

# COMMERCIAL MARKET ANALYSIS

## Hampton Bays Overlay Zone Hampton Bays, New York

NP&V No. 18056

*Submitted to:* Town of Southampton  
Town Board  
116 Hampton Road  
Southampton, New York 11968

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September 6, 2018



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**ATTACHMENT A – NELSON, POPE & VOORHIS, LLC ECONOMIC QUALIFICATIONS**



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### **1.0 INTRODUCTION AND PURPOSE**

Nelson, Pope & Voorhis, LLC (NP&V) has prepared this Commercial Market Analysis as a part of the Supplemental Draft Generic Environmental Impact Statement (SDGEIS) for Hampton Bays Downtown Overlay District for the Town of Southampton. NP&V is a professional environmental and planning firm with qualifications and expertise to prepare commercial and residential market analyses, fiscal and economic impact analyses, economic development studies, comprehensive master plans, hamlet studies, implementation strategies, land use, zoning and visioning. NP&V uses methodologies consistent with professional practice and has a track record of completed projects providing market analysis, fiscal and economic analysis, economic development, and related services to private and municipal clients. The economic qualifications of the firm and personnel are provided in **Attachment A**.

The following Commercial Market Analysis serves to assist the Town of Southampton in identifying and quantifying the gaps within the existing commercial areas in downtown Hampton Bays. The findings of this Commercial Market Analysis will be incorporated into the SDGEIS and will serve as a planning tool for the Town to examine possible future planning and land use decisions, as necessary.

The following analysis examines the existing market conditions and identifies the demand and supply of commercial uses within downtown Hampton Bays, as well as within the surrounding community. **Section 2.0** presents an executive summary and key findings of the Commercial Market Analysis. **Section 3.0** outlines the methodology and the sources of data used in this analysis. **Section 4.0** identifies and defines the target market area, or the boundary from which the majority of consumers are likely drawn to commercial uses in downtown Hampton Bays. **Section 5.0** examines the market demand for commercial uses through an examination of demographic and socioeconomic characteristics of the target market area. **Section 6.0** identifies the supply of existing uses within Hampton Bays, and provides a detailed breakdown of commercial uses within the community. **Section 7.0** presents a “leakage analysis” through an analysis of the relationship between the demand for, and the supply of, existing types of goods and services; this reveals the prevalent gaps and/or surplus of commercial uses in the target market area. Furthermore, this section represents a set of recommendations on the specific types of goods and services that the Town should be focusing their efforts on attracting and retaining in the downtown area. **Section 8.0** provides a conclusion with respect to the Commercial Market Analysis, and **Section 9.0** outlines the references utilized in this analysis.

## 2.0 EXECUTIVE SUMMARY

As noted in **Section 1.0**, this Commercial Market Analysis seeks to assist the Town of Southampton in identifying and quantifying the gaps in the market within downtown Hampton Bays. A summary of findings is provided herein, with detailed methodologies and references provided in the subsequent sections of this Commercial Market Analysis. This analysis was prepared using methods, data and information that are industry standards in the preparation of a Market Analysis.

### *Key Findings*

#### Target Market Area

- Commercial uses located in downtown Hampton Bays tend to cater to neighborhood and local needs, with most of the existing uses classified as a “convenience,” “neighborhood,” or “super community/community”-type of shopping area, as defined by ICSC and determined by the size and type of tenants.
- For the purpose of this analysis, an average five (5)-minute drive-time radius was identified as representing and serving the needs of the immediate community with convenience-type commercial uses. Likewise, the neighborhood and community-type commercial needs tend to be satisfied by those residing within a ten (10) to 15-minute drive time radius from a given shopping center/downtown area. As such, and for the purpose of this analysis, these types of shopping areas were blended, and compared with local knowledge of the area and a drive-time map to establish the target market area for this analysis. Ultimately, an 11-minute drive-time radius from downtown Hampton Bays was determined to be an appropriate target market area.
- The target market area represents a significant portion of western Southampton Town. The boundary of the target market area extends north to Great Peconic Bay, east to Tuckahoe Road in Shinnecock Hills, south to Shinnecock Bay including portions of Dune Road, and farther west along the Sunrise Highway into East Quogue and the edge of Westhampton where consumers are able to travel at faster speeds. This target market area represents the population residing within the immediate community and surrounding parts of Southampton Town that would likely support commercial uses in downtown Hampton Bays.

#### Market Demand

- The population within the target market area has increased considerably since 2000. Between 2000 and 2010, the population within the target market area increased by over 2,000 persons, or 10.6%. Likewise, the population within the target market area is estimated to have increased by an additional 712 persons, through 2018, resulting in additional estimated growth of 3.2% over the last eight (8) years.
- Population within the target market area is expected to grow by approximately 314 more persons, for a total of 15.7% growth between 2000 and 2023.
- Reflective of the population trends, the number of households within the target market area has also increased significantly since 2000.
- The number of households located within the target market area increased by 5.6% between 2000 and 2010 – from 7,562 households in 2000 to 7,982 households in 2010. As seen with population trends, current estimates and projections suggest continued growth among households within the target market area. The latest estimates from 2018 suggest 8,083 households currently exist within the target market area. The target market area is projected to increase by an additional 583 households, with 8,145 households projected to exist by 2023.

- This growth among population and households in the target market area indicates that additional commercial uses can likely be supported within the Hampton Bays community; as growth continues over the coming years, demand will increase further.
- The addition of housing in the downtown area will further increase market demand.
- With median household incomes of \$84,358, it is important to note that households residing within the target market areas have substantial levels of income. This indicates that the spending power is high, which is likely to be reflected in overall spending patterns within the community. This is attractive for new businesses looking to locate within Hampton Bays.
- The average household located within the target market area will have spent \$112,808 on goods and services in 2018.<sup>1</sup>

### Market Supply

- Hampton Bays is comprised of a healthy mix of businesses. The “retail trade” industry comprises 87 individual businesses and over 800 employees, making it the second largest industry sector in terms of the number of businesses and the largest industry sector in terms of the number of employees.
- Numerous shopping centers have taken advantage of Hampton Bays’ strategic location within a downtown area having a nearby consumer population as well as close proximity to Sunrise Highway, and a critical mass of long-standing commercial establishments clustered along Montauk Highway.
- The largest type of commercial use – in terms of both the number of businesses and the number of employees – is the “food services and drinking places” industry, which employs over 500 persons in 50 businesses in Hampton Bays. These types of eating and drinking establishments provide critical supporting uses for those visiting Hampton Bays, allowing for extended visitation and increased spending within the community. Such uses are essential to successful economic growth and sustainability within the community.
- The majority of the existing retail establishments are in good condition, with few being newly constructed. Several of the retailers are undergoing renovations, and/or were being remodeled to accommodate future tenants.
- The minimal vacancies among shopping centers in the community may be indicative of the demand for additional opportunities for economic growth within downtown Hampton Bays.

### Leakage Analysis

- The demand (retail potential) for all retail trade establishments and food & drink establishments within the target market area exceeds the supply (retail sales) of such retail by 4.1%, or by approximately \$30.0 million. This retail gap (leakage) represents the total sales that consumers are spending outside of the target market area.
- This leakage indicates that the existing businesses within the target market area are not only able to capture significant consumer demand from those residing within the target market area, but they have the opportunity to capture even more. This opportunity arises from consumers residing outside of the area – including those employed within the area, in addition to visitors and others passing through the community. It is important to note that this gap represents a conservative estimate, as the demand figures represent retail potential from year-round households located within the target market area. Additional spending power – from seasonal households, tourists, and others passing through Hampton Bays en route to other destinations farther east – is not reflected in this figure, but vastly contributes to the potential.

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<sup>1</sup> It is important to note that these figures differ from the median household income of \$84,358 in the target market area. This can be attributed to the fact that data is for median household income, while data supporting the \$112,808 represents average household expenditures. Further information is provided in Section 5.3 of this report.

- The potential for new businesses to locate within the target market area varies among specific industry sub-sectors.
- Several sub-sectors exhibit a retail surplus within the target market area. These include:
  - Other Motor Vehicle Dealers;
  - Furniture Stores;
  - Electronics & Appliance Stores;
  - Building Material & Supplies Dealers;
  - Beer, Wine & Liquor Stores;
  - Used Merchandise Stores (including antique stores and thrift stores);
  - Other Miscellaneous Store Retailers (including pet and pet supplies stores, art dealers, tobacco stores, and those that retail a general line of new and used merchandise on an auction basis); and,
  - Restaurants/Other Eating Places
- The above-mentioned sub-sectors with a retail surplus indicate that the demand for these types of stores is likely currently satisfied within the target market area. Additional retailers of these types should consider unique characteristics of the target market area with respect to competition, geography and expected sales before choosing to locate in Hampton Bays.
- While a retail surplus exists among several of the business sectors in the area, there are a considerable number of business segments where demand remains strong, as reflected in significant leakage factors. These leakages indicate the success potential, with demand that is likely large enough to support additional establishment(s) within the target market area.
- In the target market area, retail leakages exist within the following industry sub-sectors:
  - Automotive Dealers;
  - Automotive Parts, Accessories & Tire Stores;
  - Home Furnishing Stores;
  - Lawn & Garden Equipment and Supply Stores;
  - Grocery Stores;
  - Specialty Food Stores (including meat markets, fish and seafood markets, fruit and vegetable markets, bakeries and candy stores);
  - Health & Personal Care Stores;
  - Gasoline Stations;
  - Sporting Goods/Hobby/Musical Instrument Stores;
  - Department Stores Excluding Leased Departments;
  - Florists;
  - Office Supplies, Stationery & Gift Stores; and,
  - Drinking Places (specific to those serving alcoholic beverages, including bars and taverns).
- As was the case with the supply of existing businesses, such demand varies among specific industry sub-sectors. The industry sub-sectors with the highest leakage factor include:
  - Clothing Stores;
  - Shoe Stores;
  - Jewelry, Luggage & Leather Goods Stores;
  - Book, Periodical & Music Stores;
  - Other General Merchandise Stores (including warehouse clubs and supercenters); and,
  - Special Food Services (including food service contractors, caterers and mobile food).
- The above-mentioned industry sub-sectors have the highest likely success rate, and therefore it is recommended that they be targeted for recruitment and retention efforts. These findings indicate that there is significant retail potential in the target market area, with relatively few establishments currently located within the surrounding community that are able to meet the consumer demand from the local population.

- The synergy that is achieved through a mix of tenants will be important in ensuring the success of each individual tenant located within downtown Hampton Bays.
- The attraction and retention of such recommended uses will ensure that future businesses fulfill an existing consumer demand while targeting sales of those goods and services that are underrepresented in the local economy.
- The success of such stores in the target market area will be further determined by a multitude of other factors – including geography, accessibility, travel time, signage, condition, synergy of store types, product selection and related factors. Future retailers should consider the unique characteristics of the target market area with respect to competition, geography and expected sales, as well as market niches found throughout the community.

### 3.0 METHODOLOGY

Various data and information from national, state, local and private sources were used to conduct this Commercial Market Analysis. Methodology specific to various sections of this analysis are outlined in greater detail where applicable. This form of analysis conforms to standards of the industry, with methods, data and information, and sources that are considered to be industry standard in the preparation of a Commercial Market Analysis.

The United States Census Bureau was consulted for pertinent 2000 and 2010 demographic data, including population trends, household trends and median household income specific to the target market area. These data were utilized to examine the trends in demand for commercial uses within the target market area.

Environmental Systems Research Institute, Inc. (ESRI) generated on-demand demographic reports specific to the target market area. Various reports were created for the target market area with demographic factors in these profiles including those pertaining to population, the number of households, household income, per capita income, retail goods and services expenditures, and a business summary, among others. Data was collected for 2000 and 2010 as well as current estimates (2018) and projections (2023), where available. In addition, reports were created for the purpose of preparing an analysis of local retail market potential to measure supply and demand. This allows for an understanding of whether existing goods and service providers adequately meet the needs of the community's consumers.

