Town of Smithtown

COMPREHENSIVE PLAN UPDATE

VOLUME V
DRAFT
ECONOMIC RESOURCES STUDY

Planning and Community Development

Comprehensive Planning Series

Town of Smithtown
Comprehensive Plan
Update

VOLUME V
DRAFT
ECONOMIC BASE STUDY

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Planning and Community Development
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I INTRODUCTION

- **The Economic Resources Study is an analysis of the strengths and weaknesses in components of the Town's economy**
- **While some forces affecting the economy are beyond the Town's control, local strategies to support and promote economic resources are important**
- **Attentiveness and flexibility are keys to economic planning insofar as economic trends are continuously changing**

The "quality of life" of a community is, in part, determined by its economy. Such elements as employment, industry, education and retail sales affect our ability to sustain a community. In a globally competitive environment, it is necessary to understand these elements so that the community can continue to remain economically healthy. The purpose of the Economic Resources Study is to identify the strengths and weaknesses in the Town's economic base and to understand what factors the Town can influence to promote a healthy economy.

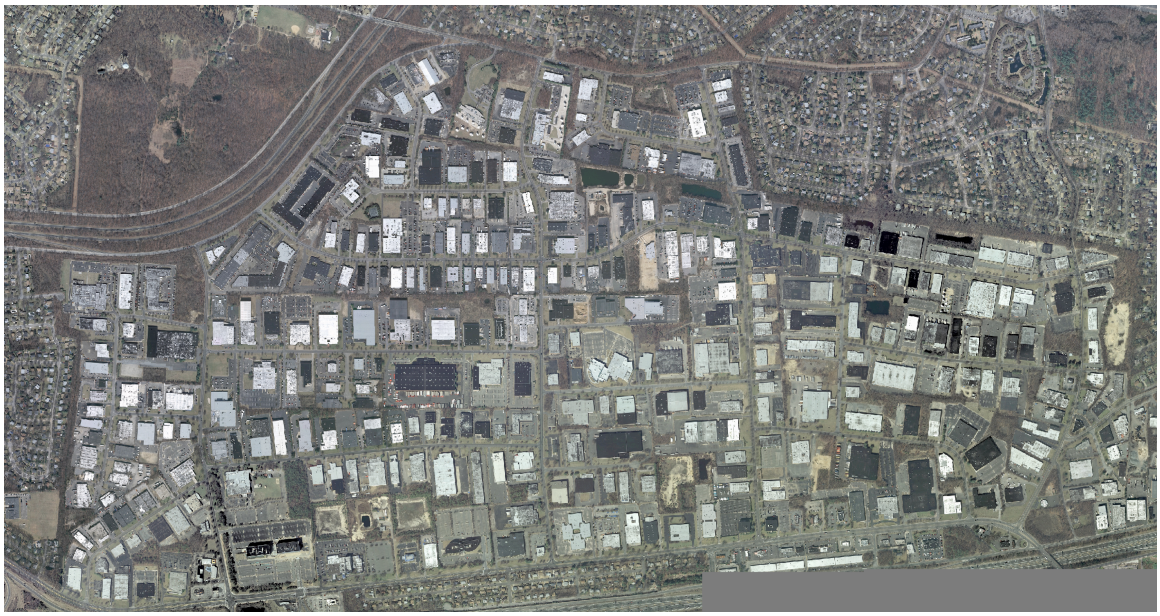
In the past, communities generally approached promoting economic development using such methods as tax abatements, industrial development bonds, or municipal investments in infrastructure. Many of these efforts have seen mixed results because they were undertaken with little understanding of the economic forces at work in the community or because the adjacent municipalities undertook the same efforts, such as tax abatements, effectively canceling any advantage.

Since every community has limited resources, it is important to understand those elements that comprise the local economy and to determine effective strategies that would maintain or improve the local economy. This can include changes in zoning and related laws and regulations, infrastructure investment, or the creation of special districts such as Business Improvement Districts.

The assessment of economic resources has been broken down into three areas: population, retail and service business, and industrial uses. Even though there are regional, national and international forces that could impact these areas, the Town's public policy can affect each of these sectors.

Since the economy itself is constantly changing, it is critical to assess trends and their local impact. For example, while some large manufacturing activities are on the decline, high valued production such as electronics or pharmaceuticals are on the upswing, which may, in turn, require a reevaluation of land use policies or infrastructure requirements. Because such change is a constant feature of the economy, economic trends should be monitored on a continuous basis and economic policy should be reevaluated accordingly. In order for the community to remain competitive with other municipalities, this monitoring and evaluation process must be ongoing, anticipating and directing change as necessary.

In a final note, this study does not address international, national, and regional trends that constrain local options and over which the Town has little influence or control. Also, this study is based on public sources of information, which tend to be less abundant and less precise for jurisdictions below the County level. Nonetheless, this information is sufficient to provide a foundation for assessing the Town's economic resources within the Town's area of authority, especially in relation to land use decisions and local policies.



Aerial photograph of John V.N. Klein Hauppauge Industrial Park, the largest industrial park in the northeast

II THE POPULATION

- **The Town has an educated workforce, which is necessary for high skill jobs**
- **The high median income contributes to high demand for services and retail goods**
- **The diminishing proportion of younger workers may create problems in the near future**
- **Approximately 85% of employed Town residents work in industries in the service sector**

A. Labor Force Inventory

The US Census Bureau defines the labor force as those in the population 16 years of age and older who are employed or seeking employment. According to 2005 Census Bureau data, there are 89,315 people (76% of the total population of 117,681) in the unincorporated part of Smithtown that are 16 or older, and about 59,700 people (51% of the total population) are in the labor force. The percentage of the population in the labor force is roughly the same in Smithtown as it is in the County (50%) and the nation as a whole (51%).

	Smithtown	Suffolk County	USA
Population	117,681	1,444,642	288,378,137
Population 16 years +	89,315	1,116,099	223,524,814
Population in labor force	59,706	742,674	147,299,391

Figure 1. Population in the Labor Force
(Source: 2005 American Community Survey)

Age

The changes in the age distribution of the Smithtown population are dealt with in detail in the Town of Smithtown Comprehensive Plan, Volume II: Population Study. As noted in that study, one of the important findings is the decline in the numbers of young people (ages 20 to 34) in the labor force. Whether compared with the national average or with statistics on the County, the Town has fewer 20-to-34 year olds. This decline in population has been evident since 1960, as can be seen in Figure 2.

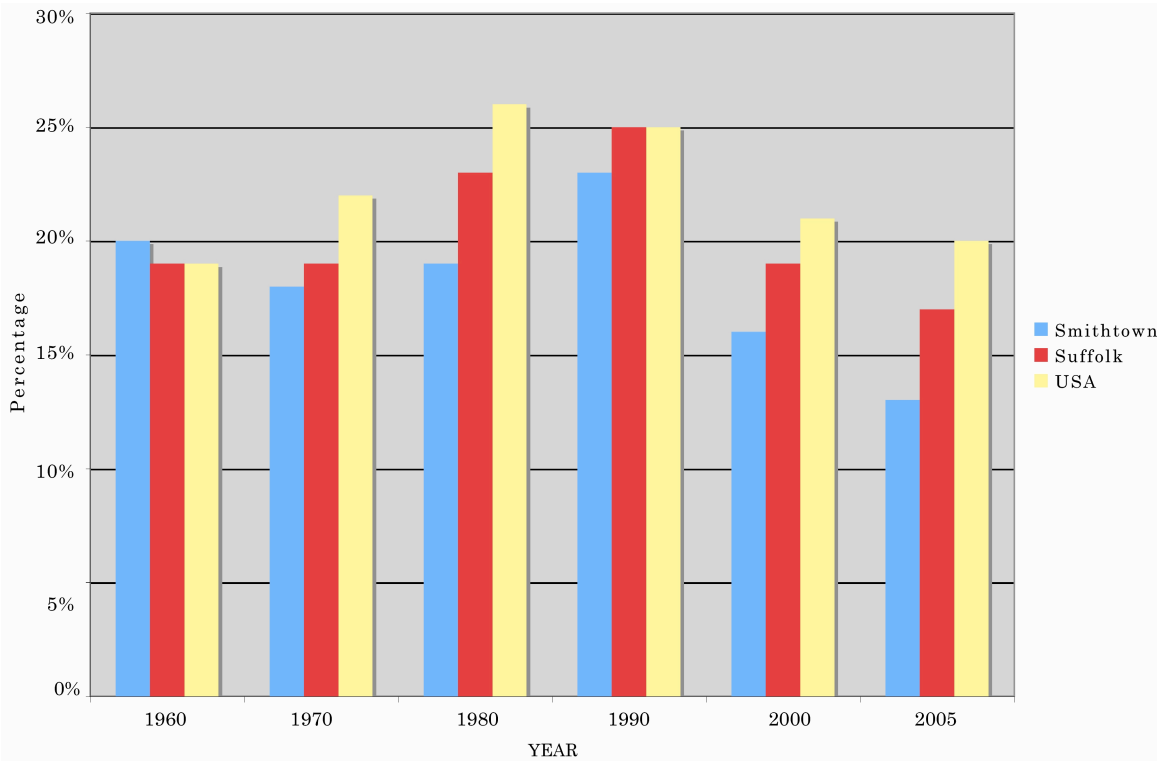


Figure 2. Percentage of Population between 20 and 34 years of age, 1960 – 2005
(Sources: Decennial Census data from 1960 through 2000; 2005 American Community Survey)

The 20 to 34 year old age group supplies entry-level workers needed for most companies. In comparison with the County and the nation as a whole, the Town had roughly the same proportion of this age group within its total population in 1960. But by 1970, a gap had begun to open and by 2005, the Town had only a little over 13% of its population in this group, while the County had more than 17% and the country as a whole had just over 20%. More importantly, an analysis of population history has shown that this is not a result of the "baby bust" effect, but that there is an actual exodus or "out migration" of residents in this age group. (See Tables A-5, A-6, A-7 in Appendix A and the Population Pyramids in Appendix B, Town of Smithtown Comprehensive Plan, Volume II: Population Study).

The 35 to 54 year old age group is made up of mature workers, an important element of the labor force. This is the group from which skilled workers and managers are most frequently drawn. The percentage of Smithtown's population in this age group has consistently been higher than the percentage in the County's and nation's population, as shown in Figure 3. This reflects the Town's stability as a source of a mature and skilled workforce.

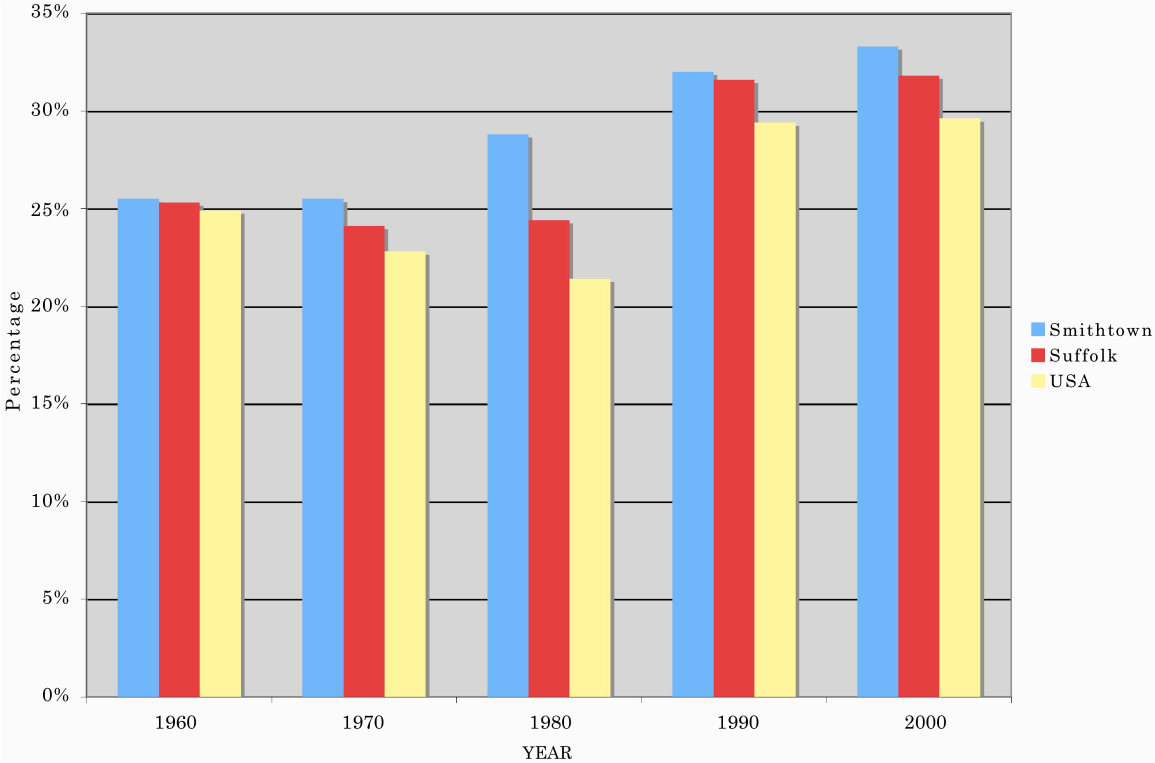


Figure 3. Percentage of Population between 35 and 54 years of age, 1960 – 2005
(Sources: Decennial Census data from 1960 through 2000; 2005 American Community Survey)

Income

Smithtown is a wealthy community in comparison to the County or to the nation as a whole. According to the 2005 American Community Survey, the median household income in the Town is more than double that of the nation as a whole, and approximately $24,500 higher than the median household income in Suffolk County.

	Median Household Income
Smithtown	$101,615
Suffolk County	$77,109
United States	$46,242

Figure 4. Comparison of Median Household Incomes

In addition, there is a higher percentage of households in the middle income range and in the upper income range, and a lower percentage in the lower income range, than the County or the nation.

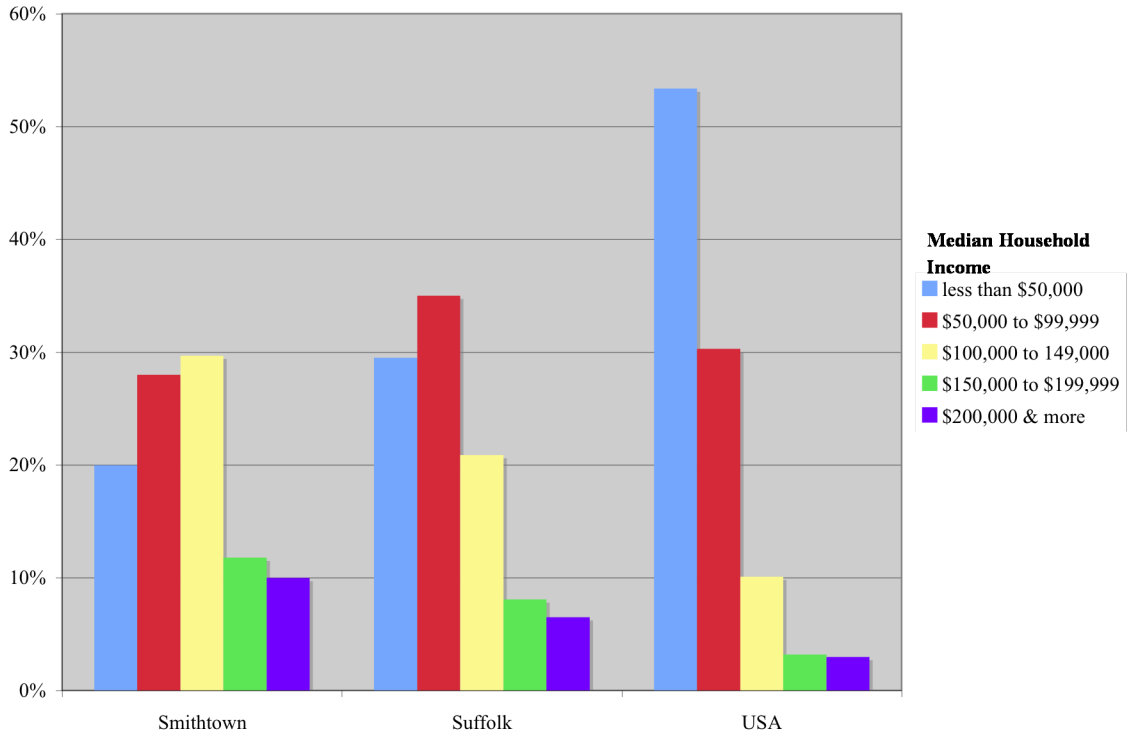


Figure 5. Breakdown of Households by 2005 Median Household Incomes
(Source: 2005 American Community Survey)

The high cost of living in the Town, especially as reflected in the housing costs, is both positive and negative as an economic condition. High property values enhance the community's reputation as a good place to live and to invest in, but also make it hard for young single people and young families to locate in the area. High property values, along with high labor costs and the lack of young workers, can also discourage new businesses to locate in the Town or region.

Education

Smithtown's population has a higher than average education level, which is the basis for a skilled workforce, and is an attractive feature for many employers. Graduation rates and total schooling achieved in the population over 25 years of age exceed County and national rates, and have increased over time. As of 2005, more than 70% of Smithtown's population over 25 years of age had completed some college and 40% held at least a Bachelor's Degree. In comparison, in the County about 55% of the population had some college and just under 30% obtained Bachelor's degrees or higher, and in the country as a whole these percentages fall to about 50% and 25%, respectively.

