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Land Use and Implementation Plan

August 2010

Ronkonkoma Hub Transit-Oriented Development Draft Land Use and Implementation Plan Town of Brookhaven



prepared for

Town of Brookhaven
Town Board
Farmingville, NY



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Ronkonkoma Hub Transit-Oriented Development Draft Land Use and Implementation Plan

Introduction

The following presents the Draft Land Use and Implementation Plan for the Ronkonkoma Hub Transit-Oriented Development (“TOD”) project. The Town of Brookhaven (the “Town”) has conducted a planning study to evaluate the redevelopment and revitalization of the 53.73±-acre area surrounding Ronkonkoma Station on the Long Island Railroad (“LIRR”) Ronkonkoma Branch (the “TOD District area”). Through the use of implementation tools such as rezoning and economic incentives (e.g., special districts, expedited permit approval), the Town’s vision is to encourage pedestrian-friendly, transit-oriented development with higher densities and a mix of uses, including new housing opportunities, and retail and office uses that support and make efficient use of the existing transportation infrastructure in the area, specifically the LIRR train station.

The following Plan provides an overview of the Ronkonkoma Station, the background and history of the planning process the Town previously embarked on and includes an overview of the recommended TOD as a planning tool. The Plan also describes the proposed TOD District and form-based code (“FBC”) zoning as an instrument to realizing the community vision. Also discussed is the development of the Theoretical Full Build Plan—a potential redevelopment option that illustrates the overall type and level of development that could take place with the application of the proposed rezoning and to evaluate potential environmental impacts in accordance with the State Environmental Review Quality Act (“SEQRA”).

Lastly, as part of the implementation strategy, the Plan presents the Town process for implementing new land use legislation designed to result in the revitalization of the area surrounding the Ronkonkoma train station through TOD as well as various economic development programs. The Plan relies on data, assumptions and conceptual plans developed in Phase 2 of the Ronkonkoma Hub Transit-Oriented

Planning Study, dated March 2009,¹ (hereinafter referred to as the “Ronkonkoma Hub Planning Study”) as well as a revised, more detailed market analysis conducted in August 2010.²

Background and History

This section provides an overview of Ronkonkoma Station, an overview of transit-oriented development as a revitalization tool, and an overview of FBC zoning as an implementation tool. This section also summarizes the Ronkonkoma Hub Planning Study (Phases 1 and 2). Phase 1 of this study, which documented existing conditions and identified potential opportunity sites for transit-oriented development, was completed in April 2008. Phase 2 was completed in March 2009 and generated a long-term vision and implementation strategy for the revitalization of the study area.

Overview of Ronkonkoma Station

Ronkonkoma Station is located approximately 50 miles east of Penn Station in Manhattan on the Ronkonkoma Branch of the LIRR, which begins at Hicksville and runs east to Greenport. Refer to Figure 1 for a map of the LIRR system. Ronkonkoma Station is one of the busiest suburban stations in the entire LIRR system serving approximately 14 million riders annually second to Babylon.³ Since 1987, it has served as the eastern terminus of the electrification of the Main Line. A weekly schedule includes 30 westbound trains and 33 weekday eastbound trains with a 66- to 85-minute ride to Penn Station.⁴ The Station also functions as a major multi-model transportation hub which serves Suffolk County Transit bus routes S57, S59, 6A, 7A. There are shuttle bus connections to/from MacArthur Airport and local taxi service provided at the Station as well.

Ronkonkoma Station originally opened in 1883 as the Lakeland Depot. It underwent major renovation/expansion in 1997, including a new station house, clock tower, plaza, pedestrian bridge, and parking garage. In 2010, surface parking improvements were implemented on the east side of the Station.

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¹ *Ronkonkoma Hub Transit-Oriented Development Planning Study*, prepared for the Town of Brookhaven, prepared by VHB, Inc., March 2009.

² *Market Analysis: Ronkonkoma Hub Transit-Oriented Land Use & Implementation Plan and GEIS*, prepared for the Town of Brookhaven, prepared by BBP & Associates, LLC, August 2010.

³ Metropolitan Transit Authority, *MTA Financial Plan and Proposed LIRR Reduction Reductions Supplemental Information*, 2010. (website: http://www.mta.info/news/pdf/LIRR_Supplemental_Info.pdf)

⁴ According to the MTA schedule as of August 2009. (website: <http://mta.info/lirr/html/ttn/ronkonko.htm>)

Figure 1
Locational Map of Ronkonkoma Station



Ronkonkoma Hub Transit-Oriented Planning Study

In 2007, the Town of Brookhaven embarked upon a two-phased planning study aimed at revitalizing a multi-block area around the Ronkonkoma Hub. The goal was to develop a vision that supports compact, mixed use, transit-oriented redevelopment (described further below). The outcome of the planning study, known as the Ronkonkoma Hub Planning Study, was a long-term development strategy that established clear and predictable guidance for the revitalization of the area.

Phase 1, completed in April 2008, focused on documenting existing conditions and identifying potential opportunity sites for transit-oriented development. Subsequently, Phase 2 of the study, which was completed in March 2009, built upon the work completed in Phase 1 to generate a long-term vision and implementation strategy aimed at providing guidance to all interested parties on potential future development around the Station. The outcome of the Ronkonkoma Hub Planning Study is a long-term development strategy that establishes clear and predictable guidance for the revitalization of the area.

Key goals of the Ronkonkoma Hub Planning Study included:

- Promote quality and healthy communities;
- Redirect growth to areas already served by existing infrastructure;
- Expand transportation choices to enhance environmental quality;

- Reduce vehicle trips around the station;
- Support compact, mixed-use, transit-accessible, pedestrian-oriented redevelopment;
- Create a sense of place;
- Support local businesses;
- Create housing choices;
- Explore reverse commute opportunities; and
- Enhance the tax base for the Town and the region to support the variety of taxing districts.

Public meetings were held to gather input from local government, residents, businesses and other stakeholders throughout the planning study, including the development of a vision for the Ronkonkoma Station. Table 1 lists the multiple public meetings held throughout the development of the Ronkonkoma Hub Planning Study under both Phases 1 and 2 (described further below).

Table 1
Public Meetings

Meeting	Date
Stakeholder Meeting	October 18, 2007
Local Stakeholders and Civic League	November 7, 2007
Public Information Meeting	January 17, 2008
Stakeholder Meeting	June 16, 2008
Public Information Meeting	September 18, 2008

Overview of Transit-Oriented Development

Transit-Oriented Developments, or TODs, are mixed-use, higher density communities that encourage people to live, work and shop near transit services, and decrease their dependence on driving. They promote the creation or enhancement of walkable communities centered around high-quality public transportation systems. Components of transit-oriented design include: walkability; having a train station as a prominent feature within the community; being a regional node containing a mix of uses including residential, office, retail and civic uses; and high-density, high-quality development within a 10-to-15-minute walk surrounding the train station. (Refer to Figure 4 for images of examples of successful TOD projects comparable to the Ronkonkoma Hub).

Since World War II, Long Island has experienced significant sprawl-like development where most residents drive to work, shop, and recreation resulting in traffic congestion and poor air quality. Long Island is currently designated by the U.S. Environmental Protection Agency as a “non-attainment” area for ozone, a primary component of smog. With its extensive service throughout Long Island and high ridership, the LIRR creates multiple opportunities to apply TOD principles, thus reducing traffic congestion and air pollution.

According to the Urban Land Institute,⁵ the following ten key principles help ensure the development of successful livable pedestrian-scale communities that promote increased transit ridership and dependency on single-occupancy vehicles, thereby, reducing traffic congestion:

1. Make it Better with a Vision
2. Apply the Power of Partnerships
3. Think Development When Thinking About Transit
4. Get the Parking Right
5. Build a Place, Not a Project
6. Make Retail Development Market Driven, Not Transit Driven
7. Mix Uses, but Not Necessarily in the Same Place
8. Make Buses a Great Idea
9. Encourage Every Price Point to Live around Transit
10. Engage Corporate Attention

In addition to having a transit system (either planned or existing) supported by a growing ridership and/or adequate funding, a fundamental element to the success of TOD is a variety of housing types for a mix of income levels. Because people of all income levels use public transit, the most successful TOD projects provide diversity in housing options.

Phase 1 of the Ronkonkoma Hub Planning Study

The study area for the Ronkonkoma Hub Planning Study, as identified in Phase 1, encompassed 181± acres of land and was generally defined by the LIRR rail line to the south, Express Drive South (LIE South Service Road) to the north, Bay Avenue to the west and Babcock Avenue to the east. Refer to Figure 2 for the study area boundaries and existing land uses, as identified by Phase 1 of the planning study.

This initial phase of work included: a site tour, data assembly and review; meetings; creation of goals and objectives; analysis of existing zoning, multi-family housing demand, parking, building space, and transportation infrastructure; and preliminary analysis of the development potential for priority development sites. A questionnaire was distributed during Phase 1 that sought opinions from both the residents and riders of the LIRR.

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R. Dunphy, D. Myerson, M. Pawlukiewicz, *Ten Principles for Successful Development Around Transit*, Urban Land Institute, 2003.

Figure 2
Ronkonkoma Hub Planning Study: Study Area and Existing Land Uses



Phase 2 of the Ronkonkoma Hub Planning Study

With input from local government, residents, businesses and other stakeholders, Phase 2 of the Ronkonkoma Hub Planning Study conducted case studies of existing successful TOD projects, identified TOD opportunity sites and included zoning recommendations, identification of transportation improvements, financial implications, and concept plans. Figure 3 shows the TOD opportunity sites that were identified during the planning process.

Figure 3
Ronkonkoma Hub Planning Study: TOD Opportunity Sites



Also as part of Phase 2, a Vision Plan was developed that called for the transformation of Railroad Avenue into a community “Main Street” with mixed-use buildings that define the street edge. In addition, the Vision Plan included pedestrian amenities such as small plazas at key intersections and streetscape improvements along both sides of Railroad Avenue. Parking was placed at the rear of or internal to these sites to enable new development to front the street. Finally, the Vision Plan called for a mix of housing, retail, recreation and office space.

The highlights of that Vision Plan included:

- Public plazas at key intersections to provide public spaces for pedestrians and help activate the street;
- Streetscape enhancements including sidewalks, signage, lighting and landscaping along Railroad Avenue, Mill Road and Hawkins Avenue;
- Orient buildings towards the street edge along Railroad Avenue and Hawkins to help define the “Main Street” character;
- Parking at the rear or interior of lots and seek opportunities for shared parking;
- Active pedestrian-oriented uses on the ground floor, particularly along Railroad Avenue between Garrity Avenue and the Station;
- New development on the MTA “bus loop” site;
- Buildings up to 5 stories on Railroad Avenue, up to 4 stories on Mill Road and up to 2.5 stories on Union Avenue;
- Streetscape enhancements to the Station plaza;
- Mix of uses on upper floors;
- Buildings oriented toward the street edge along Mill Road;
- Multi-family buildings oriented toward amenities such as parks or plazas;
- Residential unit types mixed within development sites; and
- Pedestrian connections to Fairfield residential apartments.

The Vision Plan accommodated approximately 430 residential units and approximately 132,000 square feet of office and retail space.

In addition to the land use goals, the Ronkonkoma Hub Planning Study identified numerous opportunities to enhance the streetscape and roadways to improve the public realm and plan for the anticipated growth in development within the study area. Roadway and other streetscape goals included the following:

- Potential new intersection treatment at Railroad and Hawkins Avenues;
- Potential roadway and streetscape improvements to Railroad Avenue, Mill Road, Union Street, and Hawkins Avenue;
- Streetscape amenities along Railroad Avenue including sidewalks, street trees, lighting, plazas, and landscape improvements at key intersections;
- Implement bike route connections along Railroad Avenue and Mill Road and Union Avenue; and
- Bike storage at the Train Station.

Phase 2: TOD Zoning Recommendations

Based on TOD case studies evaluated as part of Phase 2, as shown in Figure 4, a typical TOD concept includes a ten-minute walk radius. At the time of preparation of Phase 2 of the Ronkonkoma Hub Planning Study, such a radius was drawn around the Ronkonkoma Hub as a framework for a potential TOD zoning district, which captured sections of established residential neighborhoods. The intent was that this preliminary district would include the principles of TOD and encompass the land use and urban design features associated with TOD such as, the allowance of higher density housing and taller building heights, including a mix of uses.

Subsequent to the Ronkonkoma Hub Planning Study, the TOD district was refined further (reduced from 181± acres to 53.73± acres) to exclude the areas of well-established single-family residential uses and include the core TOD area consisting of the most severely underutilized and underdeveloped parcels with existing compatible land uses (i.e., commercial) as the intent of the action is not to redevelop thriving residential communities. Additionally, the refined 53.73±-acre TOD District area is based on an updated market study that determined what could ultimately be supported in the area.

Figure 4
Ronkonkoma Hub Planning Study: TOD Case Studies



Phase 2: Transportation-Related Infrastructure

The Ronkonkoma Hub Planning Study identified the need for transportation-related infrastructure improvements, including capacity enhancements at intersections and

the installation/upgrade of traffic signals or construction of roundabouts, and/or other traffic controls, as deemed appropriate. Traffic calming elements, sidewalks and other pedestrian-friendly features, were recommended to create a walkable community and reduce automobile trips. The following is a list of issues and potential improvements that were identified as having an effect on the extent of transportation-related infrastructure improvements:

- A direct link from the Ronkonkoma Station to MacArthur Airport through the airside of the Airport, by either bus rapid transit or light rail, while beneficial, was deemed unlikely due to construction costs, security concerns and FAA safety issues.
- An enhanced shuttle service should have attractive, user-friendly, clean fuel vehicles with frequent service and extended hours in order to attract ridership.
- An enhanced shuttle service could be expanded to also connect to other nearby destinations to further promote ridership.
- Multi-level parking decks should be considered as a way to improve efficiency and overall security
- Paid parking should be considered as a way to increase ride sharing and reduce the use of Single Occupancy Vehicles
- Opportunities within the Town of Islip for newly-constructed shared parking should be explored if appropriate agreements can be implemented with Suffolk County and the MTA.

Proposed TOD District

The proposed TOD District as a FBC zoning code is a tool the Town is developing to implement the Vision detailed in the Ronkonkoma Hub Planning Study.

The TOD District area being considered for rezoning encompasses a 53.73±-acre area, which is comprised of 54 individual parcels within the Town of Brookhaven. The boundaries of the TOD District area is established by the Brookhaven, NY Building Zone Map, as or hereafter amended. The proposed TOD District zoning code is a hybrid among FBC, design guidelines and zoning ordinance. The TOD District zoning establishes objectives, policies, and standards to promote orderly development and redevelopment within the Ronkonkoma TOD District for purposes of encouraging high density mixed-use development, housing, retail, and office uses.

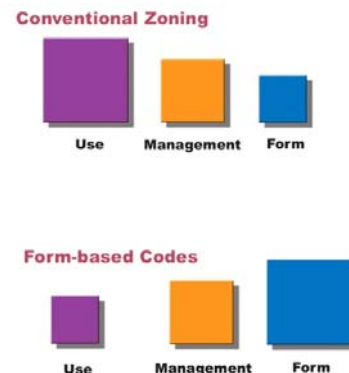
The following section provides an overview of FBC zoning, a description of the elements of the proposed TOD District, including the regulating plan and other plans that support the code.

Form-Based Code Zoning

The key goal of FBC zoning is to meet community visions not achievable through existing or conventional zoning. Form-based code zoning is different from conventional zoning in that it emphasizes building form and appearance rather than specifying and distinguishing uses or establishing set back, building height, or lot coverage restrictions. Figure 5 illustrates this difference.

Form-based code zoning focuses on regulating the public realm, including street types, blocks, and civic spaces and provides for flexibility in use, site and architectural design. Form-based code zoning also includes an extensive use of graphics to illustrate, for example, the anticipated relationship of the building to the street or site.

Figure 5



Elements of Form-Based Code Zoning

The key components of FBC zoning include:

- Regulating Plan;
- Building Form Standards;
- Public Space/Street Standards;
- Administration; and
- Definitions.⁶

Benefits of Form-Based Code Zoning

The key benefits of FBC zoning include:

- More predictable physical result.
- Achieves vision established in planning process.
- Supports smart growth principles, including:
 - Transit-oriented development;
 - Place making;
 - Compact/mixed use development; and
 - Increased density.
- Flexibility in accordance with regulating plan.



⁶ *Form-Based Codes: A Guide for Planners, Urban Designers, Municipalities, and Developers*, Daniel Parolek, AIA, Karen Parolek, and Paul Crawford, FAICP, 2008.



Proposed TOD District

The overall purpose of the proposed rezoning, or the TOD District, is to encourage the efficient use of land, be a catalyst for revitalization, and foster a sense of place through development of a new transit-oriented, mixed use, pedestrian-friendly community. Also, the proposed TOD District aims to encourage development that would enhance the tax base and compliment the surrounding communities and uses as well as better utilize existing public transit infrastructure at Ronkonkoma Station through improved access and increased ridership. More specifically, the purpose and intent of the TOD District zoning is to:

1. Promote compact, mixed-use development in proximity to the commuter rail station
2. Encourage development that supports transit
3. Encourage a diverse mix of business, commercial, office, residential, institutional, and entertainment uses for workers, visitors, and residents
4. Encourage pedestrian-friendly environment and pedestrian-oriented commercial enterprises and consumer services that do not rely on automobile traffic to bring consumers into the area
5. Encourage flexibility in site and architectural design
6. Maintain a consistently high level of design quality
7. Encourage building reuse and infill to create higher densities
8. Promote economic development opportunities

The Regulating Plan, described below, shall govern land development activities within the TOD District. The intent of the TOD District is to promote the development of the TOD District area in accordance with the Regulating Plan.

Regulating Plan

A regulating plan is a plan that governs land development activities within the zoning district by establishing objectives, policies, and standards to promote orderly development and redevelopment within the TOD District area for the purposes of encouraging high-density, mixed-use development, housing, retail, and office uses. The TOD District Regulating Plan, presented herein as Figure 6, is based upon the following principles to guide the development of the TOD District, as defined by the Ronkonkoma Hub Planning Study:

1. Create a place rather than a series of unconnected projects.
2. TOD is created by market-driven factors rather than by the mere presence of a transit station. Retail development requires a good location, market, and design. Access to transit can strengthen the retail market.
3. There must be a mix of uses that includes retail, office, and housing, generally at a higher density. The land uses should be arranged to

concentrate activity in proximity to the transit station. The land use mix falls into two categories—housing and employment uses generate transit ridership, and convenience retail and service uses support the riders and area residents.

4. Design guidelines, pedestrian amenities, and streetscape improvements are important considerations.
5. Parking standards must be carefully considered to include structured parking, common parking areas, and/or shared parking.
6. A mix of housing types and price levels is important.
7. Public-private partnerships can enhance TOD efforts.