These reports were generated for all consumers residing in, and retailers located within an 11-minute drive time radius (which defines the target market area, as seen in **Section 4.0**) of downtown Hampton Bays. For the purpose of this analysis, this assumes 2-8 Squiretown Road as the centroid.

All estimates and projections provided by ESRI draw upon data from sources including the Current Population Survey, American Community Survey, Census of Retail Trade (all via the United States Census Bureau), Consumer Expenditure Survey (via the United States Bureau of Labor Statistics), United States Postal Service, Internal Revenue Service, National Bureau of Economic Research, and other commercial and federal data sources.

International Council of Shopping Centers and Urban Land Institute both publish standards pertaining to trade areas for various types of shopping places. These standards were referenced in determining an appropriate target market area for the downtown area.

#### **4.0 IDENTIFICATION AND DEFINITION OF TARGET MARKET AREA**

In planning for new commercial uses within downtown Hampton Bays, it is important to recognize various considerations and concepts affecting viability in this location. The first of these criteria is to identify the target market area. A target market area establishes the boundary from which the majority of consumer interest is – and will be – drawn from for commercial uses within the community.

The International Council of Shopping Centers (ICSC) has identified various types of enclosed and open-air shopping centers, primarily differentiated by the location, size, major tenants and the types of goods and services sold. As seen in **Table 1**, variations of shopping centers include convenience shopping centers, neighborhood shopping centers, super community/community shopping centers, regional shopping centers, and super regional shopping centers. These definitions are meant to be guidelines to illustrate the major differences between various types of shopping centers, and it is important to note that there is no clear-cut methodology for classifying the type of a given shopping center. Some shopping centers are hybrids, combining elements from two (2) or more of the basic classifications defined by ICSC. Moreover, mixed-use developments and other shopping centers such as lifestyle centers, town centers or downtowns do not necessarily fall within one of the basic classifications. As such, it is not always possible to precisely classify all shopping centers.<sup>2</sup>

Commercial uses located in downtown Hampton Bays tend to cater to neighborhood and local needs, with most of the existing uses likely classified as a “convenience,” “neighborhood” or “super community/community”-type of shopping area, as defined by ICSC and determined by the size and type of tenants.

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<sup>2</sup> International Council of Shopping Centers, “*ICSC Shopping Center Definitions: Basic Configurations and Types for the United States*,” 2004.

**Table 1**  
**SHOPPING CENTER TYPES AND DESCRIPTIONS**

Type of Shopping Center	Concept	Size (SF)	Number and Type of Tenants	Trade Area
Convenience	Provides for sale of a narrow mix of personal services and convenience goods.	< 30,000	Minimum of three stores. Typically anchorless, or with one small convenience store/minimarket serving as an anchor.	< 1 mile; < 5 minute drive time
Neighborhood	Provides convenience shopping for the day-to-day needs of consumers in the immediate neighborhood.	Average: 60,000  Range: 30,000 – 100,000	Typically 5-20 stores with a supermarket or a drugstore serving as an anchor. Other tenants can include those offering sundries, snacks and personal services such as hair and nail salons, shoe repairing, fitness centers, and laundromats.	3 miles; 5-10 minute drive time
Super Community/ Community <sup>3</sup>	General merchandise or convenience-oriented offerings. Wider range of apparel and other soft goods than neighborhood centers.	Average: 180,000  Range: 100,000 – 500,000+	Typically 15-40 stores with two or more anchors including discount stores, super drugstores and supermarkets. Other tenants can include large-specialty discount stores offering toys, electronics, books, home improvement/furnishings, and/or sporting goods. May also include banking and professional services, personal services and recreational facilities.	3 – 6 miles; 10-15 minute travel time
Regional	Provides general merchandise in full depth and variety. Combination of anchors serves as main attraction.	Average: 500,000  Range: 250,000 – 900,000	Typically 40-80 stores with two or more anchors including one or two full-line department stores, junior department stores, mass merchants, home furnishings, discount department stores, fashion apparel. Also includes a range of services and recreational facilities.	5-15 miles; 15-30+ minute travel time
Super-Regional	Similar to a regional shopping center, but larger in size with a greater variety of merchandise.	Average: 1,000,000  Range: 500,000 – 1,500,000+	Anchors typically include three or more full-line department stores, junior department stores, mass merchants and fashion apparel. Also includes a variety of services and recreational facilities.	5-25 miles; 30-45+ minute travel time

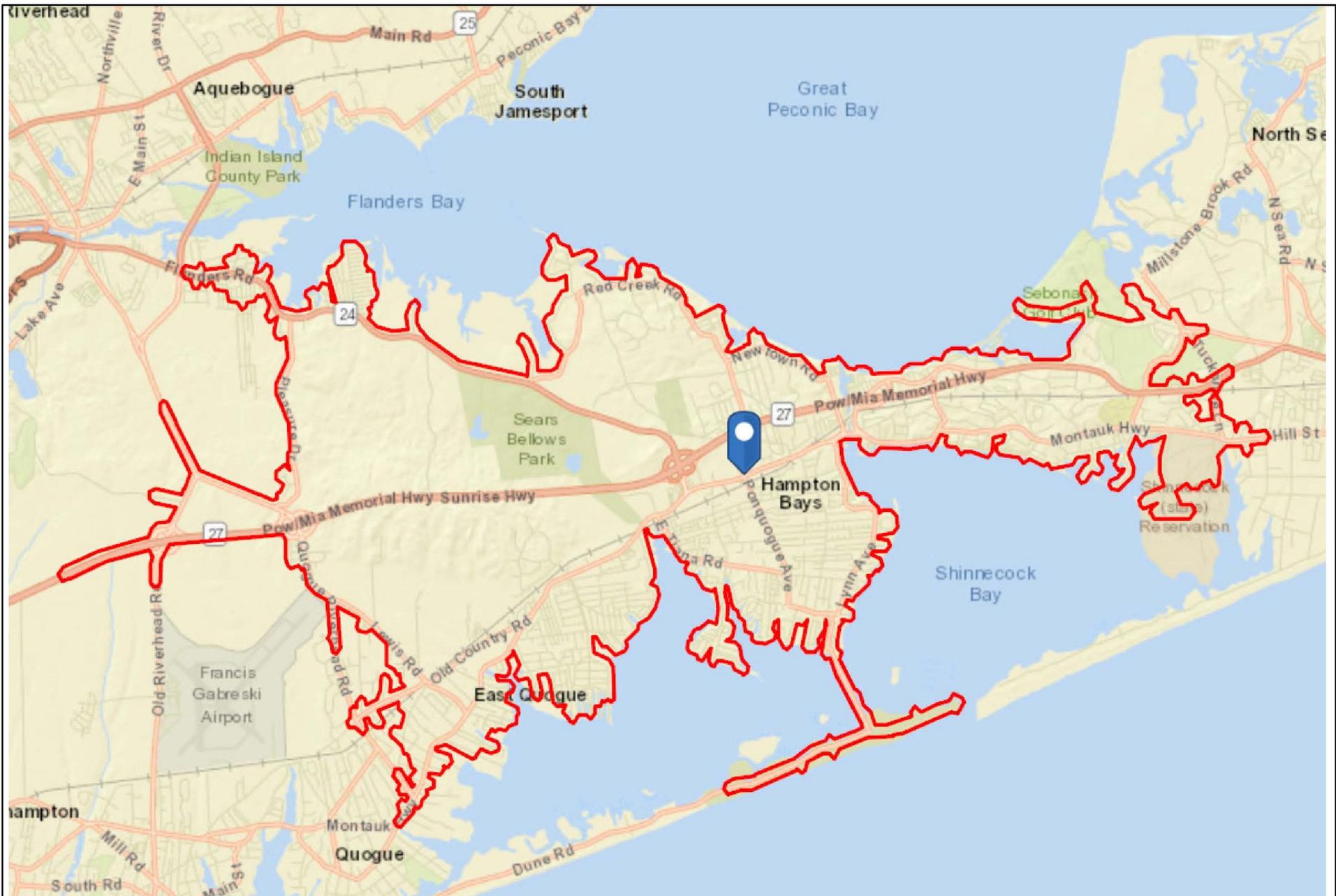
Source: International Council of Shopping Centers; Yale School of Management; Greer, Gaylon E. and Phillip T. Kolbe, *“Investment Analysis for Real Estate Decisions,”* 2003.

<sup>3</sup> International Council of Shopping Centers includes traditional community shopping centers, power centers, town centers, downtowns, lifestyle centers, and outlet/off-price centers within this shopping center classification.

According to ICSC, and as seen in **Table 1**, convenience shopping centers are typically able to draw support from within a one (1)-mile radius, while neighborhood shopping centers draw from a three (3)-mile radius and super community/community shopping centers typically draw support from a three (3)- to six (6)-mile radius. However, it is important to note that Long Island is a unique market, and its dense population results in a target market area that is slightly more specialized. This is especially true on the east end and the south fork where a large seasonal population resides. As such, a more accurate depiction of a target market area considers average travel time, which factors in the layout of roadways, speed limits and geographic barriers. It is important to note that the calculated average travel time does not reflect traffic patterns specific to a given roadway or location. For the purpose of this analysis, an average five (5)-minute drive-time radius was identified as representing and serving the needs of the immediate community with convenience-type commercial uses. Likewise, the neighborhood and community-type commercial needs tend to be satisfied by those residing within a ten (10) to 15-minute drive time radius from a given shopping center/downtown area. As such, and for the purpose of this analysis, these types of shopping areas were blended, and compared with local knowledge of the area and a drive-time map to establish the target market area for this analysis. Ultimately, an 11-minute drive-time radius from downtown Hampton Bays was determined to be an appropriate target market area.

For the purpose of this analysis, the centroid of the calculated drive time is assumed to be 2-8 Squiretown Road in Hampton Bays. As seen in **Figure 1: Target Market Area**, the area located within the red boundary constitutes the target market area. This represents a significant portion of western Southampton Town. The boundary of the target market area extends north to the Great Peconic Bay, east to Tuckahoe Road in Shinnecock Hills, south to Shinnecock Bay and including portions of Dune Road, and farther west along the Sunrise Highway into East Quogue and the edge of Westhampton where consumers are able to travel at faster speeds. This target market area represents the population residing within the immediate community, and surrounding parts of Southampton Town that would likely support commercial uses in downtown Hampton Bays.

It is important to note that residents of the target market areas do not represent the only consumers projected to support additional business in downtown Hampton Bays. Other consumers residing outside of the target market area support retailers in the community, since the area is easily accessible to those traveling further east to other communities along the south fork. In addition, Hampton Bays is a popular seasonal community, with many second homeowners and visitors frequenting the community on a regular basis – during the summer, especially. Many of these consumers originate from outside of the target market area's 11-minute drive time radius. Likewise, it cannot be assumed that all persons residing within the target market area will patronize new business within the community. However, the target market area represents a trade area from which the majority of support will be drawn. As such, this analysis will apply a conservative projection of the population that would likely support additional commercial space in the community as described in subsequent sections of this analysis.



**FIGURE 1  
TARGET MARKET AREA**

Source: ESRI Business Analyst  
Scale: Not to Scale



**Hampton Bays  
Overlay District  
Commercial  
Market Analysis**

## 5.0 MARKET DEMAND

In order to determine whether additional commercial space can be supported in the local market, it is necessary to conduct an analysis of market demand. This section will examine trends among the population and households within the target market area, as it applies to potential for new business in downtown Hampton Bays, as well as the surrounding target market area. The demand is based on several determining demographic and socioeconomic characteristics of the residential population located within the target market area.

As noted in **Section 4.0**, this analysis will apply a conservative projection of the population that likely supports existing and additional commercial space in the community as described in subsequent sections.

