

**APPENDIX A**

**METHODOLOGY USED FOR THE ECONOMIC CHAPTER  
OF THE COMPREHENSIVE PLAN UPDATE**



## TOWN OF SOUTHOOLD

# METHODOLOGY USED FOR THE ECONOMIC CHAPTER OF THE COMPREHENSIVE PLAN UPDATE

Various data and information from federal, state, local and private data sources was used in the preparation of the goals, objectives, recommendations and implementation strategies for the Economic Chapter of the Town of Southold's Comprehensive Plan Update. The methodology and sources of data are outlined in detail, below.

Public Workshops were conducted on three separate occasions in February 2010. These workshops allowed members of the public to revise the Town's vision statement, as well as provide preliminary input on the Town's current and future economic condition. Discussion focused on why residents chose to live in Southold, the types of goods and services that they buy in town versus those purchased out of town, job creation, business sectors critical to the Town's economy, downtown and hamlet center improvements, and other important issues key to planning for Southold's economic future. This feedback assisted in developing appropriate goals and strategies to best promote economic sustainability within Southold.

Business Inventories were conducted throughout the Town of Southold. The inventory focused on businesses within the Town's hamlet centers, HALO zones, and along each of the major corridors. Such businesses included but was not limited to, agricultural uses (including wineries), aquaculture, tourist attractions, restaurants, retail establishments, entertainment venues, bed and breakfasts (and other lodging facilities), medical and health-care facilities, historical and cultural amenities, recreational facilities, storage space, public beaches, commercial marinas, commercial/shell fishing, boat slips and office and industrial facilities. The business inventory included the type of industry, current use, occupancy, condition, and size, where available.

The findings of the business inventory allowed for an understanding of the economic drivers in the Town, and set the framework in identifying the Town's established and prominent industries. The business inventory helped to determine those industries that may be emerging in Town, as well as those that may be stressed. Ultimately, the findings of the business inventory set the stage for recommending how to best allocate business resources to promote strong and sustainable economic activity throughout the Town.

Individual Interviews were conducted with key stakeholders, realtors and major employers within the Town. The stakeholders that were contacted and/or interviewed include Beach Plum (Fishers Island), Braun Seafood Company, Bridgehampton National Bank, Burt's Reliable, Capital One Bank, Century 21 (Albertson Realty), Brown Harris, Corcoran Group Real Estate, Eastern Long Island Hospital, Fishers Island Community Board, Fishers Island Union Free



School District, Greenport Union Free School District, (Fishers) Island Community Center, King Kullen, Lewis and Nickles, Long Island Farm Bureau, Long Island Wine Council, Mat-a-Mar, Mattituck Chamber of Commerce, Mattituck-Cutchogue Union Free School District, McCarthy Real Estate, New Suffolk Common School District, New Suffolk Marina, North Fork Chamber of Commerce, North Fork Promotion Council, Oysterponds Union Free School District, Peconic Land Trust, Peconic Landing, Peconic Retreat, Port of Egypt, Prudential Douglas Elliman, Sea-Tow, Daniel Gale Sotheby's International Realty, Southold Business Alliance, Southold Town Baymen's Association, Southold Union Free School District, Strong's Marine, Suffolk County National Bank and Waldbaums, as well as residents and representatives from other local businesses and organizations throughout the Town. Such interviews allowed for an understanding of the housing market, the local business climate, organization/business-specific roles in the local economy, as well as specific opportunities, needs, issues and obstacles facing residents and businesses in Town.

Regional Impact Assessment Model (RIAM) is a model, developed by Nelson, Pope & Voorhis, LLC, which determines quantifiable impacts which could result from the findings of the build-out analysis. The RIAM model created in 2003, as part of the Town's *Comprehensive Implementation Strategy*, was updated to reflect a current snapshot, with specific consideration of economic data.

Town of Southold Board of Assessors Office was consulted for Townwide tax base data, including land use descriptions, parcel counts and total assessed valuations for the following broad land use categories: agricultural, residential, vacant land, commercial, recreation and entertainment, community service, industrial, public service, and public parks, wild, forested and conservation properties. Such data was incorporated into a tax base analysis, along with tax distribution and budget data, which allowed for a clear understanding of the existing composition of the Town's commercial tax base. The interpretation of this data served as a benchmark in which to measure the Town's changing fiscal needs.