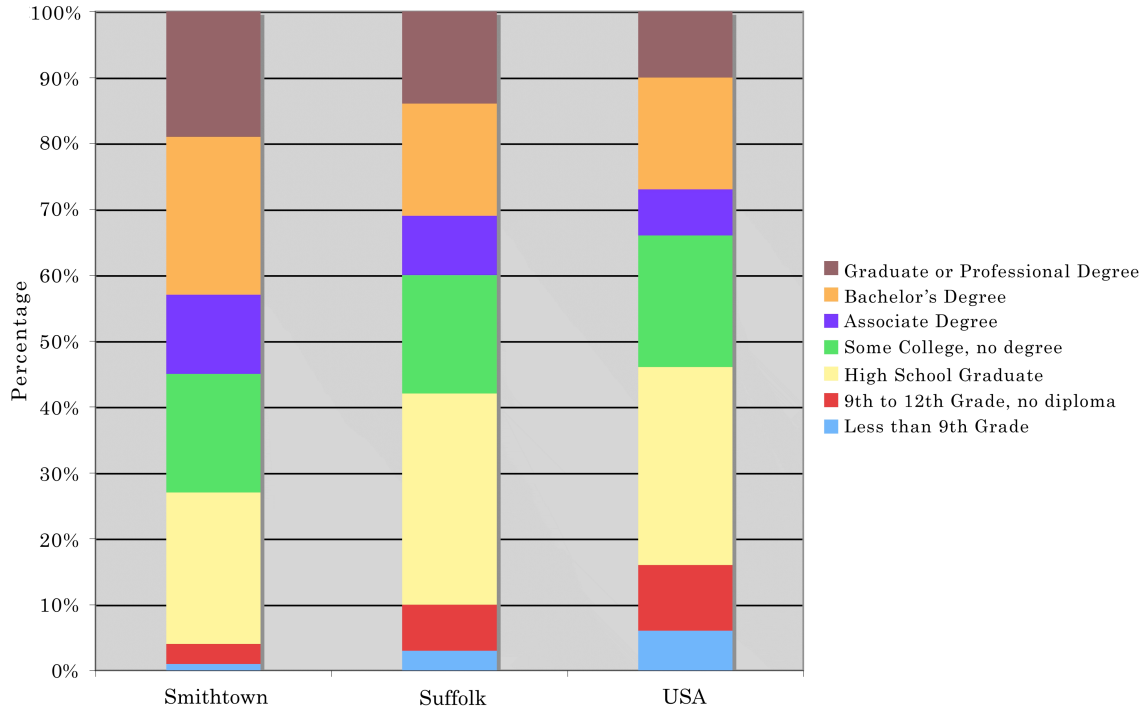


Figure 6. Breakdown of Population by Level of Education Completed
(Source: 2005 American Community Survey)

B. Places of Employment

Most Town residents work beyond the Town's boundaries. According to the decennial census, as of 2000, approximately 14,154 (26%) of Town residents worked in Smithtown, 23,531 residents (41%) worked in other townships in Suffolk County, 8,640 residents (15%) worked in Nassau County, and 10,000 residents (18%) worked in New York City or out of state (U.S. Census 2000).

A total of about 54,678 people work within the Town boundaries (Long Island Regional Planning Board, U.S. Census 2000). As noted in the previous paragraph, about 14,154 of these workers are Town residents. However, more than 40,000 workers live elsewhere.

Including the roughly 42,000 Town residents that work outside the Town, a total of about 82,000 people travel into or out of Smithtown for work, generating approximately 164,000 trips into or out of Smithtown per day. Consequently, our transportation network is an important component of our economic base. The impact that commuting has on traffic congestion is discussed in detail in the Town of Smithtown Comprehensive Plan, Volume VI: Transportation Study.

C. Employment by Sector

The U.S. Census Bureau splits jobs into three sectors of employment: the primary sector (agriculture, fishing, and mining); the secondary sector (manufacturing and construction); and the tertiary sector (sales and services). For simplicity, this report refers to the tertiary sector as the service sector of the economy.

As of 2005, 86% of Town residents, the largest segment of the Town work force, were employed in the service sector. The proportion of employment in this sector of the economy has been steadily increasing since at least the middle of the twentieth century, and is expected to continue to grow. During the same period of time, employment in the primary and secondary sectors has declined. Figure 7 displays the change in Town employment in the primary, secondary, and service sectors from 1970 to 2005.

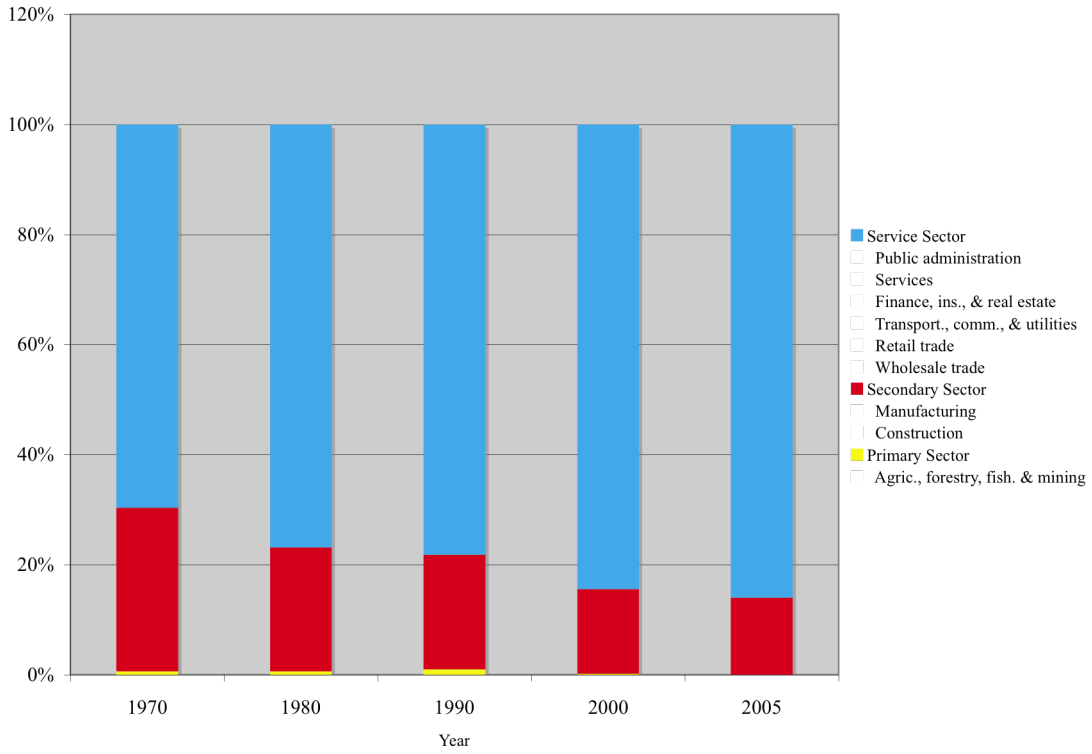


Figure 7. Employment by Sector in Smithtown, 1970 – 2005.
(Sources: Decennial Census data from 1970 through 2000; 2005 American Community Survey)

Some of these trends may not necessarily be the result of local factors, though, as the increase in service sector jobs and decrease in manufacturing appear to be occurring nationwide. The chart in Appendix A shows the change in employment sectors from 1970 through 2005 in Smithtown, Suffolk County, and the United States.

This trend toward service sector employment has resulted in the occupation distribution shown in Figure 8.

	Smithtown	Suffolk	USA
Management, professional, and related occupations	48.1%	38.3%	34.1%
Service occupations	12.9%	14.6%	16.3%
Sales and office occupations	27.4%	27.7%	25.9%
Farming, fishing, and forestry occupations	0.0%	0.2%	0.7%
Construction, extraction, maintenance and repair occupations	8.1%	10.1%	10.0%
Production, transportation, and material moving occupations	3.5%	9.1%	13.0%

Figure 8. Occupation by Industry in 2005
(Source: 2005 American Community Survey)

Employment in the Service Sector

The service sector is the primary growth sector in the national and local economies. Occupations in the fields of education, financial services, insurance, real estate, tourism, transportation, and retail and wholesale trade, among others, are included in this sector.

The New York State Department of Labor has more detailed statistics for Nassau-Suffolk and New York State than the U.S. Census Bureau does. Unfortunately, the Department of Labor does not collect statistics specific to the Town. However, given the relatively high education, skill and income profile for the labor force residing in Smithtown, demonstrated by the high percentage of residents in management and professional occupations shown in Figure 8, this study assumes that the percentage of the Town's labor force working in the higher paying occupations is at least equal to that of Nassau and Suffolk Counties.

According to the Department of Labor, about 1.1 million (88%) of the 1.3 million people employed in nonfarm related jobs in Nassau-Suffolk are employed in the service sector. About 457,400 (41%) of these workers are employed in typically high paying jobs, i.e. jobs in professional and business services, education and healthcare, and the financial industries. About 20% are employed in the education or healthcare fields, 14% are in professional and business services, and 7% are in financial activities. About 264,700 (23%) of workers in the service sector hold typically low-wage and part-time jobs such as positions in retail, tourism and entertainment. The remaining 36% in the service sector

work in public or personal service, wholesale trade, information (i.e. communications), or transportation and utility services.

D. Conclusions

Strengths of the labor force

A well-educated workforce. The Town has a well-educated, skilled, diversified, and flexible work force.

High median income. The Town has a high percentage of residents who have sufficient income to provide a solid base for retail sales and property investment.

Weaknesses of the labor force

Imbalance in the labor supply. The age cohort in the 20-35 year old range is under-represented in the population, and proportionally more people in that age group leave the Town than those in older cohorts. As a result, there is not an adequate supply of entry-level and young professional workers.

High cost of living. The high median income occurs in conjunction with a high cost of living that may discourage younger workers and families from residing in Smithtown.

A lack of skilled industrial workers and skilled mechanics. While the projection is for continued decreases in manufacturing throughout this region, it appears that there is not an adequate current supply of trained mechanics and skilled industry workers.

A lack of housing diversity. There is insufficient housing of the types needed to serve younger families, singles, "empty nesters", senior citizens, and others who wish to live in smaller units or different styles of community. The lack of housing diversity along with the cost of housing is a major factor in the out-migration of younger and older age groups.

Trends

Continued emigration of the younger age cohorts. This phenomenon, which began in the 1970s, appears likely to continue into the future.

Population is aging and becoming more diverse. In a November 2007 report, the Bureau of Labor Statistics noted that "The population is aging and becoming more diverse, as is the labor force, and those trends are expected to continue. The moderate growth of the U.S. economy and the aging of both the workforce and the population combine to present a unique set of opportunities for those seeking employment and unique challenges for policymakers and educators." Smithtown and the Long Island region will face these same conditions.

III THE BUSINESS SECTOR

- **Town-wide, per capita retail space has doubled in the past 35 years**
- **Continued turnover in the types and needs of large retailers can be expected**
- **The downtown business districts have been declining as local retail centers, and are reemerging as multi-purpose centers**
- **Suffolk County Heath Services standards for wastewater treatment limit development, especially for smaller businesses and "wet" uses**
- **Neighborhood Business and Central Business Districts have discernible amounts of underdeveloped properties**

The business sector, for the purposes of this plan, includes retail and small service establishments. The business sector plays many roles in the local economy. It consists of retail and small service establishments, which provide goods needed by residents, non-residents, and businesses. It also provides employment for residents and non-residents, pays property taxes, and generates sales tax revenues.

Those working in the business sector are part of the service sector of employment. Wages in retail jobs are usually lower and there are fewer benefits than in other industries or businesses. Retail is also primarily a *non-basic* industry, in that most profit derived from it is realized outside the region in which it is located. Since payment of wages and other business expenses by the business entity tends to be offset by the expenditures of local residents and businesses in the retail market, retail businesses tend to move money around in the local economy, but do not bring new income into the region. Large national retail chains, not based in the region, for example, usually produce a net loss of income to the region; that is, profits are exported.

Business uses may also produce negative impacts, such as traffic generation and congestion, increased solid-waste removal needs, poor aesthetic features with either architecture or signage, and the proliferation of pavement because of parking needs. In areas where there is a substantial surplus of buildings and properties, reinvestment tends to be substandard, rents tend to be low, and property maintenance is poor. These factors make it difficult to redevelop such areas.

The business sector is heavily impacted by national trends, which limits the Town's ability to predict or plan the types of retail and small service establishments that will thrive. However, the Town does have the ability to guide and encourage development in specific locations that would improve and sustain the health of the local economy.

A. Types and Locations of Business Districts

The business sector is constantly evolving. Before World War II, the downtown locations were the centers of business on Long Island. As suburbia developed, shopping centers and malls became dominant. Recently, "big box" stores (i.e., large single purpose stores that have a box form of architecture) have become preeminent. We have also witnessed the emergence of the internet as a new mode of commerce.

As the makeup of the business sector changes, the classifications and perceived functions of the different types of retail districts change as well. For example, in the 1960s, when the Master Plan was published, the Town classified shopping districts by terms such as *Regional, Sub-Regional, Community, or Neighborhood* Centers, describing their trade areas. However, as the business environment has changed, these and older retail classifications and functions have become out-dated, even though they are still used in the Zoning Ordinance of the Town. With this study, we have begun to classify business districts according to their size, location, design, trade area, and composition, as summarized in Figure 9, classifying the districts as either *Central Business Districts, Large, Medium and Small Shopping Districts, or Strip Corridor Districts.*

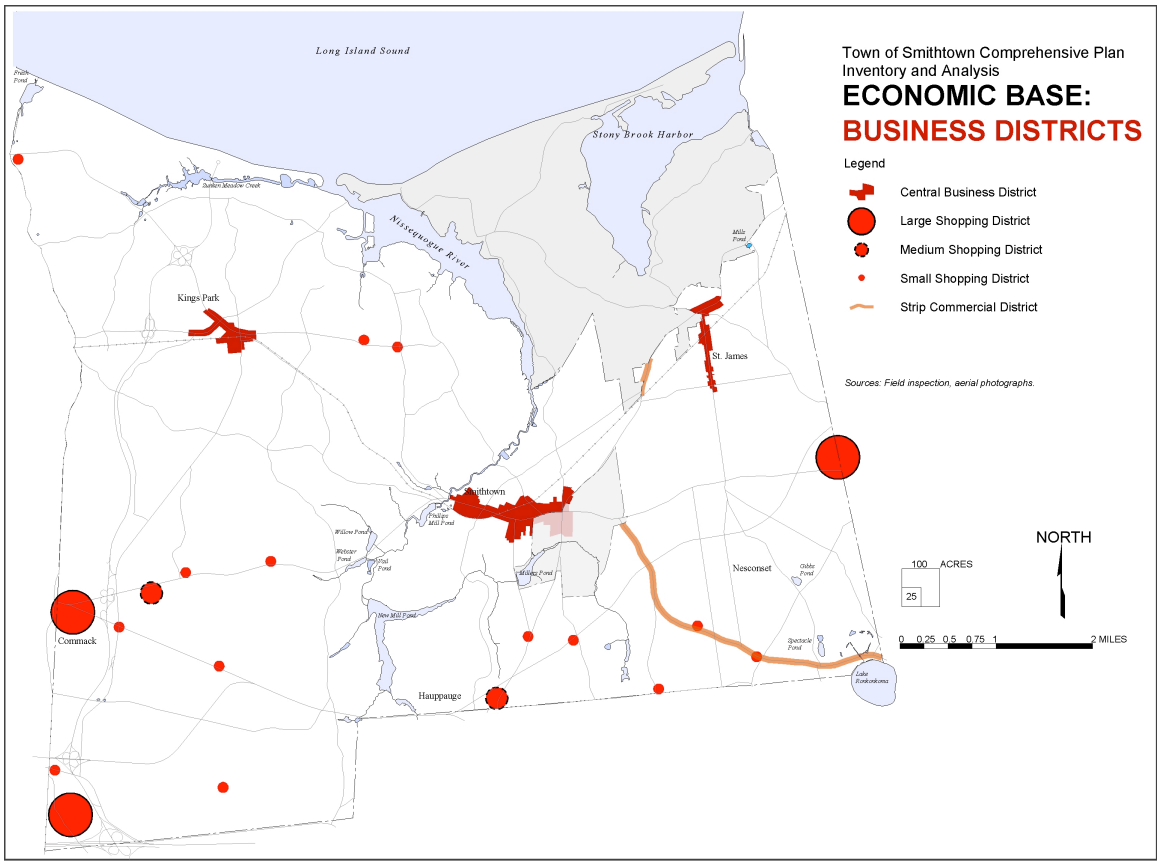


Figure 9. Business Districts

District	Characteristics	Examples of specific locations in the Town
Central business district	• total floor area is more than 200,000 sq. ft. • many small and medium sized stores • consists of multiple uses (retail, office, government, apartments, etc.) • compact design • comprised of many small lots • pedestrian oriented • located along a "main street" • attracts customers from within the hamlet and Town	• Kings Park • Smithtown • St. James
Large shopping district	• total floor area is more than 750,000 sq. ft. • many large stores • department stores and big box retail stores • buildings spread apart from each other • comprised of a small number of large lots • automobile oriented and pedestrian infrastructure within the site • located off limited access highways or primary arterials • attracts customers from adjoining hamlets and townships	• Smith Haven mall • Costco shopping center in Nesconset • Crooked Hill Road • Veterans Memorial Highway (NYS 454) and Jericho Turnpike (NYS 25) in Commack
Medium shopping district	• total floor area may vary from 200,000 – 750,000 sq. ft. • many medium sized stores • contains one or more anchor stores (e.g. supermarket) • stores attached • generally comprised of large lots • automobile oriented and pedestrian infrastructure within the site • located on primary arterials • attracts customers from within the hamlet	• Mayfair Shopping Center • southwest corner of the Smithtown By-Pass (NYS 347) and Smithtown-Islip Road (NYS 111) • southwest corner of Mt. Pleasant Road and the Smithtown By-Pass (NYS 347) • Motor Parkway and Commack Road • Fort Salonga Shopping Center
Small shopping district	• total floor area less than 100,000 sq. ft. • limited number of small to medium sized stores • generally contains a small food store or drug store as well as other retail stores • stores attached, usually in 1 building • generally comprised of large lots • automobile and pedestrian oriented • located on primary arterials • attracts customers from within the neighborhood and hamlet	• Northgate Shopping Center at Kings Park Road and Jericho Turnpike • north side of Smithtown Boulevard, across from the Nesconset armory • Old Nichols Village at Nichols Road and Smithtown Boulevard
Strip corridor district	• total floor area may vary from 20,000 - 40,000 sq. ft. • limited number of small stores • stores stand alone or attached, usually 2-3 stores per block • comprised of numerous small lots • automobile oriented • located alongside a primary or secondary arterial • attracts customers traveling on the highway	• Terry Road/Smithtown Boulevard • North Country Road in St. James • Commack Road

Figure 10. Business District Classifications

Central Business Districts

The *Central Business Districts* (CBDs) are the old downtowns of three hamlets, Smithtown, St. James, and Kings Park. Prior to World War II these districts were the center of retail shopping and commerce. The CBD is usually considered the center of the community and provides the identity or *sense of place* to the hamlet. While they experienced a decline in the retail function with the emergence of the malls and shopping centers, these districts have seen a resurgence in recent times because of their inherent flexibility and capability to adapt to changing conditions and public preferences.