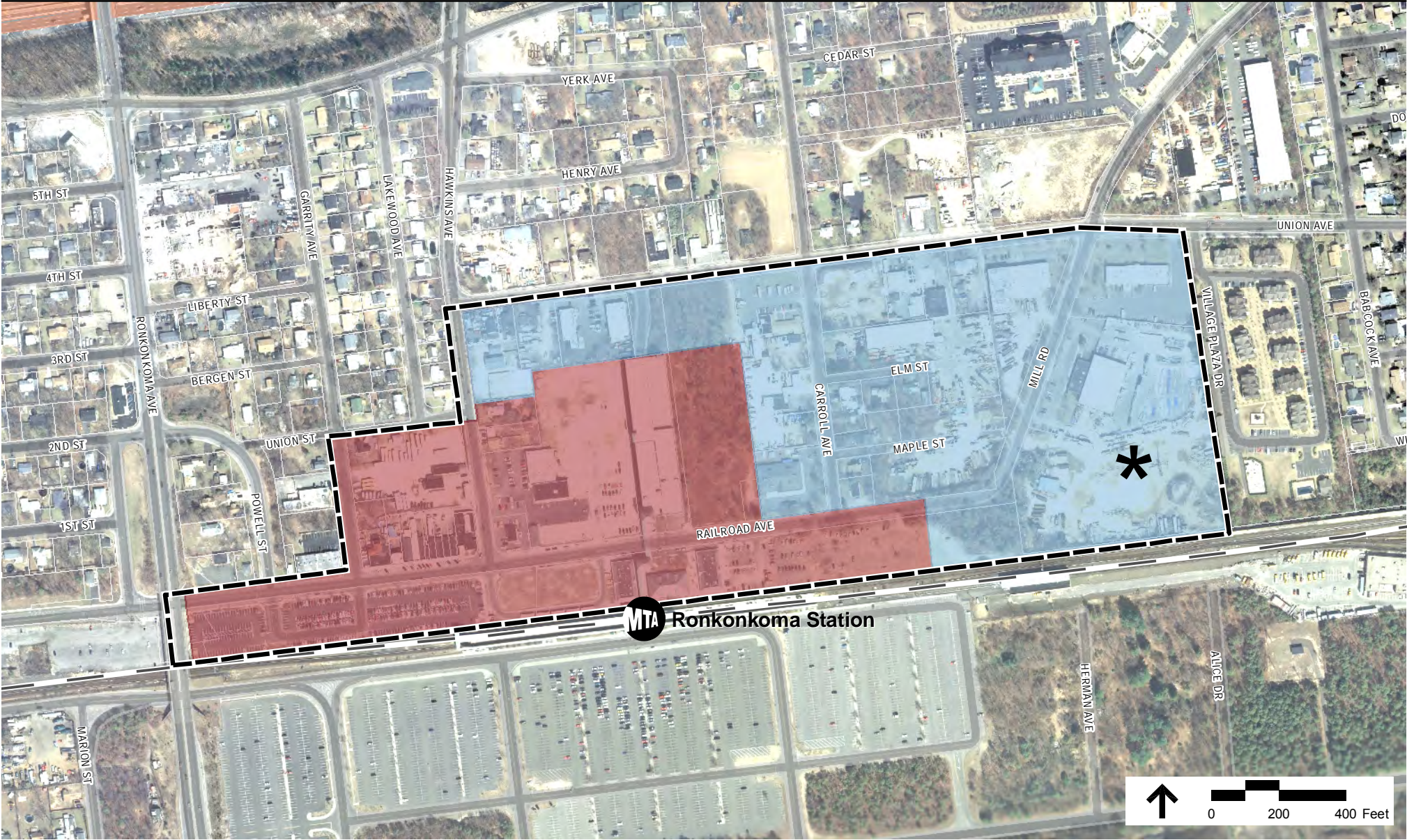
The Regulating Plan, presented in Figure 6, and the Ronkonkoma Hub Planning Study, when read in concert with the TOD District zoning code, establish a comprehensive land use plan for development or redevelopment within the TOD District area. In the review of all new development subject to these provisions, the Planning Board shall rely on the guidelines and objectives expressed in the Regulating Plan for the administration and enforcement of the TOD District.

As shown in the Regulating Plan (Figure 6), the proposed sewage treatment plant falls within the Neighborhood Zone. If the site is not used for the sewage treatment plant, any proposed development of that site shall be completed in conformance with the building form standards for the Neighborhood Zone.

Permitted Uses

Permitted uses of the proposed TOD District include:

1. Townhouses
2. Duplexes
3. Multi-family housing
4. Live/work dwelling units
5. Mixed use developments
6. Professional offices such as those of doctors, lawyers, architects and engineers
7. Retail businesses such as, but not limited to grocery, drug, apparel, variety, furniture, or sporting goods store
8. Restaurants and eating and drinking establishments where most food and drink is intended to be consumed on the premises at tables, counters, or bars
9. Personal services such as barber shops, beauty salons, laundry and dry cleaning establishments
10. Health club
11. Business services such as banks and other financial institutions, real estate and insurance offices
12. Accessory buildings and uses
13. Child care facilities



Data sources:
Assessors Parcels, LIRR and Zoning – Suffolk County GIS
Basemap – Town of Brookhaven, Long Island, NY
Land Use – Field verification by VHB, Inc., 2010.

Legend

- Main Street Zone
- Neighborhood Zone

* Note that if this site is not used for the Sewage Treatment Plant (STP), it will be developed in conformance with the Neighborhood Zone.



Figure 6
TOD District Regulating Plan

Ronkonkoma Hub
Transit-Oriented Development

14. Museum and similar cultural facility of a non-commercial nature
15. Home occupations

Additionally, no new industrial uses shall be permitted in the TOD District; however, industrial uses existing in the TOD District at the time of adoption shall be allowed to continue to exist. Any pre-existing nonconforming uses or structures shall be governed by Section 85-372 of the Brookhaven Zoning Ordinance.

Building Form Standards

The goal of the Building Form Standards (“BFS”) is the creation of a vital, and coherent public realm through the creation of good street-space. The intent of these form standards is to shape the specific physical and functional character of the TOD District. The form controls on building frontages work together to frame the street-space while allowing greater functional and operational freedom behind their facades. The building form standards aim for the minimum level of control necessary to meet this intent.

The BFS set the basic parameters governing building construction, including the building envelope (in three dimensions) and certain required or permitted functional elements, such as fenestration (windows and doors), stoops, balconies, front porches, and street walls. The BFS also establishes the rules for development and redevelopment on private lots. The Regulating Plan (Figure 6) identifies the building form standard for all private building sites within the TOD District.

Table 2 presents the building form parameters for each zone and Figure 7 shows the building form locations.

Table 2
Intent and Building Form Parameters of the TOD District Zones

	Main Street Zone	Neighborhood Zone
Purpose	To enhance the vibrant, pedestrian-oriented character of Railroad Ave. by creating a “main street” pedestrian friendly commercial area	To encourage a variety of housing types to enable a diversity of residents in a manner that yields medium to high densities that will help support the transit facilities and commercial uses in the surrounding zones
Use Mix	Vertical mixed use with retail on the ground floor and residential or commercial above	Primarily residential area that provides the core residences in medium to high density building types and allows for a limited amount of ground floor commercial use and live/work units
Heights	3 – 5 stories	2 – 4 stories
Parking	Building over grade level parking and/or parking lot	Building over grade level parking or parking lot
Location ¹	A, B, C	D, E, F, G, H

¹ Refer to Figure 7.

General Provisions

The Ronkonkoma TOD District code includes two building form standards – Main Street and Neighborhood. The following standards apply to all building forms, unless expressly stated otherwise within an individual BFS.

Transitions

When the BFS designation shown on the Regulating Plan changes along a property’s required building line (“RBL”), the property owner has the option—for that property’s street frontage only—of applying either BFS for a maximum additional distance of fifty (50) feet in either direction along the RBL.

Building Height

The height of all buildings is measured in stories, with an ultimate limit in feet, measured from the mean ground level of the established grade at the base of the building to the mean roof level (see definition of building height). The maximum building height shall not exceed five (5) stories or sixty-five (65) feet for areas A, B, and C and four (4) stories or fifty (50) feet for areas D, E, F, G, and H (Figure 7). Chimneys, mechanical equipment, antennas, skylights, bulkheads, tanks, or solar panels shall not be considered part of the height of the building if they do not extend more than four (4) feet above the specific height limit, but shall be shielded from view from the street level. Where a site abuts an existing single family district, a landscaped berm, at least four (4) to six (6) feet in height, shall be constructed.

Siting of Buildings

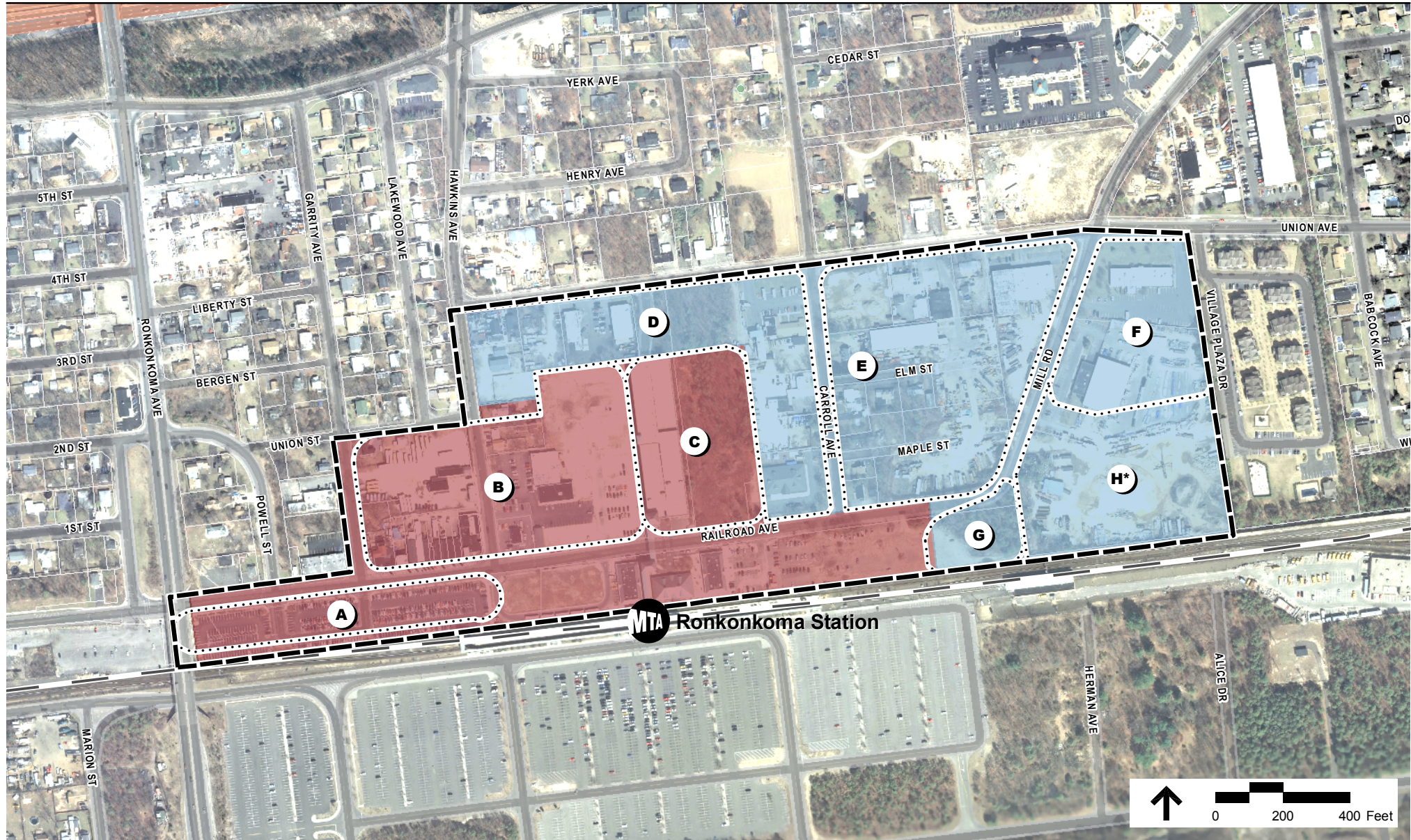
- Within thirty (30) feet of a block corner, the building facade shall be built to the RBL, unless otherwise specified in the BFS.
- A street wall shall be required along any RBL frontage that is not otherwise occupied by a building, unless otherwise designated in the BFS or Regulating Plan. A required street wall shall be located not more than eight (8) inches behind the RBL.
- The RBL, designated on regulating plan as an absolute line, incorporates an offset area (or depth) of twenty-four (24) inches into the buildable area allowing for jogs, facade articulation, etc.
- Unless otherwise designated herein, where the facade is placed within that twenty-four (24) inch depth, it shall be considered to be “built-to” the RBL.
- No part of any building may be located outside of the buildable area except overhanging eaves, awnings, stoops, bay windows, handicapped ramps, signage or balconies, or other architectural features as approved by the Planning Board.
- No part of any building may be located outside of any designated lot building limit.
- There are no side yard setbacks. No part of any building, including its architectural features, shall extend beyond the side or rear property lines.
- Curb cuts or driveways shall be located at least seventy-five (75) feet away from any block corner or alley access point on the same block face.

Public Space, Street and Streetscape Standards

Public space and street standards shape the relationship of the public realm to the buildings and include design guidelines related to thoroughfares and civic spaces, including street, sidewalk and/or bicycle lane widths, landscaping, signage, site furnishings, and lighting. Form-Based Codes consider roads to be the primary form of public space in a community and place a great deal of emphasis on their design in order to achieve a balance between the roadway function and the character intent for a specific area within the Regulating Plan. Because they emphasize design speed rather than traffic volume as a metric, typical FBC street standards provide for safe and convenient pedestrian access and walkability. Pedestrian access is incorporated into plans for new construction of buildings, parking areas and landscaping.

Street Type Specifications

The street type specifications provide typical configurations for street-spaces within the TOD District. The plans and sections presented below specify vehicular travel lane widths, sidewalks, tree planting areas, bicycle lanes, medians, and on-street parking configurations.



Data sources:
Assessors Parcels, LIRR and Zoning – Suffolk County GIS
Basemap – Town of Brookhaven, Long Island, NY
Land Use – Field verification by VHB, Inc., 2010.

Legend

- Main Street Zone
- Neighborhood Zone
- Building Form Location
- * If Sewage Treatment Plant (STP) is not built in this location.



Figure 7
TOD District Building
Form Locations

Ronkonkoma Hub Transit-Oriented Development

Street Type Designations

Figure 8 shows the permitted street types and configurations permitted within the TOD District. The numbers refer to dimensions within the street-space. Figures 9 and 10 show typical of Street type 1 (applicable to Railroad, Garrity, and Hawkins Avenues) and Street type 2 (applicable to Union Avenue, Union Street, Mill Road, and Carroll Avenue), respectively.

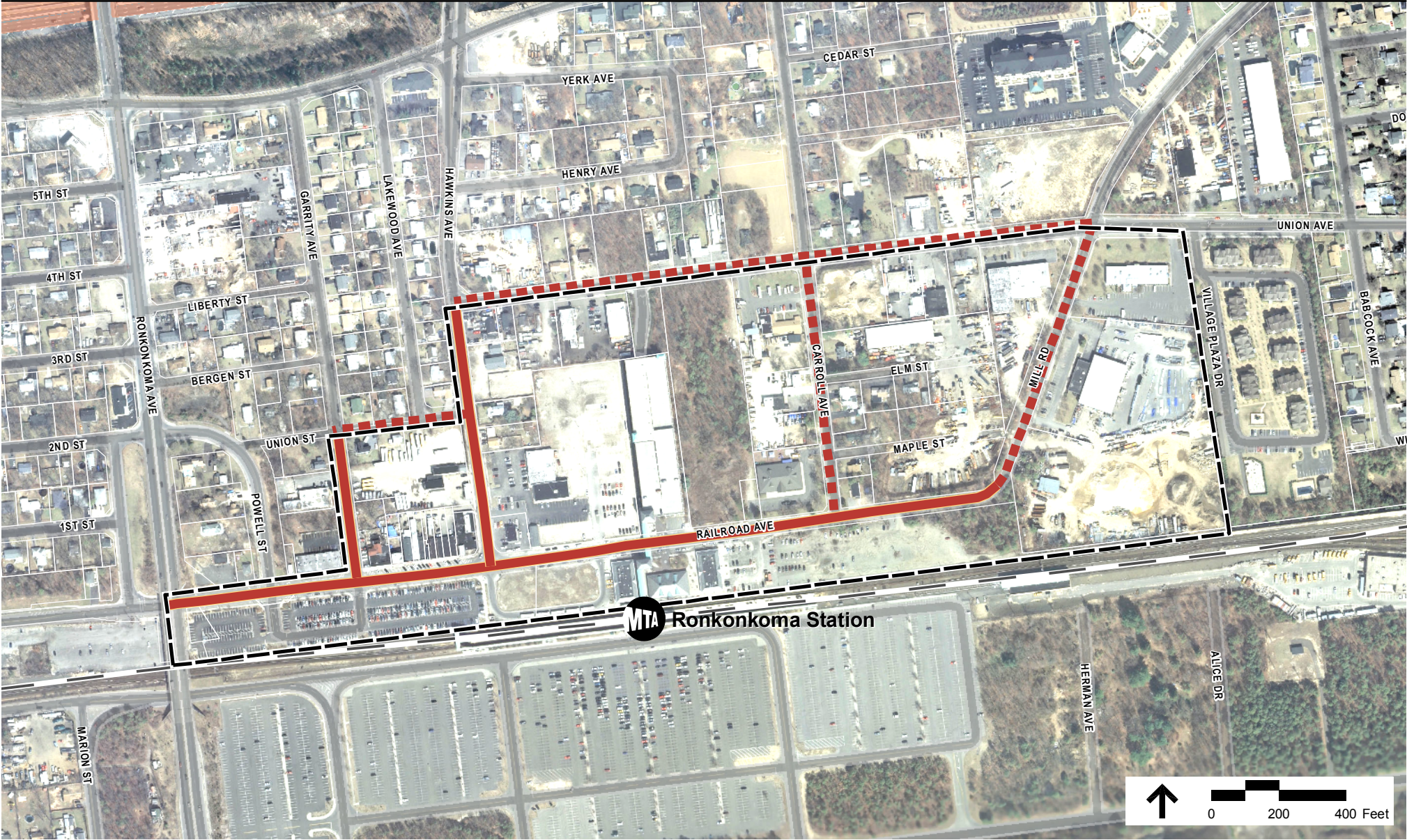
General Design Principles for Streets

1. Streets must balance the needs of all modes of transportation (auto, transit, bicycle and pedestrian) to maximize mobility, safety, and convenience for all residents and users. (Specific street elements such as road width, bicycle lanes, sidewalks, etc. can be found in Figures 9 and 10.)
2. Scale is a primary design consideration for street design elements (from signage to crossing distances).
3. An interconnected street network allows traffic capacity to be diffused and maintained across numerous streets.
4. Emergency vehicle access must be maintained, but with an interconnected street network, there will always be at least two routes of access to any lot or parcel.
5. Overall function, comfort, safety, and aesthetics of a street are more important than efficiency alone.
6. In a pedestrian-oriented area, non-vehicular traffic should be provided with every practical advantage so long as safety is not adversely affected.

