

Southampton Village Retail Market Analysis



Prepared for:
Southampton Village

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Gibbs Planning Group

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Cover photo source: <http://www.27east.com/news/article.cfm/Southampton-Village-Surrounding-Areas/406088/White-Lights-To-Brighten-Southampton-Village-For-Yuletide>

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INTRODUCTION



Figure 1: Aerial photo of the Village of Southampton shopping area looking east.

Executive Summary

This study finds that the Village of Southampton can presently support an additional 109,100 square feet (sf) of retail and restaurant development, generating over \$47.7 million in new sales. By 2017, the village can expand to 114,500 sf of new commercial growth, generating \$50.1 million in sales. The demand could partially be absorbed by existing businesses and with the opening of 30 to 40 new restaurants and retailers.

Southampton Village Center can provide goods and services for its consumer base of nearby residents, employees, visitors, students and seasonal residents. The leading categories of supportable retail growth are grocery, restaurants, health & personal care services and apparel, shoes & jewelry. Although there is strong retail competition in Bridgehampton, East Hampton, Amagansett and Sag Harbor, expenditure from employees within the vicinity will supplement residential consumer expenditure. This creates the demographic base necessary for new scale retailers to enter the market, or expand their local presence.

The Village of Southampton retail area is located along North Sea Road, which serves as the main street, Hill Street/Montauk Highway, Hampton Road and Jobs Lane one mile south of State Highway 27, the main regional thoroughfare. The existing retail in the village's vicinity is limited to mostly food and convenience goods and services, but exceptional freeway and local access, along with significant consumer expenditure leakage from the trade areas, offers potential to expand the scale to include a broad range of retailers.



Figure 2: The Village of Southampton is located in the prestigious Hamptons area of eastern Long Island.

This study further finds that Southampton Village has a primary trade area population of 16,600 persons, increasing to 16,800 persons by 2017. The projected annual growth rate is 0.29 percent, less than both the state and national levels. Average household income in the primary trade area is \$116,000, significantly greater than that of both the state and national averages. The district's per capita income of \$45,900 is also higher than the state and U.S. statistics. The primary trade area has a labor base of 17,800 employees.

Table 1: 2012 Supportable Retail

Retail Category	Supportable Square Feet	Number of Stores
Grocery	30,000 sf	1
Food & Restaurants	26,200 sf	10-15
Gifts	17,400 sf	6-7
Health Care & Personal Services	10,100 sf	1-2
Apparel, Shoes & Jewelry	9,800 sf	6-7
General Merchandise & Department Stores	7,300 sf	1-2
Electronics & Appliances	3,000 sf	1
Hardware	2,700 sf	1
Home Furnishings	1,100 sf	1
Sporting Goods, Books, & Music	1,100 sf	1
Total	109,100 sf	30-40