Today, CBDs are multi-purpose centers with a core of retail establishments and a mix of office, residential, institutional and entertainment uses. In addition to stores and personal service shops (e.g., hairdressers), CBDs provide a mix of uses and features. The three Town CBDs, for example, all have train stations, government or school facilities, apartments, offices, parks, and other institutional facilities. It is this diversity that provides the strength of the current CBDs.

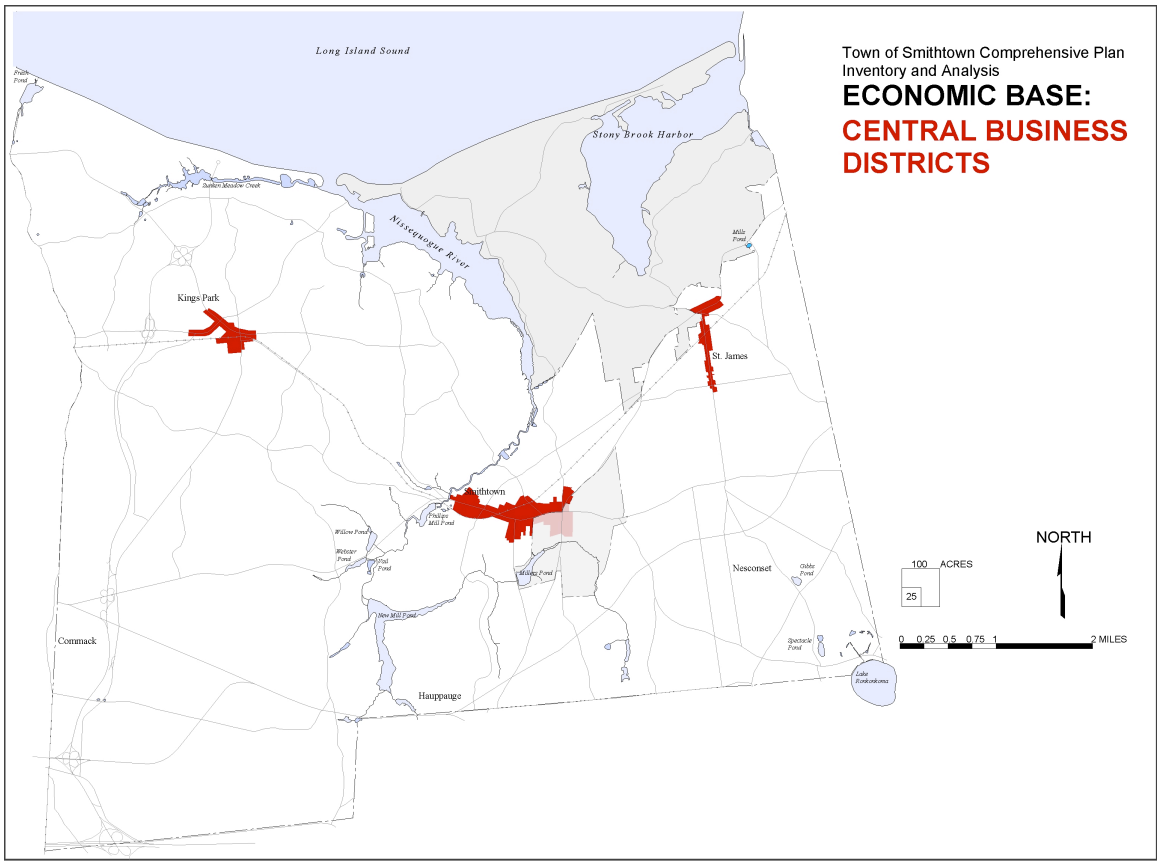


Figure 11. Central Business Districts

CBDs are also designed for pedestrian movement. Auto trips are mostly limited to travel to and from the district. Because of the intense development, parking is at a premium in this district and it is the only type of business district where there is municipal parking. Since most of these CBDs were also designed around arterial roads, conflicts emerge between providing for safe and easy pedestrian movement and smoothly moving automobile traffic.

While the Town's three CBDs have similar features, the problems and issues for each of these centers are different. In the 1980s, the Town undertook a separate study for each of these CBDs, the Smithtown Central Business District Improvement Plan (1982), the St. James Business District Improvement Plan (1983), and the Kings Park Business District Improvement Plan (1983). While the Comprehensive Plan Update will be discussing some of the major concerns for these districts, it will also include a suggestion to revisit each of these studies.

Smithtown CBD

The Smithtown central business district is the largest of the Town's three CBDs. This "greater downtown" stretches about a mile and a third, with the core centered in the two-thirds of a mile between NYS Rte. 111 and New York Avenue. The southeastern portion of the downtown, on the south side of East Main Street, is located in the Village of the Branch and is primarily made up of three shopping centers, which serve as anchors for retail activity.

Photograph. East Main Street, Smithtown

Figure 12 shows the Smithtown CBD, with an overall business area of about 260 acres and a total floor area in excess of 1.1 million square feet. During the 1800s, the core of the Smithtown CBD was centered at the intersection of Main Street and St. Johnland Road (NYS Rtes. 25 and 25A). The core moved about three-quarters of a mile east to its present location after 1872, when the Long Island Rail Road built the Smithtown railroad station. Today, the core of the district totals about 73 acres, and is located east of the railroad station. The highest concentration of stores, offices, and services is in the core area and this area is where most pedestrian activity takes place.

The downtown also has three small "pocket" parks, a theatre for the performing arts, several municipal parking lots, the main branch of the public library, a number of historical buildings, and governmental offices. There are apartments and condominiums in and adjacent to the downtown and there is bus and train service near to the main street.

While the core of the Smithtown CBD tends to have one of the highest occupancy rates in the County, there are issues of concern. The traffic on the main street is heavier and moves more quickly than is ideal for pedestrian safety and comfort and the stores are not primarily geared to promote the kind of leisurely shopping opportunities that make for a "destination downtown." There is still a need for more municipal parking, particularly south of Main Street. Because of the lack of sewers, the ability to expand to provide for more restaurants, office and housing is limited. Finally, as the center of the Town of Smithtown, improvements in the overall appearance of the business district should be encouraged.

Figure 12. Smithtown Central Business District

Kings Park CBD

The Kings Park CBD is about 110 acres in size and is comparable to the size of the St. James CBD. The district developed along with the development of the former Kings Park Psychiatric Center. The core area of the CBD is about 18 acres and is centered at the intersection of Indian Head Road and Main Street (NYS Rte. 25A).

Photograph. Main Street, Kings Park

The CBD has a small pocket park, several commuter parking lots, a branch of the public library, and several historic or architecturally significant structures. There is also an entrance to the hike/bike trail that goes through the campus of the former Kings Park Psychiatric Center and the Kings Park Heritage Museum located in a public school building. There are apartments above some of the stores and in nearby complexes, and single-family residential neighborhoods immediately adjacent to the district.

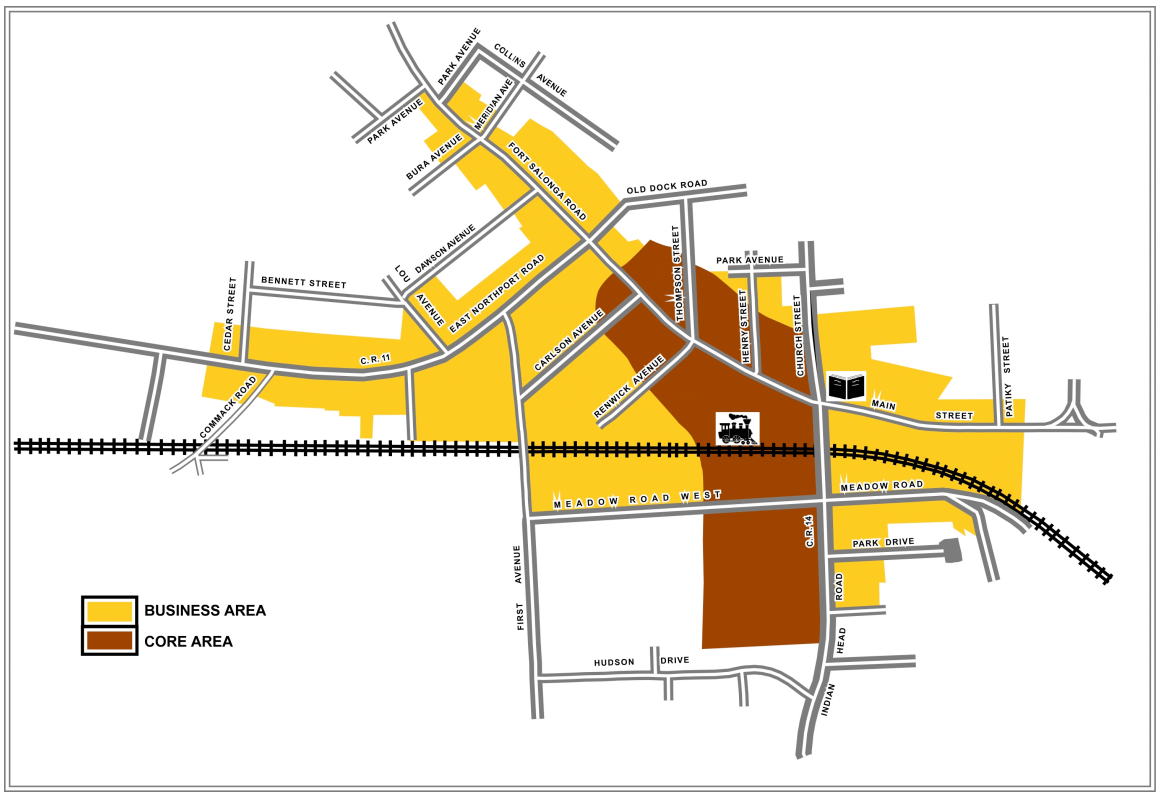


Figure 13. Kings Park Central Business District

With the closure of the Kings Park Psychiatric Center in the 1990s, the district experienced an increase in vacancy rates. Traffic volume is also a concern along with the location of the railroad station and the delays caused by the railroad crossing gates at Indian Head Road. Pedestrian movement is difficult throughout the CBD. The sidewalks in the core area are narrow and mostly lack a deep buffer between the main walkway area and the curb.

St. James CBD

The St. James CBD is about 112 acres in size and, as previously noted, about the same size as the Kings Park CBD. The core area is about 16 acres and centers around the railroad station.

There are two parks, several municipal parking lots, and government offices in the district. Much of the CBD is historic in appearance and this is one of the principal features of the downtown. The area has attracted a mix of businesses and restaurants that have retained a "small-town" feeling. There are a small number of apartments above the stores and most of the CBD zoning is immediately adjacent to single-family residence zoning and uses.

The St. James CBD has generally a low vacancy rate and has experienced significant reinvestment over the last decade.

Unlike the Smithtown and Kings Park CBDs, the main street, Lake Avenue, is not a state route. Traffic volume is lower in this CBD, although the narrow width of Lake Avenue itself has fostered complaints about traffic circulation. While the sidewalks themselves are also narrow, the lower traffic volumes and narrow streets allow pedestrians to move easily throughout the area.

Photograph. Lake Avenue, St. James

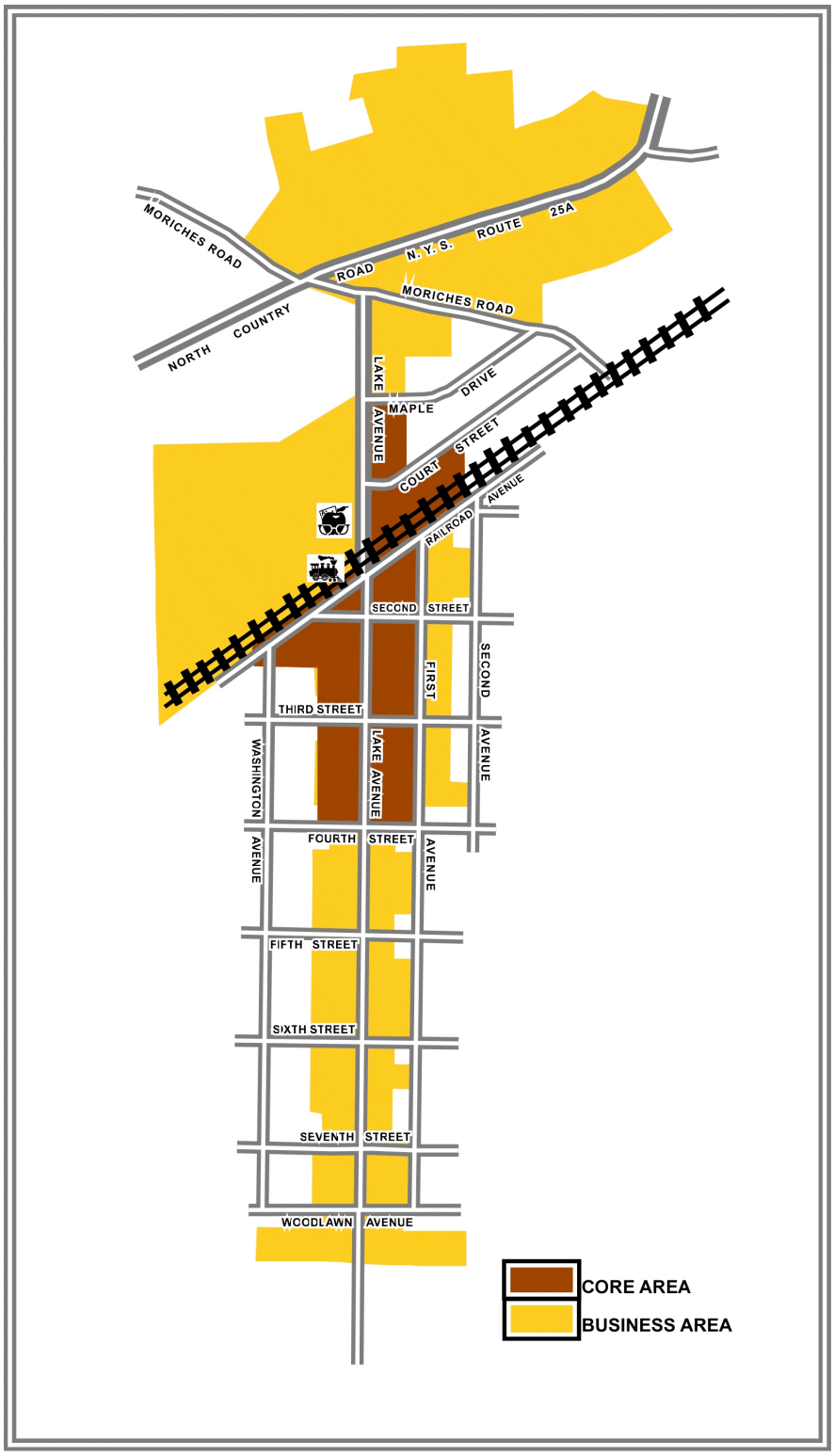


Figure 14. St. James Central Business District

Large Shopping Districts

A Large Shopping District is composed of more than 750,000 square feet of retail space and can include malls, large shopping centers, "big box" stores, or a combination of such uses. Because of their size, these districts are located along or near major arterial roads and have extensive parking facilities. There are three locations in the Town that are classified in this manner and include the Smith Haven Mall area, the shopping facilities in Commack at the intersection of Veterans Memorial Highway (NYS Rte. 454) and Jericho Turnpike (NYS Rte. 25), and a complex of several big box stores along Crooked Hill Road in Commack.

