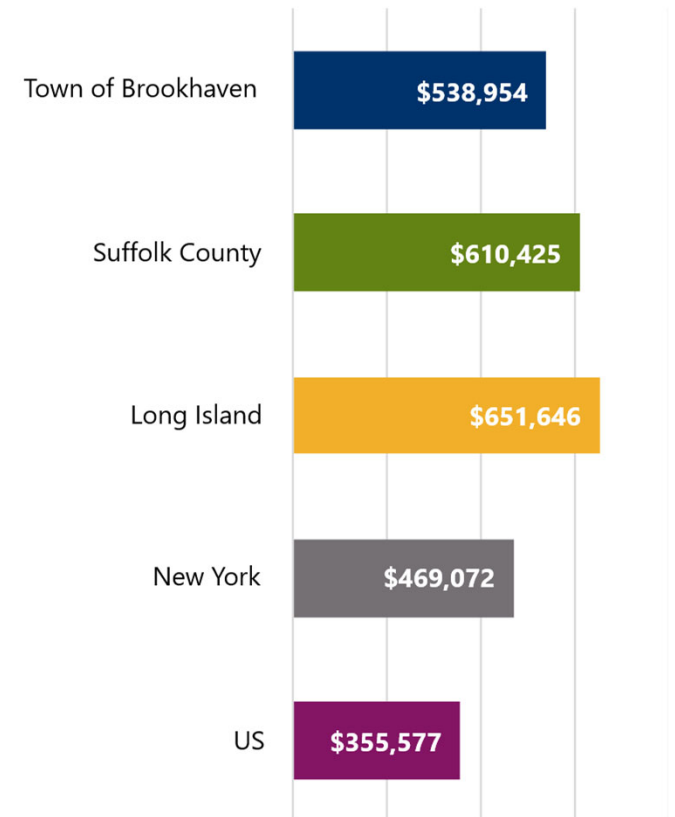
Over half (56%) of the Town's owner-occupied housing stock is valued at over \$500,000. Meanwhile, just 10% of the Town's owner-occupied housing stock is valued under \$300,000. Given these relatively high values, the market may not be accessible to first-time homeowners.

Note: This data typically registers well below reported home sales prices. Nevertheless, it still provides a highly granular view of perceived home values which are comparable across geographies.

Home Value Distribution, 2024



Median Home Value, 2024



56% of homes in Town of Brookhaven are **\$500K+ in value** compared to **69%** in Suffolk County, **77%** in Long Island, **47%** in the state, **31%** in the US

Source: Esri

Source: Esri



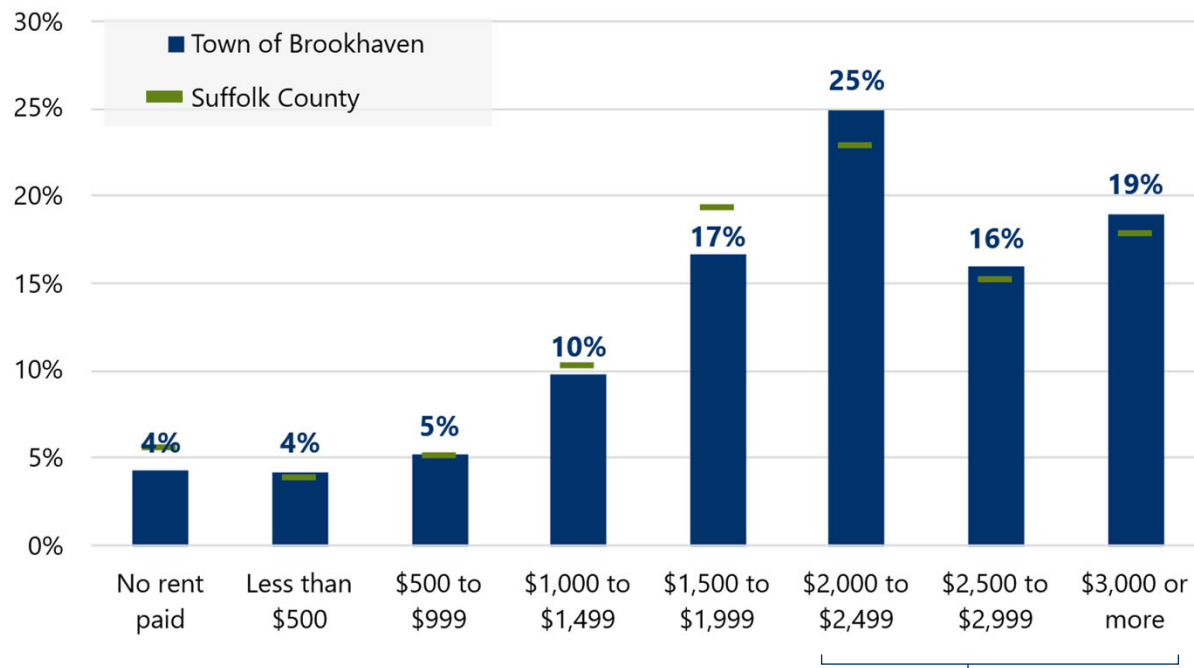
RENTAL RATES

The Town of Brookhaven has high median rental rates compared to the region, state, and the US.

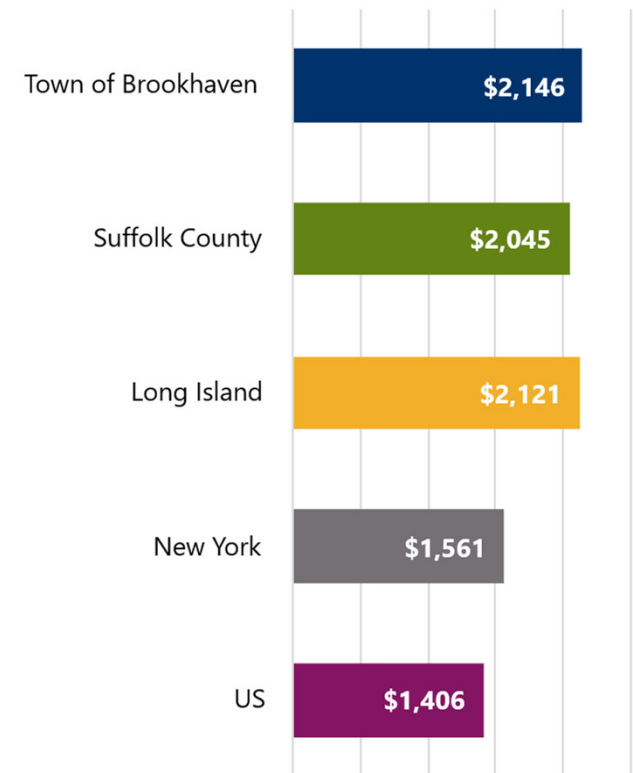
Over half (60%) of the Town’s rental housing stock is priced at or above \$2,000 per month. Suffolk County has a slightly higher share of units available in the \$1,000 to \$1,999 per month range, implying that there are more affordable rental options elsewhere in the county. Still, rental prices are relatively high across the region – Suffolk County and Long Island have higher median gross rent and a greater share of units priced above \$2,000 per month than the state and US.

Note: Gross rent includes contract rent plus the cost of utilities.

Monthly Gross Rent Distribution, 2023



Median Gross Rent, 2024



60% of rentals in Town of Brookhaven are **\$2,000+ per month** compared to **56%** in Suffolk County, **55%** in Long Island, **32%** in the state, **20%** in the US

Source: US Census ACS 2023 5-Year Data (Table: B25063)

Source: US Census ACS 2023 1-Year Data (Table: B25064), Esri, Adjusted to 2024 dollars using FRED Consumer Price Index



MULTIFAMILY STOCK BY RENT TYPE

CoStar identifies 15% of the Town’s investor-grade multifamily buildings as having an affordable component, such as rent restrictions or stabilization, 44% as market-rate, and the remaining are unknown.

Nearly 40% of the Town’s affordable multifamily buildings serve low-income renters with annual household incomes between 30% and 80% of the Area Median Income. These properties typically received tax-advantaged equity and/or debt financing, such as Low-Income Housing Tax Credits (LIHTC).

Multifamily Properties by Rent Type, Town of Brookhaven, 2025 YTD

Affordable Type*	Properties	
	Count	Share
Rent Restricted	12	6.0%
Affordable Units	9	4.5%
Rent Subsidized	9	4.5%
Rent Stabilized	1	0.5%
Total Affordable	31	15.5%
Market Rate	88	44.0%
Total	200	100%

*Rent-restricted buildings have affordable and market-rate units. Buildings labeled as affordable are entirely affordable, and rent-subsidized buildings vary (some may be entirely affordable, and some may include market-rate units).

Definitions:

Rent Restricted | Rental rates based on Area Median Income (AMI). Low-income renters at these communities typically have an annual household income that is less than 80% of AMI but greater than 30% of AMI.

Affordable | All of the community’s rents are discounted or below market.

Rent Subsidized | Rents are subsidized by the Department of Housing and Urban Development (HUD) Section 8 or other federal programs.

Rent Stabilized | Rent Stabilized apartments can only increase their rents by a certain amount each year.

Market Rate | Properties where rents are independent of regulatory conditions of restrictions

Source: CoStar

Note: Rents are unreported for 81 buildings. CoStar focuses only on investment-grade commercial property, so this is an undercount of total buildings.

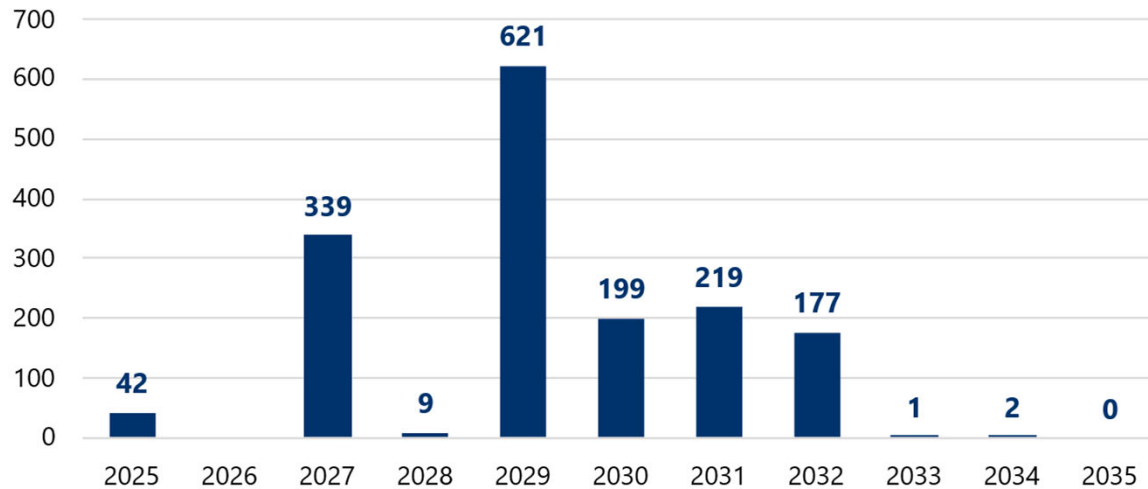


FEDERALLY ASSISTED HOUSING

Affordability restrictions are set to expire for 1,609 units by 2035, representing nearly half of the Town’s federally assisted housing supply.

Affordability restrictions linked to federal subsidies can expire after a period of time. Nearly half (46%) of Brookhaven’s federally assisted units are supported by the LIHTC program, which typically serves households earning less than 60% of the Area’s Median Income (AMI). Another 27% of Brookhaven’s federally assisted units are supported by Section 8 Project-Based Rental Assistance, which typically serves households earning 80% of AMI, with a subset of those units set aside for extremely low-income households (30% AMI or less). Note that most of these properties include a covenant to keep units affordable beyond the timeframe of their initial agreement. If property owners do not maintain their current pricing structure, however, these units may become market-rate, leaving low-income families at risk of displacement or increased rents.