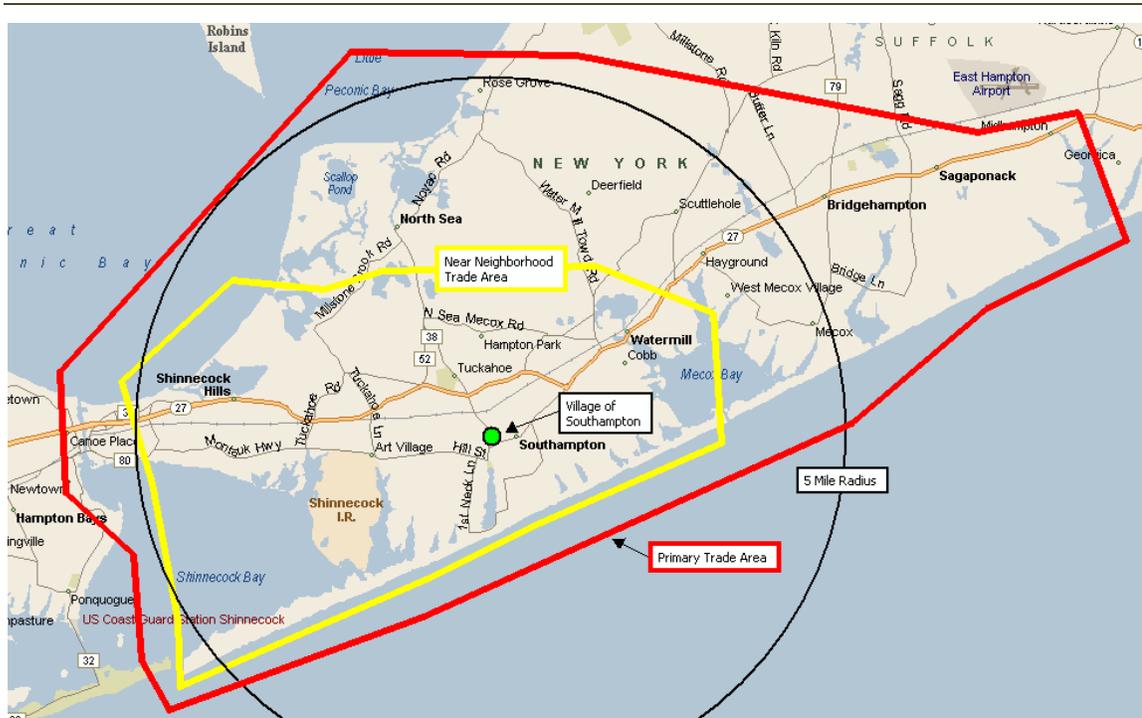


Figure 3: Consumers in the primary trade area account for 70 to 80 percent of the business generated in the study area.

Background

Gibbs Planning Group Inc. (GPG) has been retained by the Village of Southampton to conduct a retail market analysis for its historic shopping district. The study area is located along the village’s Main Street, North Sea Road, Hill Street, Hampton Road and Jobs Lane (see figure 1).

At the heart of the study area is the Village of Southampton, in the Town of Southampton in Suffolk County, New York. The village is arguably the commercial center of the southern "fork" of Long Island, serving as the home base for several region-wide businesses and having the area’s only hospital, Southampton Hospital. It is part of the summer colony known as the Hamptons, and is generally considered one of the most prestigious communities in the U.S. A large number of wealthy and influential people have homes in the "estate section" of the village, the area immediately north of the Atlantic Ocean front.

The consumer base is growing in Southampton Village, creating potential for strong and sustainable retail. Residential population in the area is expanding, as well as the employment base, which means more expenditure to contribute to the retail market.

GPG addressed the following issues in this study:

- What is the existing and planned retail market in the study and trade areas?
- What is the primary trade area for the Village of Southampton?
- What are the population, demographic and lifestyle characteristics in the trade areas, currently and projected for 2017?

- What is the current and projected growth for retail expenditures in the primary trade area, now and for the next five years?
- How much additional retail square footage is supportable in the village study area and what retail uses should be encouraged? What sales volumes can development achieve in or near the study area?

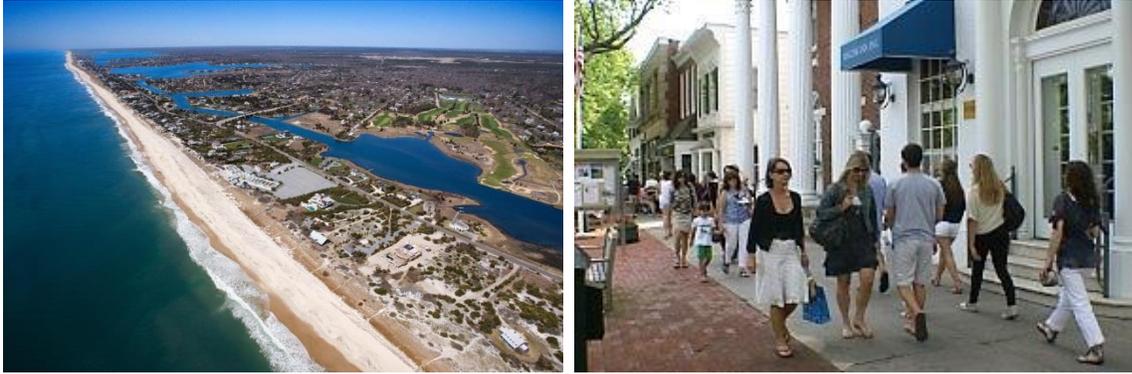


Figure 4: (Above Left) Located along the Atlantic Ocean, Southampton Village is a popular summer vacation destination. (Above Right) Shoppers enjoying the village's many retail offerings. (Image Source: (Left) <http://www.we-love-new-york.com/reserver-pour-new-york/faire-des-excursions-a-new-york/>; (Right) <http://www.southamptonvillagerealestate.com/about-southampton/photos/>)

Methodology

To address the above issues and as part of the assessment, GPG visited and conducted a detailed evaluation of most major existing shopping centers and planned retail concentrations in the primary trade area surrounding the village.