### 5.1 Population and Households

Trends in the residential population and in the number of households located within the target market area allow for a clear understanding of those consumers that support the local economy – including existing and new businesses in Hampton Bays. An analysis of past data, coupled with current estimates and projections, illustrate the changing needs of the target market area, and how such needs can be accommodated within the local market through existing and future business establishments.

As seen in **Table 2** and **Chart 1**, the population within the target market area has increased considerably since 2000. Between 2000 and 2010, the population within the target market area increased by over 2,000 persons, or 10.6%. Likewise, the population within the target market area is estimated to have increased by an additional 712 persons, through 2018, resulting in additional estimated growth of 3.2% over the last eight (8) years.

Current projections suggest continued growth, yet at a slightly slower pace, through 2023. Based on the available standard demographic references, population within the target market area is expected to grow by approximately 314 more persons, for a total of 15.7% growth between 2000 and 2023.<sup>4</sup>

It is important to note that this population projection does not account for specific developments currently in the planning or approval process. The addition of housing in the downtown area will further increase market demand. Moreover, while such factors are examined at the local level, projections are not based solely upon specific build-out scenarios or land use analyses. Rather, the projections are based upon historical trends and current estimates at the county level, a time series of county-to-county migration data, an historical analysis of residential building permit data and residential postal delivery counts. Such data is supplemented with available information generated by nationwide databases, statistics providers and demographic and spatial analysis tools.

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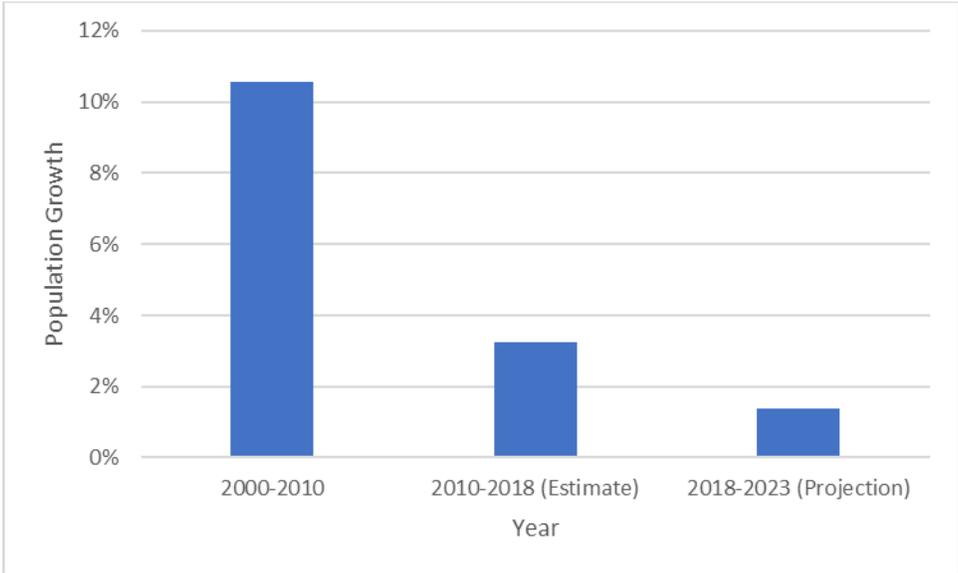
<sup>4</sup> ESRI, *Community Profile Report*. All data specific to 11-minute drive-time radius from 2-8 Squiretown Road in Hampton Bays. All reports accessed via ESRI Business Analyst Online, July 9, 2018.

**Table 2**  
**POPULATION TRENDS, 2000 – 2023 (PROJECTED)**

Year	Target Market Area
2000	19,875
2010	21,972
2018 (Estimate)	22,684
2023 (Projection)	22,998

Source: United States Bureau of the Census; ESRI Business Analyst; Analysis by Nelson, Pope & Voorhis, LLC.

**Chart 1**  
**CHANGE IN POPULATION, 2000 – 2023 (PROJECTED)**



Source: United States Bureau of the Census; ESRI Business Analyst; Analysis by Nelson, Pope & Voorhis, LLC.

Reflective of the population trends, the number of households within the target market area has also increased significantly since 2000. As seen in **Table 3** and **Chart 2**, the number of households located within the target market area increased by 5.6% between 2000 and 2010 – from 7,562 households in 2000 to 7,982 households in 2010. As seen with population trends, current estimates and projections suggest continued growth among households within the target market area. The latest estimates from 2018 suggest 8,083 households currently exist within the target market area. The target market area is projected to increase by an additional 583 households, with 8,145 households projected to exist by 2023. In total, the number of

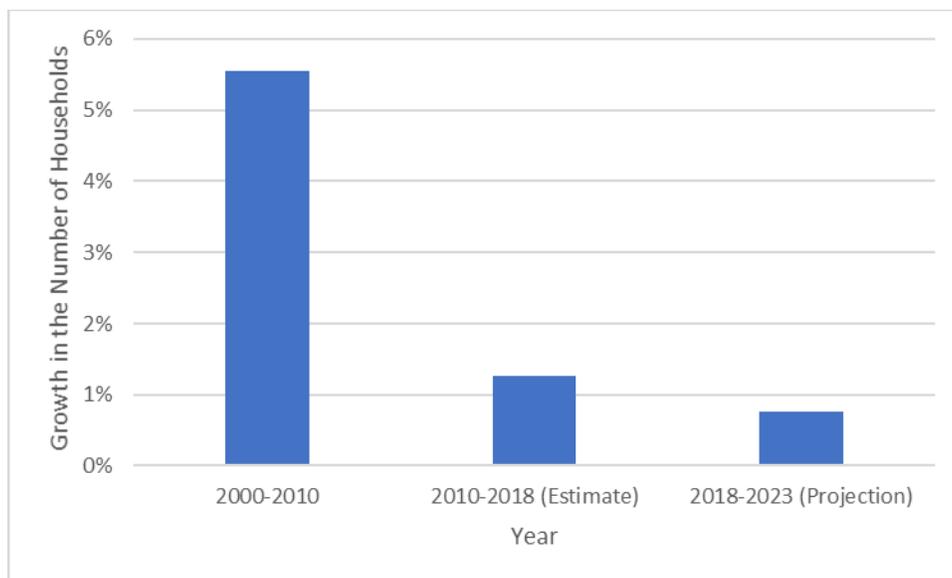
households has increased since 2000 – by 7.7%.<sup>5</sup> This growth indicates that additional commercial uses can likely be supported; as growth continues over the coming years, demand will increase further.

**Table 3**  
**HOUSEHOLD TRENDS, 2000 – 2023 (PROJECTED)**

Year	Target Market Area
2000	7,562
2010	7,982
2018 (Estimate)	8,083
2023 (Projection)	8,145

Source: United States Bureau of the Census; ESRI Business Analyst; Analysis by Nelson, Pope & Voorhis, LLC.

**Chart 2**  
**CHANGE IN THE NUMBER OF HOUSEHOLDS, 2000 – 2023 (PROJECTED)**



Source: United States Bureau of the Census; ESRI Business Analyst; Analysis by Nelson, Pope & Voorhis, LLC.

<sup>5</sup> ESRI, *Community Profile Report*. All data specific to 11-minute drive-time radius from 2-8 Squiretown Road in Hampton Bays. All reports accessed via ESRI Business Analyst Online, July 9, 2018.

## 5.2 Income

Household income is indicative of the level of buying power generated from a given community, as expenditures typically increase with higher income levels. Current estimates indicate that households in the target market area have a median income of \$84,358. An examination of per capita income reveals an estimate of \$41,388.<sup>6</sup> Residents and households residing within the target market area have substantial levels of income. This indicates that the spending power is high, which is likely to be reflected in overall spending patterns within the community. This is attractive for new businesses looking to locate within downtown Hampton Bays.

## 5.3 Average Annual Expenditures

According to the latest estimates derived from the United States Bureau of Labor Statistics' Consumer Expenditure Survey, the average household located within the target market area spent a total of approximately \$112,808<sup>7</sup> on goods and services in 2018.<sup>8</sup> A detailed breakdown of household expenditures on retail goods and services is outlined in **Table 4**.

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<sup>6</sup> ESRI, *Community Profile Report*. All data specific to 11-minute drive-time radius from 2-8 Squiretown Road in Hampton Bays. All reports accessed via ESRI Business Analyst Online, July 9, 2018.

<sup>7</sup> It is important to note that these figures differ from the median household income of \$84,358 in the target market area, as illustrated in **Section 5.2**. This can be attributed to the fact that data in **Section 5.2** depicts median household income, while data in **Section 5.3** and **Table 5** depicts average household expenditures.

<sup>8</sup> ESRI, *Community Profile Report*. All data specific to 11-minute drive-time radius from 2-8 Squiretown Road in Hampton Bays. All reports accessed via ESRI Business Analyst Online, July 9, 2018.

**Table 4**  
**AVERAGE ANNUAL EXPENDITURES ON RETAIL GOODS AND SERVICES, 2018**  
**(ESTIMATE)**

Good/Service	Target Market Area
Apparel and services <sup>9</sup>	\$2,841
Computer <sup>10</sup>	\$273
Entertainment and recreation <sup>11</sup>	\$4,208
Food away from home	\$4,480
Food and nonalcoholic beverages at home	\$7,088
Alcoholic beverages	\$782
Financial <sup>12</sup>	\$47,831
Health <sup>13</sup>	\$706
Home <sup>14</sup>	\$22,318
Household furnishings and equipment <sup>15</sup>	\$1,686
Household operations <sup>16</sup>	\$1,381
Housekeeping supplies	\$885
Insurance <sup>17</sup>	\$7,746
Personal care products	\$620
School books and supplies	\$193
Smoking products	\$442
Transportation <sup>18</sup>	\$6,945
Travel <sup>19</sup>	\$2,383
<b>Total: Annual Expenditures</b>	<b>\$112,808</b>

Source: ESRI, *Retail Goods and Services Expenditures Report*; Analysis by Nelson, Pope & Voorhis, LLC.

<sup>9</sup> This includes men's, women's and children's apparel; footwear; watches and jewelry; and apparel products and services.

<sup>10</sup> This includes computers and hardware for home use; portable memory; computer software; and computer accessories.

<sup>11</sup> This includes fees and admissions; and TV/video/audio; pets; toys/games/crafts/hobbies; recreational vehicles and fees; sports/recreation/exercise equipment; photo equipment and supplies; reading; and catered affairs.

<sup>12</sup> This includes value of stocks/bonds/mutual funds; value of retirement plans; value of other financial assets; value of loan amount excluding interest; and value of credit card debt.

<sup>13</sup> This includes nonprescription drugs; prescription drugs; and eyeglasses and contact lenses.

<sup>14</sup> This includes mortgage payment and basics; maintenance and remodeling services; maintenance and remodeling materials; and utilities, fuel and public services.

<sup>15</sup> This includes household textiles; furniture; rugs; major appliances; housewares; small appliances; luggage; and telephones and accessories.

<sup>16</sup> This includes child care; lawn and garden; and moving/storage/freight express.

<sup>17</sup> This includes owners and renters insurance; vehicle insurance; life/other insurance; and health insurance.

<sup>18</sup> This includes payments on vehicles excluding leases; gasoline and motor oil; and vehicle maintenance and repairs.

<sup>19</sup> This includes airline fares; lodging on trips; auto/truck rental on trips; and food and drink on trips.

## 6.0 MARKET SUPPLY

This section examines the existing commercial establishments located within Hampton Bays. An analysis of the existing supply is crucial, as there are many established businesses in the community, and an understanding of the local business mix is an important factor in attracting the right type of new business to the downtown.

As seen in **Table 5**, Hampton Bays is comprised of a healthy mix of businesses. The “retail trade” industry comprises 87 individual businesses and over 800 employees, making it the second largest industry sector in terms of the number of businesses and the largest industry sector in terms of the number of employees.