Large Shopping Districts tend to have large trade areas, drawing customers from the Town and surrounding communities. The primary stores are typically national chain stores that tend to have a higher volume of sales per square foot than other business districts. While malls dominated this type of use for several decades, the centers that are now composed of large national chains are currently experiencing the most growth.

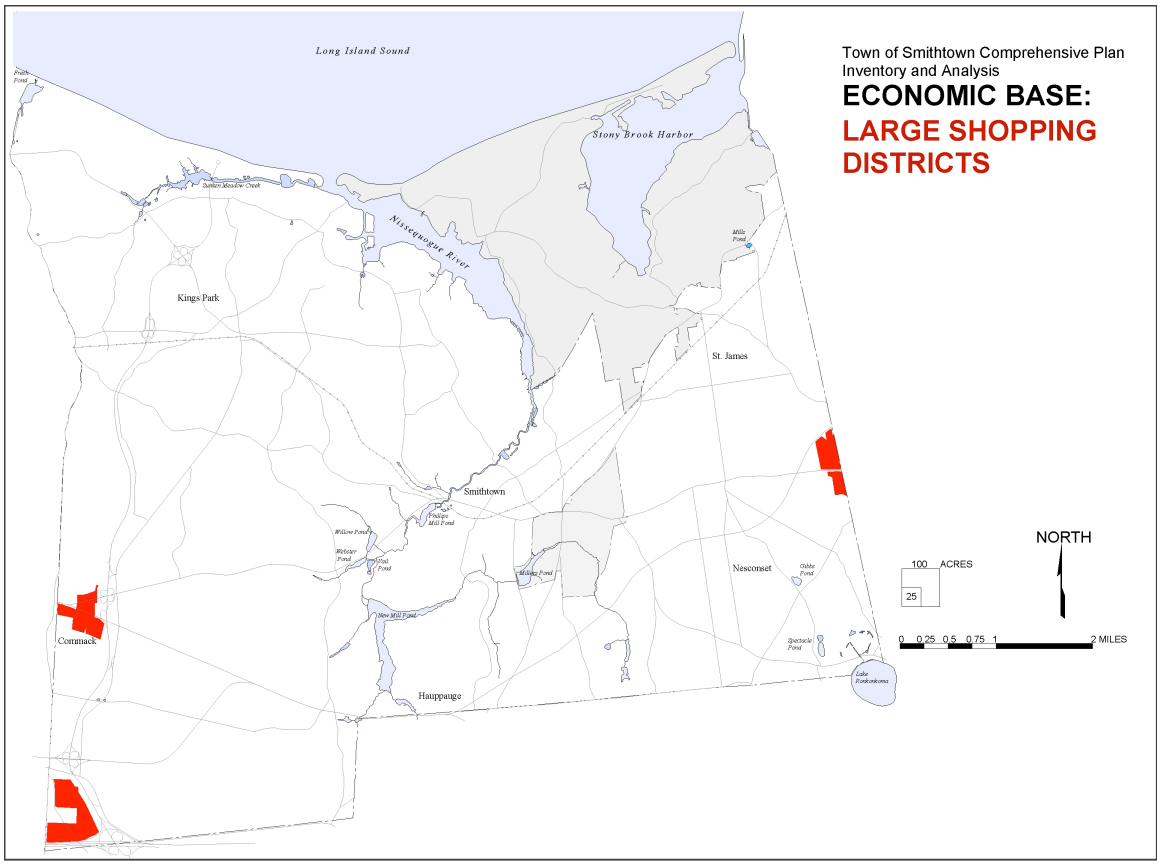


Figure 15. Large Shopping Districts

Significant among Large Shopping Districts is the Smith Haven Mall area, a regional shopping complex that is located in Smithtown, the Town of Brookhaven, and the Village of Lake Grove. It includes the only mall in the Town and combines several types of retail development. While the Smith Haven Mall (i.e., indoor facility) is the center of this regional complex, there are also big box facilities, several large shopping centers, and an outdoor plaza ("life-style center") with stores and restaurants in and surrounding this site.

Photograph. Life-style section at the Smith Haven Mall

The Large Shopping District in Commack at the intersection of Veterans Memorial Highway (NYS Rte. 454) and Jericho Turnpike (NYS Rte. 25) is composed of a series of shopping centers, big box stores, and individual stores. Unlike the Smith Haven Mall area, there is no center for this complex. Most of the shopping facilities are spread out along the roadways on several sites.

Finally, in the Crooked Hill Road area, there is a large complex of several big box stores and related facilities. This area is located at the extreme southwest corner of the Town and serves a regional area comprised of the surrounding four Towns of Islip, Babylon, Huntington, and Smithtown. It is the only large shopping district that is almost entirely contained within major arterial roads on all sides (i.e., Commack Road, the Long Island Expressway, Sunken Meadow Parkway, and Northern State Parkway).

Medium Shopping Districts

While Medium Shopping Districts could range from 100,000 to 750,000 square feet of retail space, these districts tend actually to be between 100,000 and 200,000 square feet in size. These sites generally consist of a shopping center, and serve a hamlet or community-size trade area, although that may vary with individual stores within these districts. All of these districts include a major supermarket and appear to replace the function of a Central Business District in that they are located in areas of the Town that do not have a CBD. Like the Large Shopping Districts, these sites tend to be located along major arterial roads and have large parking facilities.

Photograph. Mayfair Shopping Center

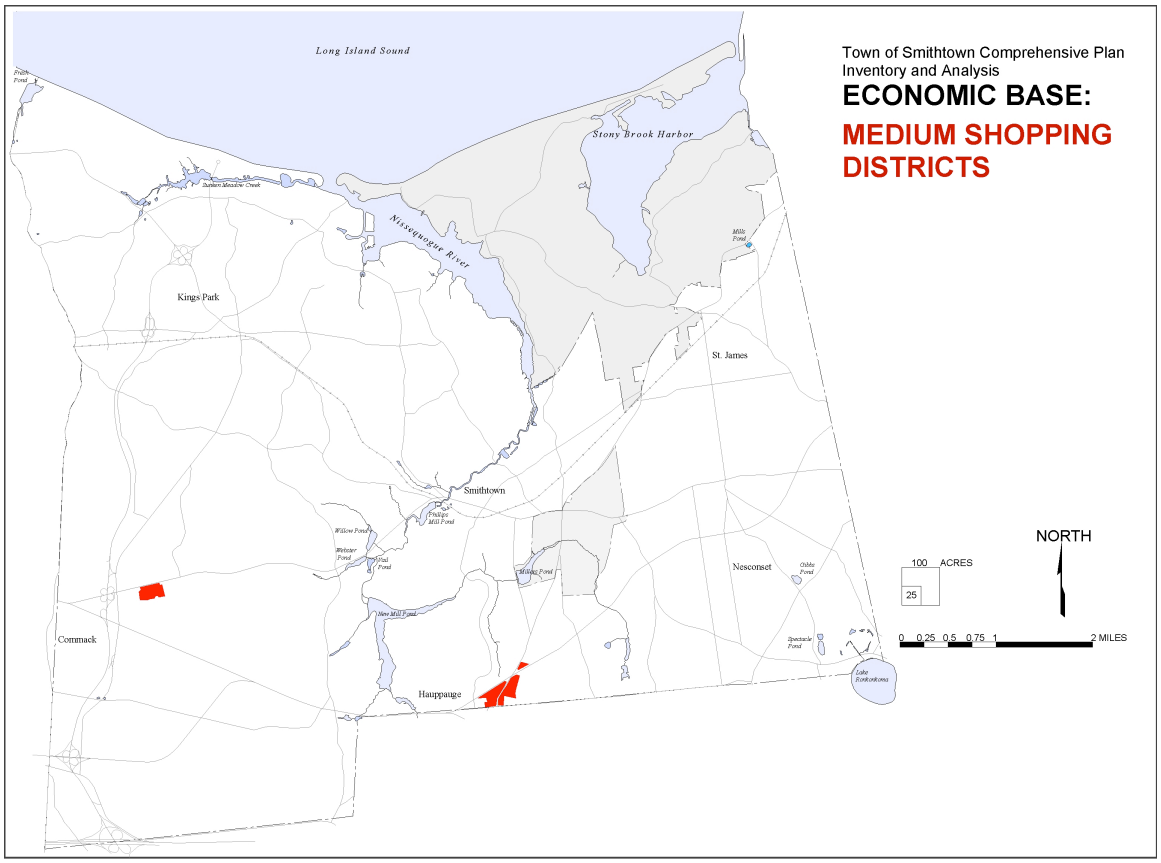


Figure 16. Medium Shopping Districts

There are five locations within the Town (as shown in Figure 16) that are classified as Medium Shopping Districts; they include the Mayfair Shopping Center in Commack, the shopping complex at Motor Parkway and Commack Road, and the various centers located along Hauppauge-Islip Road (NYS Rte. 111) and the Smithtown By-Pass (NYS Rte. 347). These districts appear to function well. There are a low number of vacancies and there has been a significant amount of reinvestment in these centers within the last ten years.

Small Shopping Districts

The Small Shopping Districts have less than 100,000 square feet of retail space and have a variety of stores that generally serve the local neighborhood. These districts may consist of a shopping center, several small strip centers, a variety of individual stores, or any combination of these patterns. These districts tend to be located on various collectors to major arterial roads.

There are thirteen Small Shopping Districts within the Town that appear to "fill the gaps" between Medium and Large Shopping Districts. Most of these districts contain a single main anchor such as a convenience or drug store that principally serves the surrounding neighborhood. In the post war period, many of these centers contained a supermarket; however, supermarkets have substantially increased in size and most have moved to the larger districts.

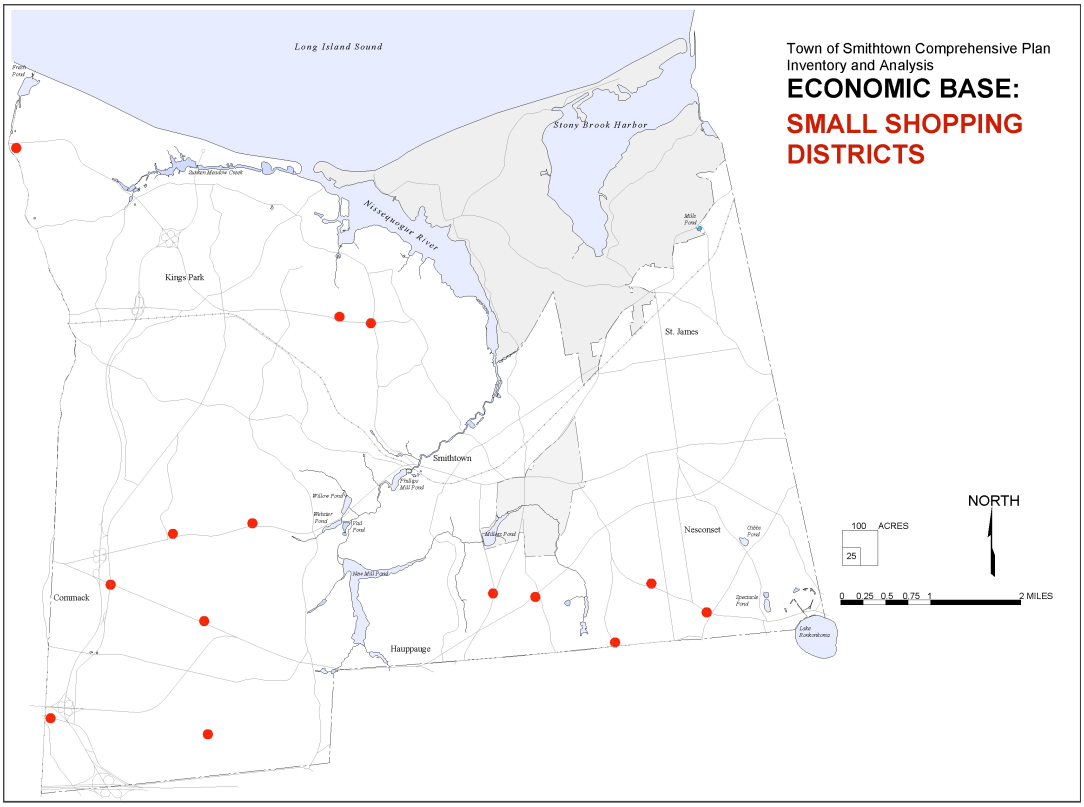


Figure 17. Small Shopping Districts

Strip Corridor Districts

Strip Corridor Districts are located along major roads. Most of these districts were created when zoning was first established in the 1930s when it was thought that the land along the major roads should be zoned for commercial uses. This practice was ended by the 1950s; however, a number of remnants of that practice still remain.

The land zoned for business tends to be shallow in depth, ranging from 100 - 300 feet. As a result, the designs and types of uses along these roads are limited. They generally include small strip centers (i.e., small shopping centers with the parking directly in front of the stores) or small individual stores.

Photograph. Typical strip center

In relation to most of the other districts, the sizes of the individual stores are small; however, because some of these districts are long, the total retail floor area may be large. While some stores tend to serve the local neighborhood, many of these stores attempt to appeal to the needs of motorists.

The most significant strip corridor is along Terry Road/Smithtown Boulevard in Nesconset. The corridor is zoned for Neighborhood Business for about three miles, that is, a land area about one-and-a-half times the area of the Smith Haven Mall.

B. Other Business Elements

The retail sector, as noted previously, is constantly changing or evolving. The downtowns and shopping center sites, while still important, are no longer the only type of retail land use. In the Town, two types of specialization, the emergence of the "big box store" and the concentration of automobile dealers on Middle Country Road, which is discussed in Section IV-B: "Industrial Centers," have had an impact on retail uses.

"Big Box" Stores

During the past two decades, "big box" stores have been a retail phenomenon across the US and Canada as well as in other parts of the world. These are large (50,000 to 200,000 square feet), no-frills-construction, warehouse-type stores. They typically sell products in bulk or in large quantities that are also sold in smaller quantities and presumably at higher prices, at food stores, pharmacies and smaller specialty stores. Big box stores may serve as the anchor tenant for a center or they may be grouped together with other big box stores in a shopping complex.

Big box stores generally focus on specific types of merchandise, such as lumber and household repair supplies (Home Depot, Lowe's), electronics (Best Buy), and books and digital media (Borders, Barnes & Noble). The smaller specialty stores tend to suffer because they are generally unable to match the low prices that "big box" stores area able to offer.

Photograph. Costco in Commack

In Smithtown, there are sixteen big box stores that were built between 1986 and 2006. Figure 18 gives the hamlet location and the size of the big box stores in Smithtown, by date of approval. There have been no additional applications for big boxes since 2006.

In much the same way that shopping centers and malls weakened downtowns in the 1960s and 1970s and made lasting changes in the focus and style of retail activity, these "big box" stores appear to have a similar impact on local business. While the residents may appear to benefit from these stores as consumers, there are negative impacts. In a study of the impact of "big box" stores on the surrounding community, researchers from Iowa State University found that gains in employment and volume of sales resulting from development of big box stores were shown to be off-set by the loss of employment and tax revenue by pre-existing local stores. They concluded that local communities should be cautious in offering incentives to such businesses (Stone and Artz, 2001).

Name	SCTM#	Hamlet	Date Approved	Sq. Ft
Costco	114-9-10.1	Nesconset	1986	122,091
Costco	174-3-84+	Commack	1994	135,586
Sports Authority	116-2-9.3	Commack	1996	43,000
Linens N Things	116-2-9.3	Commack	1996	41,686
Babies R Us	116-2-9.3	Commack	1996	38,092
Borders	116-2-9.3	Commack	1996	25,022
Target	116-2-9.3	Commack	1997	124,653
Circuit City	87-4-15	Nesconset	1997	43,862
Home Depot Expo	174-3-84+	Commack	1999	90,100
Target	174-3-84+	Commack	2002	143,590
Office Depot	87-4-12	Nesconset	2002	20,250
Dick's	114-4-23.6	Nesconset	2005	77,585
Barnes & Noble	114-4-23.6	Nesconset	2005	30,946
WalMart	173-1-39.1+	Commack	2006	142,733
Home Depot	173-1-39.1+	Commack	2006	104,870
Kohl's	173-1-39.1+	Commack	2006	88,408
			Total	**1,272,474**

Figure 18. "Big Box" Stores by Date of Approval

C. Business Conditions

While much of the local economy is dependant on regional and national forces, the role of the municipality is generally focused on ensuring that the proper amount of land is set aside in the most appropriate locations for such business activity. If there is too much land set aside for this purpose, it could lead to the construction of excessive retail space, suppressing rents and investment in the community. Likewise, too little space could result in lost opportunities for local job creation and taxes. The challenge for the local community is to find a good balance -- ensuring that there is sufficient land in the right locations to serve the needs of the public *and* providing positive impact in jobs and taxes.

Unfortunately, there is no precise formula for this balance, especially on Long Island where the suburban area is composed of many communities within which are smaller, overlapping jurisdictions. The needs and capacities of the business sector also tend to overlap and the shopping needs of one community may be served within an adjacent municipality.