Streetscape Standards

1. All plant material between the RBL and the back-of-curb shall be irrigated and maintained by the adjoining property owner.
2. All turf grass shall be sodded at installation. Vegetative groundcovers may be used in place of turf grass.
3. In addition to the lot, the owner must maintain the following areas:
 - a. The portion of the street-space between their RBL and the back of the curb.
 - b. The portion of the alley or common drive between the lot line and the edge of the alley pavement.

Mechanical and electrical equipment including, but not limited to, air compressors, pumps, exterior water heaters, water softeners, private garbage cans (not including public sidewalk waste bins), and storage tanks may not be stored or located within any street-space. Water pumps for public fountains or irrigation that are not visible are excluded from this prohibition.



Data sources:
Assessors Parcels, LIRR and Zoning – Suffolk County GIS
Basemap – Town of Brookhaven, Long Island, NY
Land Use – Field verification by VHB, Inc., 2010.

Legend

Street Type 1

Street Type 2



Figure 8
TOD District Street
Type Designations

Ronkonkoma Hub
Transit-Oriented Development

Street Trees

The following standards apply for the planting of street trees on Street Type 1. Street trees are not required for Street Type 2.

1. Each street must have street trees planted along the street tree alignment line (generally 3 to 3 ½ feet from the back of the curb) at an average spacing not greater than thirty (30) feet on center (calculated per block face). Where necessary, spacing allowances may be made to accommodate Americans with Disabilities Act (ADA) requirements, curb cuts, fire hydrants and other infrastructure elements. See Section 85-50.1 of the Brookhaven Zoning Ordinance for a list of approved street trees.
2. Required street tree planting minimum specifications are as follows:
 - a. Planting area shall be at grade or not greater than six (6) inches in height above or below the sidewalk
 - b. Any unpaved ground area shall be planted with groundcover or flowering vegetation not to exceed twelve (12) inches in height.
 - c. Street trees at planting shall be at least three (3) inches in diameter (at DBH) and at least fifteen (15) feet in overall height.
 - d. Must be “limbed up” as they gain appropriate maturity so as to not interfere with pedestrian or truck travel (minimum 7 feet clear over the sidewalk and 14 feet over the travel lanes of the street) and to maintain visibility.

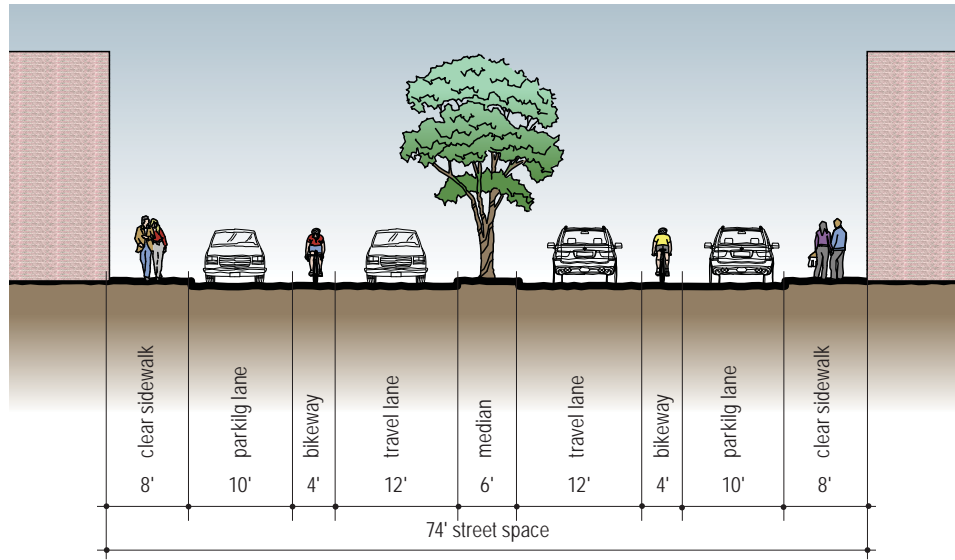
Other Streetscape Elements

1. Street lights shall be installed on both sides of streets, aligned with the street trees, at intervals of not more than eighty (80) feet, measured parallel to the street.
2. Street lights shall be between nine (9) and sixteen (16) feet above ground in height.
3. At the time of development, the developer is required to install street lights and sidewalks, as illustrated in Street Type Specifications, on the side of the street being developed.
4. Sidewalks shall be constructed to meet all Town (and ADA) specifications.
5. Street furniture shall be located along the street tree alignment line for Street Type 1, but in no case shall be allowed to obstruct the clear walkway.

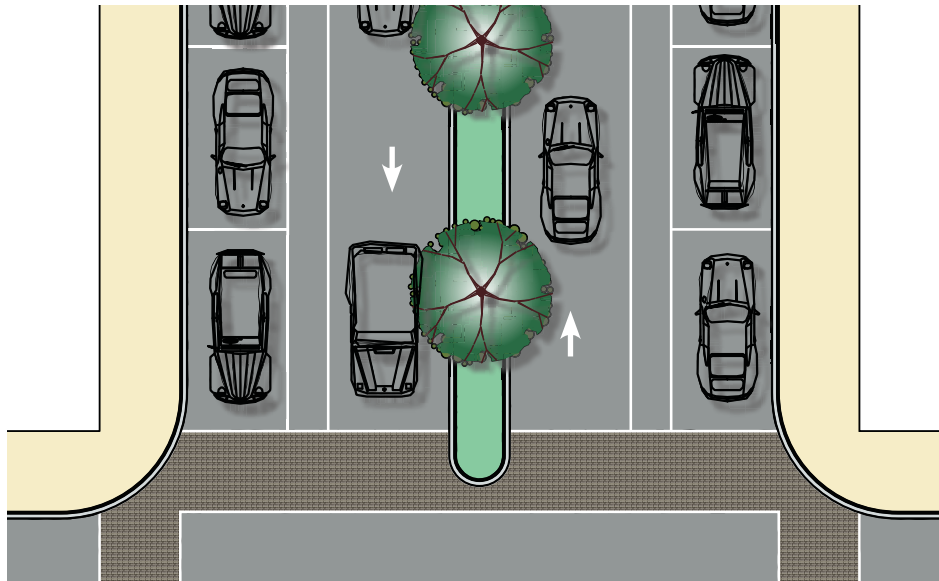
Public Space Standards

Form-Based Codes are designed to provide guidance as to the amount of open space, but also the type of space that is appropriate to the transect zone, the location, activity type and general character desired by the location. Public space standards

Section ►



Plan ►



Street Elements

GENERAL

Right of Way	74'
Curb-to-Curb Width	58'

TRAVEL LANE

Number of Lanes	2
Width	12'

BICYCLE LANES

Number of Lanes	2
Width	4'

PARKING LANES

Number of Lanes	2
Width	10'

MEDIAN

(Y/N)	Y
Width	Variable – up to 6'

SIDEWALK

Both Sides (Y/N)	Y
Width	8'



Figure 9

Street Design of Railroad, Garritty and Hawkins Ave (Street Type 1)

Ronkonkoma Hub
Transit-Oriented Development

require outdoor seating areas, scaled to the size and demands of the proposed use, where feasible. For example, a large, multi-story project should provide a patio or small plaza area located near the front entry with multiple benches and landscaping.

The TOD District public space standards apply to new development as well as the reconstruction of existing streets and other public (and publicly accessible) spaces within the TOD District area. The urban space standards establish the rules and standards for the public realm (especially streets and sidewalks). This includes property frontages and building facades. They establish an environment that encourages and facilitates pedestrian activity—"walkable" streets that are comfortable, efficient, safe, and interesting. In order to accommodate the establishment of common space open to the public such as outdoor restaurant seating, and to meet ADA sidewalk requirements, a building may be set back up to fifteen (15) feet from the RBL so that the common space is placed behind the RBL thereby allowing the minimum sidewalk requirements for each Street Type to be met.

Squares, Civic Greens, Plazas and Pedestrian Pathways

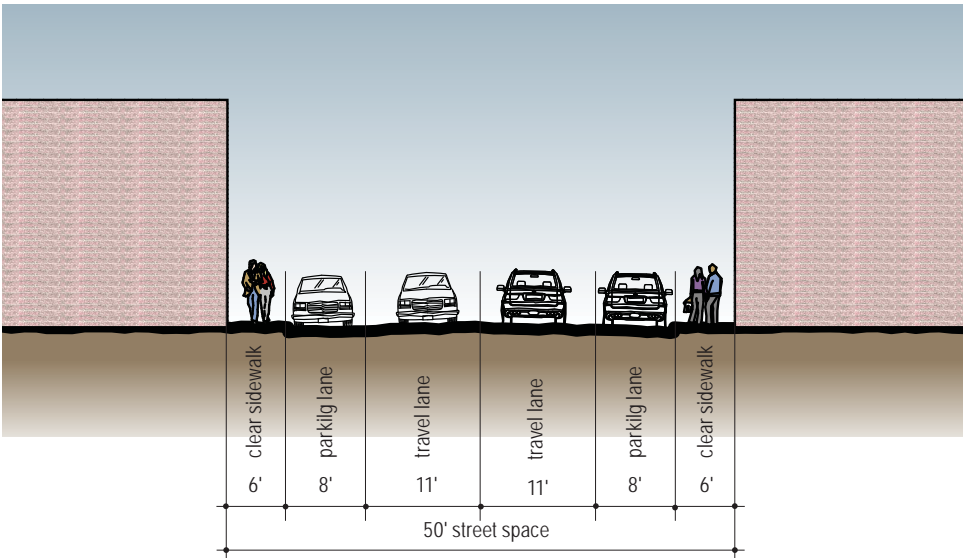
Squares, civic greens and plazas should be situated at prominent locations within each mixed-use center. The plants and trees of squares and civic greens provide a landscape and civic architecture that complement the surrounding private building architecture. Pervious paving materials (to allow oxygen for tree roots and absorb stormwater runoff) are encouraged in both squares and civic greens, and the percentage of impervious paving material is limited. Street trees should generally be of a different species than those on the connecting streets. At least 60 percent of the perimeter fronting rights-of-way shall be surrounded by street trees. Asphalt is prohibited within a square, civic green, or quadrangle.

The area within a pedestrian pathway shall be a public access easement or public right of way. The easement width for these pathways shall not be less than ten (10) feet with a paved walkway not less than six (6) feet wide and should provide an unobstructed view straight through its entire length.

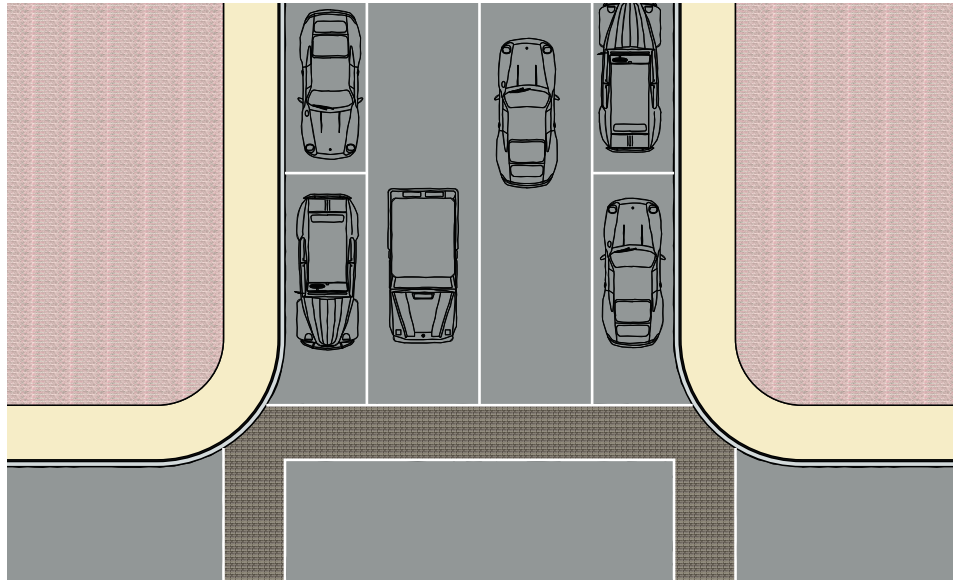
Parking Requirements

Table 3 presents the parking requirements of the proposed TOD District. On-street parking spaces shall count towards parking requirements.

Section ►



Plan ►



Street Elements

GENERAL	
Right of Way	50'
Curb-to-Curb Width	38'
TRAVEL LANE	
Number of Lanes	2
Width	11'
BICYCLE LANES	
Number of Lanes	0
Width	n/a
PARKING LANES	
Number of Lanes	2
Width	8'
MEDIAN	
(Y/N)	N
Width	n/a
SIDEWALK	
Both Sides (Y/N)	Y
Width	6'



Figure 10
Street Design of Mill Rd, Union Street,
Union Ave and Carroll Ave (Street Type 2)

Ronkonkoma Hub
Transit-Oriented Development

Table 3
TOD District Parking Requirements

Land Use	Minimum Spaces Required
Residential	1.20 spaces per dwelling unit
Restaurants	0.33 spaces per seat
Commercial	2.65 spaces per 1,000 sq. ft. of building area
Live/Work Space	1.0 spaces per 1,000 sq. ft. of building area
Office	2.86 spaces per 1,000 sq. ft. of floor area

The following guidelines are included to ensure that off-street parking areas are constructed in accordance with the district's desired design character and the provisions of Section 8.0 of the TOD District.

1. Parking lots for new construction shall be located to the side and rear of the lot. Parking is prohibited within the front yard. Parking lots that abut public rights of way or grade parking under the building shall be screened with one or a combination of the following:
 - a. A low wall made of concrete, masonry or other suitable material not exceeding a height of three (3) feet.
 - b. Raised planters planted with a minimum of 80 percent evergreen shrubs not to exceed a total height of five (5) feet (including planter).
 - c. Landscaping consisting of a mix of trees and shrubs provided that 80 percent of the shrub plantings are evergreen.
2. All off-street parking shall be located behind buildings that face on a street or public open space, and be accessed by alley or short driveway between buildings.
3. Pedestrian access shall be provided between structured parking and the public street.
4. Walls, fencing and architectural details shall complement the materials of adjacent architectural styles and the character of the development as a whole.
5. Where walls are provided, planting areas shall be a minimum width of 4 feet and should be located adjacent to the public right of way.
6. Where possible, parking areas shall be interconnected in a manner that allows the unobstructed flow of pedestrians between uses and parking areas.
7. In large parking lots (seven or more spaces) provision for bicycle racks shall be provided in locations that are safely segregated from automobile traffic and parking.

Shared Parking

Shared parking is the approved use of the same off-street parking spaces for two or more uses where peak parking demand of the different uses occurs at different times of the day, or, where various uses are visited without moving the automobile; and,

where the division of parking spaces is a net decrease from the combined total of each use's individual off-street parking requirements, if required separately.

Shared parking arrangements are subject to review and approval by the Planning Board subject to the following requirements and criteria:

1. Submission of a reciprocal agreement executed by the owners and operators of the different sources or uses ensuring the long-term joint use of such shared parking, and defining the terms upon which the parking is shared;
2. Submission of the following information shall be submitted to the Planning Board:
 - a. The hours of operation and parking demand for each use;
 - b. The hours of peak demand for parking;
 - c. A description of the character of the land use and the parking patterns of adjacent uses;
 - d. An estimate of the anticipated turnover in parking space use over a 24 hour period of time;
 - e. A site plan showing all proposed parking spaces, including the shared use spaces in the lot and the walking distance to the uses sharing the lot; and
 - f. Any other information concerning parking deemed necessary by the Planning Board to render a decision.

A determination shall be made by the Planning Board that:

- a. The shared parking is no more than 400 feet from each use sharing the parking facility;
- b. The hours of operation and peak demand of the uses involved shall not conflict; and
- c. The shared parking will provide an adequate number of spaces for the applicable uses.

In the event that the conditions for shared parking change, or if the shared parking arrangement is discontinued, the applicant shall notify the Planning Board within ten (10) days. The Town Board shall then require the applicant to meet the applicable parking requirements found in Section 8.1 of the TOD District code.

Design Guidelines

Pedestrian and Bicycle Access

Provision for safe and convenient pedestrian access shall be incorporated into plans for new construction of buildings and parking areas and should be designed in concert with landscaping plans noted below. Site plans in the Ronkonkoma TOD District should provide for continuity from sidewalks in public streets to all pedestrian entrances on the site, and walkability should be given primary importance over road speed and other access criteria. New construction should

improve pedestrian access to buildings, sidewalks and parking areas and should be completed with consideration of pedestrian safety, handicapped access and visual quality. Where appropriate, applicants are encouraged to provide pedestrian and/or bicycle paths connecting the site with abutting areas in order to promote pedestrian and bicycle circulation and safety. When parking is located in the rear, pedestrian access via a pedestrian-oriented alley or walkway through to the primary street is encouraged.

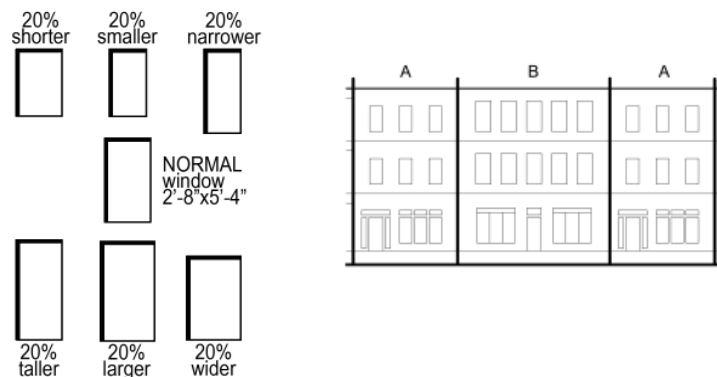
On-street bicycle parking shall be provided forward of the dooryard area. The racks shall be located in alignment with the street trees and shall not block the clear walkway. The "U" rack is recommended as the standard rack.

Building Facades

Building facades shall have the following characteristics:

1. Clearly different ground story facade composition (both framing materials and fenestration proportions).
2. Different window proportions (minimum difference 20 percent). (Refer to Figure 11 for illustrations of window proportions.)
3. Different facade composition (clearly different 'bay' rhythm, e.g. 'ABA' – 'ABBA' – 'BAAB' 'ABCBA'). (Refer to Figure 11 for an illustration of the proposed building façade.)
4. Different wall material (clearly different external wall material – color changes do not suffice).
5. Each facade composition shall include a functioning street entry door at intervals not exceeding 75 feet.