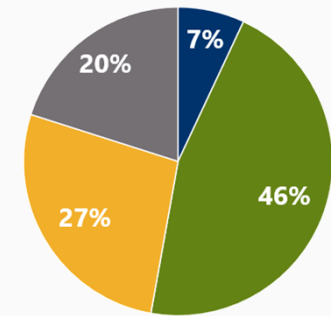
Federally Assisted Units Facing Expiration in the Next 10 Years, Town of Brookhaven



Subsidy for **1,110** units set to expire by 2030

Subsidy for **1,609** units set to expire by 2039

Federally Assisted Units by Funding Stream



- Multiple Funding Streams
- LIHTC
- Section 8
- Other HUD

73
Federally Assisted Buildings

3,320
Federally Assisted Units

Source: National Housing Preservation Database, Property Dashboard

Note: Data was last updated in December 2024.



ASSISTED LIVING AND SENIOR PROPERTIES

The Town of Brookhaven offers a variety of housing options specifically accessible to income-constrained households, including seniors.

The Town offers 3,080 rental units in senior living or assisted living communities — 1,225 units are affordable. These rental units ensure that the Town’s aging population is not displaced.

Inventory of Assisted Living and Senior Living Communities, Town of Brookhaven

Building	Units	Affordable Units	Type	Location
Brookwood on the Lake Apartments	336	336	Senior Living Community	Lake Ronkonkoma
Avery Village	300	300	Senior Living Community	East Patchogue
The Vistas of Port Jefferson	244	0	Senior Living Community	Port Jefferson Station
Fairfield Knolls at Mount Sinai	225	0	Senior Living Community	Mount Sinai
St. Joseph's Village Senior Citizens	200	200	Senior Living Community	Selden
Brightview Senior Living	170	0	Assisted & Independent Living	Jefferson Station
The Bristol Assisted Living at Holtsville	140	0	Assisted Living	Holtsville
Pinehurst Apartments	140	70	Senior Living Community	East Patchogue
Sutton Landing at Patchogue	139	14	Senior Living Community	East Patchogue
The Bristol Assisted Living at Lake Grove	136	0	Assisted Living	Lake Grove
Village Walk	128	0	Assisted Living	Patchogue
Middle Country Meadows	124	37	Senior Living Community	Selden
The Bristol Assisted Living at Mount Sinai	120	0	Assisted Living	Mount Sinai
Saint Jenna Village (Formerly Msgr Reel Village)	120	120	Senior Living Community	Medford
The Chelsea at Brookhaven	118	0	Assisted & Independent Living	Yaphank
All American Assisted Living at Coram	112	0	Assisted Living	Coram
George Link Apartments	76	76	Senior Living Community	Coram
Jefferson's Ferry Life Plan Community	75	0	Assisted & Independent Living	Suoth Setauket
The Preserve at East Moriches*	70	7	Senior Living Community	East Moriches
Cabrini Gardens Apartments	66	66	Senior Living Community	Coram
On the Common Rocky Point	38	0	Senior Living Community	Rocky Point
Total	3,077	1,226		

*Preserve at East Moriches is not yet completed.

Sources: Brookhaven IDA, Suffolk County, National Housing Preservation Database

Note: This may not be a comprehensive inventory of all senior living properties in the Town.



SHORT-TERM RENTALS

On average, in 2024, the Town of Brookhaven saw a decline in short-term rental listings compared to 2023. However, peak season listings increased by 18%.

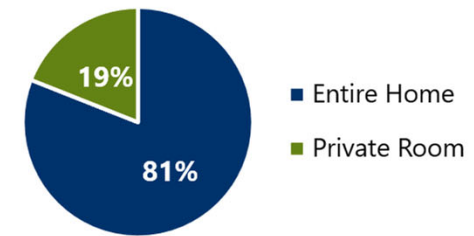
Short-term rentals (STRs) can put upward pressure on rent and home prices if their presence restricts the housing supply for permanent residents. In Brookhaven, nearly all STRs on the market are entire homes, but over two-thirds (65%) of all listings are only rented out for 180 nights annually or less, implying that many of these homes are owned by permanent residents. The 36% of STRs that are rented for more than half the year annually are more likely to restrict housing supply for long-term residents.

Key Short-Term Rental Statistics, AirDNA Town of Brookhaven Market Area

	PEAK MONTH: July 2024	SLOW MONTH: January 2024	AVERAGE/TOTAL: 2024 Annual
Occupancy Rate (% of nights leased)	68% +5 percentage points since 2023	28% No year-over-year change	50% +4 percentage points since 2023
Average Length of Stay	3.4 days	3.9 days	3.5 days
Active Listings	438 +18% since 2023	280 -8% since 2023	342 -2.5% since 2023
Average Daily Rate	\$409 +3% since 2023	\$253 -8% since 2023	\$309 -1% since 2023

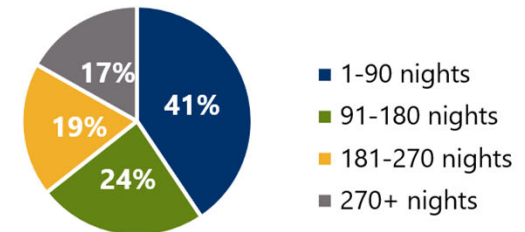
Listings by Rental Type, 2025 YTD

Entire-home STRs have a greater impact on local housing markets than private room STRs because these units are more likely to be subtracted from the area's long-term rental supply.



Listings by Annual Availability, 2025 YTD

Listings that are available beyond peak season have a greater impact on local housing markets. These are more likely to be owned by investors, rather than residents.



Sources: AirDNA

Notes: The Brookhaven market area as defined by AirDNA is smaller than the Town's boundaries, primarily excluding the Patchogue area. These data may be an undercount.



HOUSING DEVELOPMENT AND MARKET TRENDS

MULTIFAMILY STOCK OVERVIEW

Since 2014, the Town of Brookhaven has gained nearly 4,000 multifamily units, rents have increased by over 50%, and multifamily vacancy has been at 6% or more in recent years.

While rents have increased substantially over the past decade (+51.2%), this growth has slowed in recent years. This can be credited, in part, to the delivery of new multifamily units, which has pushed vacancy to 6%+ for the past several years.

Multifamily Market Metrics, Town of Brookhaven, 2014-2025 YTD

Year	Inventory Buildings	Inventory Units	Effective Rent Per Unit	Effective Rent Per SF	Year-over-Year Rent Growth	Vacancy Percent
2014	173	16890	\$1,814	\$1.85		5.0%
2015	174	17,066	\$1,926	\$1.97	6.2%	3.4%
2016	179	17,591	\$1,983	\$2.03	3.0%	3.4%
2017	179	17,591	\$2,058	\$2.10	3.8%	2.8%
2018	181	17,829	\$2,131	\$2.18	3.5%	2.1%
2019	184	18,612	\$2,222	\$2.27	4.3%	5.0%
2020	187	19,209	\$2,325	\$2.38	4.6%	4.9%
2021	190	19,397	\$2,555	\$2.61	9.9%	2.8%
2022	191	19,491	\$2,703	\$2.76	5.8%	4.3%
2023	196	20,287	\$2,703	\$2.76	0.0%	6.7%
2024	198	20,703	\$2,749	\$2.81	1.7%	6.0%
2025 YTD	199	20,842	\$2,742	\$2.80	-0.3%	6.5%

Sources: CoStar

Note: CoStar captures information regarding investment-grade commercial properties and does not provide an exhaustive listing of all properties.

Since 2014...

+26
Buildings

+3,959
Units

+51.2%
Increase in
effective rent

+12.0%
Increase in
inflation-
adjusted
effective rent

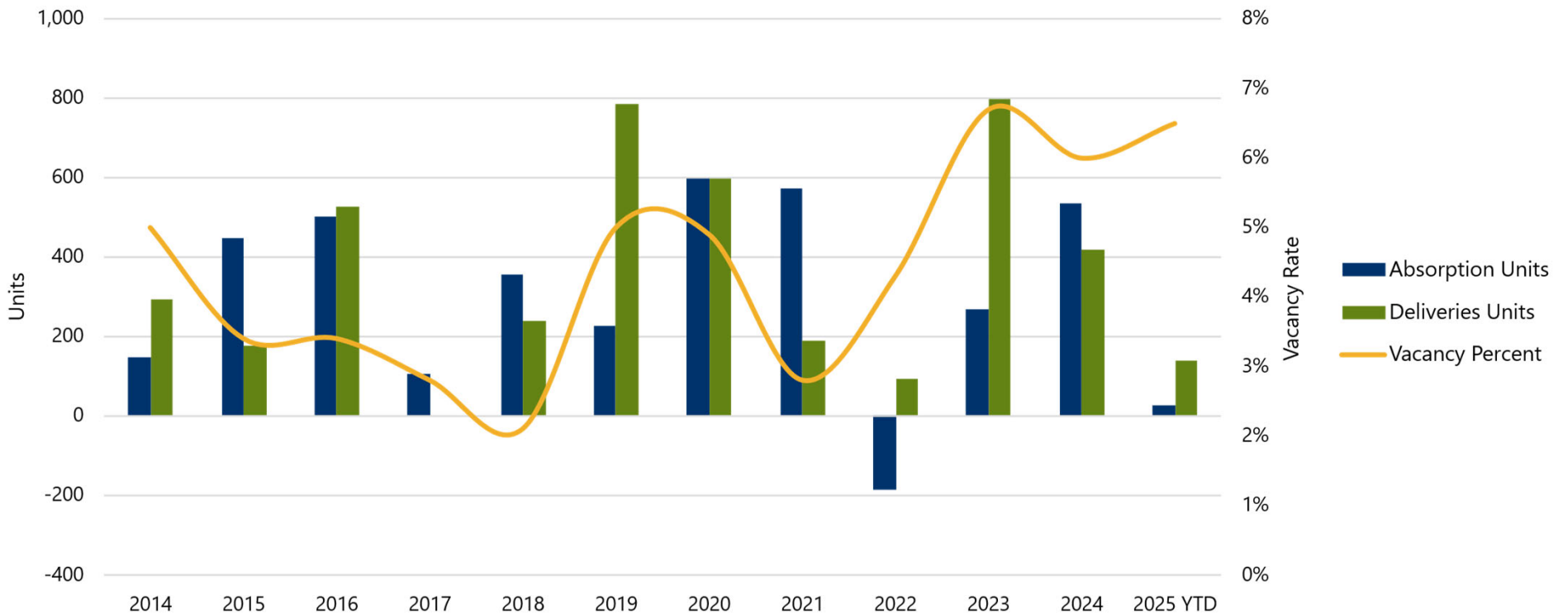


MULTIFAMILY STOCK MARKET DYNAMICS

In recent years, the delivery of multifamily units has outpaced their absorption, contributing to an increase in vacancies.

While the Town of Brookhaven’s multifamily vacancy rate (6.5%) remains within the healthy range of 5%-10%, this rate is higher than the Town’s average (4.4%) over the past decade. New deliveries, such as the Arboretum, which boosted total inventory by 292 units in 2024, or the Core Station Yards, which boosted inventory by 388 units in 2023, have pushed vacancies up. As more units delivered in 2023 and 2024 are absorbed, this vacancy rate will stabilize.

Multifamily Market Metrics, Town of Brookhaven, 2014-2025 YTD



Sources: CoStar

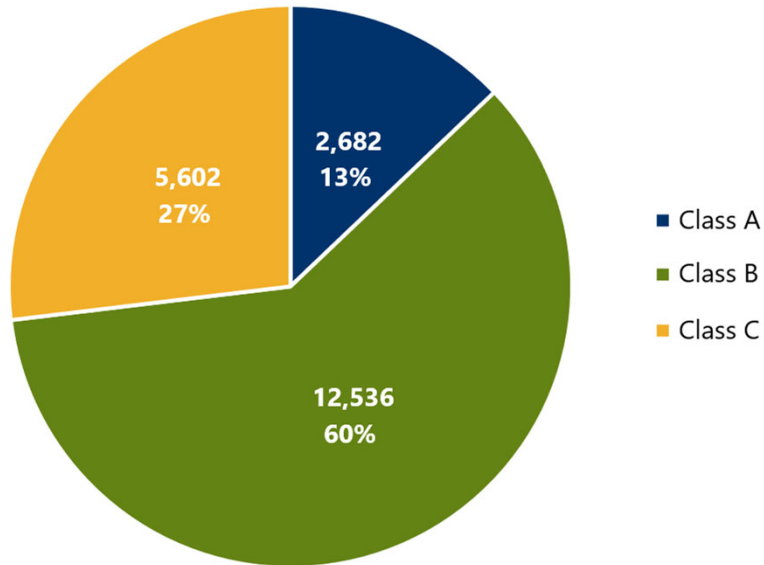


MULTIFAMILY BUILDING QUALITY

In the Town of Brookhaven, the bulk of multifamily units are in Class B or Class C buildings. These units tend to be less expensive and also smaller than the Town's Class A units.