GPG visited the area during the daytime, as well as the evening, to gain a qualitative understanding of the retail gravitational and traffic patterns throughout the study area. GPG then defined a trade area that would serve the retail in the study area based on the field evaluation, geographic and topographic considerations, traffic access/flow in the area, relative retail strengths and weaknesses of the competition, concentrations of daytime employment, the retail gravitation in the market, and our experience defining trade areas for similar markets. Population, consumer expenditure and demographic characteristics of trade area residents were collected by census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics and Esri (Environmental Systems Research Institute). Updates were made when necessary based on information gathered from local planning sources.

Finally, based on the projected consumer expenditure capture (demand) in the primary trade area of the gross consumer expenditure by retail category, less the current existing retail sales (supply) by retail category, GPG projects the potential net consumer expenditure (gap) available to support new development. The projected net consumer expenditure capture is based on household expenditure and demographic characteristics of the primary trade area, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of the Southampton Village study area. Net potential captured consumer expenditure (gap) is equated to potential retail development square footage, with the help of retail sales per square foot data provided by Dollars and Cents of Shopping Centers (Urban Land Institute and International Council of Shopping Centers), qualitatively adjusted to fit the urbanism and demographics of the study area.



Figure 5: One of the many estates located in Southampton Village. The population in the primary trade area swells to over 31,000 during the high season summer months, due to wealthy residents with seasonal homes such as the one pictured above. (Image source: <http://southampton.patch.com/articles/multimillion-dollar-listing-southampton-mansion-at-30-million#photo-11573364>)

For the purposes of this study, GPG has assumed the following:

- Other major community retail centers may be planned or proposed, but only the existing retail is considered for this study. The quality of the existing retail trade in the study area is projected to remain constant. Gains in future average retail sales per sf reflect higher sales per sf in newly developed retail and selected increases in sales per sf by individual retail categories.
- No major regional retail centers will be developed within the trade area of this study through 2017 for the purposes of this study.
- The subject site is properly zoned to support infill and redevelopment projects with current and innovative standards, and the existing infrastructure (water, sewer, arterial roadways, etc.) can support additional commercial development.
- Annual population growth for the primary trade area is estimated to be 0.29 percent throughout the five-year period of this study.
- Employment distribution is projected to remain constant, without a spike or decline in employment by NAICS categories.
- The projected lease and vacancy rate model is based on our proprietary econometric model of the relationship between changes in employment and changes in vacancy and lease rates. Data was gathered from the U.S. Census Bureau, Esri, CBRE and local brokerage services.
- The region's economy will continue at normal or above normal ranges of employment, inflation, retail demand and growth.
- Any new construction in the study area will be planned, designed, built and managed to the best practices of the American Institute of Architects, American Planning Association, American Society of Landscape Architects, Congress for the New Urbanism, International Council of Shopping Centers and The Urban Land Institute.

-
- Parking for new development projects or businesses will meet or exceed the industry standards. GPG has noted that the existing parking is apparently adequate for present amounts of commercial, but that additional parking may be necessary if the existing vacancies become occupied or new higher sales businesses deploy in the study area.
 - Visibility of any new retail is also assumed very good, with signage as required to assure easy prominence of the retailers.
 - Infill or redevelopment projects in the study area will open with sustainable amounts of retail and anchor tenants, at planned intervals and per industry standards.

Trade Area

Based on GPG's field evaluation, the existing retail hubs, population clusters, highway access, and the retail gravitation in the market, as well as our experience defining trade areas for similar communities throughout the United States, GPG determined that consumers in the primary trade area generate demand to support a wide variety of additional neighborhood and community scale retailers. This potential will continue to grow over the next five years, sustained by an annual population growth rate of 0.29 percent and household income growth of 2.39 percent.

The primary trade area is the consumer market where the study area has a significant competitive advantage because of access, design, lack of competition and traffic and commute patterns. This competitive advantage equates to a potential domination of the capture of consumer expenditure by the retailers in the study area. The near neighborhood trade area encompasses a more local saturated market whose residents frequent the village center weekly, while residents in the total trade area will only patronize village retail one to two times a month or on a business by business basis.