Figure 11
Building Façade Illustrations



Pedestrian Spaces and Comfort

For the purpose of providing a pedestrian-friendly environment in the Ronkonkoma TOD District, new and redeveloped buildings should provide for outdoor seating

areas, scaled to the size and demands of the proposed use, where feasible. For example, a large, multi-story project should provide a patio or small plaza area located near the front entry with multiple benches and landscaping. A mixed-use project with ground floor retail such as a restaurant may provide an area for outdoor dining which extends the indoor dining space for seasonal use. A ground floor use may provide a sidewalk bench where there is sufficient width.

Such pedestrian areas are best located when they take advantage of southern exposure and provide space that affords visual connectivity but is setback from major pedestrian flow and vehicular ways and is appropriate to the location. Outdoor sales and display areas should be well organized and located so as not to impede pedestrian circulation if located on a public walk or way. The following guidelines should be considered in the design and location of pedestrian spaces:

1. Flexible design to allow for flexible use
2. Buffering from major vehicular areas such as parking lots or main traffic ways
3. Lighting for nighttime comfort and safety
4. Appropriate street furnishings...i.e. benches, trash receptacles, planters, etc.
5. A focal element, where appropriate, such as a water feature, special landscape feature or public art installation
6. Decorative paving and seasonal planting
7. South facing locations
8. Visual connectivity, especially to important views such as an historic structure
9. Appropriately scaled to the development
10. Provide for continuity of pedestrian sidewalks

Landscaping

Landscaping shall be incorporated into new and redeveloped properties in such a way as to create visual relief and interest, provide shade for pedestrian areas and to screen parking and loading areas. Landscape plans shall be prepared by a registered landscape architect or may be accepted, where at the Planning Board's discretion the plans submitted are found to be consistent with the intent of this regulation and meet the specific guidelines as set forth herein. Landscape plans shall show the location, type, and size of all proposed plantings as well as enough of the surrounding context such that the Planning Board may determine the plan's appropriateness.

Side Yard Treatment

1. Where the distance between structures on adjacent lots is ten (10) feet or less the side yard shall be screened by a solid fence, wall or landscape treatment of evergreen plantings at a height not to exceed three (3) feet.

2. Where the distance between structures on adjacent lots is greater than ten (10) feet landscaping shall consist of a combination of materials sufficient to break up the view into the side yard but, for safety reasons, in no case should this planting be impermeable.
3. Side yards may, in the alternative, be established as pedestrian walkways to access parking areas to the rear of the building. Such walkways shall be landscaped and lighted for safety.

Water Conservation

The landscaping plan shall be developed to achieve water conservation through proper plant selection, installation and maintenance practices. The following principles serve as the primary means of achieving water conservation:

1. Appropriate planning and design
2. The use of native, non-invasive, low-maintenance plants
3. Limiting turf areas to locations where it provides functional benefits
4. Efficient irrigation systems
5. The use of soil amendments to improve water holding capacity of the soil
6. The use of mulches, where appropriate
7. The use of drought-tolerant plants
8. Appropriate and timely maintenance
9. The use of fertilizers, pesticides, herbicides, and fungicides is prohibited.

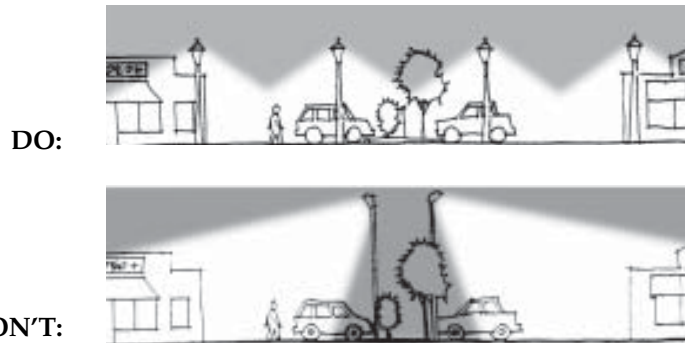
Lighting

Site lighting, security lighting and architectural/landscape lighting should provide the user with illumination levels appropriate for the designed activity (i.e. parking, walking, outdoor dining) while meeting minimum requirements. Illumination levels should also be reasonably uniform throughout the site and strive to minimize glare. Lighting fixtures shall be of a style appropriate to the character of the district, and be consistent throughout the development.

Provide adequate lighting levels in all pedestrian areas, including building entries, along walkways, parking areas, and other public areas and according to the following in lighting plans:

1. An overlapping pattern of light at a height of about ten (10) to fifteen (15) feet in lighted pedestrian areas and twenty (20) to twenty-four (24) feet in parking areas. Refer to Figure 12 for the correct and incorrect patterns of light.

Figure 12
Lighting Pattern Illustrations



2. Lighting at consistent lumens with a gradual transition to unlighted areas. Highly contrasting pools of light and dark can be temporarily blinding and should be avoided.
3. In each lighted area, design lighting levels that will allow pedestrians to identify a face fifteen (15) yards away (generally, a minimum of 4 foot-candles). Adequate lighting reduces anonymity and gives pedestrians an opportunity to choose another route. Refer to Figure 13 for an illustration of pedestrian lighting.
4. Adequate lighting at all building entrances, exits and corridors between buildings, at least four (4) foot candles during active use, especially where doors are recessed.
5. Confine site lighting to the project site; use shields or other methods to eliminate glare on adjacent properties.
6. Place light posts and standards so that they do not create hazards for pedestrians or vehicles.
7. Indicate specific lighting levels in each lighted area.

Figure 13
Pedestrian Lighting Illustration



Quality of Site Furnishings

Provide for the following site plan elements:

1. High-quality fixtures and materials in site furnishings and features, such as durable and easily maintained walls and paving.

2. Site features and furnishings that discourage vandalism. Furnishings that are easily removed or do not convey an image of care invite misuse.
3. Safety materials, such as non-slip walkway surfaces.
4. Site furnishings shall be of a style appropriate to the character of the district, and be consistent throughout the development.

Signs

1. Sign materials in the TOD District for hanging signs: Traditional-looking materials such as wood, brass, bronze, or others are to be used, as they are most appropriate. Wooden signs should be constructed of dense wood that will accept paint readily.
2. Signs shall be of a style appropriate to the character of the district, and be consistent throughout the development.
3. Signs shall comply with the requirements of the underlying zone, except that they may be flat or projected from the building a maximum of twenty-four (24) inches, provided they do not conflict with any pedestrian walks or circulation. Additional secondary signs may be permitted by the use of window applied lettering/logos, or interior signs visible through windows at the primary façade at the ground level, where at the Planning Board's discretion they are found to be consistent with the intent of the regulations.

Definitions and Administration

Section 3.0 of the TOD District provides definitions that define specific terms used throughout the code. Section 10.0 of the TOD District presents the administration component of FBC zoning, which spells out procedures for application as well as the review process, procedures for addressing non-conformities and often, procedures for addressing possible variances.



SEQRA Compliance and Theoretical Full Build Plan

Compliance with SEQRA is required for the proposed redevelopment of the Ronkonkoma Hub. The following sections describe SEQRA and the status of the review process as well as the Theoretical Full Build Plan—a potential redevelopment option that illustrates the overall type and level of development that could take place with the application of the proposed TOD District and to evaluate potential environmental impacts in accordance with SEQRA.

SEQRA and Public Review Process

All proposed “actions” in New York State, such as rezoning and/or development projects, require an environmental impact assessment. Pursuant to 6 NYCRR Part 617.2(b)(1), “actions” include:

- *Projects or physical activities, such as construction or other activities that may affect the environment by changing the use, appearance or condition of any natural resource or structure that:*
 - *Are directly undertaken by an agency; or*
 - *Involve funding by an agency; or*
 - *Require one or more new or modified approvals from an agency or agencies.*

In accordance with SEQRA and its implementing regulations, it is essential that the potential impacts of the entire development be evaluated and to establish conditions for future development. In this case, the proposed action includes the adoption of the proposed TOD District, including the rezoning of the project area to the TOD, to permit redevelopment in accordance with the TOD District, and to advance the Town’s goals in creating a compact, mixed-use TOD. The Theoretical Full Build Plan was prepared to determine the appropriate density, types of uses and the potential redevelopment sites. While the Theoretical Full Build Plan does not dictate the specific development that must take place on each parcel, it is representative of the overall type and level of development that can take place in the Ronkonkoma Hub area, and the environmental analysis of this Theoretical Full Build Plan ensures a comprehensive environmental review in accordance with SEQRA and its implementing regulations.

In May 2010, an Environmental Assessment Form (EAF) was prepared for the proposed action, and after undertaking coordinated review with all potentially involved and/or interested agencies, the Town of Brookhaven Town Board declared itself as Lead Agency for the proposed action on June 15, 2010. On July 14, 2010, a public information session was held to present the proposed TOD zoning district and the Theoretical Full Build Plan to be analyzed for potential environmental impacts. The Town Board issued a Positive Declaration on August 17, 2010 requiring preparation of a Draft Generic Environmental Impact Statement (DGEIS). A DGEIS is anticipated to be completed in the fall of 2010.

To ensure comprehensive environmental review in accordance with SEQRA and its implementing regulations, the impacts associated with implementation of the proposed action are being evaluated in the DGEIS. For the purposes of a comprehensive environmental review, detailed impact evaluations are being conducted for the potential development of the TOD for the following environmental impact categories:

- Soils and Topography

- Water Resources and Sanitary Disposal
- Ecology
- Land Use and Zoning
- Traffic and Parking
- Air Quality
- Noise
- Socioeconomics
- Community Facilities and Services
- Aesthetics
- Cultural Resources

Two alternatives—the no-action alternative and maximum build-out plan—are also being evaluated as part of the Draft GEIS. The maximum build-out plan builds on the Theoretical Full Build Plan, or the Preferred Alternative, by expanding the TOD District area south of the LIRR tracks to include parcels within the Town of Islip.

Following the submission of the DGEIS, a public hearing is to be held and a comment period provided. In response to public comments on the DGEIS, a Final GEIS is anticipated to be filed thereafter. Finally, a Findings Statement would be issued, which would conclude the SEQRA process.

Theoretical Full Build Plan

The Theoretical Full Build Plan is a potential redevelopment option that illustrates overall type and level of development that could take place with the application of the TOD District – a tool the Town creates to implement the Ronkonkoma Hub Vision. Other types and combinations of mixed use development are possible and allowed. Also, the Theoretical Full Build Plan is a concept plan created for the purpose of evaluating impacts associated with proposed TOD District, pursuant to SEQRA. Figure 14 illustrates the Theoretical Full Build Plan. Table 4 summarizes the Theoretical Full Build Plan development program that would be allowed under the TOD District.

Table 4
Theoretical Full Build Plan Program Summary

Use Type	Approximate Size
Residential	615 units
Retail	61,000 sq. ft.
Restaurants	200 seats
Office	50,000 sq. ft.
Health Club	30,000 sq. ft.
Parking	2,701 spaces
Sewage Treatment Plant	±5 acres

The Theoretical Full Build Plan proposes redevelopment of parcels within the Town of Brookhaven. As part of the Ronkonkoma Hub Planning Study, land south of the



Legend

- Study Area
- Long Island Rail Road

Note: Parking based on ITE parking generation rates as follows:

- Res:** 1.33 Spaces/Unit
- Office:** 2.84 Spaces/Unit
- Retail:** 2.65 Spaces/Unit
- Restaurant:** 1 Space/3 Seats

Note: Study Area totals are as follows...

Brookhaven: 53.73 Acres



Data sources:
Aerial Imagery – New York State Geographic Information Systems
Assessors Parcels, LIR Rail, Land Use and Zoning – Suffolk County GIS Basemap, Town of Brookhaven, Long Island, NY



Figure 14
Theoretical Full Build Plan
Ronkonkoma Hub
Transit-Oriented Development

LIRR tracks within the Town of Islip was also identified for redevelopment due to their proximity and relationship to the train station. The expansion of the TOD District, at the discretion of Islip, would further the goals of compact, mixed-use, pedestrian-friendly, transit-oriented development, therefore, benefiting the Ronkonkoma Hub area as a whole.

Figure 15 shows two renderings of the Theoretical Full Build Plan. One shows a view of what Mill Road could look like and the other shows a view of Railroad Avenue.

Figure 15
Renderings of Mill Road and Railroad Avenue



Implementation Strategy

The following section outlines the implementation strategy for realizing the Vision, including the preparation of a revised, more detailed market analysis, an overview of the rezoning tool and adoption process, and economic incentives in addition to rezoning that the Town will consider that aim to encourage private development.



Market Analysis and Trends

A revised, more detailed market analysis from what was originally done as part of the Ronkonkoma Hub Planning Study was conducted to reevaluate the market conditions to determine what ultimately could be supported in the TOD District area. The market analysis guided the development of the program mix in the Theoretical Full Build Plan (evaluated as part of SEQRA and to support the proposed TOD District). The market analysis suggests there is support for the uses identified by the

full build and maximum build out concepts.⁷ Refer to Appendix A for the full market study.

Key Findings by Market Sector

The market analysis revealed the following key findings by market sector.

Residential Market Key Findings

- The TOD District area is situated within a primary market area (Towns of Brookhaven and Islip) and secondary market area (Suffolk County) of which the majority of demand for new housing will emerge from the primary market area, with the next largest source of demand coming from the secondary market area.
- It is estimated that the majority of demand will emerge from the middle two-thirds of this range (households earning between approximately \$50,000 and \$130,000).⁸
- In 2009, there was an estimated 337,000 target market households in the primary and secondary study areas combined. By 2019, it is projected that nearly 11,000 households will be added in these areas.
- Top socioeconomic groups in the market areas are similar in that most households are relatively affluent; consists of married couples; are headed by empty nesters (couples without children and baby boomers); live in older single-family homes; commute; and enjoy shopping, dining out, and outdoor activities.
- The TOD District area could capture a modest six to seven percent of household growth in the primary and secondary market areas through 2019, which would support the development of the 615 residential units, as identified in the Theoretical Full Build Plan or even the 808 units identified in the maximum build out plan alternative.
- To appeal to the target demographic, new units should offer a broad range of amenities, including both in-unit amenities (e.g. architecturally distinctive features, private entries, gourmet kitchens, etc.) and community/station area amenities (e.g. convenient services such as child care, pet care, and auto care, as well as destination shops and restaurants).⁹

▼
⁷ *Market Analysis: Ronkonkoma Hub Transit-Oriented Land Use & Implementation Plan and GEIS*, prepared for the Town of Brookhaven, prepared by BBP & Associates, LLC, August 2010.

⁸ The target market of households most likely to prefer multi-family housing near transit includes households earning \$35,000 to \$150,000 as this is an income range that can afford current market rate rents and purchase prices.

⁹ Fairfield at Ronkonkoma development, a rental townhouse community situated to the east of the transit station, is a model for relatively higher density housing catering to the needs and preferences of target market households for the TOD District. The development has enjoyed an extremely high occupancy rate and high rental rates (in the range of \$1,875 to \$2,480), which suggest demand is strong for this type of housing near the train station.

Retail and Restaurant Market Key Findings

- The TOD District area is situated within four associated trade areas: the convenience goods primary trade area (3-mile radius, roughly equal to a 5-minute drive), the convenience goods secondary trade area (Suffolk County), the shoppers goods primary trade area (5-mile radius, roughly equal to a 10-minute drive), and the shoppers goods secondary trade area (Suffolk County).
- Two classifications of retail goods and services may be offered within the TOD District: convenience (e.g. food stores, limited service eating places, etc.) and shoppers goods (e.g. clothing, home furnishings, etc.).
- Retail spending in each trade area is strong and projected to grow as disposable income rises.
- Estimated 2009 retail spending levels on convenience goods were \$439 million in the convenience goods primary trade area and nearly \$8 billion in the convenience goods secondary trade area. By 2014, these figures are projected to increase to \$463 million in the primary trade area and nearly \$8.6 billion in the secondary trade area.
- In 2009, shoppers goods retail spending levels were nearly \$1.6 billion in the shoppers goods primary trade area and over \$10.6 billion in the shoppers goods secondary trade area. By 2014, spending is projected to rise to nearly \$1.7 billion in the primary trade area and \$11.4 billion in the secondary trade area.
- Future retail spending could support over 51 million square feet of convenience and shoppers goods retail space in the primary and secondary trade areas (in retail store group categories conducive to downtown development) and the TOD District could capture a modest 0.16 to 0.22 percent of this supportable space over the next nine years. Such capture would support the development of the 80,875 square feet identified in the Theoretical Full Build Plan or even the 112,275 square feet identified in the maximum build out plan alternative.
- Retail store groups with current sales leakage¹⁰ include: beer, wine and liquor stores; office supplies, stationary, and gift stores; taverns; auto parts, accessories and tire stores; furniture stores; clothing stores; shoe stores; jewelry, luggage and leather goods stores; book, periodical and music stores; used merchandise stores; full-service restaurants; and special food services, and, therefore, may have a high success rate within the TOD District.
- Future households, employees and transit riders generated by new development in the TOD District area will also offer potential sources of demand for retail, but have been omitted from the analysis because it is important that the future retail uses are self-sufficient (and not reliant on the success of other types of new development). These other sources of demand instead should be viewed as an



¹⁰ An analysis of retail leakage was undertaken to understand which categories of retail are underrepresented, as illustrated by retail sales "leaked" beyond the trade area, indicating unmet demand for goods and services.

important additional source of sales that will enhance their opportunity to thrive, but not be the primary reason for such success.

Office Market Key Findings

- The primary and secondary office market areas are Suffolk County and Long Island, respectively.
- Existing office uses are minimal within the TOD District area, and represent a very small proportion of the office uses present in Suffolk County and Long Island.
- Top industry clusters in Long Island include: back office and outsourcing; biomedical; communications, software and media services; financial services; front office and producer services; and information technology services.
- Office-based employment and associated demand for office space is projected to grow in Suffolk County and Long Island by 2014. Office space supply is also projected to grow based on past trends in supply.
- To support the 49,375 square feet of office space called for in both the Theoretical Full Build Plan and maximum build out plan alternative, the TOD District will have to capture either two percent of the office space supported by office employment trends or four percent of the office space supported by supply trends.
- Industries such as real estate, rental and leasing, professional, scientific and technical services, management, and administrative support are compatible with downtown settings and, thus, should be considered targets for office space in the TOD District.



Town of Brookhaven Approval and Adoption Process

A key tool for the revitalization of the Ronkonkoma Hub, which the Town of Brookhaven has begun, is rezoning the 53.73±-acre TOD District area. Through rezoning, the Town is able to encourage transit-oriented development through the use of FBC and design guidelines. The TOD District aims to establish objectives, policies, and standards to promote orderly development and redevelopment within the TOD District area for purposes of encouraging high density mixed-use development, housing, retail, and office uses. Once the SEQRA process is completed (i.e., upon adoption of a Findings Statement), the Town Board will be in a position to make a decision on the creation of the TOD District and to rezone the area to that District.



Revitalization Tool Box

Under Phase 2 of the Ronkonkoma Hub Planning Study, various economic development programs in addition to rezoning were considered to facilitate the revitalization of the Ronkonkoma Hub. This section provides a refined list of these economic development programs most applicable to the TOD District area. Table 5 describes each tool briefly and how it applies to the TOD District area.