**Table 5**  
**BUSINESS SUMMARY, 2018**

Industry	Number of Businesses	Percentage of Total	Number of Employees	Percentage of Total
Agriculture, Forestry, Fishing & Hunting	3	0.5%	17	0.3%
Mining	0	0.0%	0	0.0%
Utilities	3	0.5%	14	0.3%
Construction	89	13.9%	469	9.1%
Manufacturing	12	1.9%	72	1.4%
Wholesale Trade	21	3.3%	233	4.5%
Retail Trade	87	13.6%	839	16.2%
Transportation & Warehousing	20	3.1%	292	5.6%
Information	6	0.9%	81	1.6%
Finance & Insurance	26	4.1%	140	2.7%
Real Estate, Rental & Leasing	31	4.9%	116	2.2%
Professional, Scientific & Technical Services	35	5.5%	133	2.6%
Management of Companies & Enterprises	0	0.0%	0	0.0%
Administrative & Support & Waste Management & Remediation Services	43	6.7%	153	3.0%
Educational Services	14	2.2%	337	6.5%
Health Care & Social Assistance	55	8.6%	642	12.4%
Arts, Entertainment & Recreation	22	3.4%	138	2.7%
Accommodation & Food Services	62	9.7%	641	12.4%
Other Services (except Public Administration)	68	10.7%	308	6%
Public Administration	20	3.1%	546	10.6%
<b>Total: All Industry Sectors</b>	<b>638</b>	<b>100%</b>	<b>5,171</b>	<b>100%</b>

Source: ESRI, *Business Summary Report*; Analysis by Nelson, Pope & Voorhis, LLC.

Numerous shopping centers have taken advantage of Hampton Bays’ strategic location within a downtown area having a nearby consumer population as well as close proximity to Sunrise Highway, and a critical mass of long-standing commercial establishments clustered along Montauk Highway. **Table 6**

reveals a closer examination of the “retail trade” and the “food services and drinking places” industries in Hampton Bays. The largest – in terms of both the number of businesses and the number of employees – is the “food services and drinking places” industry, which employs over 500 persons in 50 businesses in Hampton Bays. These types of eating and drinking establishments provide critical supporting uses for those visiting Hampton Bays, allowing for extended visitation and increased spending within the community. Such uses are essential to successful economic growth and sustainability within the community.

In addition to the strong presence of food services and drinking places, there exist 11 food and beverage stores, 10 motor vehicle and parts dealers, nine (9) sport goods, hobby, book and music stores, nine (9) building material & garden equipment supply stores and 16 miscellaneous store retailers, employing a total of over 400 persons in the community. These businesses include stand-alone retail establishments, as well as small convenience shopping centers and neighborhood shopping centers, and larger super community/community-type shopping centers. As seen in **Table 1** and in **Section 4.0**, smaller convenience and neighborhood shopping centers tend to serve the needs of those residing within the immediate neighborhood, while super community/community-type shopping centers typically draw from a larger radius and offer different types of products and levels of service to its patrons.

**Table 6**  
**BUSINESS SUMMARY: RETAIL TRADE AND**  
**FOOD SERVICES & DRINKING PLACES, 2018**

Industry	Number of Businesses	Number of Employees
Motor Vehicle & Parts Dealers	10	105
Furniture & Home Furnishings Stores	4	58
Electronics & Appliance Stores	4	63
Building Material & Garden Equipment & Supplies Dealers	9	26
Food & Beverage Stores	11	232
Health & Personal Care Stores	7	80
Gasoline Stations	2	11
Clothing & Clothing Accessories Stores	6	17
Sport Goods, Hobby, Book, & Music Stores	9	28
General Merchandise Stores	8	138
Miscellaneous Store Retailers	16	80
Food Services & Drinking Places	50	567
<b>Total: Retail Trade and Food Services &amp; Drinking Places</b>	<b>136</b>	<b>1,405</b>

Source: ESRI, *Business Summary Report*; Analysis by Nelson, Pope & Voorhis, LLC.

The majority of the existing retail establishments are in good condition, with few being newly constructed. Several of the retailers are undergoing renovations, and/or were being remodeled to

accommodate future tenants. As of August 2018, only a few vacant storefronts were noted within the downtown area of Hampton Bays. It is important to note that vacancies will inevitably occur as a result of business turnover, specific and local market considerations with respect to certain tenants, and specific and local factors with respect to a given shopping center, including age and style, business mix, signage, synergy of store types, parking, and accessibility, and related factors. The minimal vacancies among shopping centers in the community may be indicative of the demand for additional opportunities for economic growth within downtown Hampton Bays.

## 7.0 LEAKAGE ANALYSIS

In order to identify the opportunity for new commercial uses within downtown Hampton Bays, a leakage analysis was conducted. Such an analysis examines the demand for and supply of various industry sub-sectors to determine if the existing businesses located within the target market area are capturing the full retail sales potential.

For the purpose of this analysis, the demand represents the estimated consumer expenditures among households located within the target market area, for various types of retail. The supply represents the actual sales revenues generated by the existing businesses located within the target market area. The difference between the demand and the supply indicate a leakage or a surplus in the local retail market. A leakage or surplus is differentiated and quantified through a leakage factor – ranging from negative 100 percent (-100%) to 100 percent (+100%). A factor of -100% indicates a complete market surplus, where demand is zero. A factor of 100% indicates a complete leakage, where supply is zero.

A leakage emerges when the demand exceeds the supply. This typically occurs when consumers purchase goods from outside of the target market area. This may be indicative of the nonexistence of retailers within the target market area, or of retailers with greater selection and/or better prices elsewhere, including non-store retailers and sales occurring through mail-order sources such as catalogs and online shopping sites. The existence of a leakage indicates that there remains untapped retail potential in the target market area, and it is likely that there exists demand for a given product and/or service. As such, additional opportunities within a specific industry are likely to exist within the target market area.

A surplus emerges when the supply exceeds the demand, or when retailers are able to attract persons residing outside of the target market area. Such a surplus is likely indicative of specialty retailers, or those retailers with greater selection and/or better prices than in neighboring communities. The existence of a surplus indicates that the local demand has been met. As such, additional retailers within such an industry are likely not demanded and may saturate the target market area. However, it is important to note that the existence of a surplus may also indicate the presence of a niche market. A niche market is one that has been identified as having a special attribute, unique from others, that stands out from the competition, and thus becomes a place that is able to be marketed to residents, new business prospectors and visitors alike. It is important to differentiate between the two (2) types of surpluses and apply the appropriate rationale when forming recommendations for uses that would best serve the target market area.

In order to determine the specific industries with local retail potential (and therefore the industries that should be targeted for attraction/development in downtown Hampton Bays), a

leakage analysis was conducted specific to the target market area.<sup>20</sup> Data specific to both the current consumer expenditures and actual business sales data within the target market area was purchased from ESRI, to calculate the difference between the demand and the supply within both the target market area. Data for both demand and supply are based upon household expenditures and actual sales receipts over the past year, generated through available data from the Census of Retail Trade from the United States Census Bureau.

The leakage analysis accounts for both physical retailers/food and drink establishments, as well as non-store retailers (NAICS 454: Nonstore Retailers in **Table 7**). According to the North American Industry Classification System (NAICS) (via the U.S. Census Bureau), non-store retailers include mail-order sources such as catalogs and online shopping sites, as well as sales stemming from door-to-door solicitation, portable stalls and vending machine operators, in addition to establishments engaged in the direct sale of products, and newspaper delivery service providers.

An examination of consumer spending patterns was conducted and compared to retail sales data within the target market area.<sup>21</sup> The demand (retail potential) for all retail trade establishments and food & drink establishments within the target market area exceeds the supply (retail sales) of such retail by 4.1%, or by approximately \$30.0 million. This retail gap (leakage) represents the total sales that consumers are spending outside of the target market area. This leakage indicates that the existing businesses within the target market area are not only able to capture significant consumer demand from those residing within the target market area, but they have the opportunity to capture even more. This opportunity arises from consumers residing outside of the area – including those employed within the area, in addition to visitors and others passing through the community. It is important to note that this gap represents a conservative estimate, as the demand figures represent retail potential from year-round households located within the target market area. Additional spending power – from seasonal households, tourists, and others passing through Hampton Bays en route to other destinations further east – is not reflected in this figure, but vastly contributes to the potential.

**Table 7** summarizes the leakage/surplus in the target market area, sorted by the potential for consumer expenditures and the actual sales generated within specific industry sectors. The potential for new businesses to locate within the target market area varies among specific industry sub-sectors.

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<sup>20</sup> A leakage analysis is considered to be the industry standard when examining the relationship between market demand and existing supply during the preparation of a commercial market analysis. However, there are other factors specific to downtown Hampton Bays that will influence the decision for new business and industry to locate, and ultimately determine whether retail establishments within specific industry sub-sectors will succeed within the local market. This is especially true in Long Island's east-end/south fork market, which is vastly different than other suburban communities throughout New York State and the nation. Though a thorough examination of such factors was beyond the scope for this commercial market analysis, various factors specific to Hampton Bays, including travel time, access, environmental features and other physical and natural barriers should be considered by all tenants interested in locating within the community.

<sup>21</sup> This includes stand-alone retail trade and food and drink establishments, as well as those located within all types of shopping centers and downtown settings.

Several sub-sectors exhibit a retail surplus within the target market area. These include<sup>22</sup>:

- Other Motor Vehicle Dealers;
- Furniture Stores;
- Electronics & Appliance Stores;
- Building Material & Supplies Dealers;
- Beer, Wine & Liquor Stores;
- Used Merchandise Stores (including antique stores and thrift stores);
- Other Miscellaneous Store Retailers (including pet and pet supplies stores, art dealers, tobacco stores, and those that retail a general line of new and used merchandise on an auction basis); and,
- Restaurants/Other Eating Places

The above-mentioned sub-sectors with a retail surplus indicate that the demand for these types of stores is likely currently satisfied within the target market area. Additional retailers of these types should consider unique characteristics of the target market area with respect to competition, geography and expected sales before locating in Hampton Bays.

While a retail surplus exists among several of the business sectors in the area, there are a considerable number of business segments where demand remains strong, as reflected in significant leakage factors. These leakages indicate the success potential, with demand that is likely large enough to support additional establishment(s) within the target market area.<sup>23</sup>

In the target market area, retail leakages exist within the following industry sub-sectors<sup>24</sup>:

- Automotive Dealers;
- Automotive Parts, Accessories & Tire Stores;
- Home Furnishing Stores;
- Lawn & Garden Equipment and Supply Stores;
- Grocery Stores;
- Specialty Food Stores (including meat markets, fish and seafood markets, fruit and vegetable markets, bakeries and candy stores);
- Health & Personal Care Stores;
- Gasoline Stations;
- Sporting Goods/Hobby/Musical Instrument Stores;
- Department Stores Excluding Leased Departments;
- Florists;
- Office Supplies, Stationery & Gift Stores; and,
- Drinking Places (specific to those serving alcoholic beverages, including bars and taverns).

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<sup>22</sup> ESRI, *Retail MarketPlace Profile Report*. All data specific to 11-minute drive-time radius from 2-8 Squiretown Road in Hampton Bays. All reports accessed via ESRI Business Analyst Online, July 9, 2018.

<sup>23</sup> It is important to note that the findings of this analysis do not seek to recommend specific tenants for any of the vacant or underutilized properties in downtown Hampton Bays. Rather, this analysis provides recommendations with respect to specific industry sectors that have the potential to succeed within the community, as evidenced by high consumer demand and relatively low supply in the target market. In an effort to capture existing demand from the target market area, it is recommended that new businesses are sought from these business categories. This will ensure that the community fulfills an existing consumer demand while targeting sales of those goods and services that are currently underserved in the target market area.