Still, there are indicators that suggest some general trends. It is useful to look at several variables, including the amount of land for specific uses, a space and vacancy rate assessment, a review of land uses, and an analysis of tax assessed value. Each of these variables may highlight potential issues or problems; however, these are only general indicators and any specific change in land use policies or other strategies should be undertaken after a more detailed review or separate study.

Land Use

There are five categories of zoning for business uses in the Town: Central Business (CB), Office Business (OB), Shopping Center Business (SCB), Neighborhood Business (NB), and Professional Business (PB). Retail and service uses are limited to the CB, SCB, and NB districts, while PB and OB districts are generally used as transition districts, i.e., land between intensive retail districts and residential areas. Central Business zoning is generally limited to downtown areas, while Neighborhood Business is located throughout the Town to provide local retail and service uses to local neighborhoods. Shopping Center Business districts are large lots devoted to major shopping centers.

All of the business districts total about 1,008 acres with 879 acres concentrated in the CB, SCB, and NB Districts.

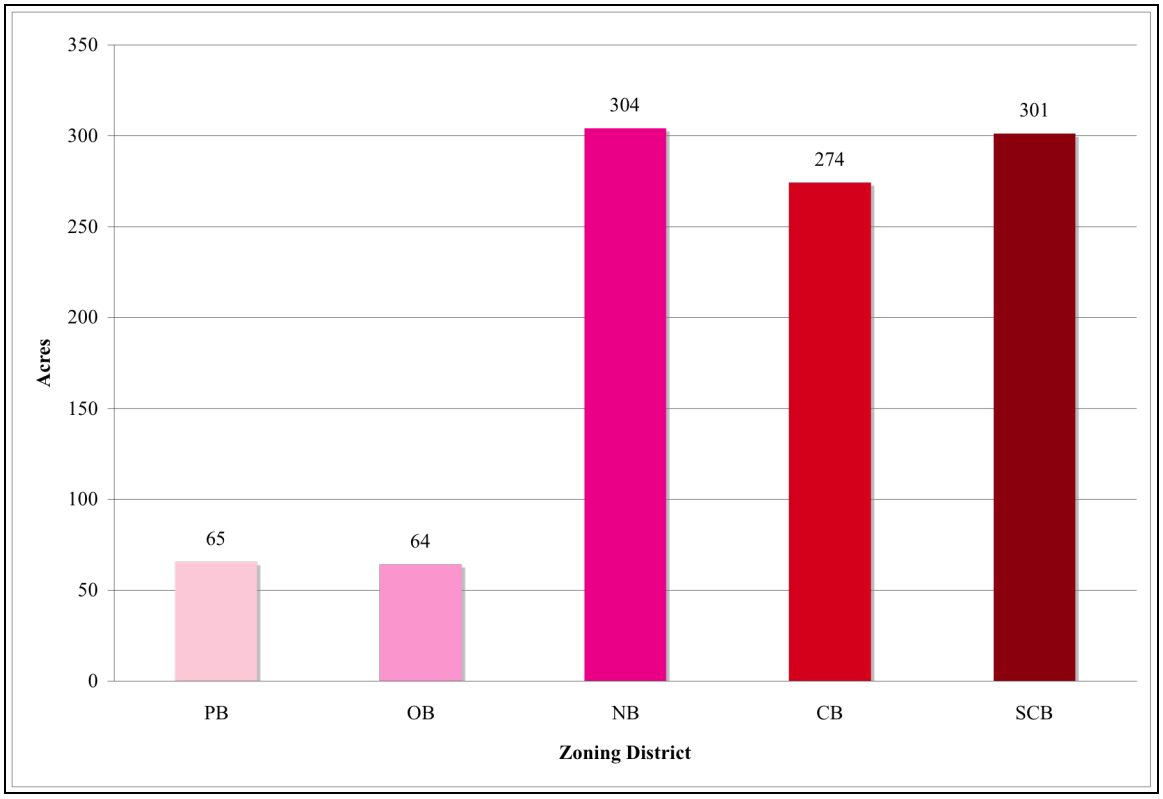


Figure 19. Acreages in Business Zoning Districts

Land use in the primary business districts varies as shown in Figure 20.

	CB			NB			SCB		
Land Use	# of lots	Acres	% of acreage	# of lots	Acres	% of acreage	# of lots	Acres	% of acreage
Agriculture	1	1.09	0.4%	0	0.00	0.0%	0	0.00	0.0%
Auto dealership (includes sales, service and auto rentals)	2	0.55	0.2%	1	0.61	0.2%	0	0.00	0.0%
Bar or restaurant	23	8.55	3.1%	19	16.38	5.4%	3	2.58	0.9%
Carwash	0	0.00	0.0%	0	0.00	0.0%	0	0.00	0.0%
Churches and membership organizations	4	4.26	1.6%	3	1.55	0.5%	0	0.00	0.0%
Commercial recreation	1	0.17	0.1%	1	0.57	0.2%	1	0.26	0.1%
Fast food restaurant or snack bar	0	0.00	0.0%	10	7.00	2.3%	0	0.00	0.0%
Gas station or auto body/repair shop	19	10.34	3.8%	21	8.77	2.9%	1	0.50	0.2%
Heavy industry	0	0.00	0.0%	0	0.00	0.0%	0	0.00	0.0%
Hospitals, clinics and nursing homes	0	0.00	0.0%	0	0.00	0.0%	0	0.00	0.0%
Hotel/motel	0	0.00	0.0%	2	3.51	1.2%	0	0.00	0.0%
Manufacturing	1	0.13	0.0%	0	0.00	0.0%	1	0.52	0.2%
Miscellaneous (Funeral Homes, dog kennels)	6	4.14	1.5%	6	3.03	1.0%	0	0.00	0.0%
Mobile Home Park	0	0.00	0.0%	2	0.61	0.2%	0	0.00	0.0%
*Multi-family residence and apartments**	*6*	*1.07*	*0.4%*	*3*	*2.73*	*0.9%*	*0*	*0.00*	*0.0%*
Multiple Use (Retail and office)	116	28.15	10.3%	32	16.24	5.3%	0	0.00	0.0%
Museums and art galleries	0	0.00	0.0%	0	0.00	0.0%	0	0.00	0.0%
Office, bank, or professional building	74	28.41	10.4%	57	32.19	10.6%	1	1.51	0.5%
*One and two family residence**	*102*	*33.77*	*12.3%*	*73*	*23.79*	*7.8%*	*0*	*0.00*	*0.0%*
Other dealership	0	0.00	0.0%	1	0.30	0.1%	0	0.00	0.0%
Parks and Open Space	2	0.13	0.0%	3	4.37	1.4%	0	0.00	0.0%
Retail	84	75.25	27.4%	66	105.15	34.6%	36	236.66	78.6%
Schools, libraries, and municipal buildings	20	39.59	14.4%	4	8.54	2.8%	0	0.00	0.0%
Storage, Warehouse and Distribution Facilities	8	8.65	3.2%	4	9.53	3.1%	0	0.00	0.0%
Utilities and infrastructure	5	4.74	1.7%	5	4.62	1.5%	3	10.61	3.5%
*Vacant**	*72*	*17.42*	*6.4%*	*106*	*47.52*	*15.6%*	*25*	*14.20*	*4.7%*
Unknown	12	7.86	2.9%	12	7.18	2.4%	25	34.38	11.4%
Total	**558**	**274.27**	**100.0%**	**431**	**304.18**	**100.0%**	**96**	**301.22**	**100.0%**

Figure 20. Land Uses in Commercial Zoning Districts

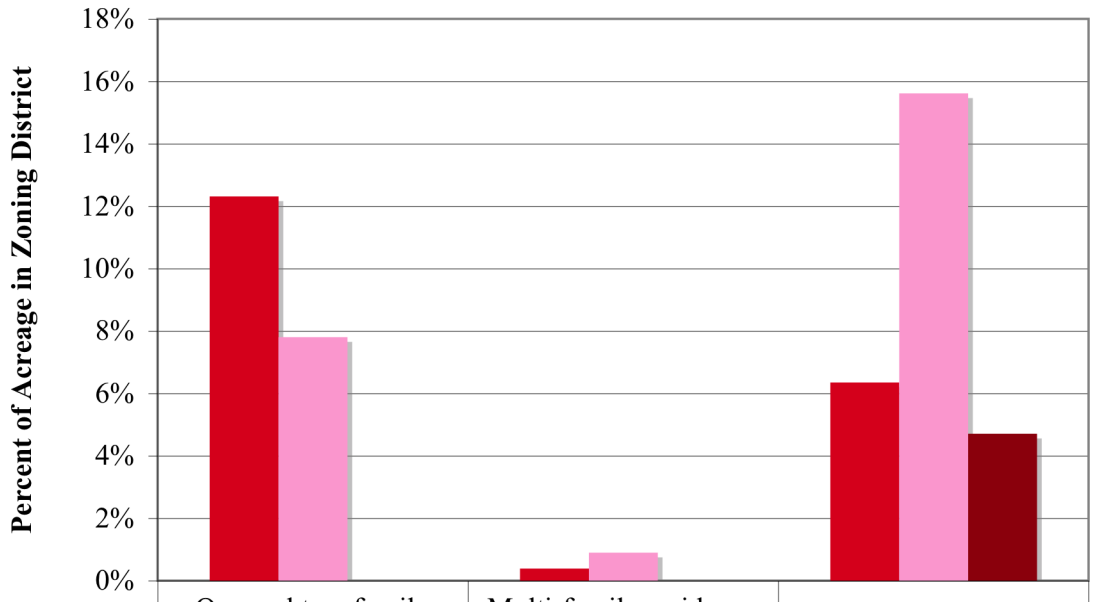
* Italics indicate vacant land or uses that are better suited for residential zoning districts

Since the Town of Smithtown is a mature, developed community, not experiencing any significant growth, the proportion of vacant land and of land devoted to single and two family uses is significant. Vacant land is completely undeveloped property and a high percentage of vacant land within a specific zoning district would seem to indicate that demand to develop property in that district has been met. Likewise, if a high percentage

of commercially zoned land is being used for residential use instead, then this might also indicate that demand has been met for commercial uses, because residential uses tend to occur in commercial zones when there is no commercial demand for the property.

Of the three major business districts, the Neighborhood Business district has the highest concentration of vacant and residentially used property, with 24% of the acreage either vacant or used for residential purposes. Central Business follows with 19%. Shopping Center Business has the lowest overall rate, with just 4.9% of vacant land (residential use is not permitted).

On a town-wide basis, there appears to be significant amount of land not used for commercial activity within the CB and NB Districts. The SCB District, on the other hand, appears developed, with a minimum amount vacant land. While these statistics might imply that there could be a need for more SCB land, most CB and NB properties were zoned by the Town when zoning was first created and before the creation of the modern shopping centers, while most of the SCB acreage was rezoned based upon property owners' requests to construct major shopping facilities. Once the SCB petitions were approved, major shopping facilities were soon constructed and the need for CB or NB acreage was reduced.



	One and two family residence	Multi-family residence and apartments	Vacant
CB	12.3%	0.4%	6.4%
NB	7.8%	0.9%	15.6%
SCB	0.0%	0.0%	4.7%

Figure 21. Percent of Acreage in Business Zoning Districts that is Vacant or Used for Residential Purposes

Assessed Value

Property is assessed for tax purposes based upon the value of real estate* pursuant to New York State Real Property Tax Law, and this is often dependent upon the degree of improvement of the site. A comparison of the total assessed values of different zoning districts can illustrate the differences *between* zoning districts. A comparison of the assessed values *within* a district can illustrate opportunities for land use changes, and for further development or redevelopment within the district or area.

The 1,009 acres of business-zoned property in the Town has a total assessed value of about $16.9 million. The Central Business, Shopping Center Business, and Neighborhood Business Districts provide most of the assessed value within the business zoning districts, or about $15.3 million. This high assessed value appears to reflect the high level of improvements within each of these districts.

Zoning District	# Lots	Acres	Total assessed value	Mean assessed value/acre	Median assessed value/acre	Acres below median	Acres above or equal to median
Central Business	558	274	$5,393,876	$19,666	$20,981	174	100
Office Business	71	64	$1,155,905	$18,019	$12,907	18	46
Shopping Center Business	96	301	$5,401,473	$17,932	$7,064	30	271
Neighborhood Business	431	304	$4,515,734	$14,846	$14,019	162	142
Professional Business	77	65	$398,151	$6,081	$11,408	50	16
TOTAL	**1,233**	**1,009**	**$16,865,139**			**434**	**575**

Figure 22. Assessed Values in Business Zoning Districts

The average assessed value per acre, using either the mean or median, are highest in the Central Business District, reflecting the higher density of building construction in the downtown areas. Although lower in permitted density, the mean assessed value per acre in the Office Business and Shopping Center Business districts are also high. As mentioned above, these high averages in assessed value per acre appear to reflect the high level of improvements in these districts. It should be noted, however, that there are differences between the mean (average) and median (middle) measurements of assessed value per acre, and these differences might require further study.

* The Town of Smithtown assesses real property at a fractional level of full market value. All assessments represent the fractional amount. Current (2009/10) level of assessment is 1.25%. Thus, a property currently valued at $500,000 will have an assessment of $6,250 ($500,000 x .0125)

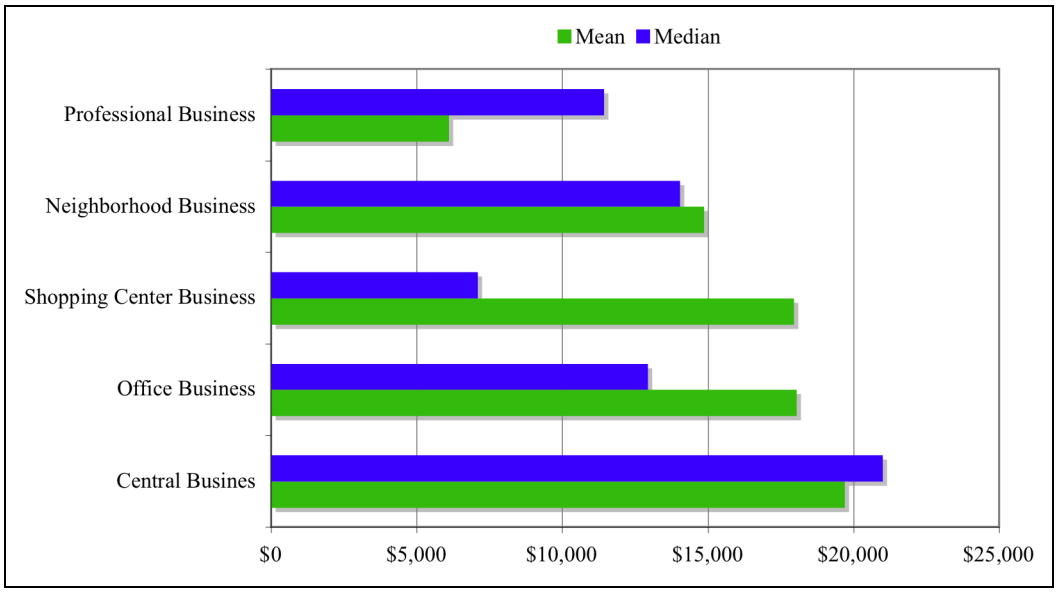


Figure 23. Average Assessed Value per Acre

In comparing the proportions of acreage and assessed value town-wide, it appears that the distributions for the commercial districts are nearly comparable, in that the amount of land set aside for each district is about proportional to assessed value of each district. However, in comparing assessed value with acreage, the extent of underdevelopment in the Central Business and Neighborhood Business districts becomes evident. Even though the Central Business and Neighborhood Business districts allow higher building density than the Shopping Center Business district, and although the acreage in the districts is similar, the proportional assessed value remains the same when it would be expected to be *measurably higher* in the Central Business district.

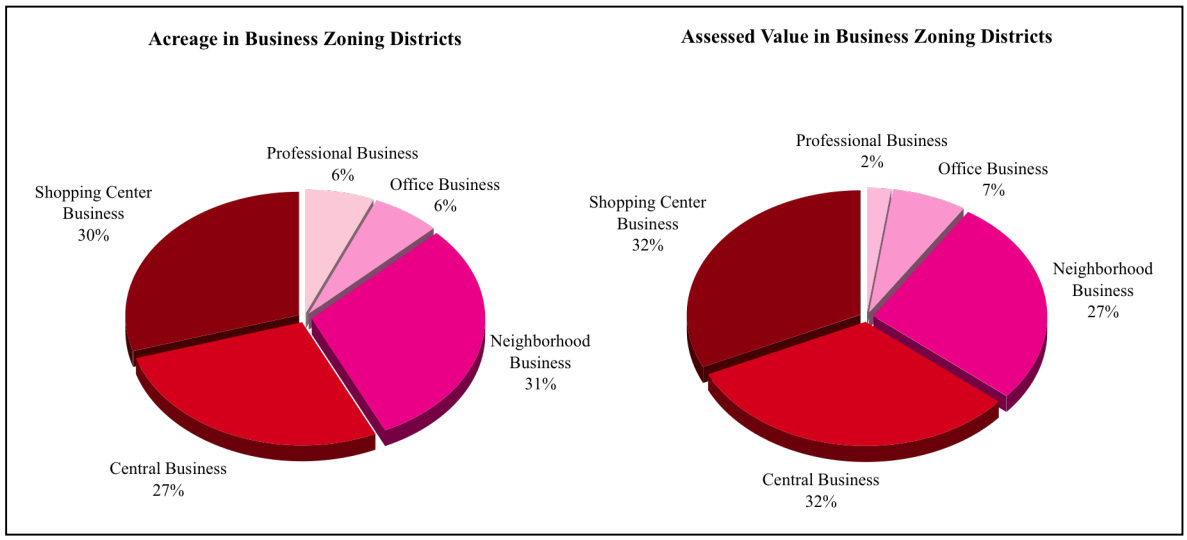


Figure 24. Acreage vs. Assessed Value in Business Zoning Districts

Retail Space and Vacancy Rates

Retail space in downtowns and shopping centers has doubled since 1970, although population has increased by less than 4% in that period. The number of households has increased by 43% in that same period, which may account for some of the increased retail demand and a seemingly disproportionate increase in retail space per capita. Based on a survey of retail space, completed by Suffolk County, Smithtown has more retail space per household and per capita than the County or any of the western towns (except that Huntington has slightly more per capita space). In addition, the rate of growth per household was higher in Smithtown than in the rest of the County during this period.