GPG defined a primary trade area by topography, vehicular access, strength of retail competition and residential growth patterns instead of standardized "drive-times." Consumers inside the primary trade area will account for up to 70 to 80 percent of the total sales captured by retailers in the village shopping area. Due to the strong retail gravitational pull of the Bridgehampton, East Hampton and Amagansett shopping areas to the east, and the Sag Harbor shopping area to the northeast, GPG finds that the primary trade area is centered on the Southampton Village Center, while being slightly elongated along the State Highway 27 axis.

The following borders approximately delineate the primary trade area:

- North - Great Peconic Bay
- South - Atlantic Ocean
- East - Georgica Pond/East Hampton Airport
- West - Shinnecock Canal

Once a primary trade area was defined, GPG compiled research on the groups of people within the trade area that contribute to the retail market:

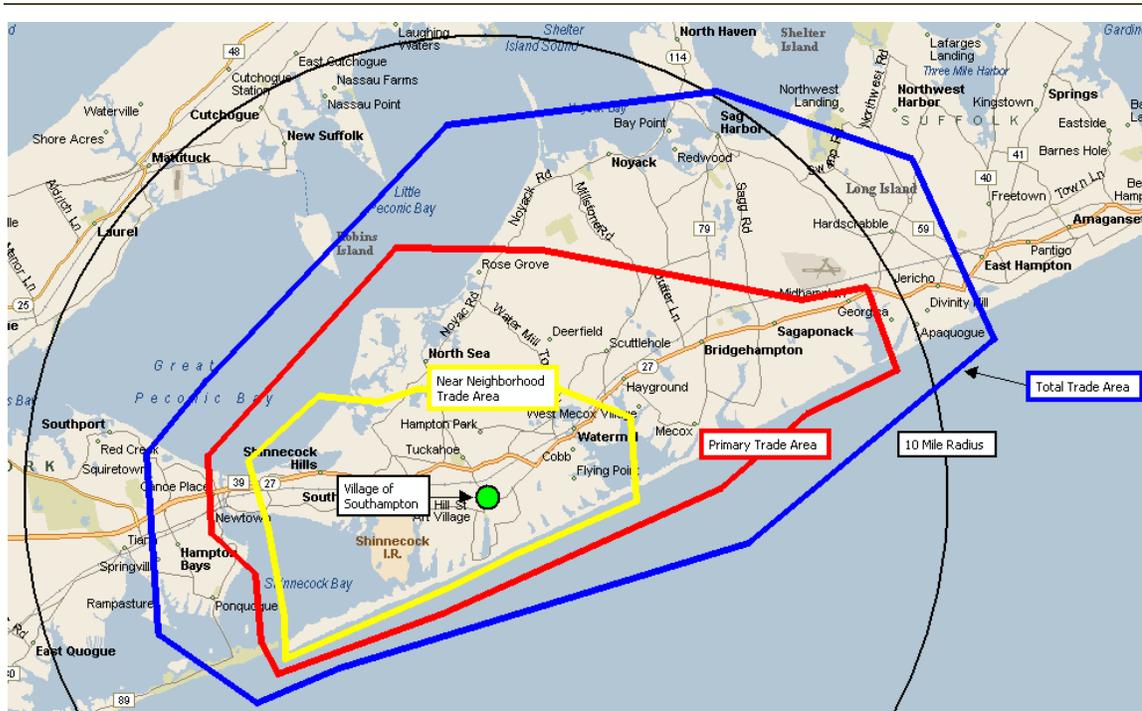


Figure 6: Southampton trade areas map. Yellow designates the near neighborhood trade area, red the primary trade, and blue the total trade area.

Research from the State Division of Tourism indicates that nearly 150,000 people visited communities within the primary trade area in 2011. Tourists contribute retail expenditures in the area surrounding Southampton Village, and their expenses could be captured by the village itself if appropriate walkable retail were developed to attract their sales. GPG estimates five percent will shop and dine within the Village Center and spend over \$24 million on retail and restaurants.

Also contributing to the retail market base in the primary trade area is Stony Brook University Southampton. GPG estimates that in general, college students actively shop and dine within their respective communities and are major contributors to captured sales. In 2012, the 96 students at Stony Brook Southampton had a total retail and restaurant potential demand of \$492,000. Retail spending accounted for the majority of this demand at \$441,000, and over \$50,000 could be spent on restaurants and special food shops such as yogurt and coffee.

In addition to students, this study estimates the employees within the primary trade area, which are in excess of 17,000, had a potential demand of nearly \$116 million in 2012. Demand for retail could be \$89 million, while restaurant expenditure totaled \$27 million. The majority of these workers are employed within a 10-minute drive time of the village commercial area, creating a constant demand for goods and dining during breaks and when the workday ends.