<sup>24</sup> ESRI, *Retail MarketPlace Profile Report*. All data specific to 11-minute drive-time radius from 2-8 Squiretown Road in Hampton Bays. All reports accessed via ESRI Business Analyst Online, July 9, 2018.

As was the case with the supply of existing businesses, such demand varies among specific industry sub-sectors. The industry sub-sectors with the highest leakage factor include:

- Clothing Stores;
- Shoe Stores;
- Jewelry, Luggage & Leather Goods Stores;
- Book, Periodical & Music Stores;
- Other General Merchandise Stores (including warehouse clubs and supercenters); and,
- Special Food Services (including food service contractors, caterers and mobile food).

The above-mentioned industry sub-sectors have the highest likely success rate, and therefore it is recommended that they be targeted for recruitment and retention efforts. These findings indicate that there is significant retail potential in the target market area, with relatively few establishments currently located within the surrounding community that are able to meet the consumer demand from the local population. The synergy that is achieved through a mix of tenants will be important in ensuring the success of each individual tenant located within downtown Hampton Bays.

The attraction and retention of such recommended uses will ensure that future businesses fulfill an existing consumer demand while targeting sales of those goods and services that are underrepresented in the local economy. The success of such stores in the target market area will be determined by a multitude of other factors – including geography, accessibility, travel time, signage, condition, synergy of store types, product selection, and related factors. Future retailers should consider the unique characteristics of the target market area with respect to competition, geography and expected sales, as well as market niches found throughout the community.

**Table 7**  
**LEAKAGE ANALYSIS: TARGET MARKET AREA (2018)**

Industry	Opportunity Gap/Surplus	Leakage Gap/Surplus Factor (Percent)
NAICS 441: Motor Vehicle & Parts Dealers	(\$33,853,231)	-19.9%
NAICS 4411: Automotive Dealers	\$734,836	0.6%
NAICS 4412: Other Motor Vehicle Dealers	(\$38,383,538)	-78.9%
NAICS 4413: Auto Parts, Accessories & Tire Stores	\$3,795,472	49.8%
NAICS 442: Furniture & Home Furnishings Stores	(\$4,158,563)	-14.0%
NAICS 4421: Furniture Stores	(\$8,165,235)	-38.5%
NAICS 4422: Home Furnishing Stores	\$4,006,672	47.2%
NAICS 443: Electronics & Appliance Stores	(\$3,085,449)	-10.3%
NAICS 444: Building Material, Garden Equipment & Supply Stores	(\$5,553,317)	-11.3%
NAICS 4441: Building Material & Supplies Dealers	(\$6,089,001)	-13.2%
NAICS 4442: Lawn & Garden Equipment & Supply Stores	\$535,684	18.0%
NAICS 445: Food & Beverage Stores	(\$138,500)	-0.1%

Industry	Opportunity Gap/Surplus	Leakage Gap/Surplus Factor (Percent)
NAICS 4451: Grocery Stores	\$901,772	0.9%
NAICS 4452: Specialty Food Stores	\$1,895,982	31.3%
NAICS 4453: Beer, Wine & Liquor Stores	(\$2,936,252)	-21.1%
NAICS 446, 4461: Health & Personal Care Stores	\$11,892,526	26.0%
NAICS 447, 4471: Gasoline Stations	\$7,366,533	12.4%
NAICS 448: Clothing & Clothing Accessories Stores	\$28,422,642	89.0%
NAICS 4481: Clothing Stores	\$20,033,252	91.0%
NAICS 4482: Shoe Stores	\$2,992,440	80.4%
NAICS 4483: Jewelry, Luggage & Leather Goods Stores	\$5,396,950	86.9%
NAICS 451: Sporting Goods, Hobby, Book & Music Stores	\$3,085,650	17.7%
NAICS 4511: Sporting Goods/Hobby/Musical Instrument Stores	\$1,455,819	9.2%
NAICS 4512: Book, Periodical & Music Stores	\$1,641,578	100.0%
NAICS 452: General Merchandise Stores	\$16,429,596	24.8%
NAICS 4521: Department Stores Excluding Leased Departments	\$5,978,385	13.1%
NAICS 4529: Other General Merchandise Stores	\$10,451,211	50.9%
NAICS 453: Miscellaneous Store Retailers	\$565,388	2.2%
NAICS 4531: Florists	\$584,959	28.5%
NAICS 4532: Office Supplies, Stationery & Gift Stores	\$2,456,465	43.6%
NAICS 4533: Used Merchandise Stores	(\$502,968)	-12.9%
NAICS 4539: Other Miscellaneous Store Retailers	(\$1,973,067)	-14.1%
NAICS 454: Nonstore Retailers	\$9,466,080	75.6%
NAICS 4541: Electronic Shopping & Mail-Order Houses	\$7,669,908	72.9%
NAICS 4542: Vending Machine Operators	\$181,780	100.0%
NAICS 4543: Direct Selling Establishments	\$1,614,392	88.5%
NAICS 722: Food Services & Drinking Places	(\$416,425)	-0.5%
NAICS 7223: Special Food Services	\$1,456,420	71.2%
NAICS 7224: Drinking Places -Alcoholic Beverages	\$1,278,657	33.3%
NAICS 7225: Restaurants/Other Eating Places	(\$3,151,500)	-4.4%
<b>TOTAL: ALL RETAIL TRADE ESTABLISHMENTS AND FOOD SERVICES &amp; DRINKING PLACES</b>	<b>\$30,022,930</b>	<b>4.1%</b>

Source: ESRI, *Retail MarketPlace Profile*; Analysis by Nelson, Pope & Voorhis, LLC.

## 8.0 CONCLUSIONS

This Commercial Market Analysis serves to assist the Town of Southampton in identifying and quantifying the gaps within the existing commercial areas in downtown Hampton Bays. The findings of this Commercial Market Analysis will be incorporated into the SDGEIS and will serve as a planning tool for the Town to examine possible future planning and land use decisions, as necessary.

The Commercial Market Analysis examines the existing market conditions and identifies the supply and demand of commercial uses within downtown Hampton Bays, as well as within the surrounding community. The first step in examining the need for additional types of commercial space in the community is to identify a target market area. For the purpose of this analysis, and as seen in **Section 4.0**, the target market area was identified as all households and businesses located within an 11-minute drive time radius of downtown Hampton Bays. Data and trends were analyzed in order to depict the characteristics of those residing within the target market area; ultimately these persons serve as the majority of support for existing and additional commercial space. As seen in **Section 5.0**, the target market area has experienced considerable growth – both in population and the number of households, since 2000, and demographic projections forecast continued growth through 2023. The substantial growth within the target market area – with high levels of purchasing power – indicates that additional commercial development can likely be supported; as growth continues over the coming years, demand will further increase.

As seen in **Section 6.0**, Hampton Bays is comprised of a healthy mix of businesses. The “retail trade” industry comprises 87 individual businesses and over 800 employees, making it the second largest industry sector in terms of the number of businesses and the largest industry sector in terms of the number of employees. The second largest industry sector – in terms of the number of employees – is the “accommodation & food services industry, which employs over 600 persons in 62 businesses in Hampton Bays. These types of eating and drinking places provide critical supporting uses for those visiting Hampton Bays, allowing for extended visitation and increased spending within the community. Such uses are essential to successful economic growth and sustainability within the community. Building material/garden equipment and supplies dealers, general merchandise stores, and motor vehicle/parts dealers are also large employers within the community.

**Section 7.0** lists those types of goods and services, as well as industries that would likely be supported in the local market. Retail leakages within the target market area exist among automotive dealers; automotive parts, accessories & tire stores; home furnishing stores; lawn & garden equipment and supply stores; grocery stores; specialty food stores; health & personal care stores; gasoline stations; sporting goods/hobby/musical instrument stores; department stores (excluding leased departments; florists; office supplies, stationery & gift stores; and drinking places.

The industry sub-sectors with the highest leakage factor include clothing stores; shoe stores; jewelry, luggage & leather goods stores; book, periodical & music stores; other general merchandise stores; and special food services. These industry sub-sectors have the highest likely success rate, and therefore it is recommended that they be targeted for recruitment and retention efforts. These findings indicate that there is significant retail potential in the target market area, with relatively few establishments currently located within the surrounding community that can meet the consumer demand from the local population. The synergy that is achieved through a mix of tenants will be important in ensuring the success of each individual tenant located within downtown Hampton Bays.

The attraction and retention of such recommended uses will ensure that future businesses fulfill an existing consumer demand while targeting sales of those goods and services that are underrepresented in the local economy. The success of such stores in the target market area will be determined by a multitude of other factors – including geography, accessibility, travel time, signage, condition, synergy of store types, product selection, and related factors. Future retailers should consider the unique characteristics of the target market area with respect to competition, geography and expected sales, as well as market niches found throughout the community.

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**ATTACHMENT A**  
Nelson, Pope & Voorhis, LLC  
Economic Qualifications

# NELSON POPE & VOORHIS

## ABOUT NELSON, POPE & VOORHIS...

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**Nelson, Pope & Voorhis, LLC** was formed in 1997 and has grown in capabilities and size since that time. The merging of Charles Voorhis & Associates (13 year history) with Nelson & Pope (a 50-year tradition in engineering and related services) created an environmental planning firm with a wealth of experience to bring to complex environmental problem solving, planning and feasibility, resource assessment and site investigations.

**Nelson, Pope & Voorhis** serves governmental and private sector clients in preparing creative solutions in the specialized area of complex environmental project management and land use planning and analysis.

**Nelson, Pope & Voorhis** has the benefit of knowledge of local issues, local resources, and the passion to provide the very best solutions and strategies for the local area. This provides unparalleled knowledge of the application of the community planning process, comprehensive planning and SEQRA Administration. The result is a team of highly compatible land use professionals that will get the job done in a manner that ensures real and implementable solutions.

**Nelson, Pope & Voorhis** employees are recognized as experts in environmental, land use and planning issues and have provided consulting services to various municipalities. NP&V encourages continuing education through participation in conferences and seminars for all staff and holds regular training luncheons utilizing APA and other training packages.

**Nelson, Pope & Voorhis** has a capable staff of professionals, including planners and economic analysts, ecologists, hydrologists, wetlands specialists and environmental professionals. When integrated with technical staff of Nelson & Pope, the team is expanded to include civil, sanitary and transportation engineers and land surveyors.

**Nelson, Pope & Voorhis** would appreciate the opportunity to discuss how we can assist you in achieving your goals. We are committed to providing quality environmental, planning and consulting services to all clients. This statement of qualifications is an introduction to the many services we provide with a focus on municipal services; the following pages contain a more detailed presentation of services offered by **Nelson, Pope & Voorhis**, as well as a sampling of completed projects and key staff resumes.

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Charles Voorhis is managing partner and is a member of the American Institute of Certified Planners (AICP) and is a Certified Environmental Professional (CEP), having over 30 years of experience in environmental planning on Long Island and the New York area. Mr. Voorhis oversees the business in terms of management, marketing and expertise, provides expert testimony in hearings and court proceedings, and ensures that client needs are served to the best of the firm's ability.

The firm has significant expertise in applied use of the State Environmental Quality Review Act (SEQRA) with understanding of the practical and legal use of this law from both the private and municipal perspective. Staffing includes environmental professionals assembled to work together as a team with complementary expertise and interests. NP&V personnel maintain wildlife collection permits in New York State, and are active contributors to the Long Island Geographic Information System (GIS) user group meetings and publications.

The firm has developed a number of copyright protected computer models for environmental analysis in the areas of: wildlife and ecology; water budget analysis and groundwater impacts; economic and market analysis; and stormwater impact prediction. The reports and graphics generated for projects are high in quality and professionally prepared through the use of state-of-the-art technology in digital aerial photography, geocoding and mapping of site features using differential global positioning systems (GPS), AutoCAD analysis/mapping, ESRI geographic information systems (GIS) programs including ArcMap and 3D Analyst and Spatial Analyst, custom spreadsheet models for regional land use impact assessment, and related technological tools for advanced data management and word processing. The seamless integration of environmental and engineering services with Nelson & Pope is accomplished by direct communication and computer networking to ensure that projects are managed through the review process to the development stage.