Town of Southold Land Preservation Department assisted with the preparation of the zoning and build out analysis of commercial and industrial parcels within the Town. The Town's Geographic Information Systems (GIS) specialist was able to query and obtain pertinent information from the Town's database of commercially and industrially-zoned properties, to determine whether existing zoning supports the goals of viable and sustainable downtowns. Existing zoning was critically evaluated, and applicable properties were incorporated into a build-out analysis. The build-out analysis conducted in 2003, as part of the Town's *Comprehensive Implementation Strategy*, was used as a benchmark and updated to reflect a current snapshot. The building analysis considered the area of properties, and applied a coefficient to reflect the square footage of commercial and industrial space that would be possible, in consideration of dimensional, parking, and landscaping requirements.

Town of Southold Planning Department provided copies of recent planning documents and initiatives performed throughout the Town. Such plans included the *Economic Development Plan* (1997), *North Fork Recreational Travel Needs Assessment* (2001), *Blue Ribbon*



*Commission for Rural Southold (2002), Southold Comprehensive Implementation Strategy (CIS) and GEIS (2003), Local Waterfront Revitalization Program (2005), Town of Southold Hamlet Study (2005), Fishers Island Strategic Plan: 2007-2017 (2007), and Southold Town Hamlet Stakeholder Initiative (2007-08).* All of the above-mentioned plans were reviewed and assimilated into the Economic Chapter. Key pieces of data and information, as well as goals, objectives and recommendations from an economic development context were highlighted and extracted for the purpose of forming goals, objectives and recommendations in the Economic Chapter of the Comprehensive Plan Update.

Suffolk County Planning Department was consulted for historic population data specific to Southold Town and each of the Town's hamlets.

Long Island Regional Planning Board published a document entitled, "*Historical Population of Long Island Communities 1790 – 1980: Decennial Census Data*", in August 1982. This document was utilized to illustrate historic population trends among each of the Town's hamlets, Southold Town and Suffolk County.

This publication of this document required obtaining twenty federal census reports (1790 – 1980), extracting the population statistics for New York State, and tabulating the data for all municipalities and incorporated communities ever recorded in the Long Island area. Record cards for more than 400 places were produced; each one detailed a full census history. Data was then supplemented with unpublished or corrected community data.

It is important to note that most early census records only include incorporated places. Since 1960, when census tracts were first established in Suffolk County, detailed maps have been produced that accurately define unincorporated boundaries. In many instances, population figures were derived for communities that were not listed in a Census publication, through the aggregation of census tracts or parts of census tracts that make up a given community. Furthermore, unincorporated area boundaries within Suffolk County were changed extensively in 1980 to reflect then-current zip codes, school district lines, and other limits deemed useful in determining boundaries. As such, it was often necessary to compute population figures to reflect the most recent census designated place boundaries, as of the date of publication of this document.

New York State Education Department prepared New York State District Report Cards, which includes the Comprehensive Information Report and the Accountability and Overview Report specific to each school district in New York State. All information reported was submitted by local school district officials.

Data was collected for Fishers Island Union Free School District, Greenport Union Free School District, Mattituck-Cutchogue Union Free School District, New Suffolk Common School District, Oysterponds Union Free School District, Southold Union Free School District, and New York State for comparison purposes. These reports provided total enrollment data, graduation



rates, free and reduced-price lunch eligibility, and performance levels among elementary and secondary-level students in English language arts, mathematics and science.

United States Census Bureau was consulted for pertinent demographic data, including population trends, trends among the number of households, age, educational attainment, household income, per capita income, unemployment rates, housing occupancy, part-time residency, commuting patterns, employment by occupation, employment by industry, and poverty status among individuals and families. Data specific to Southold Town, as well as each of the hamlets was collected for 1990 and 2000.

United States Department of Labor, Bureau of Labor Statistics supplied the Consumer Price Index (CPI) inflation calculator. The CPI inflation calculator uses the average Consumer Price Index for a given calendar year in order to illustrate how dollar values have been adjusted for inflationary purposes. This represents the change in the prices of all goods and services purchased for consumption by households over time.

The CPI inflation calculator was used to adjust median household income and per capita income dollar values in 1990 and 2000, to reflect the equivalent of 2009 dollars. The use of this tool allows for the understanding of how the buying power of the dollar has changed over time, thus allowing for comparison of income between 1990, 2000 and 2009.