	Square Footage of Retail Space Per Household		
	1996	**2005**	**% Change**
Smithtown	89.1	103.9	16.64%
Babylon	77.2	88.2	14.22%
Brookhaven	90	91.5	1.62%
Huntington	93.6	99.9	6.77%
Islip	76.6	79.9	4.29%
Suffolk	85.8	93.5	8.96%

Figure 25. Retail Space per Household in Western Suffolk in 1996 and 2005

Since 1978, the vacancy rate in shopping centers in Smithtown has been lower than the County as a whole (Suffolk County Retail Studies 1978 through 2005). In the 2005 study, the vacancy rate in Smithtown was 5.1%, compared to the County average of 7.8%.

In the downtowns, Smithtown has a slightly higher vacancy rate (7.9%) than the County average (7.3%), but a lower rate than the average for the western five towns (8.7%). Smithtown's highest vacancy rate was recorded in 2000. It had been improving until at least 2005, but has probably increased somewhat as a result of the recent recession.

	1996		**2005**	
	Downtowns	**Shopping Centers**	**Downtowns**	**Shopping Centers**
Smithtown	10.2%	12.8%	7.9%	5.1%
Babylon	11.0%	18.8%	7.9%	7.2%
Brookhaven	13.0%	22.2%	10.2%	10.6%
Huntington	8.1%	16.5%	6.5%	5.1%
Islip	21.7%	17.2%	10.6%	7.0%
Suffolk	11.4%	19.0%	7.3%	7.8%

Figure 26. Vacancy Rates in 1996 and 2005

In shopping centers and downtowns alike, vacancy rates are affected by a range of factors and are likely to fluctuate. A period with relatively low interest rates and an ample supply of capital, such as we have seen during the previous decade, encourages business start-ups and expansions. In a declining economy, vacancy rates usually increase, giving broader options to those seeking new space and putting pressure on the weaker retail locations to improve appearance and services. Competition from other areas (e.g., from big box stores, the internet), income changes in the target area, a surplus in space, and the adaptability of the owners and the properties all affect the vacancy rate.

According to the 2005 Suffolk County *Shopping Centers and Downtowns Report*, non-retail uses in Smithtown occupied approximately 48% of the storefronts in Central Business Districts (CBDs) and 32% in shopping centers, compared to the County average of 40% in CBDs and 34% in shopping centers (see Figure 27). While it is important to have sufficient and appropriate space in the CBDs for these non-retail uses (such as offices for professionals, personal service shops, etc.), these types of uses should not predominate in the ground floor of the core areas. It is important for CBDs to encourage pedestrian activity and to concentrate retail uses in the core area within walking distance of each other.

	Shopping Centers		**Downtowns**	
	1996	**2005**	**1996**	**2005**
Smithtown	27%	33%	44%	52%
Babylon	29%	36%	44%	49%
Brookhaven	29%	40%	30%	44%
Huntington	31%	39%	33%	43%
Islip	28%	37%	46%	56%
Suffolk	**29%**	**37%**	**35%**	**44%**

Figure 27. Non-Retail Uses by Type of Retail Area in 1996 and 2005

In Smithtown, the per capita retail space varies somewhat by hamlet, from less than 1% of the acreage of the hamlet to about 5%. This is not a fully accurate measure of the service to each hamlet, as people's shopping habits are neither confined to the place they live nor to the boundaries of the town itself. Figure 28 shows the number of individual retail establishments in each hamlet and the total square footage of retail space. Commack has almost one and a half million square feet of space, or almost half that of the entire Town, largely because of the big box stores at the Cosentino Commerce Center at Crooked Hill Road and the LIE. But because of the type and location of this retail, it clearly draws consumers from well beyond the hamlet.

Hamlet	Square Footage	Stores
Commack	1,469,000	154
Hauppauge	283,000	71
Kings Park	259,000	101
Nesconset	394,000	117
St. James	288,006	221
Smithtown	411,000	182
Village of the Branch	294,000	75
Total	**3,398,006**	**921**

Figure 28. Retail Area by Hamlet

D. Conclusions

Strengths of the business sector

Availability of good quality space. There is high quality space, developed and undeveloped, and available for retail and service uses, throughout the Town. However, the Central Business and Neighborhood Business District appear to be underdeveloped.

Resurgence of the downtowns. The decline of the downtowns, which began after the 1950s, has stopped and these areas have reemerged as multipurpose centers with specialized retail, restaurant, service, and entertainment uses. The recent significant public investment to encourage pedestrian-friendly amenities (e.g. sidewalks and handicap ramps) and beautification in the CBDs may have contributed to the decrease in the vacancy rates, but providing the proper infrastructure (e.g., parking, sewers, etc.) is key to maintaining vitality.

Site plan requirements. One of the Town's major assets in developing successful shopping centers is the established and detailed site plan process required for new development or major renovation. Adequate parking and landscaping, efficient and safe access, and attention to appropriate and pleasing architecture, along with the protection of property owners' rights are among the strengths of this process.

Weaknesses of the business sector

The lack of a sewer system. This situation limits further commercial development and virtually prohibits development of mixed uses (e.g., apartments over stores), especially in downtown areas. The construction of a sewer system is an important element if the Town is going to attempt to fully develop the Central Business and Neighborhood Business Districts. Such costs cannot be borne by the Town and the County alone, but federal funding may not be available.

Poor pedestrian access throughout the downtowns. Despite the diversity in the retail sector overall and the efforts made to facilitate pedestrian movement, the CBDs in the Town are not designed to encourage pedestrian activity and the establishment of "destination" centers. Two of the three downtowns, Smithtown and Kings Park, have major State Routes that bisect the downtowns, limiting pedestrian movement. Sidewalks in the downtowns tend to be narrow and access to parking could be improved. While the municipality may be able to address some of these elements, cooperation is also needed from the business community and the N.Y. State Department of Transportation.

Underdevelopment of the CB and NB Districts. There is a significant amount of underdeveloped or vacant land within the Central Business and Neighborhood Business Districts. There is also a high percentage of "non-retail" use in the core retail areas (i.e., offices, personal service shops, repair shops, fitness centers, banks, etc.), with fewer than half of the occupied storefronts in the CBDs used for conventional retail purposes. The solution to this issue would require a variety of strategies including both physical improvements (e.g., capital improvements) and non-physical efforts (e.g., changing land use laws).

Excess strip development. The proportion of strip development (24% of all stores, occupying about 9% of all retail space in the Town) tends to weaken the CBDs and increase sprawl, diluting the potential for strength generated by well-designed and compact retail areas. While there will always be a need to have some flexibility in zoning to adapt to changing conditions, rezoning to permit business uses along arterial corridors should be avoided. Business uses should be clustered in defined centers or "pocket" locations.

Trends

Redevelopment. Most changes in the business districts will be in the redevelopment of existing sites. However, retrofitting existing sites for new uses is a more complex action than building new. In order to accomplish this redevelopment, there will always be requests to increase density in order to cover the costs and this should be watched carefully.

"No-stop shopping." Internet and mail-order shopping will continue to have an impact on retail stores, but the extent is still unknown. However, retail space may decline if this sector becomes more dominant. The use of surplus retail space will then become a concern.

"Life-style centers" replace "big boxes". Big box stores seem to have peaked as new construction, while "life-style centers", that is, shopping centers with the stores located on and around an outdoor pedestrian mall, intended to simulate some of the ambiance of a downtown (as in the recent expansion at the Smith Haven Mall), are a new trend in higher-income areas around the country.

Flexibility. Changes in retail tastes, trends, and styles will continue. Town procedures and policies need to take into account the likelihood of future changes in uses and retail styles, especially when considering new construction or zoning changes.

Seeking Ambiance. Retail experts indicate that spending habits of Americans are changing. Separate from purchasing goods at low cost, more people are seeking a pleasant experience while shopping. According to one source, consumers are spending more money per square foot in historic downtowns than in modern shopping centers. The central business districts in Smithtown have enough character to capture some of this new spending.

Mixed Use. Most successful central business district in the nation are viable because they have been reinvented as multi-purpose centers. Once they were retail centers, but retail alone is not enough to keep them economically healthy. They need other draws such as libraries, theatres, museums, government offices, parks, and office buildings. People visiting the downtown for a cultural purpose tend to purchase goods and services in the same location. Having high density residential uses in and around the downtowns help the businesses and the local tax base.

IV INDUSTRIAL DEVELOPMENT

- **The Town's most significant industrial development is in the John V.N. Klein Hauppauge Industrial Park**
- **Although large scale manufacturing appears to be declining, office space use, high tech manufacturing, and service industries appear to be growing**
- **The Light Industry zoned land outside of the Hauppauge Industrial Park is significantly undeveloped in comparison to the Light Industry zoned land in the Hauppauge Industrial Park**
- **The most significant single use within the Wholesale and Service Industry District is the sale of automobiles**

A. Industrial Sector

The first zoning map for the Town was adopted in 1932 and the distribution of industrially zoned land reflected the ideas of that time. The industrial districts occupied a fraction of the land they occupy today. However, suburban population growth, the construction of the interstate highway system, the emergence of the modern freight system (including the growth in air freight services and decline in rail shipping in the northeast), and the changes in demand in the industrial sector resulted in significant changes in land use, especially in and near industrially zoned land.

The Town has three industrial zoning districts:

- Wholesale and Service Industry (WSI). This category was created during the 1950s as a replacement for strip business zoning along arterial roads. This classification provides land along appropriate arterial highways for automotive-related non-retail needs, for uses that require extensive land for outdoor storage or display and for uses that do not generate large traffic volumes. Examples of permitted WSI uses include fast food restaurants, auto repair shops, automobile sales and showrooms, offices and similar uses.

- Light Industry (LI). This classification provides, in appropriate locations, land for office, research and development, wholesale trade and light manufacturing on sites of high aesthetic character, with adequate buffering from adjoining residential

neighborhoods. Light industry is distinguished from heavy industry in that all activity is conducted inside a building; outdoor activity such as storage of raw materials or merchandise for resale is prohibited. Permitted uses include activities such as non-nuisance industries, research laboratories, and warehouses.

- Heavy Industry (HI). This classification provides for land for heavy industrial activities necessary to serve the needs of the community. Permitted uses may include activities such as asphalt manufacturing, cement batching, sand and gravel mining or processing, concrete products manufacture, licensed junkyards, and so forth. The potential for unsightly uses in this zoning is high, and these uses tend to be obnoxious and incompatible with many other land uses.

Currently, only about 9% of the area of the Town is zoned for industrial use, broken down as shown in Figure 29:

Zoning District	Acres	# Lots
WSI	412	363
LI	1,979	628
HI	78	22
TOTAL	**2,469**	**1,013**

Figure 29. Industrially Zoned Land

As traditional large space manufacturing has declined (in our suburban communities and in the nation generally), there has been significant growth in demand for space for research and development uses (including the manufacture of prototypes), pharmaceuticals, and for office uses on industrially zoned properties. The remaining manufacturing is largely of the "high-tech" variety that requires smaller spaces for manufacturing operations. Many of these uses may also require more highly skilled workers than conventional manufacturing and likely pay higher wages.

B. Industrial Centers

Light or heavy industrial uses tend to be clustered together, while WSI uses tend to be located along a length of arterial roadway. The five main clusters within the Town are listed below and described in detail in the following pages.

1. The John V.N. Klein Industrial Park
2. Middle Country Road Corridor
3. West Jericho Turnpike Corridor
4. Old Northport Road Industrial Area
5. Gyrodyne Industrial Area

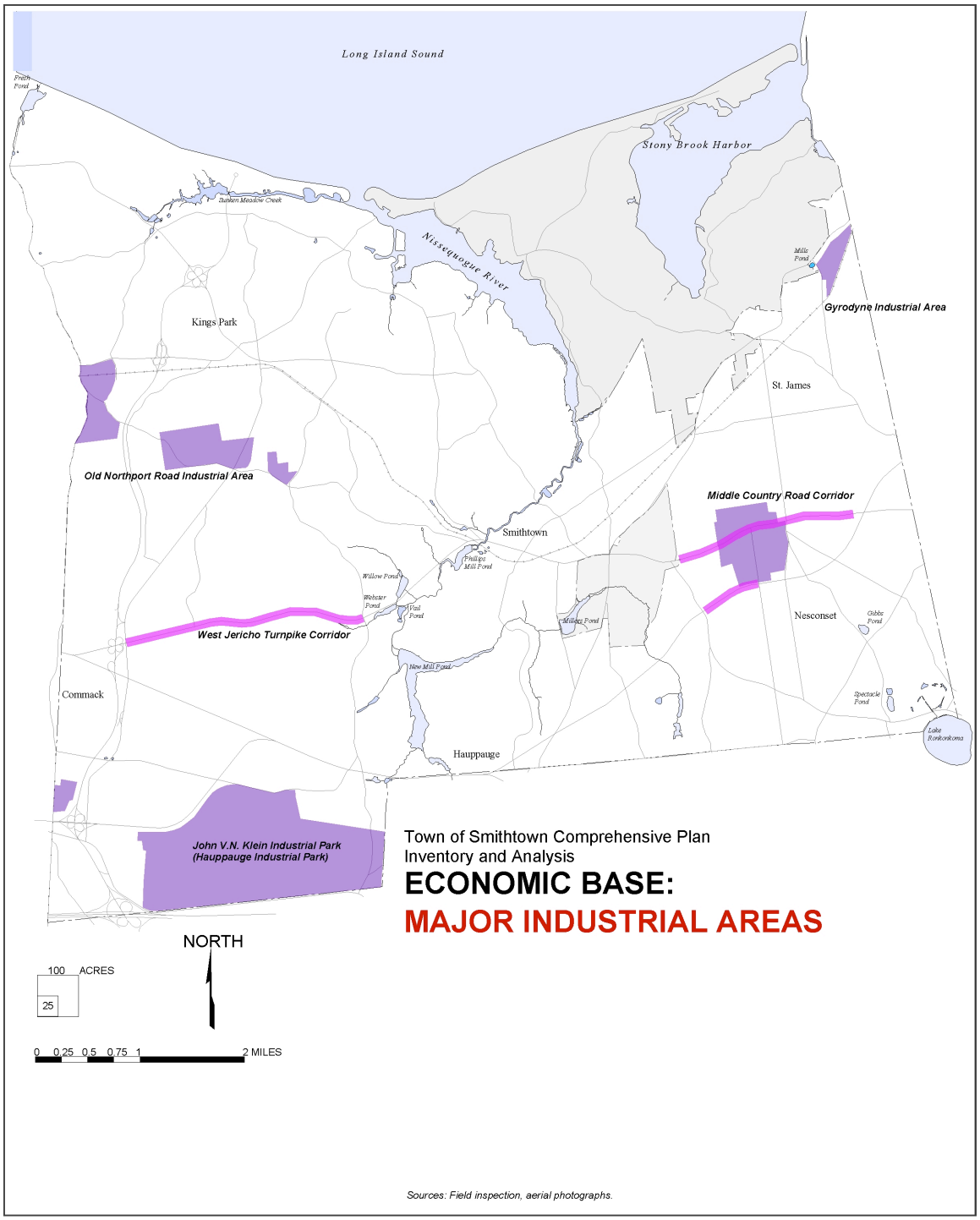


Figure 30. Major Industrial Areas

1. The John V.N. Klein Industrial Park (known as the Hauppauge Industrial Park)

This area is predominantly zoned LI. Of the 2,475 acres of industrially zoned land in the Town, 80% is zoned LI and, of that, 64% is in the industrial park. This is by far the single largest concentration of industrially zoned property in the Town and is the primary industrial center of the Town.

The Hauppauge Industrial Park is one of the largest industrial parks in the country. The Town Building Zone Ordinance establishes high building and site plan standards for the industrial park, including both landscaping and architecture. Within the Hauppauge Industrial Park, the roadways are wide and have sufficient capacity for traffic. Most utilities are located underground.

Approximately 70% of the area of the Hauppauge Industrial Park is occupied by warehouse or manufacturing uses, and about 15% is occupied by offices. About 33 acres, or about 3% of the industrial park, is vacant property. The remaining area of the park is occupied by service elements such as restaurants, a few stores to serve the industrial park, commercial recreation, hotels and community facilities.

Changes in industrial activities are to be expected over time, as technologies emerge and develop and the economic conditions nationally and locally change. It is important for the Hauppauge Industrial Park to be prepared to respond to changes, when practical, before they occur, in order to keep the infrastructure up-to-date and the management responsive to the demands of new business needs as well as to continue to serve the established tenant base.