Class A units are typically newer properties with top amenities and, therefore, more expensive. Class A units in the Town of Brookhaven have the highest average rent of \$3,290 per unit, closely followed by Class B units at \$2,996. Class A units also tend to be larger, pushing down their average rent per square foot relative to Class B and Class C units.

Multifamily Units by Building Class, Town of Brookhaven, 2025 YTD



Sources: CoStar

Unit Characteristics by Building Class

	Average Unit Size (SF)	Average \$ per Unit	Average \$ per SF
Class A	1,184	\$3,290	\$2.82
Class B	1,043	\$2,996	\$3.12
Class C	791	\$2,261	\$2.84

Source: CoStar

Definitions:

Class A | Highest quality buildings in their market and area. Typically, newer properties with the highest level of amenities.

Class B | Typically older than Class A, these may be well-maintained, though there may be some deferred maintenance issues. Generally lower-income tenants than Class A.

Class C | Typically older and/or in less desirable locations. These may be in need of renovation.



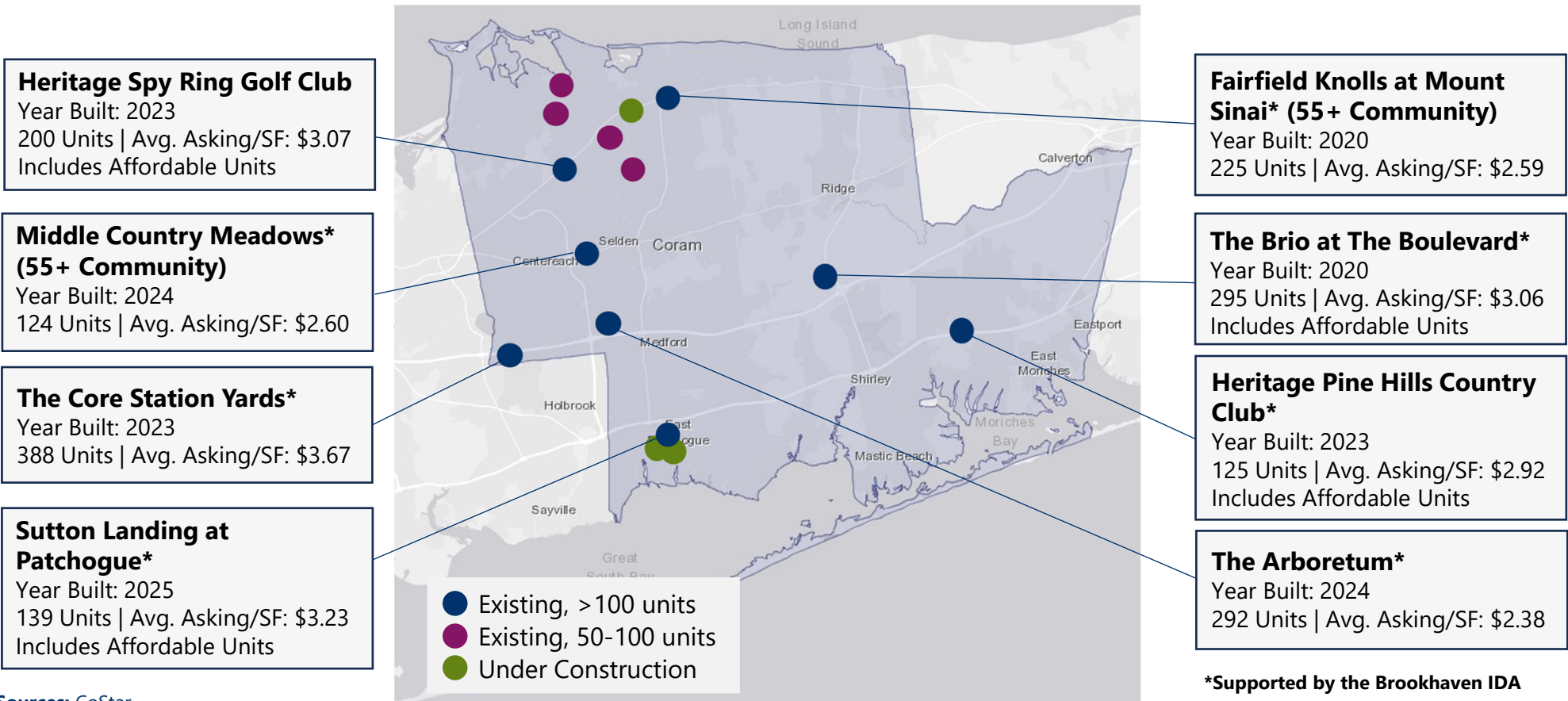
RECENT MULTIFAMILY DEVELOPMENT

Since 2020, 15 multifamily buildings and 2,230 multifamily units have been built in the Town of Brookhaven.

These units have an average asking price of \$3,490 per unit and an average asking price per square foot of \$3.00. By comparison, units built before 2020 have an average asking price per unit of \$2,658 and an average asking price per square foot of \$2.90.

Seven of the newly built multifamily buildings contain an affordable component, and two are reserved for residents aged 55 or older. The Core Station Yards (388 units), The Brio at The Boulevard (295 units), and The Arboretum (292 units) are the largest of new multifamily developments.

Recent Multifamily Development, Town of Brookhaven, 2020-2025 YTD



*Supported by the Brookhaven IDA

Sources: CoStar

Note: The map shows developments with more than 50 units.



MULTIFAMILY BUILDING ACTIVITY

Brookhaven multifamily development exceeds 4,500 units over past decade

New multifamily residential development has averaged more than 300 units annually since 2015. The peak of activity was seen in 2023 when five new properties delivered 796 units. This was followed closely by 2019, however, when 783 units became available.

Multifamily Apartments Constructed Since 2015 in Brookhaven

Property Name	Property Address	City	Number	Avg	Year
Sutton Landing at Patchogue	1000 Sutton Ct	East Patchogue	139	\$3,800	2025
The Arboretum	20 Maple Ln	Farmingville	292	\$4,007	2024
Middle Country Meadows	1277 Middle Country Rd	Selden	124	\$2,957	2024
The Core Station Yards	3 Hawkins Ave	Ronkonkoma	388	\$2,994	2023
Heritage Spy Ring Golf Club?	303 Arrowhead Ln	South Setauket	200	\$4,033	2023
Heritage Pine Hills Country Club	201 Jerusalem Hollow Rd	Manorville	125	\$4,322	2023
Port Jefferson Crossing	1609-1615 Main St	Port Jefferson	45	\$1,556	2023
122 Prince Rd	122 Prince Rd	Rocky Point	38	\$2,301	2023
Brightview Port Jefferson	1175 Route 112	Port Jefferson Station	94	\$8,929	2022
The Villas at Setauket	109 Comsewogue Rd	East Setauket	92	\$4,256	2021
Overbay	217 W Broadway	Port Jefferson	52	\$2,256	2021
The Brookport	52 Barnum Ave	Port Jefferson	44	\$2,963	2021
The Brio at The Boulevard	410 Princeton Rd	Yaphank	295	\$3,414	2020
Fairfield Knolls At Mount Sinai	300 Sutton Ct	Mount Sinai	225	\$3,572	2020
Concern - Port Jefferson	Route 112 & East Grove St	Port Jefferson Station	77		2020
Alston	1000 Mill Rd	Ronkonkoma	489	\$3,151	2019
The Vistas of Port Jefferson	588 N Bicycle Path	Port Jefferson Station	244	\$3,165	2019
Echo Pond	87 Acorn Cir	Moriches	50	\$4,462	2019
Fairfield Townhouses at Selden	495 Middle Country Rd	Selden	126	\$3,735	2018
The Shipyard at Port Jeff Harbor	201 W Broadway	Port Jefferson	112	\$3,576	2018
The Reserve at the Boulevard	1 Reserve Dr	Yaphank	240	\$3,335	2016
Fairfield Townhouses East at Coram	2135 Route 112	Coram	80	\$3,920	2016
The Hills at Port Jefferson	23 Texaco Ave	Port Jefferson	74	\$2,692	2016
Concern Middle Island	147 Rocky Point Rd	Middle Island	72		2016
Liberty Landing	58 Portion Rd	Lake Ronkonkoma	59		2016
Wincoram Commons	3700 Route 112	Coram	176	\$1,294	2015

Source: CoStar

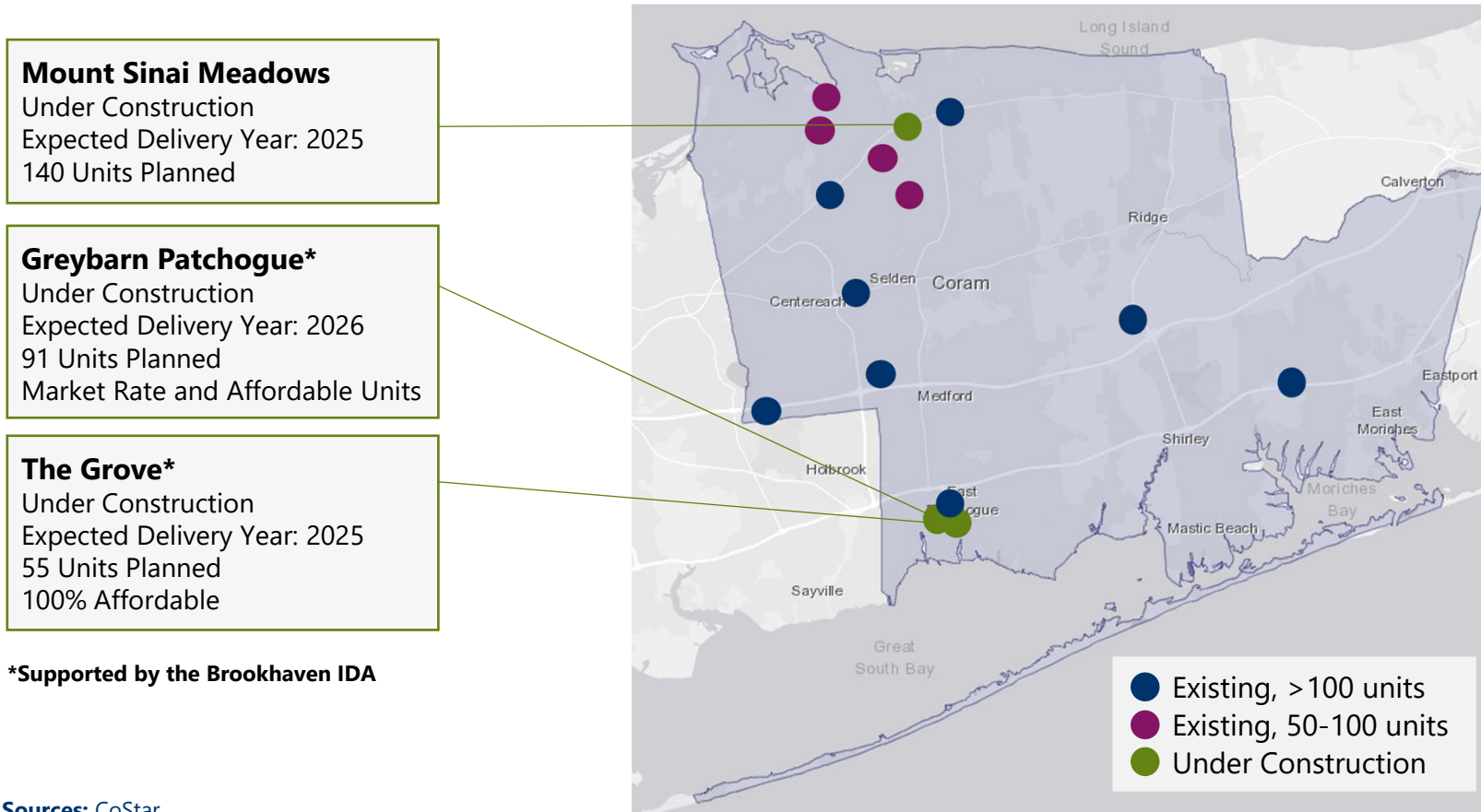


FUTURE MULTIFAMILY DEVELOPMENT

Five multifamily buildings are in the pipeline, with all but the Greybarn Patchogue projected to be constructed by the end of 2025.