To set the stage for private-sector led investment in the TOD District area, the Town of Brookhaven may take action to facilitate redevelopment and revitalization. The Town can use both existing Town programs as well as adopt innovative new programs that other communities have used with success to support revitalization. Tools range from direct incentives, such as tax credits that support business expansion, to indirect incentives, such as streamlined development review processes.

Table 5
Revitalization Toolbox for TOD in the Town of Brookhaven
Existing and Potential Programs

Program	Description	Applicability
Banking Development Districts	Facilitates the opening of bank branches in areas in need of banking services, resulting in enhanced business access to capital, new jobs, and increased community stability and revitalization.	Could help to spur new business creation and expansion in Ronkonkoma Hub's future commercial spaces
Commercial Incentive Corridor - Industrial/Commercial Incentives Plan (485 B and Double 485 B)	Provides tax incentives to encourage small business sector capital improvement projects	Could help to facilitate the creation and expansion of small commercial businesses in Ronkonkoma Hub's future commercial spaces
Special Districts	Serves as a collective entity to fund specific public improvements, such as sewer, sidewalk, street lighting, and road improvement projects. The Town offers organizational and management support as necessary to support revitalization.	Could be used to fund the provision of future amenities specific to the TOD District area, such as streetscape improvements
Amortization	Non-conforming uses in rezoned districts can be amortized out over a five-year period, which offers land owners predictability regarding future uses and increased incentive to invest in desired uses	Would support existing property owners to invest in expansion of uses called for in the Ronkonkoma Hub Plan, since predictability of other uses (and reduction of non-conforming) is increased
Expedited Permit Approval	Streamlined administrative approval is offered to expedite the review process, from initial application through issuance of a certificate of occupancy. Phased improvements are also offered to manage the cost of infrastructure improvements required with new development	Could facilitate the realization of the proposed development program sooner in the Ronkonkoma Hub revitalization district

Program	Description	Applicability
Community Development Commercial Façade Program	Façade rehabilitation is encouraged through Main Street Business District Design Manual	Could apply to new development and renovation in Ronkonkoma Hub, and improve the likelihood of consistent design
Public Assembly of Small Lots	The public sector may assemble obsolescent properties in order to facilitate privately-funded infrastructure improvements that benefit the entire commercial and residential community, but only with the substantial commitment of the private sector to build said infrastructure improvements	Could help facilitate a number of streetscape and other infrastructure improvements that may be needed and desired to support the Ronkonkoma Hub district's revitalization
Public Funded Civic Space	Publicly-funded recreational facilities may be sited within Main Street Districts to enliven the district with increased foot traffic for retailers	The introduction of small civic spaces could enhance the attractiveness of Ronkonkoma Hub and increase visitation by area residents
Infrastructure Improvements	Expanded infrastructure improvements associated with reconstruction or construction of federal and state transportation projects	Could apply to future improvement projects related to the transit station in Ronkonkoma Hub
Empire Zone and Industrial Use Relocation	Industrial uses within Main Street Districts are given the opportunity to relocate to industrial parks in the Empire Zone (where tax relief and expansion opportunities are offered)	Could enable industrial businesses in Ronkonkoma Hub that are not necessarily compatible with mixed-use residential, retail and office development to relocate
Municipal Sanitary Infrastructure	Creation of local sewer districts offers an opportunity for multiple developers in a single area to coordinate to provide one sewage treatment plant to support their respective projects	Would facilitate the development of multi-level mixed-use projects called for in the development program
Community Development Block Grant Enforcement Target	A Town Code Inspector is specifically assigned to specific targeted districts to enforce Town codes	Would offer a mechanism to address code violations as they occur throughout the entire TOD District area
Community Development Block Grant Housing Rehabilitation Program	Offers grants to homeowners in specific census tracts to improve residential units	Could encourage existing residents to improve their homes and take part in revitalization, if Ronkonkoma Hub includes targeted census tracts per the program

Source: Town of Brookhaven, BBPC, 2008 (updated in August 2010).

Appendix A

Market Analysis



Market Analysis

Ronkonkoma Hub Transit-Oriented Land Use & Implementation Plan and GEIS

Prepared For:

The Town of Brookhaven

Prepared By:



BBP & Associates, LLC
111 Annapolis Street
Annapolis, MD 21401

August 2010

Executive Summary

Overview

The Ronkonkoma TOD District area offers strong opportunities from a market perspective. The station is the most active of all rail stations in Long Island, with over 14,000 daily riders.¹ Market trends in surrounding market areas are positive, with households, household spending, and employment projected to grow – all key ingredients for residential, retail and restaurant, and office development.

Opportunities Identified by the Market Analysis

BBP LLC performed an evaluation of demand and supply characteristics of multifamily housing, retail and restaurant uses, and office uses in areas and jurisdictions surrounding the TOD District area over the next nine year period based upon the theoretical full build and theoretical maximum build out plan prepared by VHB.² The full build and maximum build out concepts prepared by VHB identified opportunities for:

Full Build Concept

- **Residential development** – 615 housing units.
- **Retail and restaurant development** –80,875 square feet (including 60,875 square feet of retail space and 20,000 square feet of restaurant space).
- **Office development** –49,375 square feet

Maximum Build Out Concept

- **Residential development** – 808 housing units.
- **Retail and restaurant development** –112,275 square feet (including 102,275 square feet of retail space and 10,000 square feet of restaurant space).
- **Office development** –49,375 square feet

The market analysis suggests there is support for the uses identified by the full build and maximum build out concepts.

In addition, both plans call for a two-story, 30,000 square foot health club. This type of use is not evaluated in residential, retail/restaurant, or office analyses, and has not been analyzed quantitatively given the scope of work focus on residential, retail/restaurant and office evaluations. However, from a qualitative perspective, having a health club in the TOD District area will provide synergies to support other development. The health club will be an added amenity for future residents and employees, and could bring additional visitors to the area who may then patronize retail shops and restaurants.

¹ Regional Plan Association, *Places to Grow*, January 2010.

² The Theoretical Full Build considers only the Brookhaven side, while the Maximum Build Out takes into consideration the Islip side as well.

Key Findings by Market Sector

The market analysis revealed a number of key findings by market sector.

Residential Market Key Findings

- The TOD District area is situated within a primary and secondary market area: the Towns of Brookhaven and Islip (the primary market) and Suffolk County (the secondary market). It is assumed that the majority of demand for new housing will emerge from the primary market area, with the next largest source of demand coming from the secondary market area.
- The target market of households most likely to prefer multi-family housing near transit includes households earning \$35,000 to \$150,000. This income range includes households that can afford current market rate rents and purchase prices. BBP LLC estimates that the majority of demand will emerge from the middle two-thirds of this range (households earning between approximately \$50,000 to \$130,000).
- There were an estimated 337,000 target market households in the primary and secondary study areas in 2009. By 2019, it is projected that nearly 11,000 households will be added in these areas.
- Top tapestry segments (i.e. socioeconomic groups) in the market areas include "Pleasant-ville," "Sophisticated Squires," "Wealthy Seaboard Suburbs," and "Up and Coming Families." These groups are similar in that most households are relatively affluent; consists of married couples; are headed by empty nesters, couples without children, and baby boomers; live in older single-family homes; commute; and enjoy shopping, dining out, and outdoor activities.
- The TOD District area could capture a modest 6 to 7 percent of household growth in the primary and secondary market areas through 2019. Such capture would support the development of the 615 residential units identified in the theoretical full build plan or the 808 units identified in the maximum build out plan.
- To appeal to the target demographic, new units should offer a broad range of amenities. These include both in-unit amenities (e.g. architecturally distinctive features, private entries, gourmet kitchens, etc.) and community/station area amenities (e.g. convenient services such as child care, pet care, and auto care, as well as destination shops and restaurants).
- Developers of new housing units may look to the proximate Fairfield at Ronkonkoma development, a rental townhouse community situated to the east of the transit station, as a model for relatively higher density housing catering to the needs and preferences of target market households. This community offers a variety of amenities, including recreational facilities, landscaping, optional detached garages, and gourmet kitchen and designer bath features. The development has enjoyed an extremely high occupancy rate and high rental rates (in the range of \$1,875 to \$2,480), which suggest demand is strong for this type of housing near the train station.

Retail and Restaurant Market Key Findings

- Two classifications of retail goods and services may be offered in the TOD District area: convenience (e.g. food stores, limited service eating places, etc.) and shoppers goods (e.g. clothing, home furnishings, etc.). The TOD area is situated within four associated trade areas: the convenience goods primary trade area (3-mile radius, roughly equal to a 5-minute drive), the convenience goods secondary trade area (Suffolk County), the shoppers goods primary trade area (5-mile radius, roughly equal to a 10-minute drive), and the shoppers goods secondary trade area (Suffolk County).
- Retail spending in each trade area is strong and projected to grow as disposable income rises.
- Estimated 2009 retail spending levels on convenience goods were as follows: \$439 million in the convenience goods primary trade area and nearly \$8 billion in the convenience goods secondary trade area. By 2014, these figures are projected to increase to \$463 million in the primary trade area and nearly \$8.6 billion in the secondary trade area.
- In 2009, shoppers goods retail spending levels were as follows: nearly \$1.6 billion in the shoppers goods primary trade area and over \$10.6 billion in the shoppers goods secondary trade area. By 2014, spending is projected to rise to nearly \$1.7 billion in the primary trade area and \$11.4 billion in the secondary trade area.
- Future retail spending could support over 51 million square feet of convenience and shoppers goods retail space in the primary and secondary trade areas (in retail store group categories conducive to downtown development). The TOD District area could capture a modest 0.16 to 0.22 percent of this supportable space over the next nine years. Such capture would support the development of the 80,875 square feet identified in the theoretical full build plan or the 112,275 square feet identified in the maximum build out plan.
- New retailers in the TOD District area will face competition from other retailers currently located in the trade areas. An analysis of retail leakage was undertaken to understand which categories of retail are underrepresented, as illustrated by retail sales “leaked” beyond the trade area, indicating unmet demand for goods and services. Such retail types may offer relatively stronger potential for success in the TOD District area given their underrepresentation elsewhere.
- Retail store groups with current sales leakage include: beer, wine and liquor stores; office supplies, stationary, and gift stores; taverns; auto parts, accessories and tire stores; furniture stores; clothing stores; shoe stores; jewelry, luggage and leather goods stores; book, periodical and music stores; used merchandise stores; full-service restaurants; and special food services.
- Factors beyond retail leakage will impact the odds of success of any particular store, including quality of products, customer service, marketing, and the experience offered to customers. A savvy entrepreneur that

offers superior products, service, marketing and/or experience may succeed in opening a type of store that is already well-represented in the trade areas by being a strong competitor.

- Future households, employees and transit riders generated by new development in the study area will also offer potential sources of demand for retail, but have been omitted from the analysis because it is important that the future retail uses are self-sufficient (and not reliant on the success of other types of new development). These other sources of demand instead should be viewed as an important additional source of sales that will enhance their opportunity to thrive, but not be the primary reason for such success.

Office Market Key Findings

- A new or expanding business considering Suffolk County or Long Island is likely to consider Ronkonkoma; therefore the primary and secondary market areas have been defined as Suffolk County and Long Island, respectively.
- Existing office uses are few within the TOD District area, and represent a very small proportion of the office uses present in Suffolk County and Long Island.
- Top industry clusters in Long Island include: back office and outsourcing; biomedical; communications, software and media services; financial services; front office and producer services; and information technology services.
- Office-based employment and associated demand for office space is projected to grow in Suffolk County and Long Island by 2014.
- Office supply is also projected to grow based on past trends in supply.
- To support the 49,375 square feet of office space called for in both the theoretical full build and maximum build out plans, the TOD District area will have to capture either 2 percent of the office space supported by office employment trends or 4 percent of the office space supported by supply trends.
- Businesses in growth industries that are compatible with downtown settings should be considered targets for office space in the TOD District area. Such industries include: real estate, rental and leasing; professional, scientific and technical services; management; and administrative support.



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Section 1 Introduction

1.1 Study Purpose

The market analysis is designed to review trends in the residential, retail and office markets in order to identify opportunities for development in the TOD District area. The evaluation includes review of the proposed conceptual plans for the area to determine whether market trends support the level of development in the theoretical full build as well as maximum build out plans.

1.2 Work Completed

The market analysis was developed through the completion of several tasks, including:

1. Economic and demographic profile – examination of existing and projected demographic and economic factors for the TOD District area and surrounding market areas. These factors are interwoven into the residential, retail and office market analysis sections of this report.
2. Residential market analysis – evaluation of demand, supply, and opportunities for transit-oriented housing development (e.g. multifamily dwellings).
3. Retail and restaurant market analysis – evaluation of demand, supply and opportunities for various types of retail uses and restaurants.
4. Office market analysis – assessment of demand, supply and opportunities for office space to accommodate different types of office-based industries.
5. Analysis of development potential – review of theoretical full build and maximum build out concepts and comparison to market opportunities to identify whether market trends support the concepts. This review and assessment is included in the residential, retail and office market analysis sections of this report.

Section 2 Residential Market Analysis

2.1 Market Area Definition

The Ronkonkoma Transit-Oriented development ("TOD") District area is situated at the border of the Towns of Brookhaven and Islip, two of many municipalities that comprise the Long Island residential market of Suffolk and Nassau Counties.

Consistent with the market analysis undertaken in 2008 as part of the *Ronkonkoma Hub Transit-Oriented Planning Study*, BBP LLC has assumed that the majority of demand for new housing will emerge from residents of local jurisdictions. An industry rule of thumb states that "between 50 to 75 percent of the buyers or renters in a new development come from the local community" (Urban Land Institute).

Using this reasoning, BBP LLC has defined the primary residential market area for the TOD District area (i.e. the geographic zone from which the majority of demand for new housing will emerge) as the Towns of Brookhaven and Islip. BBP LLC has also identified a secondary study area (i.e. the geographic zone from which the next highest proportion of demand for new housing will emerge) as the remainder of Suffolk County. This zone captures those households which currently drive to the Ronkonkoma Hub station and travel toward Manhattan via express rail service.

2.2 Target Market Profile

The target market includes households likely to reside in multi-family housing units near transit. To identify these households, BBP LLC examined the current supply of multi-family housing in the Towns of Brookhaven and Islip, including recently constructed multi-family housing in the TOD District area.

Through a reconnaissance survey of current housing supply, BBP LLC has determined that:

- The majority of rental multi-family housing units are one- and two-bedroom units;
- The average rental rate for a one-bedroom unit was \$1,370, while a two-bedroom unit was \$1,680 as of first quarter 2010;
- Newly constructed rental complexes in Suffolk County have been found to command a premium, with average rental rates roughly one-third higher than average rental rates for all multi-family units (according to the Suffolk County Department of Planning *Demographic, Economic and Development Trends* report dated November 2008);
- Market rental rates for multi-family housing in the two towns range, on average, from \$1,110 for a studio apartment up to \$2,400 for a three-bedroom unit;
- The majority of new for-sale multi-family housing units have two to three bedrooms;
- List prices for new for-sale condominiums range from approximately \$270,000 to \$470,000;
- The median list price of residential property in the area surrounding TOD District area was \$380,000 in 2010;

- Households earning approximately \$40,000 to \$100,000 can afford current rental rates, assuming gross monthly housing costs (e.g. monthly rent and utilities) does not exceed 30 percent of gross income; and
- Households earning approximately \$80,000 to \$150,000 can afford currently listed new condominium units, assuming monthly housing costs (e.g. monthly mortgage, taxes, utilities, and HOA fees) do not exceed 30 percent of gross income and assuming a 5 percent down payment is made.

Given these current conditions, BBP LLC has identified the target market for new multi-family housing in the TOD District area as households earning \$35,000 to \$150,000 annually, which spans the range of households that can afford current rental rates up through current for-sale prices. We believe the majority of demand within this range will come from the middle two-thirds of the range (approximately \$50,000 to \$130,000).

2.3 Market Area Demographics

To evaluate the depth of potential demand for multi-family housing in the TOD District area, BBP LLC performed an overview demographic analysis of estimated existing and projected future households in the primary and secondary market areas.

Key questions addressed through the demographic analysis include:

- How many estimated existing households meet the target market definition (e.g. how many earn \$35,000 to \$150,000 annually)?
- How many projected future households meet the target market definition in the short-term (e.g. 5 years)? How many in the long-term (e.g. 10 years)?
- What lifestyle and housing preferences do these households share?

Existing and Future Households

In 2009, there were an estimated 337,000 “target market” households earning \$35,000 to \$150,000 in the primary and secondary market areas. By 2014, total households meeting the target market definition could rise to 342,000 households if households are added at an annual rate of 0.15% to 0.45%, as current projections suggest (the lower growth rate is projected for the secondary market area, while the higher growth rate is projected for the primary market area). If this annual growth continues at the same pace through 2019, target market households could increase to a total of nearly 348,000 households, as illustrated in the following table.

Existing and Future Households					
Target Market: Earning \$35,000 to \$150,000					
TOD District Market Areas					
	Total			Net Increase	
Market Area	2009	2014	2019	2009-2014	2014-2019
Primary	191,592	195,973	200,454	4,381	4,481
Secondary	145,111	146,171	147,239	1,060	1,068
Total	336,702	342,144	347,693	5,442	5,550

1/ BBP LLC projected 2019 households using 0.45% annual growth rate for the primary market area, and 0.15% annual growth rate for the secondary market area, in accordance with compound growth rates projected by ESRI for the target market areas from 2009 to 2014

2/ Secondary market area excludes primary market area to avoid double-counting

Source: ESRI Business Information Solutions, BBP LLC, 2010

Given these current growth projections, the TOD District primary and secondary market areas could add a net 5,442 households earning \$35,000 to \$150,000 from 2009 to 2014 and another 5,550 households earning at this income range from 2014 to 2019. Therefore, the total potential market demand for multi-family housing could be up to 10,991 households.

Top Tapestry Segments

To identify the lifestyle characteristics and housing preferences of local residents, BBP LLC performed an evaluation of top household tapestry segments. ESRI Business Information Solutions uses demographic information such as labor force characteristics, median income, age, and spending habits to categorize neighborhoods according to a trademarked Community Tapestry classification system.³ The following table identifies the top tapestry segments in the TOD District market areas, with tapestry segments grouped by common traits.

³ ESRI is a subscription-based market research and analysis service.