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The division of **ENVIRONMENTAL & COMMUNITY PLANNING** specializes in comprehensive local and regional planning. Technology is key in today's planning field and NP&V continues to keep pace with the most current tools available for planning applications. Use of Geographic Information System (GIS) software, 3D Analyst, ArcScene and Spatial Analyst, as well as CommunityViz (3-D simulation and analysis software), architectural SketchUp (modeling software), AutoCAD, and planning and analysis software and spreadsheets, results in rapid, accurate and high quality data, analysis, illustration and reporting. This division conducts planning studies, revitalization plans, community development/public participation activities, and human resource analysis including noise, air, demographic, socio-economic and visual resource assessment (including 3D simulations, photo simulations and shadow studies). The division is directed by Kathryn Eiseman, AICP and includes planners, economic analysts and GIS specialists with environmental, planning and architectural backgrounds.

The division of **ENVIRONMENTAL RESOURCE & WETLANDS ASSESSMENT** provides quality services in the preparation of Environmental Impact Statements (EIS's), Environmental Assessments (EA's), planning and zoning law review and preparation, stormwater permitting and erosion control compliance, and wetland delineation, assessment, mitigation and permitting. This division is headed by Carrie O'Farrell, AICP and has a capable staff including environmental scientists, wetland ecologists and environmental professionals to ensure timely delivery of quality products.

The division of **PHASE I/II ASSESSMENTS & REMEDIATION** performs Phase I and II Environmental Site Assessments (ESA's), voluntary cleanup, brownfields cleanup, RI/FS and all aspects of site remediation and investigation. The division is headed by Steven McGinn, CEI a member of Nelson & Pope's environmental services branch for 13 years with significant experience in preparation of Phase I/II ESA's field investigations and remediation. This division includes a staff of hydrogeologists and environmental professionals and coordinates required field equipment and laboratory services. NP&V has performed large and small assessments and provides the fastest possible turnaround to meet due diligence periods and deadlines which are often a factor in real estate transactions. NP&V Phase I/II ESA services are known and accepted by lending institutions throughout the tri-state area. NP&V owns, maintains and operates GPR (Ground Penetrating Radar) and PowerProbe units to provide expanded services in site investigations. A description of NP&V qualifications and resumes of personnel proposed for the project and specific project experience is included in the



## SUMMARY OF SERVICES...

### **ENVIRONMENTAL PLANNING CONSULTING**

**MUNICIPAL PLANNING  
SEQRA COMPLIANCE  
HARBOR MANAGEMENT  
PLANNING  
FEASIBILITY STUDIES  
DUE DILIGENCE ASSISTANCE  
REGIONAL PLANNING  
ECONOMIC PLANNING  
ENVIRONMENTAL SITE  
ASSESSMENT  
ENVIRONMENTAL SCIENCE &  
ANALYSIS  
WETLAND PERMITTING  
STORM WATER  
MANAGEMENT PLANS  
WATERFRONT & COASTAL  
ZONE PROJECTS  
MAPPING  
WATERSHED MANAGEMENT  
& WATER SUPPLY  
PERMITTING & PROCESSING  
SUSTAINABILITY & LEED  
PROJECT PLANNING &  
SUPPORT**

### **NELSON POPE & VOORHIS**

572 Walt Whitman Road  
Melville, New York  
11747

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### What we do at Nelson, Pope & Voorhis...

- **SEQRA Compliance and Environmental Analysis:** Environmental impact statements (EIS); assessment forms (EAF); ecological and wildlife studies; noise and air emission impact studies; and compliance with Federal, State & local environmental regulations & laws.
- **Municipal Planning:** Full environmental and planning review services for municipalities including site plan and subdivision review, zoning board review and SEQRA Administration.
- **Regional and Community Planning:** Conceptual site development planning; public outreach: visioning workshops and charrettes; development alternatives; zoning; site yield studies; build-out analysis; visual analysis (3-D modeling; photo simulations) and comprehensive regional and hamlet planning studies.
- **Feasibility and Due Diligence Assistance:** Comprehensive research into site development related issues affecting project implementation, timing and costs.
- **Economic Planning:** Fiscal and economic impact analyses, market analyses & feasibility studies, economic development strategies, niche market and branding planning, tax base analysis, housing incentives and programs and community development.
- **Grants Administration:** Preparation of federal and state funded municipal grant applications, project management; including the preparation of all reporting documents.
- **Environmental Site Assessment:** Phase I, II and III environmental site assessments; geophysical surveys; remedial investigation and feasibility studies; Brownfield investigations; voluntary cleanup program; oil spill closure; asbestos and lead testing and abatement.
- **Soil Borings & Subsurface Investigations:** Soil borings, Ground Penetrating Radar; groundwater investigations, modeling; and flow studies; monitoring well and piezometer installation.



## SUMMARY OF SERVICES...

### *ENVIRONMENTAL PLANNING CONSULTING*

*MUNICIPAL PLANNING  
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HARBOR MANAGEMENT  
PLANNING  
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DUE DILIGENCE ASSISTANCE  
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- **STORM WATER MANAGEMENT PLANS (SWPPPS):** Design of management plans for storm water and erosion control compliance with latest Federal and State regulations; preparation and processing of NOI; and site compliance during construction...
- **WATERFRONT AND COASTAL ZONE PROJECTS:** Planning; permitting of waterfront improvement projects; water quality data management and studies; and docking facilities...
- **MAPPING:** Inventory of physical features; GIS mapping; data management and analysis; and ground penetrating radar for identification of subsurface conditions...
- **WATERSHED MANAGEMENT AND WATER SUPPLY:** Comprehensive regional watershed and water supply management and planning studies...
- **PERMITTING AND PROCESSING:** Preparation and processing of environmental applications for submittal; client representation before municipal agencies and departments and expert testimony for legal support and hearings...
- **Wetland Permitting:** Flagging and identification of fresh water and tidal wetlands; preparation of wetland permitting; and wetland restoration plans.

**Nelson, Pope & Voorhis** has the benefit of knowledge of local issues, local resources, and the passion to provide the very best solutions and strategies for the local area. This provides unparalleled knowledge of the application of the community planning process, comprehensive planning and SEQRA Administration. The result is a team of highly compatible land use professionals that will get the job done in a manner that ensures real and feasible solutions.



# ECONOMIC AND FISCAL IMPACT ANALYSIS, DEMOGRAPHIC AND COMMUNITY NEEDS ASSESSMENTS

## ENVIRONMENTAL PLANNING CONSULTING

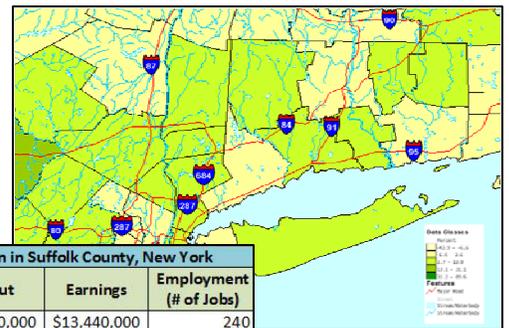
FEASIBILITY & DUE DILIGENCE  
ASSISTANCE  
REGIONAL & SITE PLANNING  
ECONOMIC PLANNING  
ENVIRONMENTAL SITE  
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- FISCAL ANALYSIS
- ECONOMIC IMPACT ANALYSIS
- ECONOMIC DEVELOPMENT STRATEGIES
- MARKET POSITIONING & BRANDING
- MAIN STREET REVITALIZATION
- COMPREHENSIVE COMMUNITY NEEDS ASSESSMENTS
- SOCIOECONOMIC ANALYSIS
- DEMOGRAPHIC ANALYSIS
- TAX BASE ANALYSIS



NAICS CODE 230000: Construction in Suffolk County, New York			
	Output	Earnings	Employment (# of Jobs)
Direct Impact	\$33,600,000	\$13,440,000	240
RIMS Multiplier	1.9793	0.5803	14.0154
Indirect and Induced Impact	\$66,504,480	\$7,799,232	100
<b>Total Impact</b>	<b>\$100,104,480</b>	<b>\$21,239,232</b>	<b>340</b>

Many of our clients know of our quality services in tax revenue and demographic impact analysis including demographic and school district impact assessments. This expertise combined with our expert use of Geographic Information System (GIS) and census data has allowed NP&V to complete quality fiscal and economic impact studies since the company was formed in 1997.

Our fiscal impact analyses identify project benefits in terms of tax revenue projections and demand for community services from various providers. We have expanded our capabilities and recently, our economic impact analyses concentrate on an expanded quantification of project benefits including job generation during the construction and operation of development, projected salaries, consumer spending, sales tax generation from spending and other economic “ripple effect” benefits. It is critically important to understand the full benefits of economic development projects during difficult economic times.

NP&V has a track record of completed, successful and built projects involving fiscal impact analysis, demographic assessment, market studies and customized analyses of community service related impacts in nearly all Towns in Nassau and Suffolk Counties. NP&V’s economic planning expertise can be integrated into economic development strategies, project feasibility, balancing of mixed-use project scenarios, community development and assistance programs and needs assessments. Please contact us for more information on how we can assist with the economic planning aspects of your development, re-development, revitalization or community needs assessment project.

# MARKET ANALYSIS

**ENVIRONMENTAL  
PLANNING  
CONSULTING**

- FEASIBILITY & DUE DILIGENCE ASSISTANCE**
- REGIONAL & SITE PLANNING**
- ECONOMIC PLANNING**
- ENVIRONMENTAL SITE ASSESSMENT**
- ENVIRONMENTAL SCIENCE & ANALYSIS**
- WETLAND PERMITTING**
- STORM WATER MANAGEMENT PLANS**
- WATERFRONT & COASTAL ZONE PROJECTS MAPPING**
- WATERSHED MANAGEMENT & WATER SUPPLY**
- PERMITTING & PROCESSING**
- SUSTAINABILITY & LEED PROJECT PLANNING & SUPPORT**

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& VOORHIS**

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NP&V is a professional environmental and planning firm with qualifications and expertise to prepare various types of residential and commercial market analyses and feasibility studies, and has a track record of such completed projects throughout Long Island.

In the preparation of a market analysis, NP&V strives to identify and quantify the need for a specific type of development – be it a shopping center, office space, a new residential subdivision or an assisted living community, among others – that can be accommodated at a given location. NP&V is able to analyze the relationship between the supply and demand and reveal whether or not a given development could be supported in a specified location. This is accomplished through the definition of a target market area, a critical evaluation of demographics, socioeconomic characteristics and consumer trends, and an analysis of existing and comparable developments.



Findings and recommendations of our market analyses are tailored to each community, and provide the facts necessary to determine the viability of a given project, attract specific types of businesses, and market projects to possible investors. As such, our market analyses have proven to be a valuable tool in the decision-making process – for both the public sector and private developers.

# NICHE MARKET AND BRANDING PLAN & BUILD-OUT/TAX BASE ANALYSIS TOWN OF BROOKHAVEN

## ***ENVIRONMENTAL PLANNING CONSULTING***

***FEASIBILITY & DUE DILIGENCE  
ASSISTANCE  
REGIONAL & SITE PLANNING  
ECONOMIC PLANNING  
GRANT PREPARATION &  
ADMINISTRATION  
ENVIRONMENTAL SITE  
ASSESSMENT  
ENVIRONMENTAL SCIENCE &  
ANALYSIS  
WETLAND PERMITTING  
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Nelson, Pope & Voorhis (NP&V) is working with the Town of Brookhaven on a niche market and branding plan for Greater Bellport community. The focus of this plan is to form a set of recommendations that outline the necessary steps that members in the Greater Bellport community can take in order to successfully create a sense of place, community pride and positive perceptions through a more niche-oriented position in the local market. NP&V recommended various initiatives to make the Greater Bellport community unique and marketable, creating a place that people want to be, where people are comfortable, and a place that people remember and come back to time and again. The niche market and branding plan strives to promote the community's niche market to new residents, visitors and economic development opportunities alike, offering the Greater Bellport community the opportunity to develop a theme that they want to be known for.