Finally, a large amount of expenditure within the primary trade area comes from seasonal residents. Many wealthy residents from nearby New York City and other major U.S. cities maintain a vacation home in the Hamptons, and their expenditures can be captured within their respective communities while they take residence there. In 2012, according to the Suffolk County Planning Department there were 33,100 seasonal residents within the primary trade, with a potential retail demand of \$98 million, and a restaurant demand of \$65 million, for a total of \$163 million.

Demographic Characteristics

Using data from Esri (Environmental Systems Research Institute) and the U.S. Census Bureau, GPG obtained the most recent population and demographic characteristics (2012), and those projected for 2017, for the defined trade areas, as well as national and statewide statistics.

Table 2: Demographic Comparisons

Characteristics	Near Neighborhood Trade Area	Primary Trade Area	Total Trade Area	New York	U.S.
2012 Population	10,000	16,600	34,500	19,532,800	313,129,017
2017 Population	10,200	16,800	34,900	19,877,930	323,986,227
2012-2017 Projected Annual Growth Rate	0.32%	0.29%	0.24%	0.35%	0.68%
Persons Per Household 2010	2.55	2.49	2.49	2.57	2.58
2012 Median Household Income	\$86,600	\$86,000	\$83,000	\$53,800	\$50,100
2012 Per Capita Income	\$45,000	\$46,000	\$45,200	\$29,900	\$26,400
% Households with Incomes \$75,000 or Higher	56.0%	55.8%	54.4%	36.3%	31.5%
Median Age	43.7	44.7	44.2	38.1	37.3

Table 2: This side-by-side table compares and contrasts primary trade area demographic statistics with those of the near neighborhood trade area, total trade area, New York and the United States.

The primary trade area's estimated 2012 population is 16,600 persons, which is projected to grow to 16,800 by 2017, a one percent increase over the total five-year period (2012-2017). This annual growth rate is consistent with the state level of one percent and less than the national level of three percent. The number of households in the primary trade area is estimated at 6,400, holding 2.49 persons-per-household, and is projected to increase to 6,500 by 2017, a one percent total increase over the five-year period of 2012-2017. Persons-per-household will remain constant over the next five years, causing the identical percentage gains of population and households. Approximately 30.2 percent of households are owner-occupied, a number that will increase by 1.9 percent in 2017. An increase in owner-occupied housing is causing the projected vacant housing units statistic to decrease slightly from 57.5 percent in 2012 to 55.7 percent in 2017.

The near neighborhood trade area includes 10,000 people and is expected to grow to 10,200 by 2017 at an annual rate of 0.32 percent. Households in 2012 include 3,700 growing to 3,800 by 2017 at an annual rate of 0.33 percent. The near neighborhood trade area's 2012 average household income is \$115,900 and is projected to increase to \$137,900 by 2017. Median household income in the trade area in 2012 is \$86,600 and estimated to increase to \$98,500 by 2017. Moreover, 56 percent of the households earn above \$75,000 per year. The average household size of 2.55 persons in 2012 is anticipated to remain constant and the 2012 median age is 43 years old.

The total trade area includes 34,500 people and 13,600 households. The former is estimated to grow at an annual rate of 0.24 percent, and the latter expected to grow at an annual rate of 0.26 percent to 2017, when the area's projected population will be 34,900 with 13,800 households. Median incomes of \$83,000 in 2012 for the total trade area were slightly less than in the other

trade areas, but all three figures were significantly higher than the state and national median household incomes of \$53,800 and \$50,100 respectively.

As shown in Table 2, the median household income of \$86,000 in the primary trade area is greater than the state and national levels. The average household income by census tract map found in the appendix of this report depicts a majority of high incomes in all three trade areas, with a small portion of incomes within the average of the state.

The area’s employment base is concentrated in the Services (34.2 percent) and Retail Trade (26.4 percent) industries. There are also high concentrations in the Construction (10.3), Finance, Insurance and Real Estate (6.7 percent) and Wholesale Trade (5.3 percent) sectors.

Persons-per-household in the primary trade area (2.49) is lower than the national and state averages. This lower level is a result of the concentration of retirement, empty-nest and childless couple orientated demographic groups.