TOD District Market Areas (Top Tapestry Segments)		
	Towns of Brookhaven and Islip	Suffolk County
High Society	25.7%	30.5%
Top Rung	0.6%	1.5%
Suburban Splendor	1.8%	2.6%
Connoisseurs	1.8%	4.6%
Boomburbs	0.7%	0.4%
Wealthy Seaboard Suburbs	10.1%	15.2%
Sophisticated Squires	10.4%	5.8%
Exurbanites	0.3%	0.4%
Upscale Avenues	43.3%	40.7%
Urban Chic	0.7%	3.0%
Pleasant-Ville	37.7%	34.6%
In Style	3.0%	2.0%
Enterprising Professionals	1.4%	0.8%
Green Acres	0.1%	0.0%
Cozy and Comfortable	0.4%	0.3%
Family Portrait	17.4%	7.7%
Up and Coming Families	12.6%	0.7%
Milk and Cookies	1.4%	1.9%
Urban Villages	3.4%	5.1%
Senior Styles	5.7%	6.5%
Prosperous Empty Nesters	0.8%	1.1%
Silver and Gold	0.4%	1.1%
Retirement Communities	2.3%	2.7%
The Elders	1.4%	0.7%
Senior Sun Seekers	0.2%	0.2%
Heartland Communities	0.2%	0.1%
Simple Living	0.2%	0.5%
Social Security Set	0.2%	0.1%
Traditional Living	6.5%	5.6%
Main Street USA	6.0%	5.1%
Midlife Junction	0.5%	0.5%
TOTAL	98.6%	91.0%
<i>Source: ESRI Business Information Solutions, BBP LLC, 2010</i>		

The "Pleasant-ville" tapestry segment, one of several "Upscale Avenues" tapestry types, is the dominant segments in the Towns (37.7 percent) and Suffolk County (34.6 percent). "Upscale Avenues" households comprise over 40 percent of all households in the Towns and County. "High Society" tapestry types are the next most prevalent, with 25.7 percent of all Brookhaven and Islip households, and 30.5 percent of all Suffolk County households, identified as

such. The two top tapestries in this group are “Sophisticated Squires” (10.4 percent and 5.8 percent of the Towns and County households, respectively) and “Wealthy Seaboard Suburbs” (10.1 percent and 15.2 percent of the Towns and County households, respectively). The “Up and Coming Families” segment is also prevalent in the Towns, representing 12.1 percent of all households.

“Pleasant-ville” households are characterized as affluent households comprised primarily of middle-aged married couples with children; about half of households are empty nesters. Though one fifth of households receive retirement income, the majority of residents work in a variety of industries. Commuting rates are high in this tapestry segment, and an estimated 12 percent commute an hour or more. Most households currently live in single-family residences built in the decades following World War II. Favorite leisure time pursuits include dining out, watching sporting events, and traveling.

“Sophisticated Squires” households include many “baby boomer” married-couple families, including empty nesters. These households are among the most affluent tapestry segments identified by ESRI (grouped collectively as “High Society”). Residents are employed primarily in white-collar occupations, and many have long commutes to work. The majority of households reside in single-family structures, most of which were built between 1970 and 1989. Leisure time activities include playing sports, bicycling, photography, playing golf, and gardening.

“Wealthy Seaboard Suburbs” neighborhoods are characterized as affluent, married-couple families living in older communities in coastal metropolitan areas. Just under half of households have children. Approximately 25 percent of households collect retirement income, while most of the employed residents work in management or professional occupations. Of the 65 tapestry segments identified by ESRI, “Wealthy Seaboard Suburbs” residents are among the top five most likely to commute to work (including commuting out-of-state to work). Most households live in older neighborhoods comprised of single-family homes built prior to 1970. Leisure time is spent shopping, traveling, skiing, ice skating, and going to the theater. Popular retail destinations include Macy’s, Nordstrom, and warehouse clubs.

“Up and Coming Families” are young and affluent with younger children. Household incomes are higher than the national median, and labor force participation is high, with many dual-income households. Most households live in new single-family housing built in the past 10 years. Leisure time activities include playing sports, dining out at family restaurants, traveling, and shopping.

Common characteristics of the tapestry segments profile above include:

- Households are relatively wealthy;
- Most households consist of married couples;
- Many households are empty nester or couples without children (with the exception of “Up and Coming Families”);
- Many households are headed by baby boomers;
- Most households live in older single-family homes (with the exception of “Up and Coming Families”);
- Many households commute long distances to work; and
- Most households enjoy shopping, dining out, and outdoor activities.

Since many households commute long distances, live in older homes, and are either empty nesters or couples without children, some of these households may be interested in “downsizing” from their older single-family homes to smaller homes near transit. Such relocation would afford residents more convenient access to transit and reduce the level of maintenance required on their property, freeing up more leisure time. The baby boomer segment (age 55 and older) was highlighted, along with young adults (age 25 to 34), as a group more likely than other age groups to live in downtowns across Long Island in a recent study.⁴

2.4 Potential Market Capture

Living near transit in downtown settings is becoming more desirable in Long Island and throughout the nation. This desirability is emerging in part from demographic trends, including the aging of baby boomers and the preference of younger adults for mixed-use environments.⁵ These trends are borne out in Long Island, where most downtowns are comprised of slightly more baby boomers (residents over age 55) and more young adults (residents aged 25-34).⁶

The success of recent housing development at the TOD District area bodes well for future transit-oriented, multi-family housing around the station. When Fairfield at Ronkonkoma Hub was constructed in 2007, the project was quickly leased, and occupancy has remained high through 2010, indicating strong demand for multi-family housing in the area (particularly luxury rental housing).

The Ronkonkoma Hub station is also the busiest commuter train stations in Long Island, with an average daily ridership of over 14,600 riders.⁷ Offering the easternmost express trains to Manhattan on the Main Line, The station has attracted tens of thousands of daily commuters from the surrounding area and eastern Suffolk County. These commuters should be targeted as one market segment for multi-family housing in the TOD District area.

Demographic trends in the Towns of Brookhaven and Islip and Suffolk County suggest households in the target market (i.e. those earning \$35,000 to \$150,000) will grow over the next five and ten year periods. Growth of these households could serve as a key source of demand for multi-family housing in the station area.

Given the strong commuter activity in the TOD District area, the recent successful multi-family housing development in the area, and the growth of households in surrounding towns and Suffolk County, there are strong opportunities for new multi-family housing in the TOD District area.

To support the 615 residential units identified in the theoretical full build plan, the TOD District area will need to capture a modest 6 percent of the household growth that occurs in the primary and secondary market areas over the next ten years. An additional 1 percent of this growth will need to be captured to support the 808 residential units identified in the maximum build out plan (for a total capture rate of 7 percent). BBP LLC believes these relatively

⁴ Regional Plan Association, *Places to Grow*, January 2010.

⁵ Urban Land Institute, “Higher-Density Development: Myth and Fact,” 2005.

⁶ *Places to Grow*, January 2010.

⁷ Ridership data provided in *Places to Grow*, January 2010.

modest capture rates are achievable in the TOD District area given the area's many strengths identified as part of the residential market assessment.

Proposed Residential Development and Required Capture of Household Growth			
TOD District Area			
Concept	Residential Units	Net Increase in HH (2009-2019, Primary and Secondary Market Areas)	Required Capture Rate
Full Build	615	10,991	6%
Maximum Built Out	808		7%

Source: ESRI Business Information Solutions, BBP LLC, 2010

BBP LLC recommends that these units include a balanced mix of rental and owner-occupied units. To offer a competitive edge and appeal to target households, BBP LLC recommends that new units and the surrounding TOD District area provide a rich array of amenities. According to the Urban Land Institute, households interested in transit-oriented lifestyles seek amenity-rich living environments couples with the convenience of proximity to transit. Households prefer: neighborhoods with urban-style amenities (even in suburban settings); proximity to restaurants, shops, and cultural and sporting venues; historic or architecturally unique buildings; and smaller lots.

According to the National Multi Housing Council, amenities found in innovative new housing developments include:

- Architecturally distinctive features
- Compact lots
- Private entries
- Direct-entry garage parking
- Nine-foot ceilings
- Bay windows and skylights
- Two-level units
- Gourmet kitchens
- Deluxe master baths
- Full-sized laundry facilities
- Keyless entry systems
- Units wired for integrated telephone, cable, and internet service
- In-wall speaker systems with theater-quality sound
- Business centers, conference facilities
- Media rooms
- Community gardens
- Car wash and car detailing facilities
- Daycare and children's activities
- Pet daycare and dog walking services

The TOD District area already offers several community amenities found in innovative new housing developments, including auto care and daycare services. Additional services and retail offerings would enhance the appeal of the

area to new residents. Destination shops and restaurants in particular are a type of use not well-represented in the area that would complement the existing convenience retail stores and services in the area.

2.5 Summary

The TOD District area offers a strong opportunity for multi-family housing development oriented to transit. Market trends in the surrounding towns and county are favorable, with short- and long-term household growth of the target demographic (e.g. households earning \$35,000 to \$150,000) projected through 2014, and from 2014 to 2019. Such growth should fuel demand for new housing units focused around the transit station in the TOD District area.

Key findings from the housing demand and opportunities analysis include:

- The TOD District area is situated within a primary and secondary market area: the Towns of Brookhaven and Islip (the primary market) and Suffolk County (the secondary market). It is assumed that the majority of demand for new housing will emerge from the primary market area, with the next largest source of demand coming from the secondary market area.
- The target market of households most likely to prefer multi-family housing near transit includes households earning \$35,000 to \$150,000. This income range includes households that can afford current market rate rents and purchase prices. BBP LLC estimates that the majority of demand will emerge from the middle two-thirds of this range (households earning between approximately \$50,000 to \$130,000).
- There were an estimated 337,000 target market households in the primary and secondary study areas in 2009. By 2019, it is projected that nearly 11,000 households will be added in these areas.
- Top tapestry segments (i.e. socioeconomic groups) in the market areas include "Pleasant-ville," "Sophisticated Squires," "Wealthy Seaboard Suburbs," and "Up and Coming Families." These groups are similar in that most households are relatively affluent; consists of married couples; are headed by empty nesters, couples without children, and baby boomers; live in older single-family homes; commute; and enjoy shopping, dining out, and outdoor activities.
- The TOD District area could capture a modest 6 to 7 percent of household growth in the primary and secondary market areas through 2019. Such capture would support the development of the 615 residential units identified in the theoretical full build plan or the 808 units identified in the maximum build out plan.
- To appeal to the target demographic, new units should offer a broad range of amenities. These include both in-unit amenities (e.g. architecturally distinctive features, private entries, gourmet kitchens, etc.) and community/station area amenities (e.g. convenient services such as child care, pet care, and auto care, as well as destination shops and restaurants).

- Developers of new housing units may look to the proximate Fairfield at Ronkonkoma development, a rental townhouse community situated to the east of the transit station, as a model for relatively higher density housing catering to the needs and preferences of target market households. This community offers a variety of amenities, including recreational facilities, landscaping, optional detached garages, and gourmet kitchen and designer bath features. The development has enjoyed an extremely high occupancy rate and high rental rates (in the range of \$1,875 to \$2,480), which suggest demand is strong for this type of housing near the train station.

Section 3 Retail and Restaurant Market Analysis

3.1 Trade Area Definition

A trade area is the geographic area from which the majority of a retail establishment's customers originate. Trade areas differ based on the type of products offered at the retail establishment. For example, the trade area for a convenience good such as milk is typically smaller than the trade area for a shoppers good, or "comparison" good, such as furniture or apparel. The distance a consumer will travel to buy a gallon of milk is significantly shorter than the travel distance tolerated to buy a new sofa.

Another factor affecting the trade areas for convenience and shoppers goods is comparison shopping. To purchase a gallon of milk, one generally does not need to compare brands or stores. To purchase a piece of furniture, consumers are willing to travel further distances to compare various merchandise.

These factors impact the designation of trade areas for the TOD District area, which currently offers a small cluster of convenience goods oriented to commuters. This current mix of stores does not, however, preclude the TOD District area from eventually adding shoppers goods. Therefore, **two primary trade areas** have been established for the TOD District area:

1. **Convenience goods primary retail trade area** – defined as all the land within a 3 mile radius of the train station, and roughly equal to an easy 5-minute drive of the train station (which is the typical drawing area of neighborhood-oriented convenience retail establishments, which often include food stores, drug stores, personal service establishments such as dry cleaning and beauty parlors, takeout food businesses, and small sit-down restaurants).
2. **Shoppers goods primary retail trade area** – defined as all the land within a 5 mile radius of the train station, and roughly equivalent to a 10-minute driving distance (which is the typical drawing area of community-oriented retail destinations, which often include destination restaurants, clothing and apparel stores, home furnishings and specialty stores).

Not all sales to TOD District area retail establishments (both existing and future) will draw from these primary trade areas. Establishments situated around the train station already take advantage of the high volume of commuters that patronize the station, including those that reside beyond a 5-mile radius of the station. Most of these commuters reside in eastern areas of Suffolk County; therefore, Suffolk County may be viewed as a **secondary trade area** for both convenience and shoppers goods.

3.2 Household Spending Profile

Convenience Goods

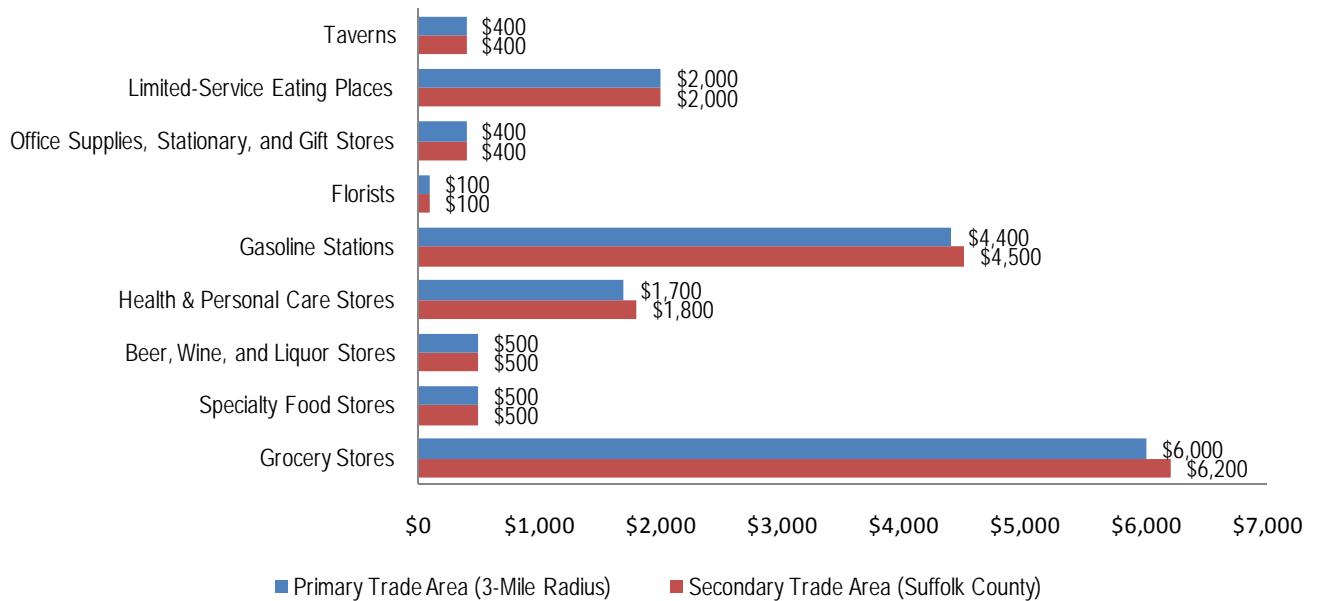
Residents of the convenience goods primary and secondary trade areas surrounding the TOD District area offer strong disposable income to support convenience retailers. Within a 3-mile radius of the station, approximately 27,500 households offer \$439 million in annual convenience goods retail spending potential (\$16,000 per household). Residents of Suffolk County, which total over 488,000, offer a combined nearly \$8 billion in annual convenience goods retail spending potential (\$16,400 per household).

Trade Area Household Spending Profile				
Convenience Goods, 2009				
	Primary Trade Area (3-Mile Radius)		Secondary Trade Area (Suffolk County)	
	Households:	27,514	Households:	488,298
	Total Expenditures	Spending Per Household	Total Expenditures	Spending Per Household
Grocery Stores	\$166,000,000	\$6,000	\$3,010,000,000	\$6,200
Specialty Food Stores	\$14,000,000	\$500	\$260,000,000	\$500
Beer, Wine, and Liquor Stores	\$14,000,000	\$500	\$261,000,000	\$500
Health & Personal Care Stores	\$47,000,000	\$1,700	\$870,000,000	\$1,800
Gasoline Stations	\$121,000,000	\$4,400	\$2,197,000,000	\$4,500
Florists	\$2,000,000	\$100	\$36,000,000	\$100
Office Supplies, Stationary, and Gift Stores	\$10,000,000	\$400	\$174,000,000	\$400
Limited-Service Eating Places	\$55,000,000	\$2,000	\$1,000,000,000	\$2,000
Taverns	\$10,000,000	\$400	\$186,000,000	\$400
TOTAL	\$439,000,000	\$16,000	\$7,994,000,000	\$16,400

Source: ESRI, BBP LLC, 2010

Top spending categories of households in both the convenience goods primary and secondary trade areas include: groceries, health and personal care products, gasoline, and limited-service eating places.

Convenience Goods Spending Per Household, 2009



Source: ESRI, BBP LLC, 2010

These residents' purchasing power may offer potential to support new convenience goods establishments in the TOD District area. Small-scale versions of these stores will be the most appropriate fits for the downtown scale and character envisioned for the TOD District area.