NP&V is also working with the Town of Brookhaven on a build-out/tax base analysis, to analyze how the local school district could be impacted by growth. NP&V is working on the creation of a GIS model to compare tax assessments for various land use scenarios to ensure an adequate tax base to support increased growth in school population without disproportionate increases in residential tax rates. This model will be used to test assumptions for future development and analyze various alternatives in an automated fashion, allowing for easily comparison of scenarios and results. Ultimately, the model will provide a reality check for future planning with respect to provision of quality community services, and may provide support for creating additional commercial tax base within the district. The project is underway, and is nearing completion.

# ECONOMIC DEVELOPMENT CHAPTER OF THE COMPREHENSIVE PLAN UPDATE TOWN OF SOUTHOLD

## **ENVIRONMENTAL PLANNING CONSULTING**

**FEASIBILITY & DUE DILIGENCE  
ASSISTANCE  
REGIONAL & SITE PLANNING  
ECONOMIC PLANNING  
ENVIRONMENTAL SITE  
ASSESSMENT  
ENVIRONMENTAL SCIENCE &  
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WATER SUPPLY  
PERMITTING & PROCESSING  
SUSTAINABILITY & LEED  
PROJECT PLANNING &  
SUPPORT**



In an effort to achieve the Town's vision, five goals and numerous objectives were formed to provide direction for future decision-making pertaining to the Town's economy. Much of the Town's economic vitality is based on the Town's unique rural, historic and maritime-based character as well as its natural resources. It is critical that these qualities be recognized, enhanced and protected. NP&V is currently working on the preparation of the economic chapter of the Comprehensive Plan Update for the Town of Southold to allow for the formation of appropriate recommendations and implementation strategies focused on long-term economic sustainability throughout the Town.

One of the specific tasks involved with the economic chapter of the Town's Comprehensive Plan is the zoning/build-out analysis. The Town of Southold is facing development pressure and is concerned about the impact that the current zoning may have on the Town's resources. The Town of Southold prepared a build-out analysis of several zoning districts, and NP&V funneled these findings into a model to assess the regional impact of full build-out and modified development scenarios. Ensuring quality of life, protection of environmental resources, housing needs and maintenance of the tax base were key elements of the model. This project involved the creation of a spreadsheet model to synthesize multiple evaluation factors to analyze the impact of full build out of the Town of Southold under its current zoning. This project is an update to a similar project completed for the Town in 2003.

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**RESUMES**

*Nelson, Pope & Voorhis*

## Title

Managing Partner of Firm, Nelson, Pope & Voorhis, LLC; Melville, New York

## Education & Training

- SUNY at Stony Brook; Master of Science in Environmental Engineering, concentration in Water Resource Management, 1984
- Princeton Associates; Groundwater Pollution and Hydrology Short Course, Princeton, New Jersey, 1983
- New York State Health Department, Environmental Health Training Course, Hauppauge, New York, 1982
- Southampton College of Long Island University; Bachelor of Science in Environmental Geology, 1977

## Professional Affiliations, Certifications & Training

- American Planning Association, Washington, D.C.
- National Association of Environmental Professionals, Alexandria, VA
- Environmental Assessment Association, Scottsdale, Arizona
- American Water Resources Association, Syracuse, New York
- New York Water Pollution Control Association, Riverdale, NY
- Water Pollution Control Federation, Washington, D.C.
- Long Island Seaport & EcoCenter, Inc., Director, Port Jefferson, NY
- Boy Scouts of America, Trained Scoutmaster, Nathaniel Woodhull District,
- Historical Society of Port Jefferson, Trustee, Port Jefferson, NY
- Environmental Conservation Board, Village of Port Jefferson, NY
- Port Jefferson Village, Waterfront Advisory Committee, Port Jefferson, NY
- Town of Brookhaven Mount Sinai Harbor Advisory Committee, Medford, NY
- Brookhaven Conservation Advisory Council, Medford, NY

## Professional Experience

Charles Voorhis is a professional planner (AICP) and a certified environmental professional (CEP) with both private sector and public sector experience. Mr. Voorhis has managed municipal projects including regional and local planning studies, wetlands and shoreline restoration, environmental impact statements, permit compliance and environmental analysis. Charles Voorhis has over 39 years of professional environmental planning experience, including the position of Director of Environmental Protection of the Town of Brookhaven, supervising the environmental implementation of the Town of Brookhaven Comprehensive Plan Update and secured grants under the Local Waterfront Revitalization Program. As a private consultant for over 23 years, Mr. Voorhis has managed environmental planning and analysis of large scale planning and development projects throughout Nassau and Suffolk Counties. Recent projects include a study to eradicate aquatic invasive/nuisance species in upper and lower Canaan Lakes, Yaphank, stormwater management studies on the north and south shores for the Town of Brookhaven and Town of Islip, completion of the Water Supply Management & Watershed Protection Strategy for the Town of Southold, completion of the Suffolk County North Shore Embayments Watershed Management Plan, and completion of the Lake Agawam Comprehensive Management Plan, as well as numerous environmental impact statements, wetland and shoreline feasibility analyses and management plans.

## Project Experience

- Great Cove Watershed Management Plan, 2011
- Town of Southold Comprehensive Plan Update, Economic Chapter, 2010
- Beaver Dam Creek Watershed Management Plan, 2009
- Lake Agawam Comprehensive Management Plan, 2009
- Southold TDR Planning Report and GEIS, 2008
- The Residences at North Hills, DEIS and FEIS, 2005-06
- Town of Southold Comprehensive Implementation Strategy, 2003
- Southampton Agricultural Opportunities Subdivision, DEIS, FEIS and Findings, 2001
- Old Orchard Woods, DEIS and FEIS, 2000
- Town of Smithtown Armory Park, DEIS, 2000
- Town of Southold Water Supply Management & Water Protection Strategy, 2000
- Knightsbridge Gardens, DEIS and FEIS, 1997
- Camelot Village @ Huntington, DEIS, 1997
- Airport International Plaza, DEIS and FEIS, 1996
- Price Club @ New Rochelle, DEIS and FEIS, 1995
- Commack Campus Park @ Commack DEIS and FEIS, 1994
- Water Mill Shops @ Water Mill DEIS, 1993
- Town of Brookhaven Land Use Plan, 1987

## Title

Partner/Division Manager  
Environmental & Community  
Planning Division  
Full-time | 25 Years with Firm

## Education & Training

- State University of NY at Stony Brook, Masters Degree in Environmental and Waste Management, 1996
- Syracuse University; Bachelors Dual Majors: Mathematics and Education, 1988
- IAP2 Certificate Course in Public Participation
- CommunityViz Scenario Constructor, SiteBuilder 3D™ Policy Simulator training
- ArcView GIS, ESRI 16 hour course
- Fundamentals of Dispersion Modeling and Computer Modeling Laboratory
- Rutgers University, Methodology of Delineating Wetlands

## Professional Affiliations, Certifications & Training

- Treasurer, American Planning Association - Long Island Section, since 2008
- Advisory Council Member, Boys & Girls Club of Bellport
- American Institute of Certified Planners since July 2000
- American Planning Association Member since 1997

## Professional Experience

Kathy Eiseman is a Partner and Division Manager of the Environmental & Community Planning Division at Nelson, Pope & Voorhis and has been with NP&V since its incorporation in 1997 and prior to that, Ms. Eiseman was an employee of Charles Voorhis & Associates, a predecessor to NP&V.

Ms. Eiseman is a certified planner (AICP) with over 20 years of experience in environmental planning and manages both private and public planning projects. Ms. Eiseman is the planner for the Villages of Southampton and Sag Harbor Planning Boards and in an on-call capacity for review of site plan applications for the Town of Oyster Bay. In this capacity she works with other professionals at NP&V to perform site plan and subdivision reviews and attends hearings to present on a regular basis. Ms. Eiseman is skillful in managing complex projects and working with team members both in house and as sub consultants. Ms. Eiseman's staff is proficient in the use of GIS and design software for preparation of high quality graphic products. Ms. Eiseman is experienced in the art of public participation and education and tailors her approach to the unique needs of each project/community.

Ms. Eiseman is an enthusiastic and creative planner who endeavors to bring a fresh approach to each project as well as to her position as Treasurer for the Long Island Section of the American Planning Association.

Prior to joining the firm's predecessor CVA in 1993, Ms. Eiseman taught middle school mathematics in New York's Hudson Valley.

## Project Experience

- Glen Cove Step III BOA Implementation Strategy for the Orchard and Sea Cliff Avenue, in progress
- Bellport BOA Step II Nomination Study, Community Engagement, 2018
- Superfund Reuse Feasibility Study for the Lawrence Aviation site for the Suffolk County Landbank Corporation, 2017
- Riverhead Brownfield Opportunity Area Nomination, 2016
- Riverside Revitalization BOA Nomination, December 2015
- Southeast Hicksville Brownfield Opportunity Area Nomination, 2014
- Northeast Hicksville Brownfield Opportunity Area Step I, 2014
- Planning consultant (on-call) for Town of Oyster Bay, 2018
- Industrial Corridor District Study and Code Amendments, Islip, 2017
- Planning consultant - Village of Sag Harbor Planning Board, since 2016
- Environmental planning consultant - Village of Southampton Planning Board, since 2006
- Theodore Roosevelt Blueway Trail Planning and Design, 2014
- Town of North Hempstead Blueway Trail, 2013
- Town of Brookhaven Athletic Fields Needs Assessment, 2012
- Montauk Highway Corridor Study & Land Use Plan for Mastic and Shirley Phase II and Transitional Overlay District Code Preparation, 2009
- Eastern Waterfront Community Vision & Revitalization Plan, 2009
- Lake Ronkonkoma Clean Lakes Study Update, 2008
- Suffolk County North Shore Embayments Watershed Management Plan, 2007

## Title

Partner/Division Manager  
Phase I/II Site Assessments &  
Remediation

## Education & Training

- Bachelor of Science in Geography, January 1986
- 8-Hour HAZWOPER Refresher Course
- 40-Hour Course Hazardous Materials Training
- Performing Phase I Environmental Inspections, Environmental Assessment Association
- Environmental Regulations Course, Executive Enterprises
- Environmental Impact Statements Course

## Professional Affiliations, Certifications & Training

- National Association of Environmental Professionals, Alexandria, VA
- Environmental Assessment Association, Scottsdale, AZ
- National Groundwater Association, Association of Groundwater Scientists and Engineers

## Professional Experience

Steven McGinn, CEI is a Partner and Division Manager of the Phase I/II Assessments & Remediation Division of Nelson, Pope & Voorhis, LLC. Mr. McGinn has 24 years of experience in the environmental field and is a USEPA certified Asbestos Inspector; a USEPA certified Risk Assessor for Lead Based Paint; a Radon Measurement Specialist; and, has completed the 40 Hour OSHA HAZWOPER training. Mr. McGinn has completed and/or supervised the remediation of numerous sites over the past 21 years of employment with Nelson, Pope & Voorhis, LLC. Mr. McGinn routinely manages numerous site assessment and remediation projects concurrently, and oversees a staff which includes environmental analysts and geologists. The Division possesses numerous pieces of equipment for site assessment and sampling, including Ground Penetrating Radar (GPR), two (2) Power Probe sampling rigs (for soil and groundwater samples ) , and a pipe camera.