The current business uses for which growth is expected are office uses and biotechnology and pharmaceuticals, including research and development. Compared to traditional manufacturing, these are businesses that tend to require less space but to employ significant numbers of people in higher wage jobs. At the same time, they pose issues for traffic generation and traffic circulation within and approaching the industrial park.

Photograph. Site in the Hauppauge Industrial Park

Additionally, for all uses, growth within the Hauppauge Industrial Park requires that the sewage system be adequate. As of 2009, the sewer capacity of Sewer District 18 is 495,000 gallons per day (gpd), serving 150 lots in the industrial park. Suffolk County is in the process of upgrading the sewer system to provide additional sewer hook-up capacity for approximately 340 additional lots. With

this upgrade, the entire industrial park will be served by sewage treatment facilities, increasing the potential for development of vacant parcels and permitting greater intensity of development throughout the Hauppauge Industrial Park.

In order to accurately predict and accommodate changes in business needs for the Hauppauge Industrial Park, the Town should initiate an on-going series of studies/surveys of Park users. This would provide the Town with consistent and timely information about needs within the Hauppauge Industrial Park to assist in planning for support and development.

2. Middle Country Road Corridor - between Terry Road and the Smithtown By-Pass (NYS Rte. 347)

Photograph. Honda Dealership on Middle Country Road

This area is primarily zoned Wholesale and Service Industry (WSI), with a few lots zoned for light industry, and includes a large number of sites developed with automobile dealerships.

Most of the automotive sales are clustered along a two-mile stretch of Middle Country Road (NYS Rte. 25) between Terry Road and the Smithtown By-Pass (NYS Rte. 347). Planning objectives dating to the 1950s included creating this strong concentration of automobile sales and showrooms along this route. This is the highest concentration of automobile showrooms in the County, having approximately 24 vehicle dealers.

During the past decade, there have been several change of zone requests along and adjacent to lots fronting Middle Country Road (NYS Rte. 25), for changes from LI zoning to WSI zoning. Some of these requests were for automotive-related uses and some for other uses that require outdoor storage, such as masonry supply sales. It is unlikely that LI uses similar to those in the Hauppauge Industrial Park would seek to locate here. The area does not meet modern standards for light industrial use, as it lacks related infrastructure, it is not near major transportation corridors, and the properties are smaller and more irregular in shape than those in industrial parks.

The sales and marketing model in the automotive industry appears to be changing, with automobile companies merging and individual sales agencies moving away from maintaining a large local inventory. This is likely to decrease the demand for the amount and type of lots that make up this corridor.

Figure 31. Aerial Photograph highlighting Automobile Dealerships along Middle Country Road and the Smithtown By-Pass

In the near future there may be a surplus of WSI and LI zoning in this area. However, many parcels are not of sufficient size or appropriate shape to accommodate other land uses, as many lots in this area are long and narrow ("bowling alley" lots) or have shallow depth. Given the availability of retail and light industrial lands in the Town, reuse of this land may require a specific redevelopment plan for this corridor.

3. West Jericho Turnpike Corridor - west of Old Willets Path/Plymouth Boulevard

The WSI zoning in this area is a remnant of the original 1932 zoning plan, which zoned the area for strip commercial, neighborhood business. As of 2009, the area has some intermittent retail zoning, to serve adjacent residential neighborhoods, but it is mostly zoned WSI and intended for automotive-related uses, office uses, service facilities, restaurants and similar uses.

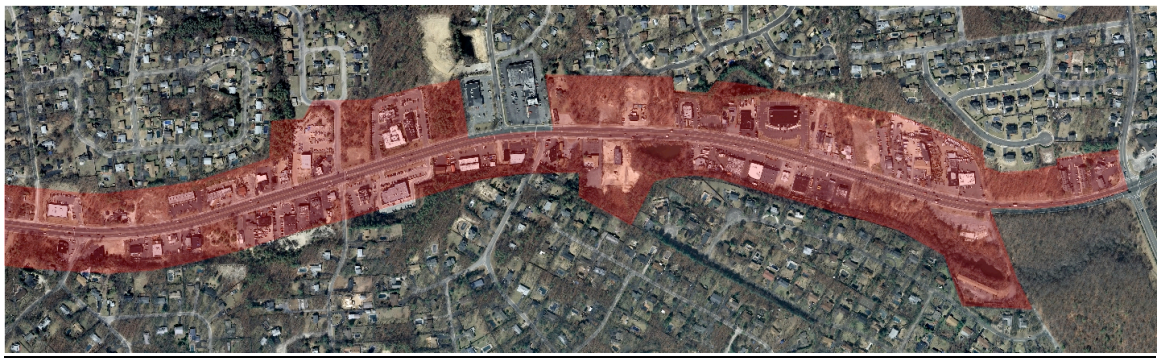


Figure 32. Aerial Photograph highlighting WSI Zoned Properties along Jericho Turnpike

Unlike the WSI properties located east of Terry Road (discussed above), the lots in this area tend to have a shallow depth and steep slopes in the rear, which limits the potential uses for the sites even more. Given that the WSI zoning runs along the entire corridor, there may be more WSI zoned property in this area than can reasonably be used, especially considering the shallow lots and the proximity to developed residential lots, as shown in Figure 32. As with the Middle Country Road corridor east of Terry Road, full utilization of these properties may prove difficult.

4. Old Northport Road Industrial Area

Although this area has the second highest amount of industrial land in the Town, it also has many uses that are not in compliance with the zoning ordinance. There are several sand-mining, contractor materials distributors, truck and bus storage and similar uses along Old Northport Road, most of which are operating in violation of zoning regulations for this area. Also located in this section are the Town's Municipal Services Facility and landfill.

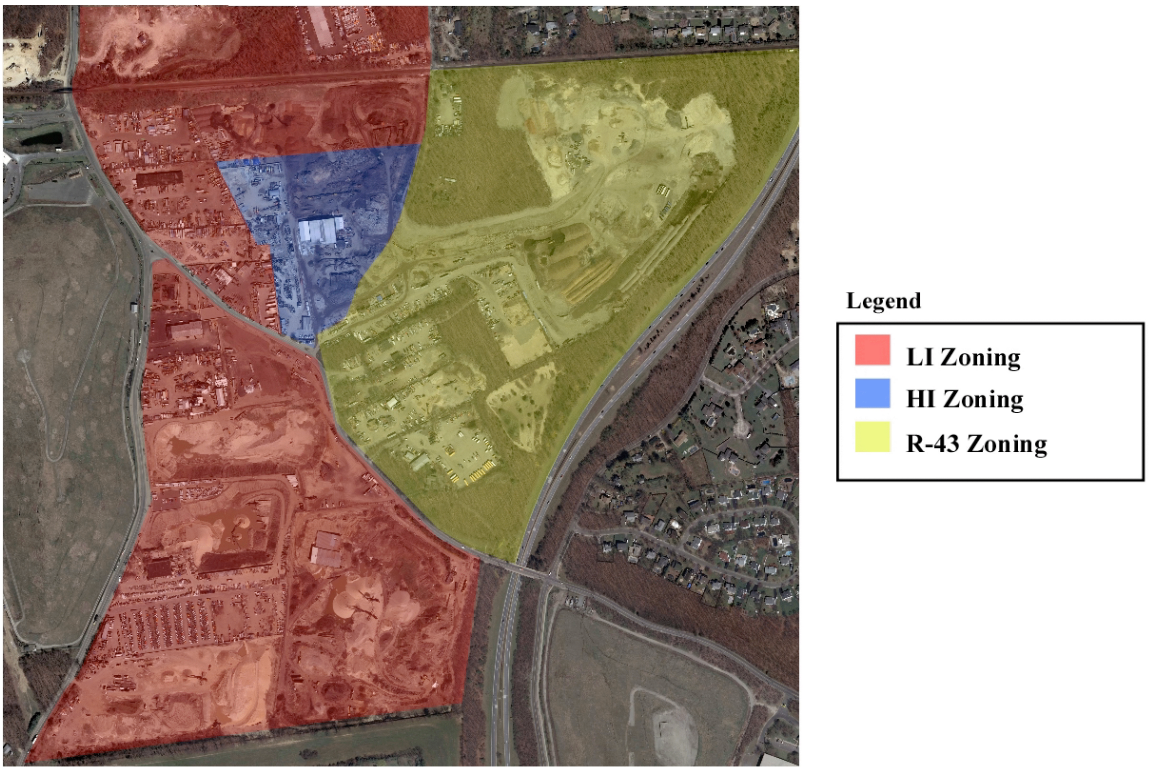


Figure 33. Aerial Photograph highlighting Old Northport Road Industrial Area

For several decades, the Town has been endeavoring to control the uses and the zoning along this roadway, but the large extent of the violations has made bringing the area into compliance more complicated than simple enforcement measures can accomplish. Nonetheless, the Town must devise ways to effectively control the land use in this area.

A key strategy in attempting to regain some control over land use is to consider efforts that might eventually approve most of the uses in this area, so long as the sites comply with buffer and site design standards. Unless the Town gains control over land use, redevelopment opportunities that would benefit the community will not occur.

Once land use control is regained, the Town should consider uses that might provide some additional benefits for the community. This might include uses that provide some tax benefit to the school district or other uses that might have some other community benefit, such as employment.

5. Gyrodyne Industrial Area

The site was formerly the home of a helicopter design company. Most of the site is zoned LI, with approximately 11.6 acres adjacent to 25A and Mills Pond Road zoned for residential use at a density of one unit per acre, with an additional 2.2 acres of out-parcels that also front Mills Pond Road. A part of this property is in the St. James National Register Historic District and part is within the NYS Rte. 25A scenic corridor. Since the surrounding roadways, principally NYS Rte. 25A and Mills Pond Road, are not adequate to handle significant increases in traffic, any proposed development here is constrained by roadway capacity.

Photograph. Entrance to Flowerfield at Gyrodyne

Recently, New York State acquired a 245-acre portion of this property (mostly within the Town of Brookhaven) and is developing it as a research and development campus of the State University of New York at Stony Brook called the *New York State Center of Excellence in Wireless and Information Technology*. The remaining section within Smithtown is currently (in 2009) the subject of a change of zone petition for Planned Residential Development (PRD) zoning, with a proposal to build about 309 units of retirement housing.

C. Industrial Conditions

Like the business sector, much of the industrial economy is dependant on national forces. At the same time, the municipality can insure that the proper land is set aside in the right locations, that there is the proper infrastructure for such uses, and that other efforts are undertaken that encourage business investment. It is critical to understand the needs and requirements of this sector especially as related to the other regional, national, and international communities that compete for the same industrial base.

Land use

As noted earlier, there are three categories of zoning for industrial uses in the Town including Wholesale and Service Industry (WSI), Light Industry (LI), and Heavy Industry (HI). These zones total about 2,469 acres of land, or about 2 ½ times the amount of business zoning. WSI is primarily designed as a corridor-based, service-type zone that provides for a wide variety of uses, excluding general retail uses. Light Industry is set aside for manufacturing, distribution, and office uses and unlike the WSI zone is located in specific centers throughout the Town. There is a small amount of Heavy Industry zoning that permits a variety of uses that require both indoor and outdoor activity.

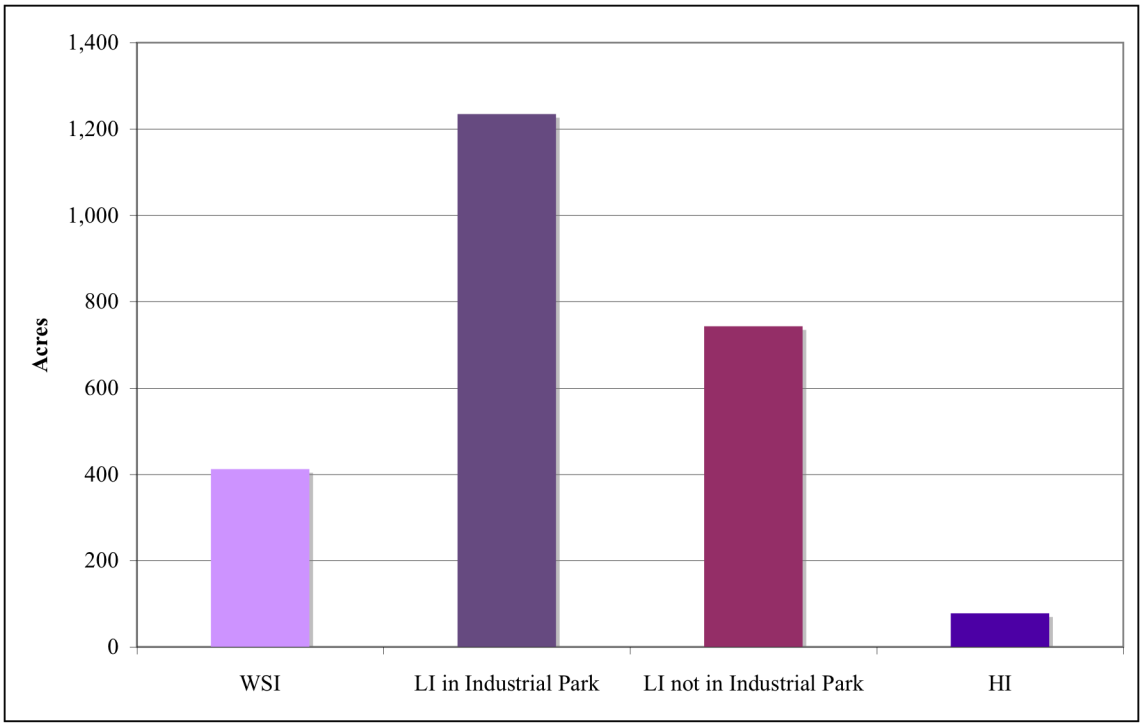


Figure 34. Acreage in Industrial Zoning Districts

Like the business districts, the distribution of vacant and residential land is significant. About one-third of the land in LI zoning districts that is outside of the Hauppauge Industrial Park and 22% of the land in WSI zoning districts is either vacant or used for single family homes. Refer to Appendix B for a detailed list of land uses in the industrial districts.

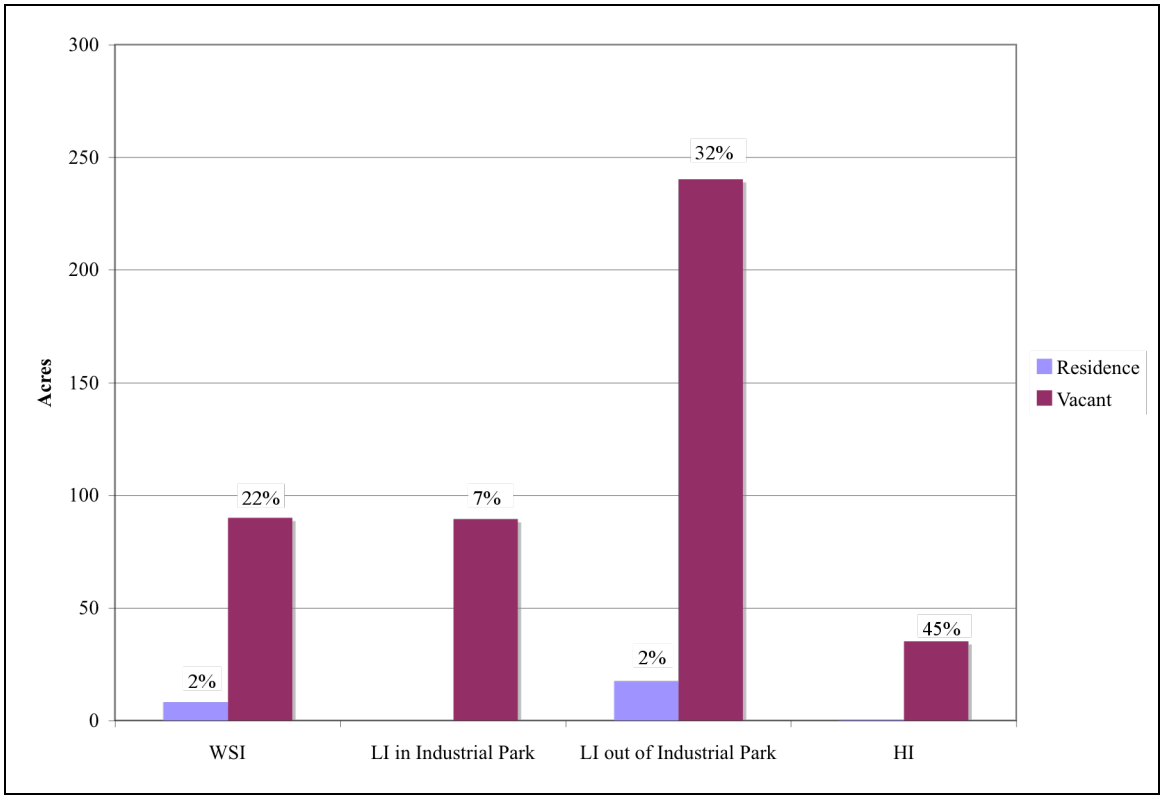


Figure 35. Acreage and % of Acreage in each Industrial District that is vacant or used for residential purposes

Because the LI districts outside of the Hauppauge Industrial Park have significantly more acreage than the WSI and HI districts, underdevelopment in the LI zoned land out of the industrial park is more acute than in either of these districts. As a result, this part of the LI district should be reexamined for future land use decisions.