Shoppers Goods

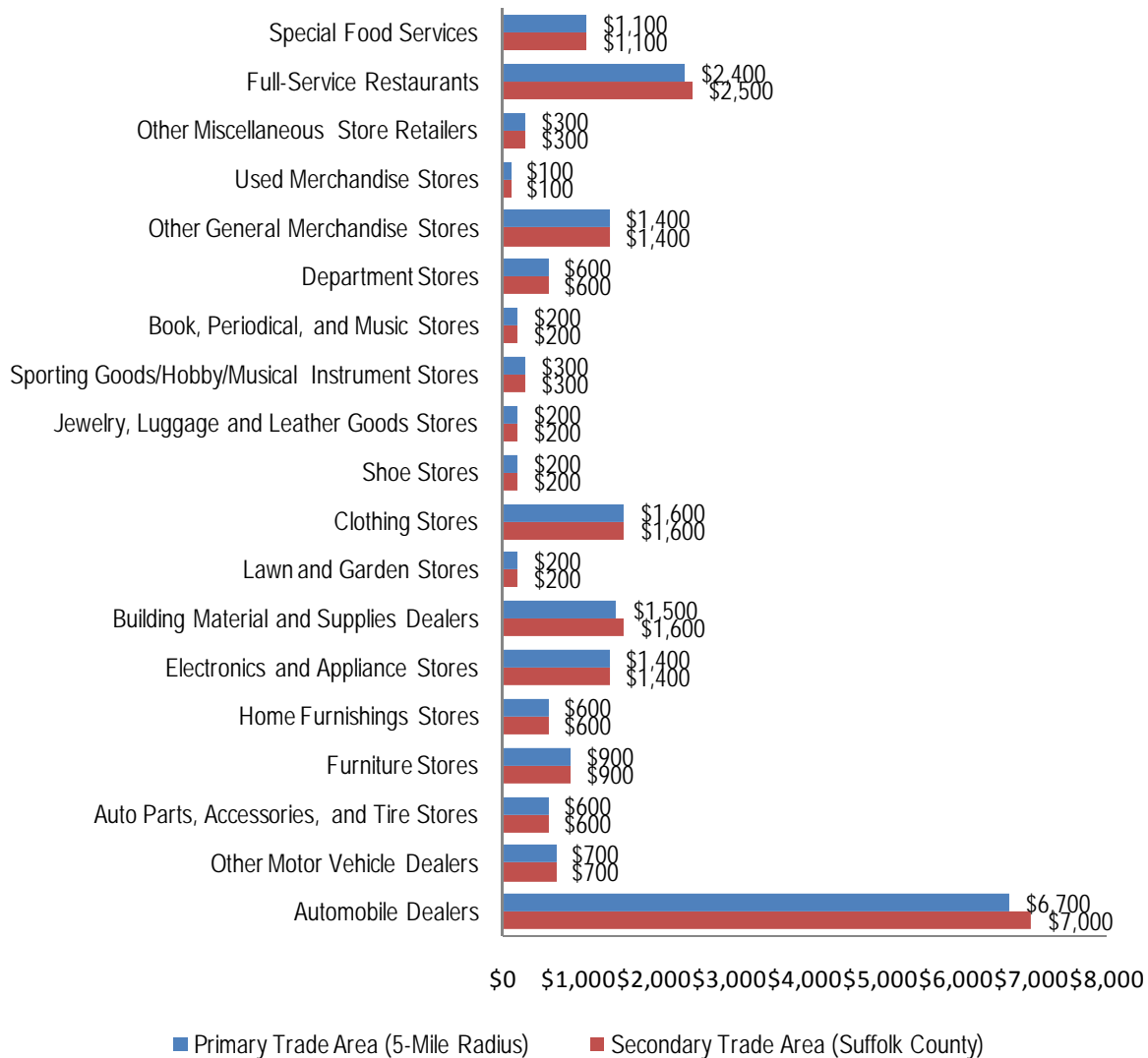
The buying power of households for shoppers goods in the shoppers goods primary and secondary trade areas surrounding the TOD District area is also substantial. The nearly 76,000 households living within a 5-mile radius of the train station (the primary trade area) offer a combined nearly \$1.6 billion in annual retail spending potential for shoppers goods (\$21,000 per household). The 488,000 households in Suffolk County offer an annual potential for \$10.6 billion in shoppers goods expenditures (\$21,500 per household).

Trade Area Household Spending Profile				
Shoppers Goods, 2009				
	Primary Trade Area (5-Mile Radius)		Secondary Trade Area (Suffolk County)	
	Households:	75,702	Households:	488,298
	Total Expenditures	Spending Per Household	Total Expenditures	Spending Per Household
Automobile Dealers	\$508,000,000	\$6,700	\$3,418,000,000	\$7,000
Other Motor Vehicle Dealers	\$50,000,000	\$700	\$350,000,000	\$700
Auto Parts, Accessories, and Tire Stores	\$44,000,000	\$600	\$295,000,000	\$600
Furniture Stores	\$65,000,000	\$900	\$441,000,000	\$900
Home Furnishings Stores	\$45,000,000	\$600	\$299,000,000	\$600
Electronics and Appliance Stores	\$106,000,000	\$1,400	\$707,000,000	\$1,400
Building Material and Supplies Dealers	\$114,000,000	\$1,500	\$760,000,000	\$1,600
Lawn and Garden Stores	\$17,000,000	\$200	\$114,000,000	\$200
Clothing Stores	\$121,000,000	\$1,600	\$797,000,000	\$1,600
Shoe Stores	\$15,000,000	\$200	\$97,000,000	\$200
Jewelry, Luggage and Leather Goods Stores	\$16,000,000	\$200	\$108,000,000	\$200
Sporting Goods/Hobby/Musical Instrument Stores	\$24,000,000	\$300	\$156,000,000	\$300
Book, Periodical, and Music Stores	\$15,000,000	\$200	\$102,000,000	\$200
Department Stores	\$46,000,000	\$600	\$306,000,000	\$600
Other General Merchandise Stores	\$104,000,000	\$1,400	\$692,000,000	\$1,400
Used Merchandise Stores	\$4,000,000	\$100	\$28,000,000	\$100
Other Miscellaneous Store Retailers	\$25,000,000	\$300	\$170,000,000	\$300
Full-Service Restaurants	\$184,000,000	\$2,400	\$1,212,000,000	\$2,500
Special Food Services	\$84,000,000	\$1,100	\$554,000,000	\$1,100
TOTAL	\$1,587,000,000	\$21,000	\$10,606,000,000	\$21,500

Source: ESRI, BBP LLC, 2010

Households in both the shoppers goods primary and secondary trade areas offer the most potential spending on the following types of shoppers goods: automobiles, full-service restaurants, clothing, building materials, and other general merchandise.

Shoppers Goods Spending Per Household, 2009



Source: ESRI, BBP LLC, 2010

Given the downtown character of the TOD District area, small-scale specialty shops and sit-down restaurants may be the most appropriate means through which to capture a portion of the spending power of primary and secondary trade area households. These types of businesses can fit within a downtown scale and character more appropriate than, for instance, large automobile dealers or department stores.

3.3 Future Households, Income, and Retail Spending

Convenience Goods

In addition to existing households, future households offer potential to support new retail establishments in the TOD District area. Based on recent demographic trends, by 2014 there will be 27,250 households located within a 3-mile radius of the transit station (which does not take into account other, additional households that may locate in the TOD area). With a median projected income of over \$94,000 in 2014, future residents offer potential to spend an average of \$17,100 annually on convenience retail goods and services for a combined total of \$463 million annually.

Trade Area Household Spending Profile				
Convenience Goods, 2014				
	Primary Trade Area (3-Mile Radius)		Secondary Trade Area (Suffolk County)	
	Households:	27,250	Households:	489,782
	Total Expenditures	Spending Per Household	Total Expenditures	Spending Per Household
Grocery Stores	\$175,000,000	\$6,400	\$3,231,000,000	\$6,600
Specialty Food Stores	\$15,000,000	\$600	\$279,000,000	\$600
Beer, Wine, and Liquor Stores	\$15,000,000	\$600	\$280,000,000	\$600
Health & Personal Care Stores	\$49,000,000	\$1,800	\$934,000,000	\$1,900
Gasoline Stations	\$127,000,000	\$4,700	\$2,358,000,000	\$4,800
Florists	\$2,000,000	\$100	\$39,000,000	\$100
Office Supplies, Stationary, and Gift Stores	\$11,000,000	\$400	\$187,000,000	\$400
Limited-Service Eating Places	\$58,000,000	\$2,100	\$1,073,000,000	\$2,200
Taverns	\$11,000,000	\$400	\$200,000,000	\$400
TOTAL	\$463,000,000	\$17,100	\$8,581,000,000	\$17,600

Source: ESRI, BBP LLC, 2010

In 2014, there are projected to be nearly 490,000 households in Suffolk County with a median projected income of nearly \$92,000. These households bring with them potential annual spending of \$17,600 per household on convenience retail goods and services for a total of over \$8.6 billion per year. Such increase in potential spending offers potential to support new convenience goods establishments in the TOD District area.

Shoppers Goods

Projected increases in buying power for shoppers goods may also offer support for new shoppers goods businesses in the TOD District area. By 2014, households in the primary goods shoppers goods trade area (5-mile radius surrounding the train station) are projected to spend nearly \$1.7 billion per year on shoppers goods. Households in the secondary trade area (Suffolk County) are projected to spend nearly \$11.4 billion per year.

Trade Area Household Spending Profile				
Shoppers Goods, 2014				
	Primary Trade Area (5-Mile Radius)		Secondary Trade Area (Suffolk County)	
	Households:	75,670	Households:	489,782
	Total Expenditures	Spending Per Household	Total Expenditures	Spending Per Household
Automobile Dealers	\$542,000,000	\$7,200	\$3,669,000,000	\$7,500
Other Motor Vehicle Dealers	\$53,000,000	\$700	\$376,000,000	\$800
Auto Parts, Accessories, and Tire Stores	\$47,000,000	\$600	\$317,000,000	\$600
Furniture Stores	\$69,000,000	\$900	\$473,000,000	\$1,000
Home Furnishings Stores	\$48,000,000	\$600	\$321,000,000	\$700
Electronics and Appliance Stores	\$113,000,000	\$1,500	\$759,000,000	\$1,500
Building Material and Supplies Dealers	\$122,000,000	\$1,600	\$816,000,000	\$1,700
Lawn and Garden Stores	\$18,000,000	\$200	\$122,000,000	\$200
Clothing Stores	\$129,000,000	\$1,700	\$855,000,000	\$1,700
Shoe Stores	\$16,000,000	\$200	\$104,000,000	\$200
Jewelry, Luggage and Leather Goods Stores	\$17,000,000	\$200	\$116,000,000	\$200
Sporting Goods/Hobby/Musical Instrument Stores	\$26,000,000	\$300	\$167,000,000	\$300
Book, Periodical, and Music Stores	\$16,000,000	\$200	\$109,000,000	\$200
Department Stores	\$49,000,000	\$600	\$328,000,000	\$700
Other General Merchandise Stores	\$111,000,000	\$1,500	\$743,000,000	\$1,500
Used Merchandise Stores	\$4,000,000	\$100	\$30,000,000	\$100
Other Miscellaneous Store Retailers	\$27,000,000	\$400	\$182,000,000	\$400
Full-Service Restaurants	\$196,000,000	\$2,600	\$1,301,000,000	\$2,700
Special Food Services	\$90,000,000	\$1,200	\$595,000,000	\$1,200
TOTAL	\$1,693,000,000	\$22,300	\$11,383,000,000	\$23,200

Source: ESRI, BBP LLC, 2010

3.4 Supportable Retail Space

The level of retail space that may be supported in the TOD District area is a function of how many sales can be captured from the retail spending of residents in the primary and secondary trade areas. In conducting the analysis of supportable retail space based on this function, BBP LLC omitted several types of retail goods that were not consistent with the types of fine-grain uses contemplated for the downtown area. These include: gasoline stations, automobile dealers, other motor vehicle dealers, and department stores. All of these uses require larger spaces than those envisioned for the area.

Convenience Goods

Retail spending in the primary and secondary trade areas is projected to total nearly \$6.6 billion in retail store group categories by 2014, consistent with Ronkonkoma's downtown character. Such spending would support nearly 19.2 million square feet of convenience space in the primary and secondary trade areas.

Future Trade Area Expenditures and Supportable Square Feet, 2015					
Convenience Goods, 2014					
	PTA Expenditures	STA Expenditures	Combined Expenditures	Sales Per SF	Supportable SF
Grocery Stores	\$175,000,000	\$3,231,000,000	\$3,406,000,000	\$473	7,200,846
Specialty Food Stores	\$15,000,000	\$279,000,000	\$294,000,000	\$151	1,947,020
Beer, Wine, and Liquor Stores	\$15,000,000	\$280,000,000	\$295,000,000	\$396	744,949
Health & Personal Care Stores	\$49,000,000	\$934,000,000	\$983,000,000	\$430	2,286,047
Florists	\$2,000,000	\$39,000,000	\$41,000,000	\$226	181,416
Office Supplies, Stationary, and Gift Stores	\$11,000,000	\$187,000,000	\$198,000,000	\$120	1,650,000
Limited-Service Eating Places	\$58,000,000	\$1,073,000,000	\$1,131,000,000	\$246	4,597,561
Taverns	\$11,000,000	\$200,000,000	\$211,000,000	\$358	589,385
TOTAL	\$336,000,000	\$6,223,000,000	\$6,559,000,000	-	19,197,224

Source: ESRI, Urban Land Institute, BBP LLC, 2010

Shoppers Goods

In the shoppers goods category, retail spending by 2014 is projected to total over \$8 billion. Such spending would support over 31.8 million square feet of shoppers goods space in the primary and secondary trade areas.

Future Trade Area Expenditures and Supportable Square Feet, 2014

Shoppers Goods, 2014

	PTA Expenditures	STA Expenditures	Combined Expenditures	Sales Per SF	Supportable SF
Auto Parts, Accessories, and Tire Stores	\$47,000,000	\$317,000,000	\$364,000,000	\$173	2,104,046
Furniture Stores	\$69,000,000	\$473,000,000	\$542,000,000	\$156	3,474,359
Home Furnishings Stores	\$48,000,000	\$321,000,000	\$369,000,000	\$216	1,708,333
Electronics and Appliance Stores	\$113,000,000	\$759,000,000	\$872,000,000	\$302	2,887,417
Building Material and Supplies Dealers	\$122,000,000	\$816,000,000	\$938,000,000	\$388	2,417,526
Lawn and Garden Stores	\$18,000,000	\$122,000,000	\$140,000,000	\$265	528,302
Clothing Stores	\$129,000,000	\$855,000,000	\$984,000,000	\$269	3,657,993
Shoe Stores	\$16,000,000	\$104,000,000	\$120,000,000	\$222	541,353
Jewelry, Luggage and Leather Goods Stores	\$17,000,000	\$116,000,000	\$133,000,000	\$303	438,944
Sporting Goods/Hobby/Musical Instrument Stores	\$26,000,000	\$167,000,000	\$193,000,000	\$183	1,057,534
Book, Periodical, and Music Stores	\$16,000,000	\$109,000,000	\$125,000,000	\$246	508,130
Other General Merchandise Stores	\$111,000,000	\$743,000,000	\$854,000,000	\$167	5,101,553
Used Merchandise Stores	\$4,000,000	\$30,000,000	\$34,000,000	\$206	165,049
Other Miscellaneous Store Retailers	\$27,000,000	\$182,000,000	\$209,000,000	\$206	1,014,563
Full-Service Restaurants	\$196,000,000	\$1,301,000,000	\$1,497,000,000	\$358	4,181,564
Special Food Services	\$90,000,000	\$595,000,000	\$685,000,000	\$335	2,042,431
TOTAL	\$1,049,000,000	\$7,010,000,000	\$8,059,000,000	-	31,829,098

Source: ESRI, Urban Land Institute, BBP LLC, 2010

The theoretical full build and theoretical maximum build out plans call for 80,875 and 112,275 square feet of retail space, respectively (including restaurant space). Future retail spending patterns could support over 51 million square feet in the primary and secondary market areas, as based on spending projections for 2014. BBP LLC estimates that such demand could be absorbed in the market area by 2019. The TOD District area would therefore need to capture a modest 0.16 to 0.22 percent of this total supportable space to support the 80,875 or 112,275 square feet identified in the plans. Given the TOD District area's strong current visitation by transit riders, BBP LLC believes such modest capture rates are possible, and will only be further supported by the addition of new residents and employees to the area.

Proposed Retail Development and Required Capture of Supportable Square Feet

TOD District Area

Concept	Retail and Restaurant Square Feet	Supportable Square Feet (2009-2019, Primary and Secondary Market Areas)	Required Capture Rate
Full Build	80,875	51,026,322	0.16%
Maximum Built Out	112,275		0.22%

Source: ESRI Business Information Solutions, BBP LLC, 2010

3.5 Retail Supply

New retailers in the TOD District area can take advantage of the spending power of primary and secondary trade area residents, and even with very modest capture rates, such new businesses can be successful. However, it is important to note that these new stores will compete with other retailers in the trade areas. Given this issue, BBP LLC has performed an evaluation of retail supply, focusing on **retail leakage** in the trade areas (i.e. retail sales that are “leaked” beyond the trade areas) to understand which categories of retail are underrepresented, indicating unmet demand for retail goods and services. This analysis is meant to help focus in on which types of retail may be best positioned to succeed in the TOD District area given their underrepresentation elsewhere.

Convenience Goods

As illustrated in the following table, convenience goods are well-represented in most categories in the primary trade area, with retail sales exceeding retail spending in most categories. However, leakage does appear in three categories: beer, wine and liquor stores (\$4 million in spending is leaked beyond this trade area); office supplies, stationary and gift stores (\$3 million in spending is leaked); and taverns (\$3 million in spending is leaked). These three categories may offer relatively stronger potential for success in the TOD District area given their underrepresentation in the primary trade area.

Trade Area Household Spending Profile						
Convenience Goods, 2009						
	Primary Trade Area (3-Mile Radius)			Secondary Trade Area (Suffolk County)		
	Total Expenditures	Total Sales	Leaked Sales	Total Expenditures	Total Sales	Leaked Sales
Grocery Stores	\$166,000,000	\$258,000,000	\$92,000,000	\$3,010,000,000	\$3,036,000,000	\$26,000,000
Specialty Food Stores	\$14,000,000	\$15,000,000	\$1,000,000	\$260,000,000	\$190,000,000	(\$70,000,000)
Beer, Wine, and Liquor Stores	\$14,000,000	\$10,000,000	(\$4,000,000)	\$261,000,000	\$198,000,000	(\$63,000,000)
Health & Personal Care Stores	\$47,000,000	\$72,000,000	\$25,000,000	\$870,000,000	\$792,000,000	(\$78,000,000)
Gasoline Stations	\$121,000,000	\$136,000,000	\$15,000,000	\$2,197,000,000	\$1,808,000,000	(\$389,000,000)
Florists	\$2,000,000	\$2,000,000	\$0	\$36,000,000	\$32,000,000	(\$4,000,000)
Office Supplies, Stationary, and Gift Stores	\$10,000,000	\$7,000,000	(\$3,000,000)	\$174,000,000	\$105,000,000	(\$69,000,000)
Limited-Service Eating Places	\$55,000,000	\$63,000,000	\$8,000,000	\$1,000,000,000	\$1,040,000,000	\$40,000,000
Taverns	\$10,000,000	\$7,000,000	(\$3,000,000)	\$186,000,000	\$87,000,000	(\$99,000,000)
TOTAL	\$439,000,000	\$570,000,000	\$131,000,000	\$7,994,000,000	\$7,288,000,000	(\$706,000,000)

Source: ESRI, BBP LLC, 2010

In the convenience goods secondary trade area, more sales are leaked in almost every category, indicating that residents are underserved in many retail categories. Since this trade area was drawn to capture the residence locations of commuters from around Suffolk County that patronize the Ronkonkoma Hub station, this leakage indicates that convenience goods in the TOD District area catering to commuters should be expanded to take advantage of the relative undersupply of such goods near the homes of many commuters.

Shoppers Goods

In the shoppers goods category, several categories of retail sales are being leaked beyond the primary trade area. These underserved retail store groups include: auto parts, accessories and tire stores (\$3 million leaked); furniture stores (\$22 million leaked); clothing stores (\$60 million leaked); shoe stores (\$7 million leaked); jewelry stores (\$6 million leaked); book, periodical and music stores (\$4 million leaked); used merchandise stores (\$1 million leaked); full-service restaurants (\$71 million leaked); and special food services (\$27 million leaked).