Tapestry Lifestyles

Esri (Environmental Systems Research Institute) has developed Tapestry Lifestyles, which is an attempt to create 65 classifications, or lifestyle segments, that help determine purchasing patterns. These segments are broken down to the U.S. Census Block Group level and used by many national retailers to help determine future potential locations. The following Table 3 details the top Tapestry Lifestyles found in the primary trade area.

Table 3: Tapestry Lifestyles

Lifestyle	Trade Area Statistics	Short Description
 <p>Urban Chic</p>	<p>Population 6,600</p> <p>Median HH Income \$82,500</p> <p>40.2% Primary Trade Area Market Share</p> <p>1.3% National Market Share</p>	<p>Urban Chic residents are professionals who live a sophisticated, exclusive lifestyle. More than half of these households are married-couple families, similar to the US proportion. Fewer than half of them have children.</p> <p>Urban Chic residents focus more on their lifestyle than ambience. They travel extensively, visit museums, attend dance performances, shop at upscale stores, and do volunteer work.</p>

Lifestyle	Trade Area Statistics	Short Description
 <p>Connoisseurs</p>	<p>Population 2,750</p> <p>Median HH Income \$115,900</p> <p>18.0% Primary Trade Area Market Share</p> <p>1.4% National Market Share</p>	<p>Residents of Connoisseurs neighborhoods are somewhat older, with a median age of 47.2 years. Approximately 70 percent of the population is married. Although residents appear closer to retirement than child-rearing age, 30 percent of the households are married couples with children living at home. Connoisseurs are second in affluence only to the Top Rung segment. Employed residents earn wages from high-paying management, professional, and sales jobs.</p> <p>Connoisseurs residents may be second to Top Rung in wealth, but they are tops for conspicuous consumption. This is one of the top markets for owning or leasing a luxury car or convertible equipped with a navigational system. They travel abroad and in the United States, go to museums, and attend theater and dance performances. They go online to make travel plans, track and trade their investments, and shop. They order from high-end catalogs and shop in person at service-oriented department stores.</p>
 <p>Rural Resort Dwellers</p>	<p>Population 2,870</p> <p>Median HH Income \$45,700</p> <p>16.9% Primary Trade Area Market Share</p> <p>1.6% National Market Share</p>	<p>Rural Resort Dweller neighborhoods are found in pastoral settings in rural nonfarm areas throughout the United States. Household types include empty-nester married couples, singles, and married couples with children. The median age is 49.4 years; more than half are aged 55 and older. Although retirement beckons, most of these residents still work. Because so many residents are aged 65 and older, receipt of retirement income and Social Security benefits is common. More than two-fifths collect investment income; approximately 20 percent receive self-employment income. Of the Tapestry segments, Rural Resort Dwellers has the highest percentage of seasonal housing, 16 times higher than the national level.</p> <p>These residents live modestly and have simple tastes. They often work on home improvement and remodeling projects and own garden equipment to maintain their yards. They cook and bake at home. They go hiking, boating, canoeing, hunting, fishing, horseback riding, and golfing.</p>

Lifestyle	Trade Area Statistics	Short Description
 <p data-bbox="310 548 456 569">Pleasant-Ville</p>	<p data-bbox="597 327 716 384">Population 1,720</p> <p data-bbox="597 411 805 468">Median HH Income \$76,600</p> <p data-bbox="597 495 813 552">8.9% Primary Trade Area Market Share</p> <p data-bbox="597 579 748 636">1.7% National Market Share</p>	<p data-bbox="850 327 1406 573">Pleasant-Ville residents lead settled lives distinguished by prosperous domesticity. Families, especially middle-aged married couples, characterize Pleasant-Ville neighborhoods. The average family size is 3.3; nearly 40 percent of the households include children. Thirteen percent of the households have adult children. Employed residents work in a variety of occupations in diverse industry sectors, similar to the US distributions.</p> <p data-bbox="850 600 1406 762">They shop at warehouse stores for value and use coupons for discounts. For more upscale items, they shop at department stores. Pleasant-Ville residents spend time with their families, dine out, play cards and board games, attend baseball games and visit theme parks.</p>
 <p data-bbox="310 1010 472 1031">Silver and Gold</p>	<p data-bbox="597 806 716 863">Population 780</p> <p data-bbox="597 890 805 947">Median HH Income \$62,700</p> <p data-bbox="597 974 808 1052">5.9% Primary Trade Area Market Share</p> <p data-bbox="597 1079 748 1136">0.9% National Market Share</p>	<p data-bbox="850 806 1422 1052"><i>Silver and Gold</i> residents are the second oldest of the Tapestry segments with a median age of 60.5 years. Most residents have retired from professional occupations. Half of the households are composed of married couples without children. These are wealthy, educated seniors. Fifty-six percent of the households still earn wages or salaries, half collect Social Security benefits, 63 percent receive investment income, and 35 percent collect retirement income.</p> <p data-bbox="850 1079 1422 1325"><i>Silver and Gold</i> residents have the free time and resources to pursue their interests. They travel domestically and abroad including cruise vacations. They are also interested in home improvement and remodeling projects. They eat out, attend classical music performances, and relax with a glass of wine. Favorite restaurants include Outback Steakhouse, Cracker Barrel and Applebee's. They shop by phone from catalogs such as L.L. Bean and Lands' End.</p>