Of the five multifamily buildings under construction, three will deliver more than 50 units – Mount Sinai Meadows (140 units planned), Greybarn Patchogue (91 units planned), and The Grove (55 units planned). Some or all of the units at The Grove will and Greybarn Patchogue are slated to be affordable, while the Mount Sinai Meadows project may also include some affordable units.

Upcoming Multifamily Development, Town of Brookhaven, 2020-2025 YTD



Sources: CoStar

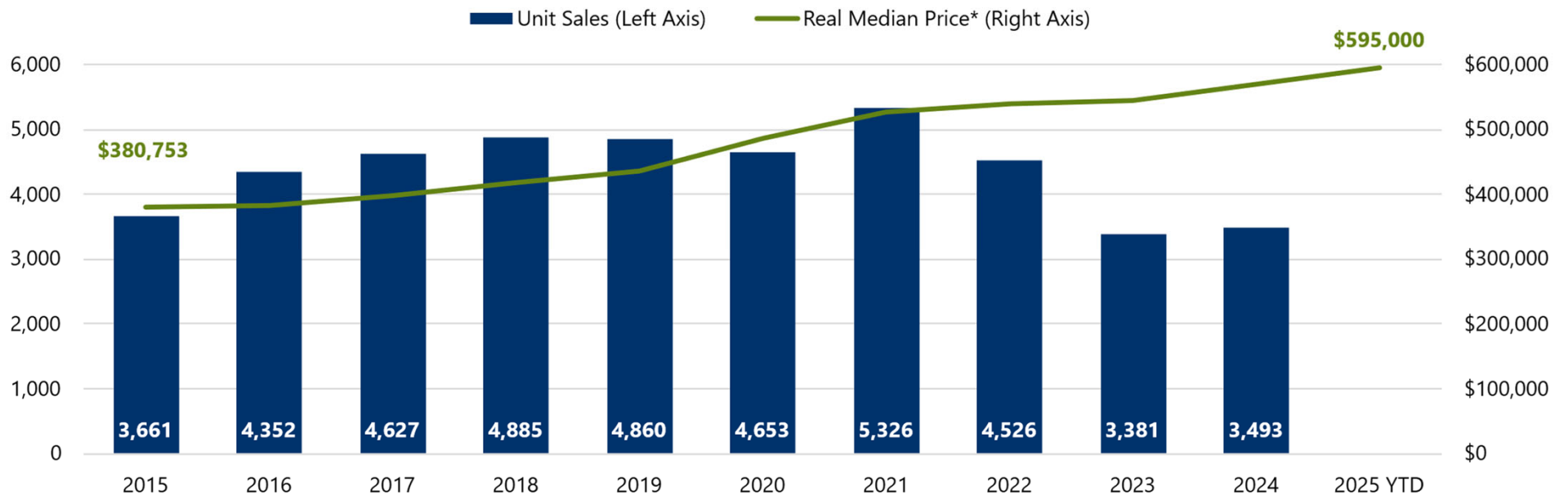


HOME SALES PRICES

Today's median home sales price is \$595,000 – 2.1 times greater than the median in 2015 or 56% higher when adjusted for inflation.

This increase in value boosts personal wealth for those fortunate enough to own a home. At the same time, these price increases push ownership out of reach for many renters hoping to buy. The rise in interest rates, beginning towards the end of 2022, has further pushed ownership out of reach for many. The Town of Brookhaven saw a particularly sharp increase in home sales prices following the onset of the COVID-19 pandemic in 2020. Between 2019 and 2025 (year-to-date), home sales prices grew at an annualized rate of 9.2% (or 5.3%, adjusted for inflation) compared to just 5.5% (or 3.5% adjusted for inflation) between 2015 and 2019. Additionally, home buying has become more competitive, as indicated by the decrease in the average time it took homes to sell.

Single Family Home Sales, Town of Brookhaven, 2015-2025 (YTD)



Average days on the market

129	116	89	76	67	60	39	36	38	35	48
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Sources: Redfin, FRED

Note: Home sales prices are adjusted to 2025 dollars using an average of monthly CPI values to date.



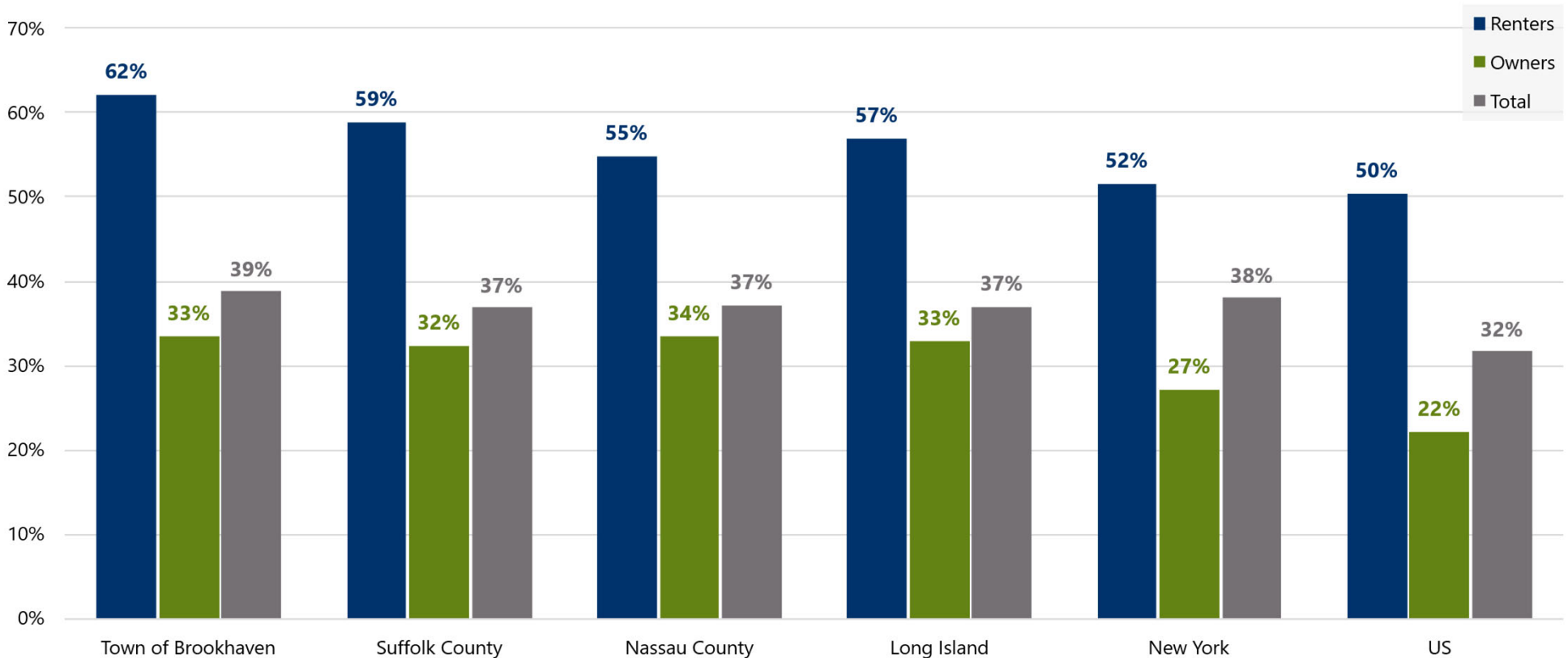
HOUSING AFFORDABILITY ASSESSMENT

COST-BURDEN BY TENURE

The Town of Brookhaven has a higher share of cost-burdened households than the region, state, and US.

Households whose **housing costs exceed 30% of their total income** are considered cost-burdened. These households are more likely to face difficulties meeting other needs beyond shelter, such as food, health care, and other necessities. In the Town of Brookhaven, 39% of all households are cost-burdened (two percentage points higher than the county's share and seven percentage points above the US share). That share jumps to 62% when considering just renter households (3 percentage points higher than the county's share and 12 percentage points higher than the US share).

Housing Cost Burden by Tenure, 2023



Source: US Census ACS 2013, 2023 5-Year Data (Table: B25070 and B25091)

Note: Tenure refers to the nature of occupancy of a housing unit (renter-occupied or owner-occupied). This measure includes only households where data is available.

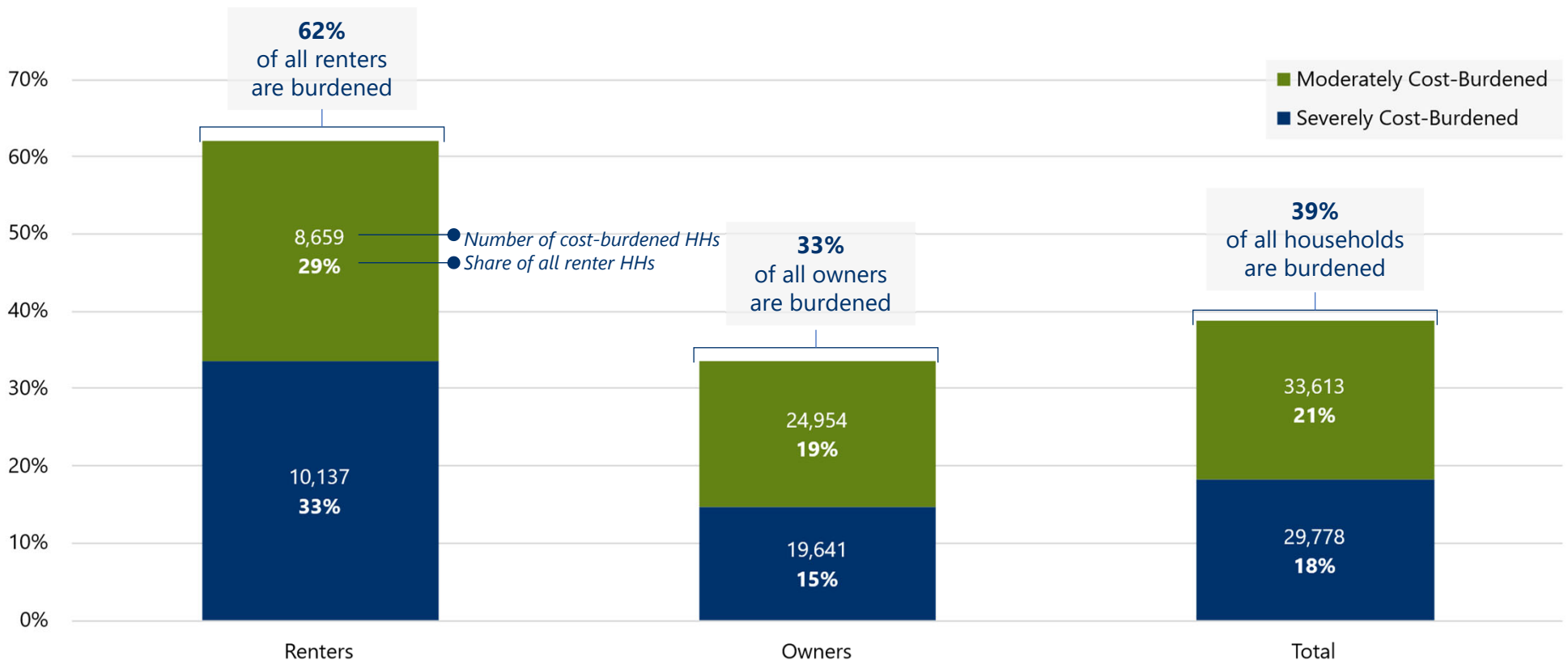


EXTREME COST-BURDEN BY TENURE

In the Town of Brookhaven, nearly two-thirds of renter households register as being cost-burdened. This compares to just one-third of owner households.