Trade Area Household Spending Profile						
Shoppers Goods, 2009						
	Primary Trade Area (5-Mile Radius)			Secondary Trade Area (Suffolk County)		
	Total Expenditures	Total Sales	Leaked Sales	Total Expenditures	Total Sales	Leaked Sales
Automobile Dealers	\$508,000,000	\$721,000,000	\$213,000,000	\$3,418,000,000	\$3,616,000,000	\$198,000,000
Other Motor Vehicle Dealers	\$50,000,000	\$84,000,000	\$34,000,000	\$350,000,000	\$468,000,000	\$118,000,000
Auto Parts, Accessories, and Tire Stores	\$44,000,000	\$41,000,000	(\$3,000,000)	\$295,000,000	\$234,000,000	(\$61,000,000)
Furniture Stores	\$65,000,000	\$43,000,000	(\$22,000,000)	\$441,000,000	\$421,000,000	(\$20,000,000)
Home Furnishings Stores	\$45,000,000	\$204,000,000	\$159,000,000	\$299,000,000	\$392,000,000	\$93,000,000
Electronics and Appliance Stores	\$106,000,000	\$162,000,000	\$56,000,000	\$707,000,000	\$778,000,000	\$71,000,000
Building Material and Supplies Dealers	\$114,000,000	\$130,000,000	\$16,000,000	\$760,000,000	\$996,000,000	\$236,000,000
Lawn and Garden Stores	\$17,000,000	\$24,000,000	\$7,000,000	\$114,000,000	\$157,000,000	\$43,000,000
Clothing Stores	\$121,000,000	\$61,000,000	(\$60,000,000)	\$797,000,000	\$617,000,000	(\$180,000,000)
Shoe Stores	\$15,000,000	\$8,000,000	(\$7,000,000)	\$97,000,000	\$74,000,000	(\$23,000,000)
Jewelry, Luggage and Leather Goods Stores	\$16,000,000	\$10,000,000	(\$6,000,000)	\$108,000,000	\$60,000,000	(\$48,000,000)
Sporting Goods/Hobby/Musical Instrument Stores	\$24,000,000	\$26,000,000	\$2,000,000	\$156,000,000	\$308,000,000	\$152,000,000
Book, Periodical, and Music Stores	\$15,000,000	\$11,000,000	(\$4,000,000)	\$102,000,000	\$67,000,000	(\$35,000,000)
Department Stores	\$46,000,000	\$142,000,000	\$96,000,000	\$306,000,000	\$670,000,000	\$364,000,000
Other General Merchandise Stores	\$104,000,000	\$157,000,000	\$53,000,000	\$692,000,000	\$884,000,000	\$192,000,000
Used Merchandise Stores	\$4,000,000	\$3,000,000	(\$1,000,000)	\$28,000,000	\$26,000,000	(\$2,000,000)
Other Miscellaneous Store Retailers	\$25,000,000	\$39,000,000	\$14,000,000	\$170,000,000	\$227,000,000	\$57,000,000
Full-Service Restaurants	\$184,000,000	\$113,000,000	(\$71,000,000)	\$1,212,000,000	\$885,000,000	(\$327,000,000)
Special Food Services	\$84,000,000	\$57,000,000	(\$27,000,000)	\$554,000,000	\$357,000,000	(\$197,000,000)
TOTAL	\$1,587,000,000	\$2,036,000,000	\$449,000,000	\$10,606,000,000	\$11,237,000,000	\$631,000,000

Source: ESRI, BBP LLC, 2010

In the shoppers goods secondary trade area, the same categories that are underrepresented in the primary trade area are undersupplied, with substantial retail sales being leaked beyond the trade area. Such leakage of these categories in both trade areas suggests their introduction in the TOD District area may prove more successful than other shoppers goods store types since they would fulfill an unmet need in the trade areas. However, it is important to note that many of these types of goods benefit from critical mass of co-location. For example, having several stores offering similar goods - such as clothing, shoes and jewelry - located together will have stronger collective drawing power for customers, since the area will become known as a destination for finding those items.

3.6 Retail Opportunities

Based on the evaluation of the current retail competition in the convenience goods and shoppers goods trade areas, we have identified a set of retail categories that have better chances for success in the TOD District area given their undersupply in the trade areas. These retail store groups are identified in the following table.

Retail Categories with Strong Potential for Success Given Current Retail Leakage
<i>Convenience Goods, 2014</i>
Beer, Wine, and Liquor Stores
Office Supplies, Stationary, and Gift Stores
Taverns
<i>Shoppers Goods, 2014</i>
Auto Parts, Accessories, and Tire Stores
Furniture Stores
Clothing Stores
Shoe Stores
Jewelry, Luggage and Leather Goods Stores
Book, Periodical, and Music Stores
Used Merchandise Stores
Full-Service Restaurants
Special Food Services
<i>Source: BBP LLC, 2010</i>

Additionally, retail leakage is but one indicator of the potential success of future stores. Other factors, including quality of products, customer service, marketing, and the experience offered to customers also impact the odds of success. For these reasons, a savvy entrepreneur could still open a shop in a retail category that is already well-represented in the trade areas surrounding the TOD District area (and thus faces more competition) but succeed because of the superior products, service, marketing and/or experience offered in the store.

Finally, the above analysis does not take into account the retail spending potential presented by future households of the multi-family units recommended for the study area as based on the residential analysis, nor does it include future office employees or additional transit riders generated by new development in the study area. We have omitted these potential sources of demand because we want to make sure the future retail uses will be self-sufficient (and not reliant on other new uses for their success). That being said, the presence of new residents, employees and additional transit riders that could be located in the study area could provide substantial benefits to retailers in terms of an additional local source of retail sales, thereby further encouraging retail success.

3.7 Summary

Strong opportunities exist for new retail goods and services in the TOD District area. Trends in the primary and secondary trade areas are positive, with household spending projected to increase by 2014.

Key findings from the analysis of retail demand and opportunities include:

- Two classifications of retail goods and services may be offered in the TOD District area: convenience (e.g. food stores, limited service eating places, etc.) and shoppers goods (e.g. clothing, home furnishings, etc.). The TOD area is situated within four associated trade areas: the convenience goods primary trade area (3-mile radius, roughly equal to a 5-minute drive), the convenience goods secondary trade area (Suffolk County), the shoppers goods primary trade area (5-mile radius, roughly equal to a 10-minute drive), and the shoppers goods secondary trade area (Suffolk County).
- Retail spending in each trade area is strong and projected to grow as disposable income rises.
- Estimated 2009 retail spending levels on convenience goods were as follows: \$439 million in the convenience goods primary trade area and nearly \$8 billion in the convenience goods secondary trade area. By 2014, these figures are projected to increase to \$463 million in the primary trade area and nearly \$8.6 billion in the secondary trade area.
- In 2009, shoppers goods retail spending levels were as follows: nearly \$1.6 billion in the shoppers goods primary trade area and over \$10.6 billion in the shoppers goods secondary trade area. By 2014, spending is projected to rise to nearly \$1.7 billion in the primary trade area and \$11.4 billion in the secondary trade area.
- Future retail spending could support over 51 million square feet of convenience and shoppers goods retail space in the primary and secondary trade areas (in retail store group categories conducive to downtown development). The TOD District area could capture a modest 0.16 to 0.22 percent of this supportable space over the next nine years. Such capture would support the development of the 80,875 square feet identified in the theoretical full build plan or the 112,275 square feet identified in the maximum build out plan.
- New retailers in the TOD District area will face competition from other retailers currently located in the trade areas. An analysis of retail leakage was undertaken to understand which categories of retail are underrepresented, as illustrated by retail sales “leaked” beyond the trade area, indicating unmet demand for goods and services. Such retail types may offer relatively stronger potential for success in the TOD District area given their underrepresentation elsewhere.
- Retail store groups with current sales leakage include: beer, wine and liquor stores; office supplies, stationary, and gift stores; taverns; auto parts, accessories and tire stores; furniture stores; clothing stores; shoe stores;

jewelry, luggage and leather goods stores; book, periodical and music stores; used merchandise stores; full-service restaurants; and special food services.

- Factors beyond retail leakage will impact the odds of success of any particular store, including quality of products, customer service, marketing, and the experience offered to customers. A savvy entrepreneur that offers superior products, service, marketing and/or experience may succeed in opening a type of store that is already well-represented in the trade areas by being a strong competitor.
- Future households, employees and transit riders generated by new development in the study area will also offer potential sources of demand for retail, but have been omitted from the analysis because it is important that the future retail uses are self-sufficient (and not reliant on the success of other types of new development). These other sources of demand instead should be viewed as an important additional source of sales that will enhance their opportunity to thrive, but not be the primary reason for such success.

Section 4 Office Market Analysis

4.1 Market Area Definition

The TOD District area is located at the western fringes of the Eastern Suffolk County office market area, a broad geography that includes the County east of Central Islip. The TOD area is also located close to the neighboring Western Suffolk County office market area to the west, and is likely to be influenced by market dynamics in this area as well as Eastern Suffolk County. A new or expanding office-based business considering either the Western or Eastern Suffolk County market areas is likely to consider the Ronkonkoma area as a possible location as well.

Therefore, the primary market area for the office sector has been defined as Suffolk County to include both of these market areas. To include firms that may be seeking a Long Island location and have not identified a requirement for either Nassau or Suffolk County, the secondary market area has been defined as Long Island.

4.2 Office-Based Employment Profile

Only a handful of office-based businesses are located in the TOD District area at present. These employers together employ approximately 90 individuals. In surrounding Suffolk County, office-based businesses employ nearly 120,000 employees, and in Long Island as a whole, such businesses employ nearly 280,000 individuals. The most dominant industry in terms of employment is the professional, scientific and technical services industry, which employs the largest proportion of office-based workers in the TOD District area, Suffolk County, and Long Island. Finance and insurance is also a top employer in Suffolk County and Long Island, though not well-represented in the TOD District area. Administrative support (which includes back office functions) is a major source of employment in Long Island but less dominant in Suffolk County and in the TOD District area.

Office-Based At Place Employment, 2009			
Industry	TOD District Area	Suffolk County	Long Island
Information	1	18,637	29,443
Finance & Insurance	1	24,241	60,775
Real Estate, Rental & Leasing	37	13,880	18,951
Professional, Scientific & Technical Services	40	42,780	76,015
Management of Companies & Enterprises	0	447	18,064
Administrative Support, Waste Management	9	19,257	74,373
TOTAL	88	119,242	277,621

*1/ 2009 office-based employment estimated based on most recent available employment data and projected rates of growth from NYS Department of Labor
Source: ESRI, NYS Department of Labor, BBP LLC, 2010*

To gain a stronger sense of the types of office employers that comprise Long Island's economy – and thereby learn about the types of businesses that may be candidates for locating in the TOD District area – BBP LLC evaluated industry clusters provided by the NYS Department of Labor for the island. An industry cluster is a grouping of many sub-industries that are highly interrelated in the goods and services they provide. Six industry clusters comprised of at least some office-based industries are located in Long Island. These include: back office and outsourcing; biomedical; communications, software and media services; financial services; front office and producer services; and information technology services.

Long Island Office-Based Industry Clusters, 2008			
Industry Cluster	Associated Office Industries	Employment	Location Quotient
Back Office & Outsourcing Cluster	Administrative Support, Waste Management	18,800	0.54
Biomedical Cluster	Professional, Scientific & Technical Services	15,200	1.68
Communications, Software & Media Services Cluster	Information	32,300	1.04
Financial Services Cluster	Finance & Insurance; Real Estate, Rental & Leasing; Management of Companies & Enterprises	47,000	0.89
Front Office & Producer Services	Professional, Scientific & Technical Services; Management of Companies & Enterprises	73,200	1.06
Information Technology Services	Information; Professional, Scientific & Technical Services	10,100	0.54
TOTAL	-	196,600	-

Source: NYS Department of Labor, Quarterly Census of Employment and Wages, BBP LLC, 2010

These industry clusters are represented in varying degrees on Long Island, with some featuring relatively higher levels of employment compared to the industry's employment nationwide; such industries are identified by higher location quotients. Industry clusters with the highest location quotients on Long Island include: biomedical; front office and producer services; and communications, software and media services.

The biomedical cluster contains the laboratories and research offices of firms; some of these scientific researchers may opt to locate in specialized office spaces. The front office and producer services cluster includes a variety of business and environmental services (lawyers, accountants, graphic designers, architects, engineers, etc.). This cluster also includes the headquarters of companies and organizational offices of business and professional associations. The communications, software and media services cluster includes businesses and organizations engaged in publishing, broadcasting and telecommunications.

4.3 Future Employment

Employment growth in office-based industries is an important factor contributing to demand for new office space. Long Island is projected to add office-based jobs over the next six years at an annual rate of less than 1 percent, although some office-based industries will grow more rapidly than others (and some will shrink as businesses downsize).

The most job growth is projected in the administrative support industry, which is part of the back office cluster (one of the six office-based clusters present in Long Island). Professional, scientific and technical service jobs are also projected to increase; this industry is part of several of Long Island's office-based clusters: biomedical, financial services, front office and producer services, and information technology. Real estate, rental and leasing and management of companies are projected to add jobs as well. Both of these industries are represented in the financial services cluster; the management industry is also represented in the front office and producer services cluster.

Projected Changes in Office Employment by Industry Sector, Long Island, 2006 to 2016				
Industry	Employment (2006)	Projected Employment (2016)	Total Employment Change	Annual Rate of Change
Information	29,740	28,760	(980)	-0.33%
Finance & Insurance	61,450	59,230	(2,220)	-0.37%
Real Estate, Rental & Leasing	18,110	21,070	2,960	1.53%
Professional, Scientific & Technical Services	74,040	80,830	6,790	0.88%
Management of Companies & Enterprises	17,420	19,660	2,240	1.22%
Administrative Support, Waste Management	71,000	82,880	11,880	1.56%
TOTAL	271,760	292,430	20,670	0.74%

Source: NYS Department of Labor, BBP LLC, 2010

Assuming Suffolk County and Long Island add jobs at the rates identified by the NYS Department of Labor, over the next four years each area will add office-based jobs, including over 3,800 jobs in Suffolk County and nearly 8,300 jobs in Long Island.

Projected Changes in Office Employment by Industry Sector, 2009 to 2014				
Industry	Suffolk County		Long Island	
	Employment (2014)	Employment Change (2009-2014)	Employment (2014)	Employment Change (2009-2014)
Information	18,327	(310)	28,953	(489)
Finance & Insurance	23,799	(442)	59,667	(885)
Real Estate, Rental & Leasing	14,971	1,091	20,442	1,201
Professional, Scientific & Technical Services	44,699	1,919	79,424	2,739
Management of Companies & Enterprises	475	28	19,190	906
Administrative Support, Waste Management	20,806	1,549	80,355	4,822
TOTAL	123,077	3,835	288,031	8,295

Source: ESRI, NYS Department of Labor, BBP LLC, 2010

4.4 Supportable Office Space

Based on the office-based employment growth projected over the next five years, Suffolk County could support the net addition of over 900,000 square feet of office space, while Long Island as a whole could support the net addition of over 1.9 million square feet of office space.

Supportable Office Space, 2014				
Industry	Suffolk County		Long Island	
	Total Space	Net New Space	Total Space	Net New Space
Information	3,665,472	0	5,790,676	0
Finance & Insurance	4,759,819	0	11,933,498	0
Real Estate, Rental & Leasing	2,994,281	218,281	4,088,324	240,219
Professional, Scientific & Technical Services	8,939,719	383,719	15,884,785	547,840
Management of Companies & Enterprises	94,974	5,574	3,838,013	181,288
Administrative Support, Waste Management	4,161,159	309,759	16,070,947	964,410
TOTAL	24,615,424	917,333	57,606,243	1,933,757

Source: ESRI, NYS Department of Labor, BBP LLC, 2010

4.5 Office Supply

Of course, office-based employment growth projections are but one source of future estimates of space. Another method of projecting future space in Suffolk County and Long Island involves using projections of new supply that could be added based on past trends in the marketplace. REIS, a company which monitors commercial real estate in Long Island as well as across the nation, provides such projections. By 2014, REIS has projected that Suffolk County could add a net over 350,000 square feet of office space, while Long Island could add over 900,000 net square feet of office space.

Projected Growth of Office Inventory, 2009 to 2014				
Year	Suffolk County		Long Island	
	Total Space	Cumulative Net New Space	Total Space	Cumulative Net New Space
2009	17,760,000	-	43,494,000	-
2010	17,760,000	0	43,494,000	0
2011	17,760,000	0	43,514,000	20,000
2012	17,881,000	121,000	43,815,000	321,000
2013	18,002,000	242,000	44,115,000	621,000
2014	18,117,000	357,000	44,396,000	902,000

Source: REIS, BBP LLC, 2010

4.6 Office Opportunities

Both the theoretical full build and maximum build out plans call for 49,375 square feet of office space. To support this level of development, the TOD District area must capture 2 percent of the office space growth supportable in the primary and secondary areas as based on employment growth, or 4 percent of the office space growth supportable in the primary and secondary areas as based on supply growth. BBP LLC believes these relatively modest capture rates are achievable for the TOD District area given the area's strengths as a busy commuter hub (with access to a large labor force), and that such office development opportunities will only be further supported by the introduction of new housing, retail and restaurant choices that will make the area an even better place to conduct business.

Proposed Office Development and Required Capture of Employment and Supply Growth
TOD District Area

Concept	Office Square Feet	Net Increase in Square Feet (2009-2019, Primary and Secondary Market Areas)		Required Capture Rates	
		Employment Growth Basis	Supply Growth Basis	Employment Growth Basis	Supply Growth Basis
Full Build	49,375	2,851,090	1,259,000	2%	4%
Maximum Built Out	49,375			2%	4%

Source: NYS Department of Labor, REIS, BBP LLC, 2010

Suggested Target Office Users

Employment growth projections tell us that real estate, rental, leasing, professional, scientific, technical, management, and administrative support firms all may grow in the next several years. These types of businesses also happen to be compatible with downtown settings, as many firms in these industries are small in scale. Therefore, such businesses should be considered potential targets for new office spaces in the TOD District area.

4.7 Summary

Employment (demand) and supply trends in the TOD District area's primary and secondary market areas show promise for office development opportunities over the next several years. The TOD District area could be a participant in such office growth.

Key findings from the analysis of the office market include:

- A new or expanding business considering Suffolk County or Long Island is likely to consider Ronkonkoma; therefore the primary and secondary market areas have been defined as Suffolk County and Long Island, respectively.

- Existing office uses are few within the TOD District area, and represent a very small proportion of the office uses present in Suffolk County and Long Island.
- Top industry clusters in Long Island include: back office and outsourcing; biomedical; communications, software and media services; financial services; front office and producer services; and information technology services.
- Office-based employment and associated demand for office space is projected to grow in Suffolk County and Long Island by 2014.
- Office supply is also projected to grow based on past trends in supply.
- To support the 49,375 square feet of office space called for in both the theoretical full build and maximum build out plans, the TOD District area will have to capture either 2 percent of the office space supported by office employment trends or 4 percent of the office space supported by supply trends.
- Businesses in growth industries that are compatible with downtown settings should be considered targets for office space in the TOD District area. Such industries include: real estate, rental and leasing; professional, scientific and technical services; management; and administrative support.