Table 3: The top five Tapestry Lifestyle groups profiled above portray a cluster of affluent families and aging residents within the primary trade area.

The trade area's most common tapestry lifestyle group is "Urban Chic," representing 40.2 percent of all households. Urban Chic residents are professionals who live a sophisticated, exclusive lifestyle. More than half of these households are married-couple families, similar to the U.S. proportion. Fewer than half of them have children. Unlike the United States, there is a smaller proportion of single parents and a higher proportion of singles and shared households. The median age of 42.7 years is older than the U.S. median of 37 years

Major concentrations of Urban Chic neighborhoods are found in urban areas on the northern and southern California coasts and along the east coast. These neighborhoods parallel the United States for housing type and home ownership. Homes range in age from pre-World War II to post-2000, and types from high-rises to single-family houses. Sixty-three percent of the housing is single-family; 27 percent is apartments in multiunit buildings. The rate of home ownership is 65 percent.

Urban Chic residents have a median household income of \$85,500. They are well educated; more than half of residents aged 25 years and older hold a bachelor's or graduate degree; 80 percent have attended college. They work in a variety of occupations, especially professional, management, and sales positions in the scientific and technical services, educational services and health care industry sectors. Twenty percent of these households earn income from self-employment ventures; 55 percent receive additional income from investments.

Tapestry Lifestyles Segmentation

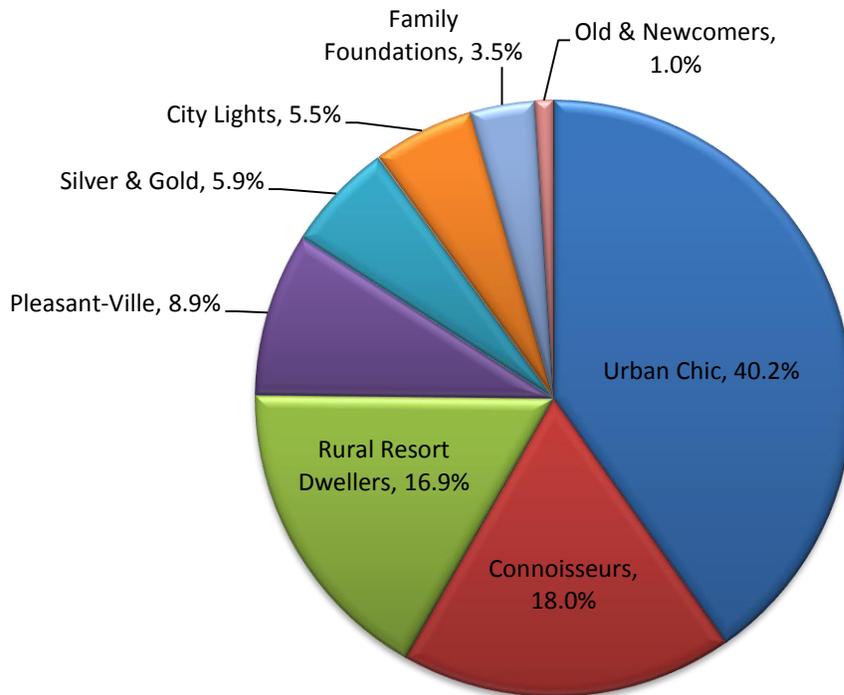


Figure 7: The relative proportions of the top Tapestry Lifestyle segments found in the primary trade area.