Assessed Value

The 2,469 acres of industrial property have a total assessed value of $27.6 million (or just over $2,200,000,000 in full market value, as of 2009). Almost 70% of that value is located in Hauppauge Industrial Park. In real terms, half of the industrial-zoned land produces more than two-thirds of the assessed value.

Zoning District	# Lots	Acres	Total assessed value	Mean assessed value/acre	Median assessed value/acre	Acres below median	Acres above or equal to median
LI in Industrial Park	432	1,235	$19,098,743	$15,461	$15,017	573	662
Wholesale Service &Industry	363	412	$3,991,660	$9,683	$10,103	235	177
LI not in Industrial Park	196	743	$4,330,674	$5,825	$1,814	409	335
Heavy Industry	22	78	$201,605	$2,594	$3,193	57	21
TOTAL	**1,013**	**2,469**	**$27,622,682**			**1,275**	**1,194**

Figure 36. Assessed Value in Industrial Districts

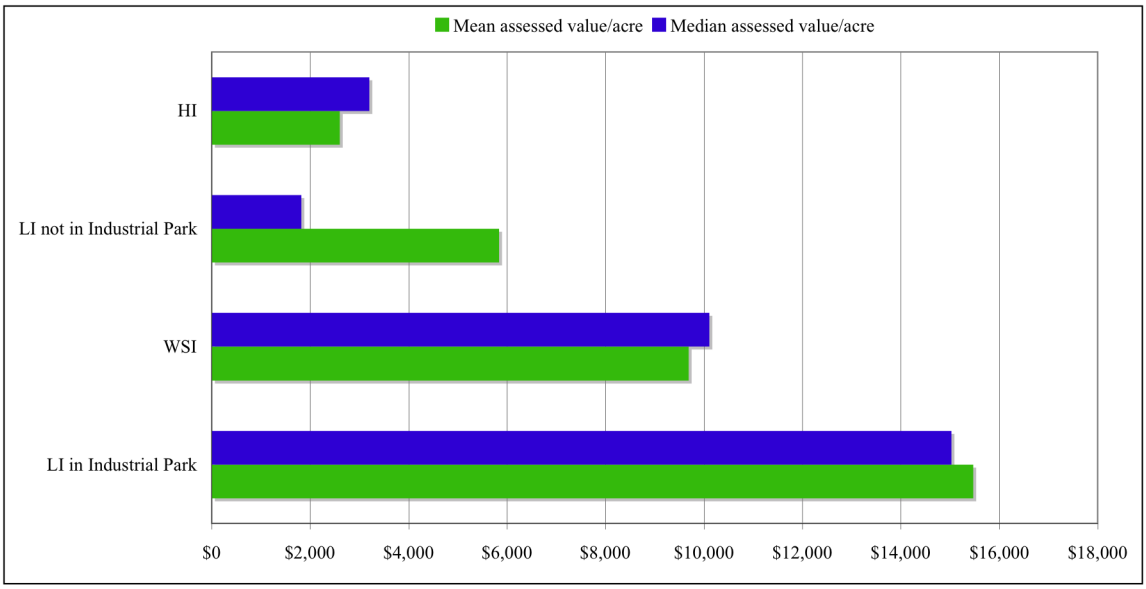


Figure 37. Average Assessed Value per Acre in Industrial Districts

In terms of mean and median values, the average assessed value per acre is also in the Industrial Park. Note that there is a large difference between the mean and median assessed values per acre in the LI district outside of the industrial park. This difference may warrant a more detailed review in the future.

At the same time, the Light Industry property not in the Hauppauge Industrial Park produces significantly less value than its share of the total acreage. This also may reflect the high amount of vacant and residential use noted above.

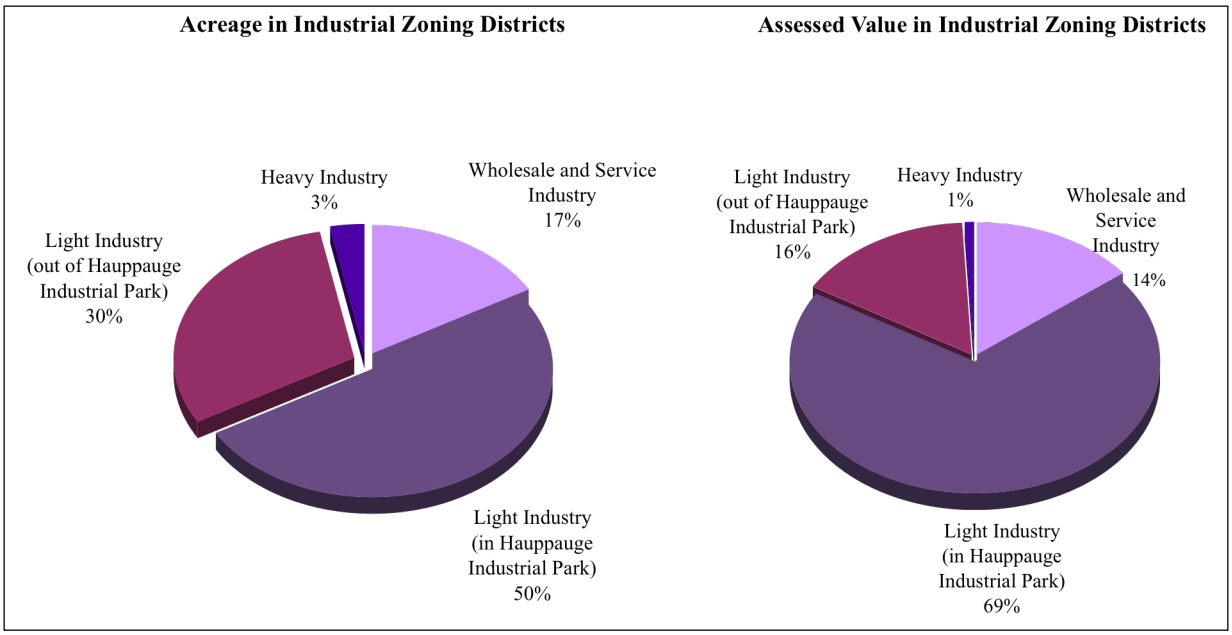


Figure 38. Acreage vs. Assessed Value in Industrial Zoning Districts

D. Conclusions

Strengths of the Industrial Sector

The Hauppauge Industrial Park. The Hauppauge Industrial Park is healthy and well maintained, with an active industrial association and a vacancy rate less than 3%. There is diversity in the types of firms that locate within the Hauppauge Industrial Park. The location near the LIE and other major routes is important for employees and users of the site as well as for shipping and receiving, and to link more of the Hauppauge Industrial Park with local resources such as Stony Brook University programs to develop incubator industries. The industrial park is also developed for attractive office space. The new sewage treatment plant under construction will provide more capacity, promoting continued growth within the Hauppauge Industrial Park. It is important for the Hauppauge Industrial Park to remain alert to adapt to new conditions, especially relative to changes in telecommunications and transportation and to preserve aesthetics.

Motor vehicle sales showrooms. The corridor along Middle Country Road (NYS Rte. 25) in Smithtown and St. James where the Town has encouraged development of motor vehicle sales showrooms has created a strong business cluster that draws buyers from a wide radius. Since most major automobile manufacturers are represented here, the Town should continue to encourage the use of this area for that purpose and should not encourage uses that might conflict with this purpose. However, due to the volatility of this industry, the land use along the Middle Country Road Corridor should be examined more often than updates to the Comprehensive Plan are prepared.

Infrastructure. Most of the Town's roadways, whether state, county or town, are properly engineered for safety and good drainage, adequately maintained, and safe in winter weather conditions. However, with the exception of the Hauppauge Industrial Park, most industrial areas are not sewered, which limits the flexibility of land use.

Population. The labor force is well educated for many of the kinds of high-skill jobs that are likely to be developed in industry and in the white-collar segment of the service sector. The high level of education may also increase the potential for entrepreneurial activity.

Weaknesses of the Industrial Sector

Existing uses and zoning. There are limits to the types of uses likely to locate on some of industrially zoned properties outside the Hauppauge Industrial Park, including both WSI and LI zoning. Some properties should be considered for rezoning to encourage more coordinated and efficient property use. However, the appropriate type of adaptive reuse is not readily apparent at all such locations.

Infrastructure. Traffic congestion is a serious problem in the Town and in the immediately surrounding areas. In addition, the public transit system is minimal and improvements in this sector are not anticipated in the near future. Further, the lack of sewers limits potential land uses. Wireless service access and fiber-optic networks are uneven throughout the Town. Internet connectivity and high-speed internet service is inadequate, although connectivity has improved significantly in the Industrial Park.

Population. The age cohort of those 19 to 34 years old is proportionately smaller in the Town than in the County or the nation as a whole. The resulting lack of labor supply of entry-level workers and those preparing for managerial positions may have a negative impact on firms planning to locate or expand in and near the Town. Additionally, there is a lack of skilled mechanics for manufacturing within the current workforce.

Competition. There are many desirable properties in neighboring towns, some of which have advantages such as public sewers or better transportation networks.

Intergovernmental coordination. Many development issues, such as transportation, sewers, solid waste removal, open space preservation, affordable housing, and protection

of the water supply may be beyond the resources of the Town to solve. Coordination among the towns, and with county, state and federal governmental agencies will likely be necessary.

Motor vehicle sales showrooms. The significant concentration of automobile sales and showroom businesses along Middle Country Road are vulnerable to changes in the industry or downturns in automobile sales.

Trends

Public support for infrastructure improvements and affordable housing is increasing. There is increasing awareness of the need for sewer and transportation improvements and increasing public support for efforts to plan for and finance necessary improvements to sewer systems, road networks, public mass transportation and more affordable "workforce" housing.

Industrial and business development will change. We can anticipate a continued decline in manufacturing on Long Island, but it is likely that some manufacturing, especially of high-value-added products, high-skilled and "high tech" businesses will remain. A continued increase in office development is also likely in the immediate future.

Redevelopment will be a major form of growth. As there is little undeveloped property in the Town and there is a desire to preserve open space that does remain, redevelopment of vacant or under-used structures is likely to become more common.

The service sector will continue to expand. Continued increases in service industries, as developing businesses and as employment opportunities, are expected.

Demand for high speed and broadband internet connectivity and fiber-optic cabling will increase. As businesses in diverse industries expand use of the internet, demand for reliable and fast connectivity will grow. For example, in a 2005 survey of businesses located in the industrial park, 86% of the respondents anticipated having a company website, even if they did not have internet service at the time of the survey.

The impact of the national and global economy will be evident locally. The Town's business and industry components will remain vulnerable to national and international business trends.

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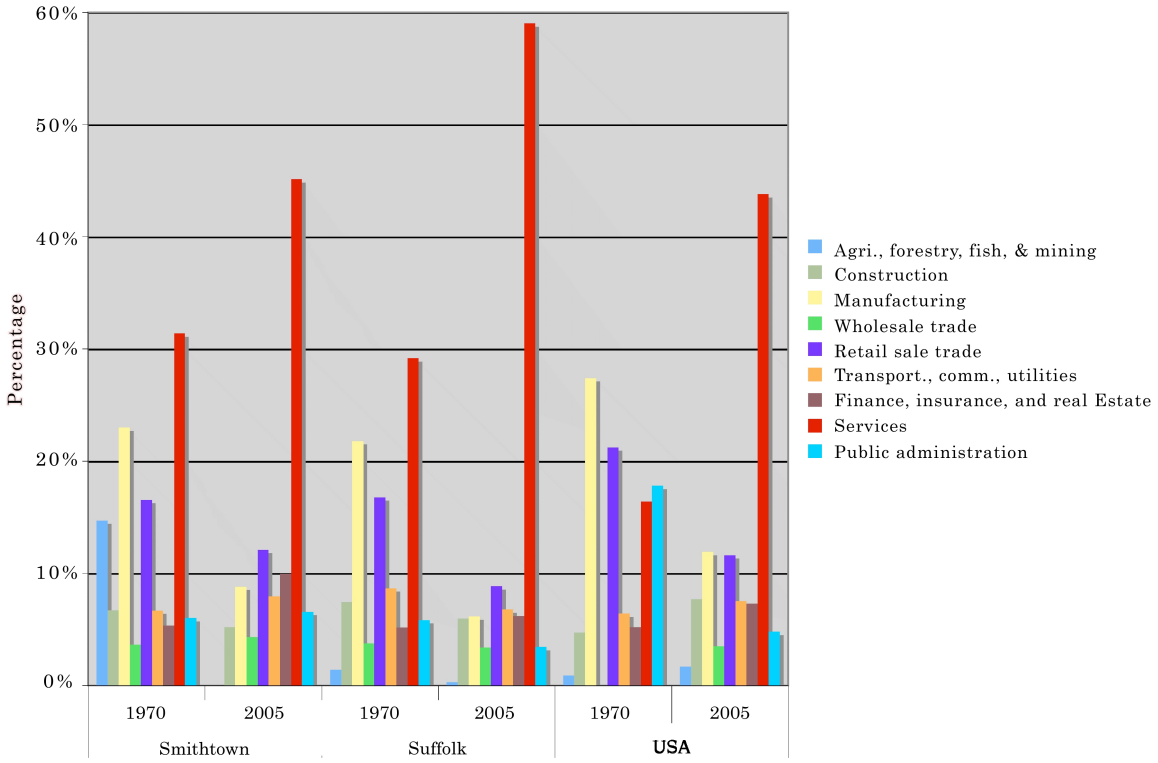
VI APPENDICES

A. Change in Employment 1960-2005: Smithtown, Suffolk County, and the United States

B. Land Use in Industrial Zoning Districts

APPENDIX A

CHANGE IN EMPLOYMENT 1960-2005
Smithtown, Suffolk County, and the United States



APPENDIX B
LAND USE IN INDUSTRIAL ZONING DISTRICTS

	WSI			LI in Industrial Park			LI out of Industrial Park			HI		
Land Use	# of lots	Acres	% of acreage	# of lots	Acres	% of acreage	# of lots	Acres	% of acreage	# of lots	Acres	% of acreage
Agriculture	0	0.00	0%	0	0.00	0%	0	0.00	0%	0	0.00	0%
Auto dealership (includes sales, service & rentals)	25	61.42	15%	0	0.00	0%	2	5.34	1%	0	0.00	0%
Bar or restaurant	22	22.97	6%	2	5.38	0%	3	14.59	2%	0	0.00	0%
Carwash	2	2.23	1%	0	0.00	0%	0	0.00	0%	0	0.00	0%
Churches and membership organizations	0	0.00	0%	1	1.64	0%	1	2.68	0%	0	0.00	0%
Commercial recreation	2	3.59	1%	2	3.66	0%	3	11.56	2%	0	0.00	0%
Fast food restaurant or snack bar	14	22.42	5%	0	0.00	0%	1	4.88	1%	0	0.00	0%
Gas station or auto body/repair shop	26	20.10	5%	0	0.00	0%	3	4.53	1%	0	0.00	0%
Heavy industry	0	0.00	0%	0	0.00	0%	9	35.57	5%	5	11.07	14%
Hospitals, clinics and nursing homes	0	0.00	0%	0	0.00	0%	2	27.93	4%	0	0.00	0%
Hotel/motel	2	3.16	1%	1	10.51	1%	1	2.86	0%	0	0.00	0%
Manufacturing	2	2.09	1%	5	30.30	2%	6	13.59	2%	0	0.00	0%
Miscellaneous (Funeral Homes, dog kennels)	2	2.97	1%	1	1.90	0%	0	0.00	0%	0	0.00	0%
Mobile Home Park	0	0.00	0%	0	0.00	0%	0	0.00	0%	0	0.00	0%
Multi-family residence and apartments	1	0.36	0%	0	0.00	0%	1	2.09	0%	1	0.34	0%
Multiple Use (Retail and office)	38	31.88	8%	4	10.38	1%	4	5.70	1%	0	0.00	0%
Museums and art galleries	0	0.00	0%	0	0.00	0%	0	0.00	0%	0	0.00	0%
Office, bank, or professional building	24	27.90	7%	61	203.34	16%	10	18.66	3%	0	0.00	0%
One and two family residence	12	7.91	2%	0	0.00	0%	13	15.45	2%	0	0.00	0%
Other dealership	3	4.25	1%	0	0.00	0%	0	0.00	0%	0	0.00	0%
Parks and Open Space	0	0.00	0%	0	0.00	0%	0	0.00	0%	0	0.00	0%
Retail	53	46.13	11%	0	0.00	0%	20	73.64	10%	3	8.67	11%
Schools, libraries, and municipal buildings	0	0.00	0%	5	14.56	1%	3	71.65	10%	1	0.61	1%
Storage, Warehouse and Distribution Facilities	11	16.51	4%	279	808.72	65%	23	141.82	19%	7	19.32	25%
Utilities and infrastructure	6	5.01	1%	24	51.25	4%	10	45.84	6%	0	0.00	0%
Vacant	95	90.04	22%	44	89.43	7%	79	240.30	32%	4	35.20	45%
Unknown	23	41.33	10%	3	4.17	0%	2	4.77	1%	1	2.53	3%
Total	**363**	**412.25**	**100%**	**432**	**1,235.25**	**100%**	**196**	**743.47**	**100%**	**22**	**77.73**	**100%**