In the Town, 39% of all households are housing cost-burdened. Among these cost-burdened households, 18% are severely cost-burdened, **spending 50% or more of their income on housing**, and 21% are moderately cost-burdened, meaning they spend between 30% and 50% of their income on housing.

Share of Households with Housing Cost Burden by Tenure, Town of Brookhaven, 2023



Source: US Census ACS 2013, 2023 5-Year Data (Table: B25070 and B25091)

Note: Tenure refers to the nature of occupancy of a housing unit (renter-occupied or owner-occupied). Figures include only those households where income and housing cost data are available.

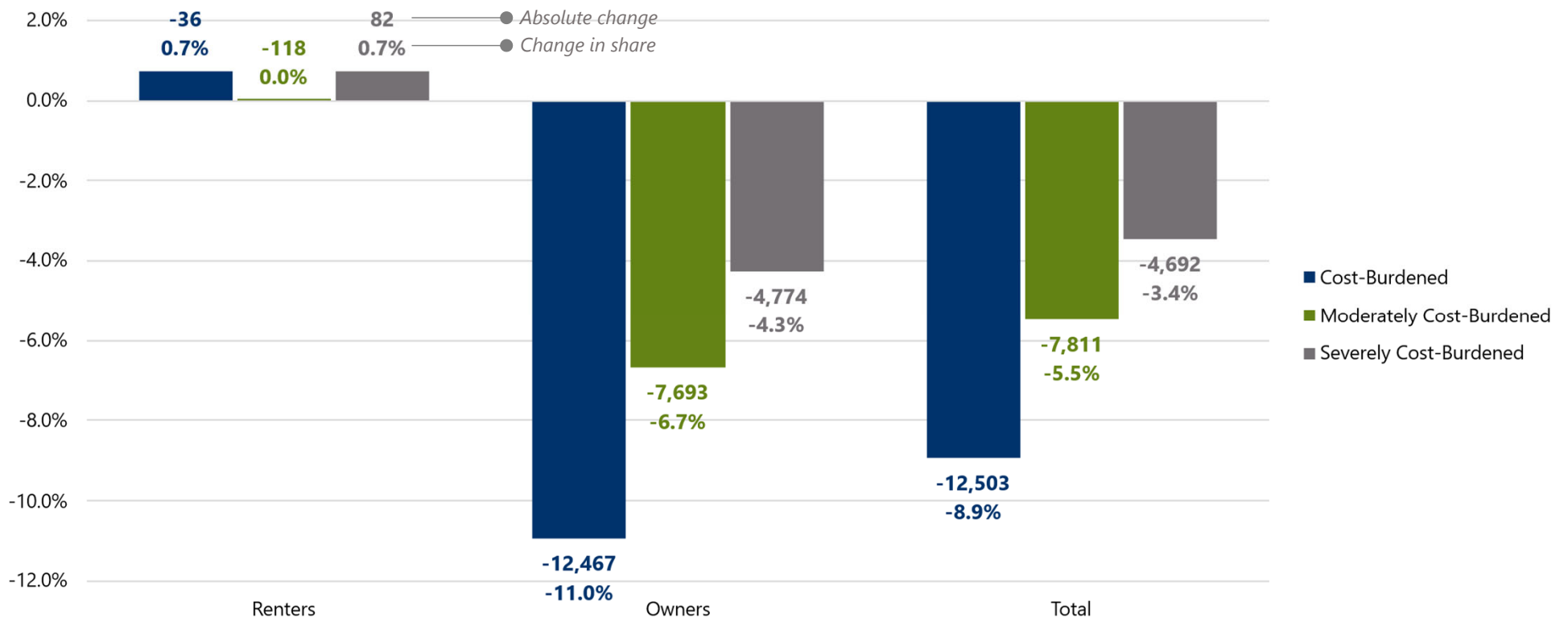


CHANGE IN COST-BURDEN

Although a relatively high percentage of Brookhaven residents are cost-burdened, this rate has decreased among homeowners over the past decade.

A decline in cost-burdened households could indicate increased housing support, wages keeping up with housing costs, or, alternatively, reflect gentrification as the area becomes more affluent. While owners are less cost-burdened today than 10 years ago, the proportion of severely cost-burdened renters in the Town has risen, possibly due to rent increases outpacing wage growth.

Change in Households with Housing Cost Burden by Tenure, Town of Brookhaven, 2013-2023



Source: US Census ACS 2013, 2013, 2023 5-Year Data (Table: B25070 and B25091)

Note: Tenure refers to the nature of occupancy of a housing unit (renter-occupied or owner-occupied). Excludes non-computed households from totals

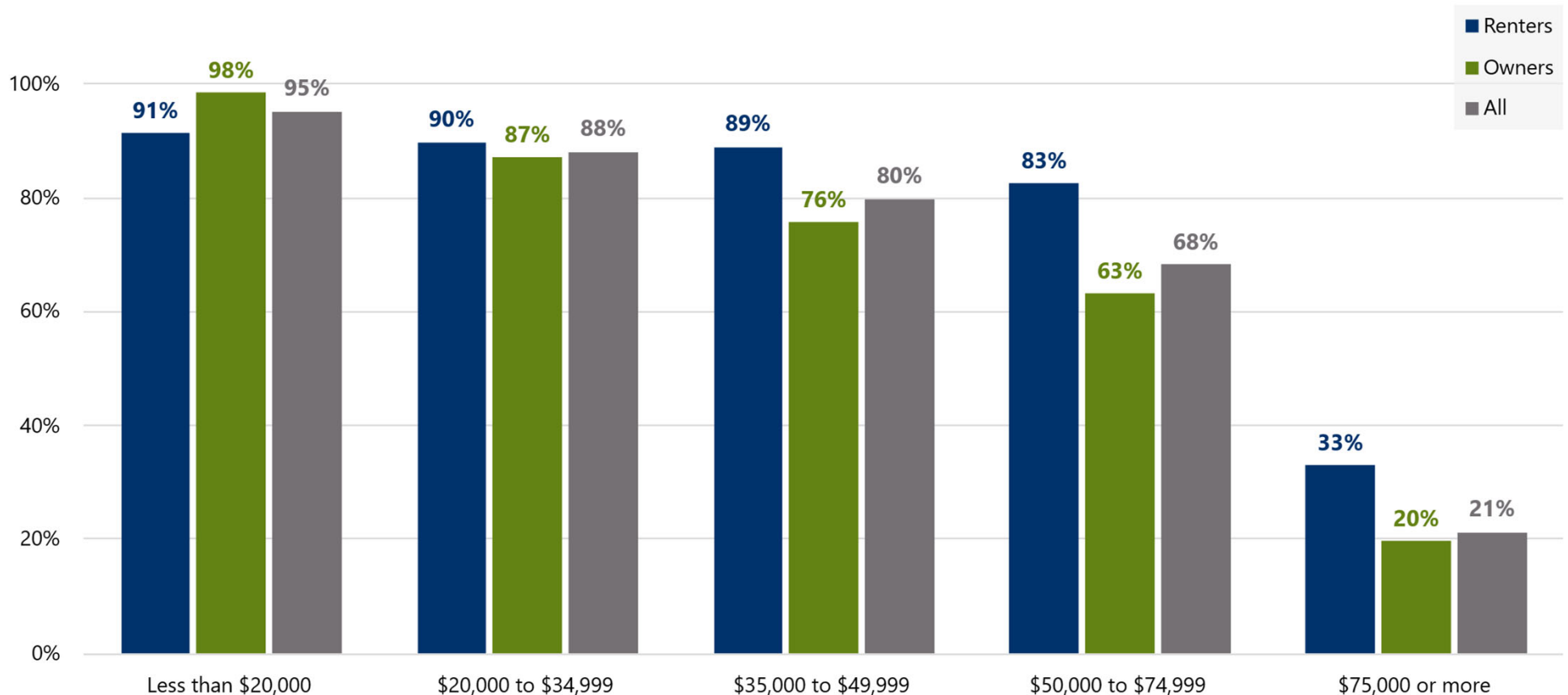


COST-BURDEN BY INCOME

Unsurprisingly, lower-income households are more likely to be cost-burdened. In the Town of Brookhaven, housing cost burden is pervasive across all household income groups below \$75,000.

Most households earning less than \$75,000 face a housing cost burden, regardless of tenure (renter or owner). By contrast, a much more modest 21% of households earning \$75,000 or more face a housing cost burden in the Town of Brookhaven. While this is a relatively low share, this 21% still accounts for about 24,300 households.

Share of Households with Housing Cost Burden by Income, Town of Brookhaven, 2023



Source: Tenure refers to the nature of occupancy of a housing unit (renter-occupied or owner-occupied). US Census ACS 2023 5-Year Data (Table: B25106)

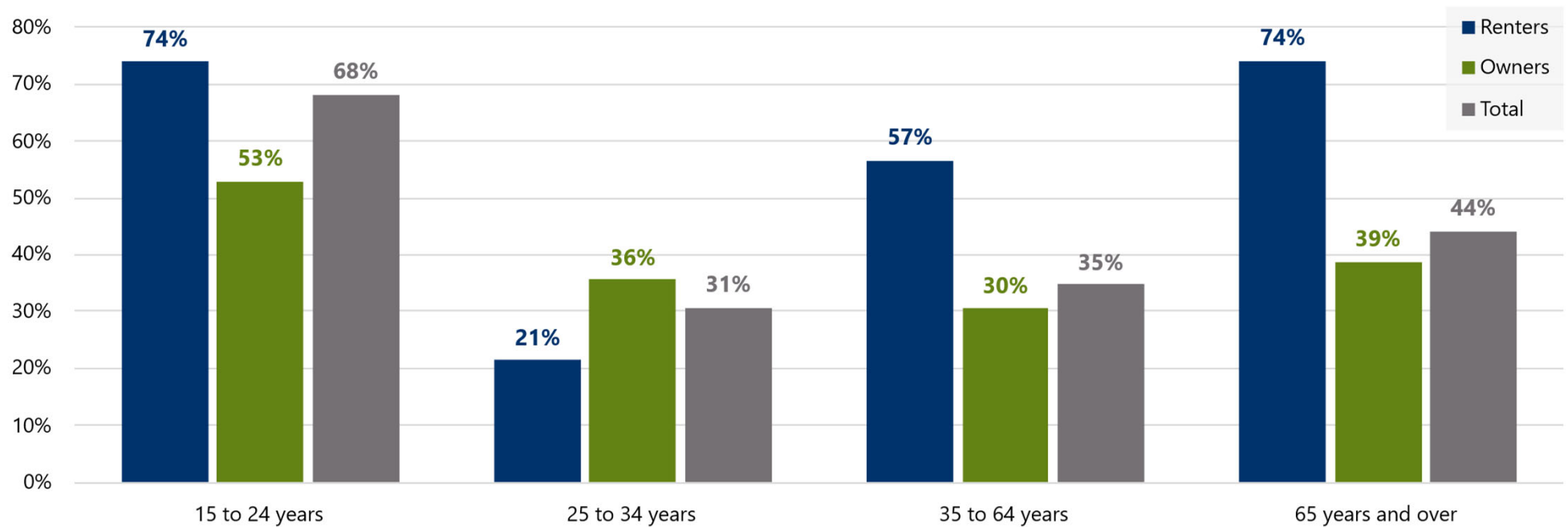


COST-BURDEN BY AGE OF HOUSEHOLDERS

Younger householders and renter householders above age 35 experience the highest rates of housing cost burden, while homeowners tend to experience more stable rates of housing cost burden regardless of age.

Housing needs and income shift throughout life. Younger households often consist of entry-level workers with lower earnings, resulting in greater rates of being cost-burdened. Renters between 25 and 34 may be more likely to reduce expenses by sharing housing with roommates or opting for smaller units. In contrast, renters between 35 and 64 may require larger living spaces to accommodate children or additional storage, contributing to a higher rate of cost burden.

Share of Households with Housing Cost Burden by Age, Town of Brookhaven, 2023



This measure may overstate the burden felt by senior households. Senior households and retirees frequently live on more restricted or fixed incomes but have often accrued a degree of wealth, which provides a buffer against financial hardships.