## Project Experience

- Division Manager for Phase I and Phase II Environmental Site Assessments, Site Remediation Coordination and Supervision, Lead Based Paint sampling and Asbestos Surveys for lending institutions
- Author of numerous Phase I & II ESA reports, remediation & brownfield projects work plans, and closure reports in both draft and final formats for major large scale, high-profile projects.
- Other responsibilities include the preparation of various environmental, planning and zoning studies and the preparation of various state and federal applications such as: land use and zoning studies, noise and air quality assessments, feasibility studies, economic analyses, freshwater and tidal wetland permits, etc.
- Interaction with various Town, County, State and Federal officials, attorneys, developers, engineers. Town Boards, Planning Boards, and Zoning Boards of Appeals.

## Title

Senior Partner/Division Manager  
Environmental Wetlands & Resource  
Assessment Division

## Professional Experience

Carrie O'Farrell is a Partner and Division Manager of the Environmental Resource and Wetlands Assessment Division at Nelson, Pope & Voorhis and has been with the company since 2002.

## Education & Training

- University of Rochester; Bachelors of Science, 5/99
- NYSDEC Certificate of Erosion & Sediment Control Training
- Center for Watershed Protection 8-hour Erosion Control Training & Stormwater Retrofit Training
- SUNY College of Environmental Science and Forestry, various stormwater training classes

Ms. O'Farrell is a trained environmental scientist with applied planning experience, and is expert in NEPA/SEQRA and land use regulations, drainage and stormwater issues, wetland and stormwater permitting and is diverse in ability to conduct environmental planning analysis. Ms. O'Farrell has overseen the preparation of numerous environmental impact statements, assessments, SEQRA/NEPA administration actions, harbor management plans, planning and zoning law review and preparation, stormwater permitting and erosion control compliance documents and wetlands and coastal permits. Ms. O'Farrell is also responsible for environmental permitting, including necessary environmental assessments pursuant to SEQRA and NEPA requirements.

## Professional Affiliations & Certifications

- NYSDEC Certified Inspector of Erosion & Sediment Controls since 2010
- American Institute of Certified Planners since 2006
- American Planning Association Member since 2004

Ms. O'Farrell has been at the forefront of the NYSDEC SPDES Phase II stormwater permitting & compliance program since 2002, both in assisting MS4 designated municipalities in Long Island with the creation and implementation of Stormwater Management Plans and with the preparation of Stormwater Pollution Prevention Plans (SWPPP) for various construction projects. Ms. O'Farrell is intimately familiar with EPA's recommended BMPs, good housekeeping practices and example local laws/methods for municipal implementation and enforcement of the Stormwater Phase II program. Ms. O'Farrell regularly works with staff engineers in development of stormwater management solutions in sensitive environmental areas and manages the completion of all SWPPP prepared for construction projects (over 150 SWPPPs completed to date).

## Relevant Experience

- Environmental Impact Statements (EIS): Project manager for Riverside Brownfield Opportunity Area (BOA), Overlay Zoning and Zoning Map Amendments GEIS, New Rochelle Downtown Overlay Zone GEIS, Village of Hempstead Downtown Rezoning SGEIS; Huntington Station Gateway Development Voluntary DEIS, The Uplands at St. Johnland, Kings Park DEIS (Town of Smithtown); Gabreski Airport Planned Development District GEIS and Expanded EAF, Lighthouse @ Long Island mixed use redevelopment EIS, Kensington Estates EIS, Woodbury; Roslyn Landing mixed use development EIS, Roslyn
- Municipal Retainers: Ms. O'Farrell is the planning consultant serving a number of municipal boards, including the Village of Lake Success Planning Board, Zoning Board and Village Trustee (attending meetings for site plan, subdivision plan, and SEQRA reviews of projects proposed in the Village). Ms. O'Farrell also represents the City of Long Beach Zoning Board of Appeals, Town of Southold Zoning Board of Appeals and the Village of Plandome Planning Board.
- Municipal Stormwater Consulting: Stormwater MS4 Compliance and SWPPP review for the Villages of Southampton and Bellport.
- Watershed Management Plans (WMP): Great Cove WMP; Town of Islip; Shelter Island WMP, Town of Shelter Island; Lake Montauk WMP, Town of East Hampton; Tuthills Creek WMP, Town of Brookhaven.
- Stormwater Management/SWPPP: Gabreski Airport – Hampton Business Center SWPPP, Westhampton, NY; Colony Preserve residential subdivision (100+acres) SWPPP, Mastic Beach, Sandy Hills, Mixed Use Development SWPPP, Middle Island, Longwood Library SWPPP; US Coast Guard Facility SWPPPs in Easton's Neck, Jones Beach & Shinnecock.

## Title

Economic Analyst/Planner

## Education & Training

- Formal training course in the IMPLAN Economic Modeling System, Minnesota Implan Group, 2009
- Master of Urban Planning Specialization in International and Economic Development, SUNY University at Buffalo, 2006
- Bachelor of Arts- Economics, SUNY College at Geneseo, 2004
- Bachelor of Arts- International Relations, Specialization in Economic Development, SUNY College at Geneseo, 2004

## Professional Affiliations, Certifications & Training

- American Planning Association
- State University of New York, College at Geneseo, Long Island Regional Alumni Committee, Member
- Ronald McDonald House of Long Island, Volunteer
- Special Olympics of New York, New York City Region and Long Island Region, Volunteer
- Alphi Phi Omega, Alumni

## Professional Experience

Ms. Dellavecchia is an economic analyst and a planner with vast experience overseeing the preparation of market analyses and feasibility studies, niche market studies and branding plans, school district analyses, economic development strategies, as well as fiscal (projecting taxes and the impact to local jurisdictions) and economic (projecting job creation and associated revenues circulating throughout the economy) impact analyses for residential, commercial, office, industrial, recreational, hospitality, tourism and mixed-use developments. She has significant expertise in analyzing demographic data and preparing grant applications. Ms. Dellavecchia has been involved with corridor management plans, local waterfront revitalization plans, brownfield development, zoning plans, mall redevelopment, tourism plans and public participation and community visioning processes. Prior to joining NP&V in 2009, Ms. Dellavecchia was involved in numerous planning initiatives - including public-sector and private development projects throughout New York's Capital District, Southern Tier and Hudson Valley region, as well as within various municipalities/regions in Pennsylvania and Massachusetts.

## Project Experience

- Fiscal and Economic Impact Analysis: Hampton Classic Horse Show (2018), The Hills at Southampton (2017), Dune Deck (2016), Renaissance Downtowns (New Rochelle, 2015; Huntington Station, 2015; Hempstead 2012), Canoe Place Inn (2014), The Meadows at Yaphank PDD (2011), New Frontier (2011)
- Commercial Market Analysis: Medford (2014), The Meadows at Yaphank PDD (2011), Mt. Sinai Village Centre (2011)
- Residential/Housing Market Analysis: Bellport and East Patchogue (2017), Brentwood Garden Apartments (2012), The Canal Property (2012), The Uplands at St. Johnland CCRC (2011)
- Waterfront Market Analysis: Town of Oyster Bay Eastern Waterfront Area (2011)
- School District Analysis: Mt. Sinai Meadows (2018), Jefferson Meadows (2011), North Manor Estates (2011)
- Niche Market and Branding Plan: North Bellport (2011)
- Economic Development Studies: Lawrence Aviation Redevelopment Feasibility Study (2017); Peconic River/Route 25 Corridor BOA (2015)
- Comprehensive/Master Planning: Village of Poquott (2011), Town of Southold- Economic Development Chapter and Demographics Chapter (2011)
- American Planning Association Massachusetts Chapter Award for Outstanding Planning, City of Pittsfield Master Plan, 2009

## Title

Environmental Planner  
Hudson Valley, New York

## Education & Training

- Pratt Institute, Master of Science in City & Regional Planning, 05/2017
- SUNY College of Environmental Science and Forestry, BS Environmental Policy, Planning & Law, Minor: Urban Environmental Science, May 2011

## Professional Affiliations, Certifications

- American Planning Association, New York Metro Chapter: Member

## Professional Experience

Adriana Beltrani, Environmental Planner has an undergraduate degree in Environmental Policy, Planning and Law from SUNY College of Environmental Science and Forestry and a Master's Degree in City and Regional Planning from Pratt Institute where she completed her thesis on Community Engagement in Brownfields Planning.

Adriana performs on-call planning work for the Village of Airmont and the Town of Mamakating Planning Boards. She recently worked with the Village of Airmont in adopting a Comprehensive Plan Update and is now working on Zoning Updates, including a Village Center development district. She regularly performs site plan reviews on behalf of the Village and Town Planning Boards. Adriana has reviewed a controversial solar project for the Town of Mamakating in an environmentally sensitive area, and subsequently helped to develop a unique solar zoning code that addresses the issues experienced throughout the review process. She has since collaborated on the creation and SEQRA documentation for a solar zoning code in the Town of Blooming Grove as well.

Adriana is passionate about planning around sound environmental science. She assists the Partners in the Hudson Valley office with performing solar suitability, land use, zoning and ridgeline analyses using GIS. She is also assisting with completing the Village of Hillburn Comprehensive Plan and the associated Zoning Update. She regularly prepares documentation relating to the SEQRA process for her on-call planning work as well as project specific tasks and performs in-depth analyses on land use and zoning changes.

## Project Experience

- **Village of Airmont, Planning Retainer**  
Comprehensive Plan Update: Guide Village Committee through the comprehensive plan and zoning update process, including writing the draft, conducting workshops, writing zoning text, facilitating stakeholder meetings, SEQR review and the adoption process.  
Village Planning Board Consultant: Projects include site-plan review for places of worship, commercial offices, neighborhood shopping centers and healthcare facilities.
- **Town of Mamakating, Planning Retainer**  
Cypress Creek Solar Development: Review 2MW solar farm proposal undergoing Planning Board Review, guide Planning Board through the SEQRA process.  
Solar Zoning: Assist managing partner in amending current solar zoning text to take mature forest into greater consideration for site selection.
- **Town of Blooming Grove Comprehensive Plan and Zoning Update**  
Assist managing partner with research, meetings, writing plan sections and mapping, focusing on open space and agricultural preservation.

- **Village of Hillburn Comprehensive Plan and Zoning Update**  
 Assist managing partner in facilitating meetings, writing draft plan sections and preparing maps, including ridgeline analyses.
- **Letchworth Village, Stony Point NY Zoning Analysis**  
 Perform an analysis of previous planning and zoning studies in the Town of Stony Point to inform a potential zoning amendment which would affect the historic Letchworth Village within Stony Point, NY.
- **Economic Analyses**  
 Use of labor statistics, census data, and tax data, and programs such as ESRI business analyst and IMPLAN for market analysis and fiscal and economic impact analyses. Projects range from planning activity such as Brownfield Opportunity Area studies and the impacts of private development to school districts or the labor force.
- **Town of Fishkill Zoning Update**  
 Assist in the reorganization and functionality of the zoning code for the Town of Fishkill and provide consulting services for specific development projects as-needed.
- **Solar Zoning Projects**  
 Mapping land suitability analyses, amending solar code text and corresponding SEQRA documentation for the Village of South Blooming Grove, Town of Blooming Grove, Town of Shawangunk and the Town of Mamakating.
- **Spatial Analysis and Visualization Initiative**  
 Graduate assistant: Produced analytical maps for non-profit and community-based clients.
- **Dutchess County Department of Planning and Development**  
 County Planning Intern: Mapped trails for county-wide inventory, Evaluated and updated town zoning plans using ArcMap Inventoried local town law and comprehensive plan changes
- **United States Peace Corps**  
 Agriculture/ Community Development Specialist: Conducted community analysis and SWOT analysis, monitored and assessed projects through quarterly progress reports, wrote grant proposals for community agriculture and development, produced environmental programming in elementary schools, camps, workshop development and facilitation.