Nielsen Claritas Market Research created on-demand market data demographic reports specific to each of the Town's hamlets, Southold Town and Suffolk County through the Claritas MarketPlace resource. Reports were created to depict a Census Demographic Overview Report and a Demographic Snapshot Report for each of the geographic areas under study. Demographic factors in these reports included those pertaining to population, number of households, age, average household size, housing type, housing age, housing occupancy, the value of owner-occupied housing units, educational attainment, language spoken at home, median household income, per capita income, commuting patterns, employment by occupation and poverty status among families. This data was collected for 1990 and 2000 (as reported from the U.S. Census Bureau), as well as 2009 estimates and 2014 projections.

Nielsen Claritas is known as the industry leader in demographics. All estimates and projections provided by this source draw upon inputs from public and private agencies as well as national household consumer databases, local governments, and service bureaus. Specific sources of data include the Current Population Survey and American Community Survey (via the United States Census Bureau), data on housing values from Acxiom, new construction data from ADVO, Equifax, InfoUSA, Targus, TeleAtlas North America, Bureau of Economic Analysis, income statistics from the Internal Revenue Service, Office of Federal Housing Enterprise Oversight, National Association of Realtors, deliverable address counts from the United States Postal Service, local government agencies, and other commercial and federal data sources.

Nielsen Claritas' market data reflects the impact of both national trends and local events such as major disasters, seasonal population shifts and key demographic changes within each geographic



area. This range of data sources allows for the most reliable demographic information in the industry.

Environmental Systems Research Institute, Inc. (ESRI) generated on-demand reports specific to each of the Town's hamlets, Southold Town and Suffolk County through the ArcGIS Business Analyst Online program. Reports were created to depict a 1990-2000 Comparison Profile, a Demographic and Income Profile, and a Housing Profile for each of the geographic areas under study. Demographic factors in these profiles included those pertaining to age, average household size, median household income, per capita income, unemployment rates, and employment by industry in 1990 and 2000 (as reported from the U.S. Census Bureau), as well as 2009 estimates and 2014 projections.

In addition, reports were created to depict a retail marketplace profile for the purpose of preparing a Leakage Analysis to measure supply and demand. This allows for an understanding of whether existing goods and service providers adequately meet the needs of the Town's consumers. Data was generated for all consumers residing in, and retailers located within the Town of Southold and the Village of Greenport.

ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services and Drinking Establishments subsector. All estimates and projections provided by this source draw upon data from sources including the Current Population Survey, American Community Survey, Census of Retail Trade (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, Nielsen Claritas Market Research, Hanley Wood Market Intelligence, and other commercial and federal data sources.

Minnesota IMPLAN Group has developed an economic impact modeling system called IMPLAN, short for "impact analysis for planning". The program was developed in the 1970s through the United States Department of Agriculture's Forest Service, and was privatized in 1993. IMPLAN is built on a mathematical input-output (I-O) model to express relationships between various sectors of the economy in a specific geographic location.

IMPLAN is widely accepted as the industry norm in estimating how much a one-time or sustained increase in economic activity in a particular region will be supplied by industries located in the region. IMPLAN differentiates in its software and data sets between 440 sectors that are recognized by the United States Department of Commerce. Though the IMPLAN model is used mostly for estimating local economic multipliers, the program also provides pertinent data – including production, value-added, employment, wage and supplier data – that was used for the preparation of an Industry Profile specific to each of the zip codes within the Town of Southold. This Industry Profile outlines the current state of the Town's economy, and depicts the top industries in terms of the number of persons employed within each sector, the total labor income, and the total output in terms of the dollar contribution to the local economy.



IMPLAN's data is derived from production, employment and trade data from sources including the United States Census Bureau, County Business Patterns, Annual Survey of Government Employment, Annual Survey of Retail Trade; United States Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Consumer Expenditure Survey; United States Department of Labor; Office of Management and Budget; United States Department of Commerce; Internal Revenue Service; United States Department of Agriculture, National Agricultural Statistical Service; Federal Procurement Data Center; and United States Bureau of Economic Analysis, Regional Economic Information System, Survey of Current Business, among other national, regional, state and local data sources.