Source: US Census ACS 2023 5-Year Data (Table: B25072)

Note: Tenure refers to the nature of occupancy of a housing unit (renter-occupied or owner-occupied). Excludes non-computed households from totals



HOUSING AFFORDABILITY GAP - RENTERS

A renter household earning the median income level and paying the median rental rate would spend 41% on housing, indicating an affordability gap.

Rental Affordability Gap Based on Median Rent and Median Renter Income Levels, 2023

Can a median-earning renter comfortably afford Brookhaven’s median gross monthly rent?

Income Gap	
Median Gross Monthly Rent	\$2,240
Annualized Rent	\$26,880
Household Income Threshold	\$89,600
Median Renter Income	\$65,073
Income Gap	\$24,527
Median Rent as a % of Median Income	41%

Rental Price Gap	
Affordable Rent with Median Renter Income	\$1,627
Median Gross Monthly Rent	\$2,240
Rental Affordability Gap	\$613

- Paying \$2,240 monthly in rent would consume 41% of a median-earning renter’s income.
- To afford the Town’s median rent without exceeding 30% of their income on housing, a household would need to earn \$89,600 annually.
- **As the median income for renters is \$65,037, a median-earning renter would require an increase in their annual income of \$24,527 to meet that threshold.**

- A median-earning renter in Brookhaven can comfortably afford \$1,627 per month in rent (30% of total income).
- **This means the median rent would have to decrease by \$613 per month to be affordable to the median renter.**

Source: US Census ACS 2023 1-Year Data



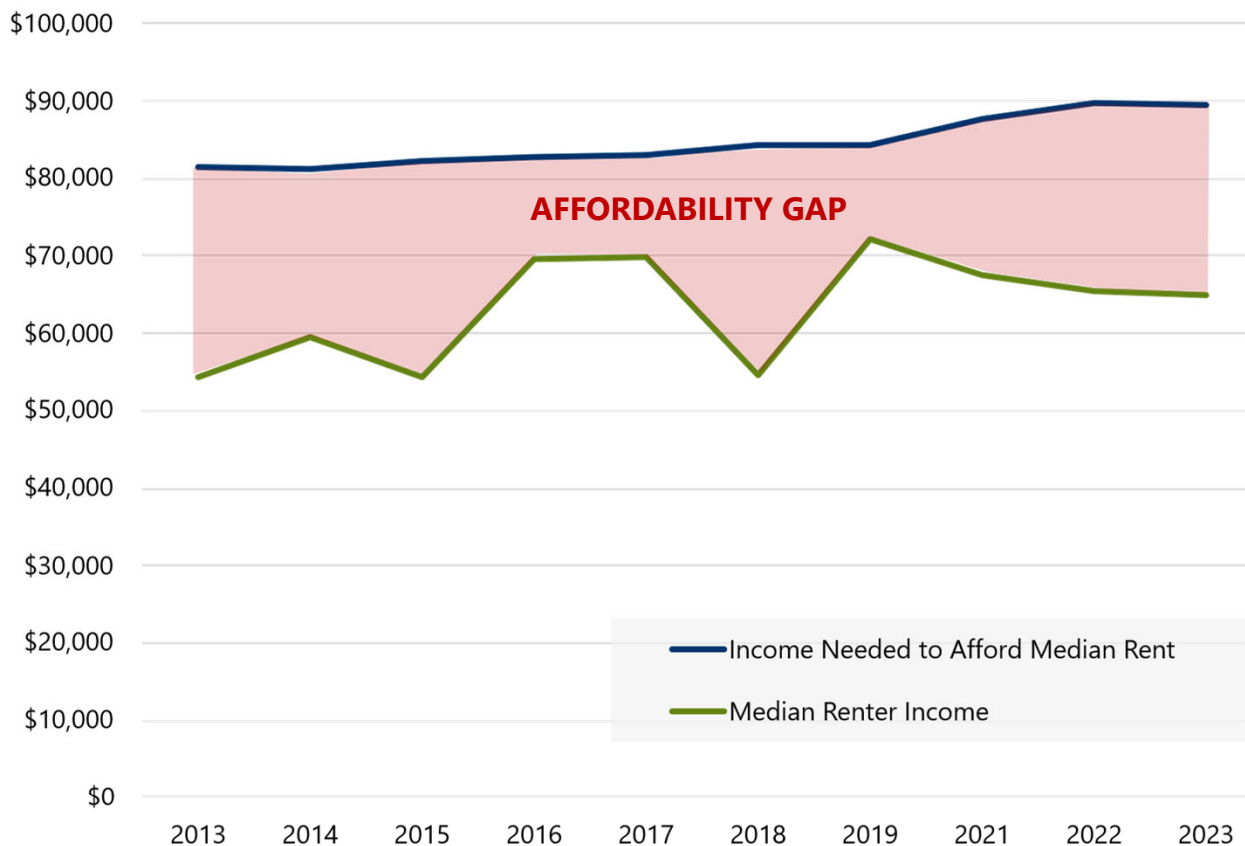
HOUSING AFFORDABILITY GAP - RENTERS

While renter incomes has kept pace with rising rents, the median rent remains unaffordable to many renters.

In 2013, the median-earning renter would have to increase their annual income by \$27,225 to avoid housing cost-burden (based on median rent price). The affordability gap today – \$24,527 – is less than a decade ago but nevertheless remains steep.

Change in Median Renter Income vs. Income Needed to Afford Median Rent

Adjusted to 2023 Inflation



Between 2013 and 2023...

***Inflation Adjusted to
2023 Dollars***

+1.8%

Annualized growth rate for
median renter income

+1.0%

Annualized growth rate
for gross rent*

***Note:** This value is sourced from Census data and will differ from the percent change derived from CoStar, which provides 2025 YTD data.

Source: US Census ACS 2023 1-Year Data



RENTAL AFFORDABILITY BY OCCUPATION

The rental market in the Town of Brookhaven is often unaffordable for those who work there.

The primary impact of high housing costs is that workers who provide essential services often cannot afford to live near their workplaces. In the Town of Brookhaven, even higher-earning Food Preparation and Serving workers, for example, can only afford 25% of all rental units in the market. By contrast, in a high-wage occupation, such as Legal Occupation, even a median-earning worker can afford nearly 100% of all rental units on the market.

Share of Rental Units Affordable to Each Occupation by Income Bracket

Description	Share of Employment	Share of Units	Share of Units	Share of Units	Share of Units
		Affordable to	Affordable to	Affordable to	Affordable to
		25th Percentile Earners	50th Percentile Earners	75th Percentile Earners	90th Percentile Earners
Food Preparation and Serving Related Occupations	8.4%	12%	13%	18%	25%
Personal Care and Service Occupations	3.0%	12%	13%	18%	50%
Military-only occupations	0.3%	12%	13%	50%	73%
Farming, Fishing, and Forestry Occupations	0.2%	12%	14%	18%	50%
Building and Grounds Cleaning and Maintenance Occupations	3.7%	13%	18%	25%	50%
Sales and Related Occupations	8.2%	13%	18%	50%	99%
Protective Service Occupations	2.7%	13%	18%	50%	73%
Healthcare Support Occupations	5.9%	14%	18%	18%	25%
Production Occupations	2.5%	13%	18%	25%	50%
Transportation and Material Moving Occupations	8.5%	14%	18%	50%	50%
Office and Administrative Support Occupations	10.5%	14%	18%	50%	50%
Community and Social Service Occupations	1.9%	18%	25%	50%	91%
Installation, Maintenance, and Repair Occupations	3.9%	18%	25%	73%	73%
Construction and Extraction Occupations	5.5%	18%	50%	73%	91%
Arts, Design, Entertainment, Sports, and Media Occupations	1.5%	18%	50%	91%	100%
Educational Instruction and Library Occupations	10.1%	18%	50%	91%	100%
Life, Physical, and Social Science Occupations	1.4%	25%	50%	91%	100%
Architecture and Engineering Occupations	0.9%	50%	73%	91%	100%
Business and Financial Operations Occupations	5.3%	50%	73%	99%	100%
Healthcare Practitioners and Technical Occupations	6.5%	50%	73%	99%	100%
Computer and Mathematical Occupations	2.0%	50%	91%	100%	100%
Legal Occupations	0.9%	50%	99%	100%	100%
Management Occupations	6.1%	73%	99%	100%	100%

In some occupations, high earners may afford a high share of units, but entry-level or relatively low earners may become cost-burdened.

Office and Administrative Support workers account for 10.5% of Brookhaven's workforce, but even high earners in this field can only afford 50% of rental units on the market.

Source: Lightcast; US Census ACS 5-Year Estimates (Tables: B25056 & B25075)

Note: Assumes affordable to mean 30% or less of income is spent on rent. Wage data are only available at the county level.



HOUSING AFFORDABILITY GAP - OWNERS

A household earning the median income level can comfortably afford a home valued at \$272,700 – well below the Town of Brookhaven’s median home sales price of \$595,000, indicating an affordability gap.

Owner Affordability Gap Based on Median Home Price and Median Owner Income Levels, 2023

Can a median-earning owner comfortably afford Brookhaven’s median home value?

Income Gap	
Median Home Sales Price (2025 YTD)	\$595,000
Down Payment of 10%	\$59,500
Loan Amount	\$535,500
Monthly Mortgage Payment	\$3,438
Other Monthly Expenses (Taxes/Insurance/Utilities)	\$2,200
Total Monthly Payment	\$5,637
Household Income Threshold	\$225,494
Median Income	\$113,944
Income Gap	\$111,550

- To afford the Town’s median home without exceeding 30% of their income on housing, a household would need to earn \$225,494 annually.
- This means a median-earning household would have to increase their annual income by \$111,550 to meet that threshold.**

Source: Esri, Redfin, Freddie Mac, NY State Office of Real Property Tax Services, move.org

Note: Home prices and payments assume 6.65% mortgage rate and 10% down payment

Home Price Gap	
Affordable Monthly Payment with Median Owner Income	\$2,849
Affordable Monthly Mortgage Payment (Excl. Other Monthly Expenses)	\$1,576
Affordable Home Price Based on Median Owner Income	\$272,700
Median Home Value	\$595,000
Owner Affordability Gap	\$322,300

- A median-earning owner in Brookhaven can comfortably afford \$2,849 per month in monthly payments (30% of total income).
- This means the median home value would have to decrease by \$322,300 to be affordable to the median earning household.**

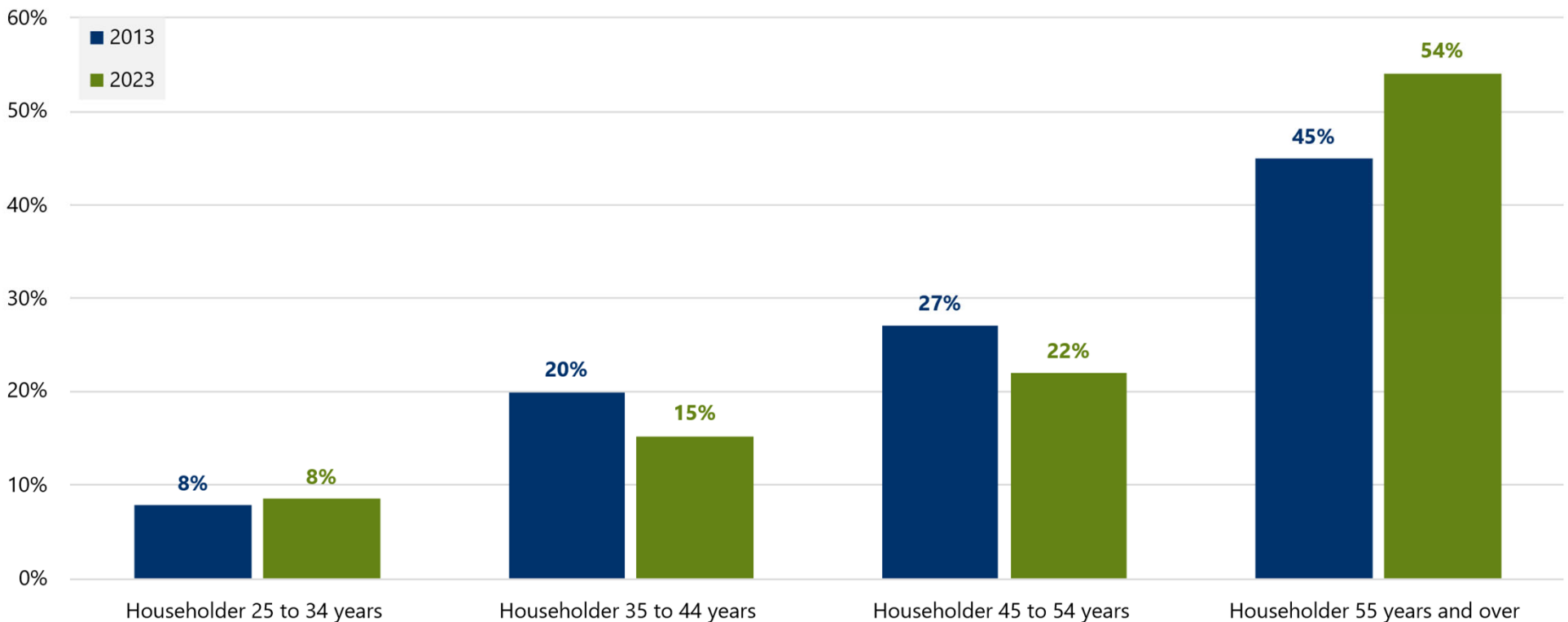


HOME OWNERSHIP BY AGE

Homeowners in the Town of Brookhaven are aging. This could indicate that homeowners are aging in place or that the area is becoming increasingly unaffordable to younger first-time buyers.

In the last decade, the share of homeowners between ages 35 to 44 years old decreased by five percentage points, as did the share of homeowners between ages 45 to 54. By contrast, the share of homeowners aged 55 or older increased by nine percentage points. This could be due to homeowners aging in place, making fewer units available to new homeowners. It could also be due to increasing home values, making homeownership less accessible to new homeowners.

Share of Homeowners by Age, Town of Brookhaven, 2013-2023



Source: US Census ACS 2013, 2023 5-Year Data (Table: B25007)



HOUSING NEEDS ANALYSIS

HOUSING NEEDS FRAMEWORK

Several elements at play in the Town of Brookhaven's housing market can be quantified and summed to evaluate the scope of the area's total need for new residential development over the coming years. This analysis considers three primary components of need.

Types of Housing Need

Current Need | *Development needed to address existing housing shortages by unit pricing or size*

- **Rental Supply Gap** = Demand (# households by AMI bracket) - Supply (# units affordable to households by AMI bracket, assuming an affordability benchmark where rent is 30% of income)
- Number of **overcrowded households** (more than 2 people per bedroom)

Future Need | *Development needed to address projected household growth*

- Projected demand due to **new household growth**, accounting for tenure (renters vs. owners) and income

Replacement Need | *Development needed to replace unusable or underutilized units*

- Number of units needed to replace **housing stock removals** (demolitions)
- Number of units needed to replace **substandard housing**

Data | Camoin Associates relied on US Census American Community Survey (ACS) 1-Year Data and ACS Public Use Microdata Sample (PUMS) files to measure the Town of Brookhaven's current and future housing needs. AMI is the midpoint of a region's income distribution, accounting for household size, and is calculated annually by the US Department of Housing and Urban Development (HUD).



HOUSING NEEDS FRAMEWORK

The analysis of different housing needs informs how much and what type of housing development to target.

Quantifying Housing Need

New Units Needed | The total number of units needed to replace housing stock removals and new demand due to household growth. These are distinct and non-overlapping types of need.

Target Affordability and Unit Sizes | The number of units needed to address current unmet needs. There may be an overlap between these areas of need, so this analysis focuses on unmet needs by unit price.

Net New Housing Needed by 2029
This quantifies housing needs *without* considering existing shortages.

=

Units needed to accommodate household growth
+
Units needed to replace housing stock removals

Aspirational Housing Development by 2029
This quantifies housing needs *while also* accounting for existing shortages by price point.

=

Adjusted distribution of **Net New Housing Needed by 2029**, with one quarter of that need allocated to those price points with the largest supply gap

Policy intervention would be needed to achieve this adjusted distribution.



ABOUT AMI – AREA MEDIAN INCOME

Area Median Income, or AMI, is the midpoint of all household incomes in a specific area — half of households earn more, and half earn less. It is calculated and published each year by the federal government and adjusted for both location and household size.

Communities use AMI to decide who qualifies for affordable housing. For example, a family earning 80% of the AMI might qualify for workforce housing, while one earning 50% or less could be eligible for deeper affordability. Rents for these homes are then set so that families don't spend more than 30% of their income on housing. This creates a fair and consistent way to match housing costs to what local residents can actually afford.

For Brookhaven, the AMI for a family of four is \$156,200. As an example, a family of four with an income of \$124,950 (80% of AMI), would qualify for affordable housing. Further, their rent would be set to 30% of their income, or \$3,125/month ($0.3 * \$124,950 / 12$ months).

Analysis around housing and prices typically references AMI and percentages of AMI. This is useful as any particular AMI percentage (50%, 80%, 120%,...) will, in practice, be converted to differing levels based up on the persons per household. In addition, AMI levels are adjusted annually by HUD. References to AMI percent can easily be discussed and analyzed over time. Centering these items around actual dollar figures, however, would make it difficult to compare year-to-year shifts and even harder to set policies designed to be applied to differing household sizes over an extended period of time.

Actual Income Levels Corresponding to HUD AMI Brackets for Brookhaven - 2024

Household Size (persons/hhld)	1	2	3	4	5	6	7	8
Extremely Low 30%	\$32,800	\$37,500	\$42,200	\$46,850	\$50,600	\$54,350	\$58,100	\$61,850
Very Low 50%	\$54,700	\$62,500	\$70,300	\$78,100	\$84,350	\$90,600	\$96,850	\$103,100
Affordable 80%	\$87,500	\$100,000	\$112,500	\$124,950	\$134,950	\$144,950	\$154,950	\$164,950
Median (100%)	\$109,350	\$124,950	\$140,600	\$156,200	\$168,700	\$181,200	\$193,700	\$206,200
Workforce 120%	\$131,200	\$149,950	\$168,700	\$187,450	\$202,450	\$217,450	\$232,450	\$247,450

Source: HUD, Camoin Associates



OVERVIEW OF HOUSING NEED IN BROOKHAVEN

Over the next five years, the Town of Brookhaven will need nearly **2,300 new residential units** to replace housing removals and accommodate new household growth. This demand is generally distributed more towards lower- and middle-income households.

Making an active effort to address current shortages of housing that is affordable to lower-income households would focus development activities even more on the lower AMI brackets.

Net New Housing Needed by 2029

This quantifies housing need *without considering existing shortages*.

AMI Bracket	Total Need
0% to 30% of AMI	405
31% to 50% of AMI	311
51% to 80% of AMI	648
81% to 100% of AMI	333
101% to 120% of AMI	216
121% to 150% of AMI	143
Over 150% of AMI	222
Total	2,278

Aspirational Housing Development by 2029

This quantifies housing *need accounting for existing shortages* by price point.

AMI Bracket	Total Need
0% to 30% of AMI	643
31% to 50% of AMI	493
51% to 80% of AMI	618
81% to 100% of AMI	316
101% to 120% of AMI	104
121% to 150% of AMI	57
Over 150% of AMI	47
Total	2,278

The adjusted distribution of Net New Housing Needed by 2029 to reflect the existing housing shortage for households earning up to 50% AMI



FUTURE NEED: NEW HOUSEHOLD GROWTH

Over the next five years, the Town of Brookhaven will need over 900 units to accommodate new household growth.

Household growth leads to an increase in demand for housing units. The total number of households in the Town of Brookhaven is slated to reach over 169,000 by 2029, an increase of 900 households. Nearly all this household growth will come from owner households, and 41% of new owner households are projected to have incomes below 80% AMI. If these owner households cannot afford to purchase a home in Brookhaven, they become renters.

Household Growth by Tenure and AMI, Town of Brookhaven, 2024 to 2029

AMI Bracket	2024			2029			Change - 2024 to 2029		
	Owners	Renters	Total	Owners	Renters	Total	Owners	Renters	Total
0% to 30% of AMI	14,572	8,284	22,856	14,544	8,224	22,768	-28	-60	-88
31% to 50% of AMI	14,806	5,014	19,820	14,873	5,009	19,882	67	-5	62
51% to 80% of AMI	26,249	7,815	34,064	26,634	7,886	34,520	385	71	456
81% to 100% of AMI	17,687	3,886	21,573	17,907	3,910	21,817	220	24	244
101% to 120% of AMI	16,044	2,438	18,482	16,183	2,443	18,626	139	5	144
121% to 150% of AMI	10,541	1,318	11,859	10,602	1,313	11,915	61	-5	56
Over 150% of AMI	36,296	3,717	40,013	36,386	3,695	40,081	90	-22	68
Total	136,195	32,472	168,667	137,129	32,480	169,609	934	8	942

Source: Esri, ACS, Camoin Associates



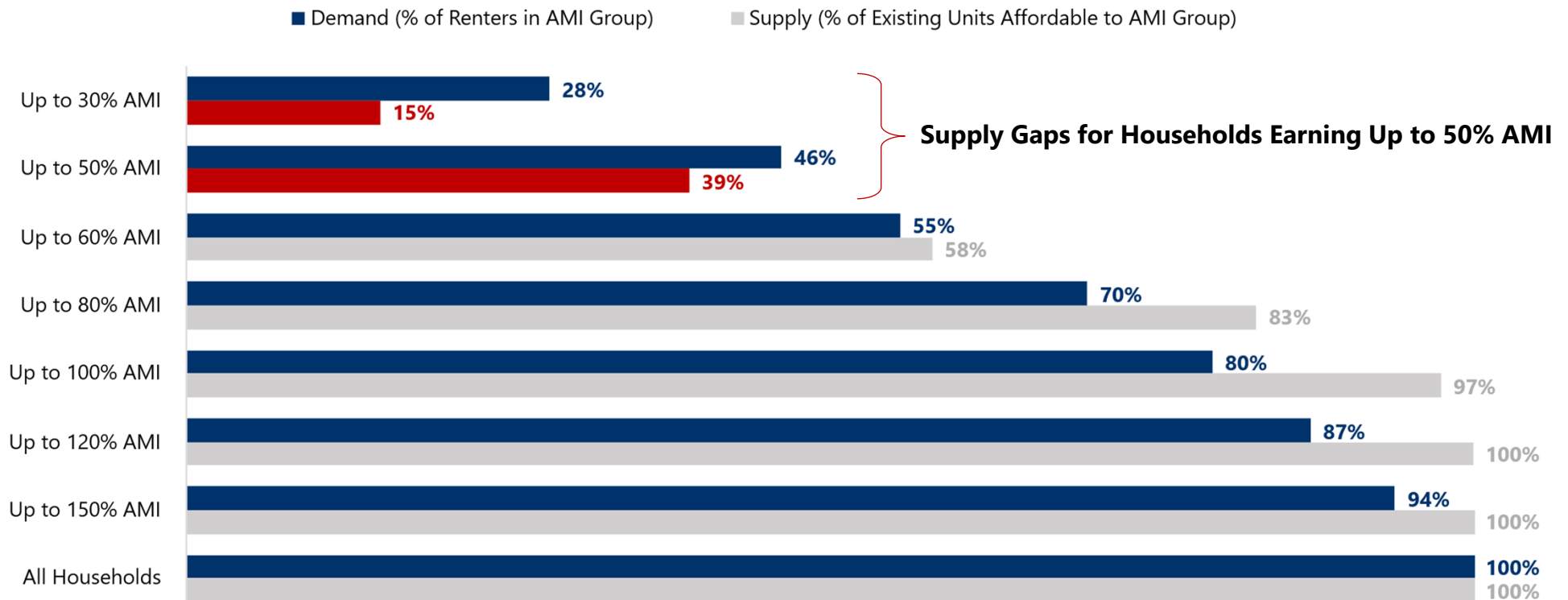
CURRENT NEED: RENTAL HOUSING GAP

In 2023, the Town of Brookhaven had a supply gap for households earning up to 50% AMI.

Nearly half of all renters (46%) earn 50% of AMI or less, but currently, these renters can only afford 39% of the Town's existing rental units. This represents a **shortfall of 1,670 units** for households at this level of income. The supply gap is even deeper for the 28% of renters who 30% of AMI or less.

While the Town has more rental units (35,000) than renters (32,300), a significant proportion of these units remain vacant (8%), while others may be inhabited by households spending well below their means. This creates a supply gap at the lower income levels.

Cumulative Shortfall of Affordable Rental Units by AMI Level, Town of Brookhaven, 2023



Source: ACS PUMS 1-Year Data, Camoin Associates



CURRENT NEED: OVERCROWDED HOUSEHOLDS

In the Town of Brookhaven, a small proportion (2%) of households are overcrowded, meaning there is more than one person per room.

In some homes, the number of residents registers exceptionally high compared to the number of rooms in the unit. Consider a family of five living in a four-room apartment. In this instance, the ratio of occupants per room measures 1.25, well over the threshold for households characterized as overcrowded (1.01).

Of the 3,080 overcrowded households in the Town of Brookhaven, 47% are severely overcrowded, meaning there are 1.51 or more persons per room, with renters nearly five times more likely to be severely overcrowded. Households may be overcrowded due to a lack of units available to accommodate the size of their family or due to their inability to afford a larger unit.

Overcrowded Households, Town of Brookhaven, 2023

Housing Units	Owner Occupied	Renter Occupied	Total Occupied
Total Units	132,349	30,753	163,102
Overcrowded Units	1,289	329	1,618
Severely Overcrowded Units	255	1,208	1,463
Total	1,544	1,537	3,081
Overcrowded Percent of Total	1.2%	5.0%	1.9%

Definitions:

Overcrowded = 1.01 to 1.5 persons per room

Severely overcrowded = 1.51 or more persons per room

Source: ACS report S2501



REPLACEMENT NEED: HOUSING REMOVALS

Over the coming five years, for every 1,000 units in the Town of Brookhaven, 7.5 units on average will be removed from the housing stock.

HUD estimates an annual removal rate of 0.15% for communities with a mix of owners and renters found in the Town of Brookhaven. This relates to an average of nearly two obsolete units being removed annually for every 1,000 units in the housing stock. Based on the Town of Brookhaven’s current housing base, this will total over 1,300 residential units needing replacement over the next five years. HUD data also shows a greater removal rate in homes of lower-income households. As a result, well over half (56%) of removed units will come from those occupied by residents with household incomes registering 50% of AMI or less.

Housing Units Due for Replacement, Town of Brookhaven, 2024 to 2029

Total Housing Units (2023)	181,629
Annual Removal Rate*	0.15%
Five Year Removal Rate	0.74%
Five Year Removals	1,336

*Note: HUD removal rate is based on owner/renter mix

Housing Units Due For Replacement by Tenure and AMI Level, Town of Brookhaven, 2024 to 2029

AMI Bracket	Owners	Renters	Total
0% to 30% of AMI	276	217	493
31% to 50% of AMI	162	87	249
51% to 80% of AMI	104	88	192
81% to 100% of AMI	54	35	89
101% to 120% of AMI	47	25	72
121% to 150% of AMI	69	18	87
Over 150% of AMI	121	33	154
Total	833	503	1,336

Source: HUD; ACS; Camoin Associates

Source: HUD, ACS, Camoin Associates



REPLACEMENT NEED: SUBSTANDARD HOUSING

Nearly 700 units fall into the category of substandard housing, meaning they lack adequate plumbing and/or kitchen facilities.

Census data reports that 540 housing units in the Town of Brookhaven lack complete plumbing facilities and may be considered substandard. These are split fairly evenly between owner-occupied and renter-occupied units. An additional 685 units lack complete kitchens, 58% of which are rentals. There is likely some overlap between these two categories of substandard housing, but nevertheless, there are at least 700 of these substandard housing units in need of upgrading or replacement in the Town of Brookhaven.

Substandard Housing Units, Town of Brookhaven, 2023

	Owner Occupied	Renter Occupied	Total Occupied
Total Units	133,893	32,290	166,183
Plumbing Availability			
Units with complete plumbing	133,639	32,006	165,645
Units without complete plumbing	254	284	538
Percent without complete plumbing	0.2%	0.9%	0.3%
Kitchen Availability			
Units with complete kitchen	133,490	32,008	165,498
Units without complete kitchen	403	282	685
Percent without complete kitchen	0.3%	0.9%	0.4%
Minimum Substandard Units	403	284	687

Note: Some of these may be seasonal units, and the owners may be comfortable with limited features. There may be an overlap between units with inadequate plumbing and inadequate kitchen availability.

Definitions:

The US Census specifies that:

Incomplete Plumbing lacks one or more of the following:

- Hot and cold water
- A toilet
- A bath or shower

An Incomplete Kitchen lacks one or more of the following:

- A refrigerator
- A stove or range
- A sink or piped water

Source: ACS report S2504



SUMMARY OF HOUSING NEED

Over the next five years, the Town of Brookhaven will need nearly 2,300 new residential units to replace housing removals and to accommodate new household growth.

The total net new housing need by 2029 includes the number of units required to support projected household growth and replace units lost due to demolition. These categories of need are distinct and non-overlapping.

By income, anticipated household growth, and the removal of current units that must be replaced, indicates a need for the bulk of new residences to be highly skewed towards the lower income brackets. Indeed, well over half (60%) of these new units will need to be dedicated towards housing for those households with incomes registering as 80% of AMI or less.

New development over the coming five years may provide the Town of Brookhaven with a full 2,300 units, but if they are primarily priced at levels affordable only by higher-income households, the overall housing deficit (see page 71) will only become more severe.

Consolidated Residential Demand for Brookhaven - 2024 to 2029

Source of Demand	Owner Units	Renter Units	Total
Household Growth	934*	8	942
Due for Replacement	833	503	1,336
Total	1,767	511	2,278

Five-Year Total Net Housing Demand Growth for Brookhaven - 2024 to 2029

AMI Bracket	Owners	Renters	Total
0% to 30% of AMI	248	157	405
31% to 50% of AMI	229	82	311
51% to 80% of AMI	489	159	648
81% to 100% of AMI	274	59	333
101% to 120% of AMI	186	30	216
121% to 150% of AMI	130	13	143
Over 150% of AMI	211	11	222
Total	1,767	511	2,278

60% of needed units

Source: HUD, ACS, Camoin Associates

*Note: These household projections are based on historic trends; if would-be homeowners cannot afford a home in Brookhaven, they will become renters.



ADDRESSING HOUSING SHORTAGES

Partially addressing the current deficit of lower-income units requires a concerted effort.

The 2,300 new housing units needed by 2029 do not address the unmet housing needs among existing households. There is a current deficit of 1,670 units for households earning 50% AMI and below (see page 71). An Aspirational Development effort would attempt to mitigate one-quarter of this deficit (420 units) by expanding the two lowest income AMI Brackets by this number of units. This approach prioritizes development that serves households earning up to 50% AMI. This goal is referred to as Aspirational, as the private market is unlikely to deliver these units without targeted policy support.

Net New Housing Needed by 2029

This quantifies housing need *without considering existing shortages*.

Five-Year Total Net Housing Demand Growth for Brookhaven - 2024 to 2029

AMI Bracket	Owners	Renters	Total
0% to 30% of AMI	248	157	405
31% to 50% of AMI	229	82	311
51% to 80% of AMI	489	159	648
81% to 100% of AMI	274	59	333
101% to 120% of AMI	186	30	216
121% to 150% of AMI	130	13	143
Over 150% of AMI	211	11	222
Total	1,767	511	2,278

Source: HUD; ACS; Camoin Associates

60% of needed units

Aspirational* Housing Development by 2029

This quantifies housing need *accounting for existing shortages* by price point.

Five-Year Adjusted Net Housing Demand Growth for Brookhaven - 2024 to 2029

AMI Bracket	Owners	Renters	Total
0% to 30% of AMI	248	394	643
31% to 50% of AMI	229	264	493
51% to 80% of AMI	435	183	618
81% to 100% of AMI	219	96	316
101% to 120% of AMI	91	13	104
121% to 150% of AMI	49	9	57
Over 150% of AMI	40	7	47
Total	1,311	967	2,278

Source: Camoin Associates

77% of needed units

*Intention and Methodology for Aspirational Development:

The total housing need is for 2,300 units by 2029. Holding this total number of units unchanged while still shifting a portion into the lower-income brackets then requires a corresponding reduction of 420 units from the other five AMI Brackets (51% of AMI and higher). The resulting distribution of units, Aspirational Development, then becomes even more skewed towards the lowest income brackets, indicating a significant level of production at these price points is required to at least partially address the current level of need found among the town's lowest-income households.

Source: HUD, ACS, Camoin Associates



APPENDIX

DATA SOURCES



Lightcast (formerly Emsi Burning Glass) is a global leader in labor market analytics, offering a data platform that gives a comprehensive, nuanced, and up-to-date picture of labor markets at all scales from national to local. Key components of the platform include traditional labor market information, job postings analytics, talent profile data, compensation data, and skills analytics. Lightcast integrates government data with information from online job postings, talent profiles, and resumes to produce timely intelligence on the state of the labor market. Job and compensation data is available by industry, occupation, educational program, and skill type. [Click to learn more.](#)



Esri ArcGIS Business Analyst combines proprietary statistical models covering demographic, business, and spending data with map-based analytics to offer insights on market opportunities for industries, businesses, and sites. Business Analyst integrates datasets covering a wide range of topics including demographics, consumer spending, market potential, customer segmentation, business locations, traffic counts, and crime indexes, which can be overlaid spatially to produce customizable maps and uncover market intelligence. Data can be pulled for standard and custom geographies, allowing for valuable comparison between places. [Click to learn more.](#)



The **American Community Survey** (ACS) is an ongoing statistical survey by the US Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. Mandatory to fill out, the survey is sent to a small sample of the population on a rotating basis. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. [Click to learn more.](#)

OnTheMap | US Census Bureau

OnTheMap is a tool developed through the US Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. It offers visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. [Click to learn more.](#)



DATA SOURCES, CONTINUED



Conducted every ten years in years ending in zero, the **US Decennial Census of Population and Housing** is a complete count of each resident of the nation based on where they live on April 1st of the Census year. The Constitution mandates the enumeration to determine how to apportion the House of Representatives among the states. The latest release of the 2020 Census contains data for a limited number of variables, including: total population by race/ethnicity, population under 18, occupied and vacant housing units, and group quarters population. [Click to learn more.](#)



CoStar is a comprehensive source of commercial real estate intelligence, offering an inventory of over 6.4 million commercial properties spanning 135 billion square feet of space in 390 markets across the US. CoStar covers office, retail, industrial, hospitality, and multifamily markets. Property- and market-level data on absorption, occupancy, lease rates, tenants, listings, and transactions are researched and verified through calls to property managers, review of public records, visits to construction sites, and desktop research to uncover nearly real-time market changes. [Click to learn more.](#)



ChatGPT is an advanced natural language processing tool designed to assist researchers and analysts. With its vast knowledge base and sophisticated language understanding capabilities, ChatGPT can be used to generate ideas, summarize research findings, automate routine tasks, and aid in data interpretation. By harnessing the power of artificial intelligence, researchers can leverage ChatGPT to streamline workflow, extract valuable insights from data, and enhance the quality of reports. [Click to learn more.](#)

National Housing Preservation Database (NHPD) | Public and Affordable Housing Research Corporation (PAHRC) and National Low Income Housing Coalition

The database provides access to de-duplicated information on federally assisted housing inventory across the US at no cost. The data in the NHPD come from the US Department of Housing and Urban Development (HUD) and the US Department of Agriculture (USDA) and include ten federally subsidized programs.



ABOUT CAMOIN ASSOCIATES

As the nation's only full-service economic development and lead generation consulting firm, Camoin Associates empowers communities through human connection backed by robust analytics.

Since 1999, Camoin Associates has helped local and state governments, economic development organizations, nonprofit organizations, and private businesses across the country generate economic results marked by resiliency and prosperity.

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The Project Team

Rachel Selsky
Principal

Tom Dworetsky
Director of Research

John Walker
Senior Analyst

Bailey McConnell
Analyst