Urban Chic residents focus more on their lifestyle than ambience. They travel extensively, visit museums, attend dance performances, shop at upscale stores, and do volunteer work. To stay fit, they downhill ski; go backpacking, hiking, and biking; practice yoga; do aerobics; play tennis; and lift weights. They buy natural or organic food and take a multitude of vitamins and dietary supplements. They drink imported wine and truly appreciate a good cup of coffee.

These busy, tech-savvy residents use PCs extensively. This is a top segment to own an Apple computer. They go online to arrange travel; get the latest news; check their investment portfolios; trade stocks; and buy books, clothes, flowers, and tickets to concerts and sports events. They use credit cards, often charging more than \$700 a month. They also own shares in stocks, tax-exempt funds, mutual funds, and money market funds. They will occasionally use a financial planner or brokerage firm.

Urban Chic is one of Tapestry Segmentation's top segments for radio listening; these residents tune in to classical music, all-talk, and public radio. They are also avid readers of newspapers; books; and general editorial, news and entertainment, business, and home service magazines. They seldom watch TV; however, their favorite channels broadcast news programs and documentaries.

Employment Base

The employment picture found in the primary trade area reflects an overwhelmingly service and retail sector foundation, with additional elevated levels in construction, the finance, insurance, and real estate sector (FIRE) and wholesale trade.

As shown in Table 4 below, the retail trade and service sectors account for the majority of employment (a combined 60 percent) in the primary trade area. Construction and wholesale trade employment in the primary trade area is higher than state and national averages, while FIRE sector employment is below the New York and U.S. statistics.

Table 4: Employment Comparison by Sector

Sector	Near Neighborhood Trade Area	Primary Trade Area	Total Trade Area	New York	U.S.
Agriculture & Mining	3.3%	4.1%	4.6%	0.8%	1.6%
Construction	9.0%	10.3%	9.9%	3.5%	4.7%
Manufacturing	2.1%	2.4%	2.1%	7.1%	9.0%
Transportation	2.8%	2.5%	2.8%	3.1%	3.0%
Communication	1.7%	1.5%	1.2%	1.1%	1.0%
Utility	0.4%	0.3%	0.4%	0.4%	0.6%
Wholesale Trade	5.3%	5.3%	4.4%	4.1%	4.8%
Retail Trade	24.8%	26.4%	26.3%	19.5%	20.8%
Finance, Insurance & Real Estate	6.1%	6.7%	6.2%	8.9%	6.9%
Services	37.8%	34.2%	35.5%	44.7%	40.2%
Government	5.2%	4.6%	4.8%	5.9%	6.6%
Other	1.5%	1.8%	1.7%	1.1%	0.8%

Table 4: Agriculture and mining, construction, communication, retail and wholesale trade sector employment in the primary trade area is greater than state or national levels.

Daytime employment plays a large role in supporting retail. The primary trade area is estimated to have over 17,000 employees, with nearly 11,000 employees within a ten-minute drive time from the village commercial area. The mix of employees throughout the 5-, 10-, and 15-minute drive times is consistent with primary trade area percentages, with retail trade and service sector employment being the leaders within 10 minutes at 2,800 and 4,000 jobs respectively. "Other Services" makes up the majority of service sector employment, and "Eating and Drinking Places" is the largest sector of employment within the retail trade category.

Table 5: Drive Time Employment by Industry Sector

Employment Sector	5 minute Drive-time	10 minute Drive-time	15 minute Drive-time
Agriculture & Mining	90	358	495
Construction	431	957	1,383
Manufacturing	109	248	313
Transportation	136	328	389
Communication	113	186	232
Utility	5	39	57
Wholesale Trade	199	529	727
Retail Trade	1,328	2,809	3,743
Home Improvement	72	246	323
General Merchandise Stores	143	206	287
Food Stores	235	331	363
Auto Dealers, Gas Stations, Auto Aftermarket	160	457	637
Apparel & Accessory Stores	125	192	268
Furniture & Home Furnishings	61	227	274
Eating & Drinking Places	329	747	1,077
Miscellaneous Retail	203	402	514
Finance, Insurance, & Real Estate	448	722	903
Banks, Savings, & Lending Institutions	98	142	175
Securities Brokers	53	82	88
Insurance Carriers & Agents	68	101	113
Real Estate, Holding, Other Investment	229	397	527
Services	2,170	4,057	5,122
Hotels & Lodging	70	273	418
Automotive Services	39	139	167
Motion Pictures & Amusements	33	151	268
Health Services	731	1,059	1,076
Legal Services	61	88	99
Education Institutions & Libraries	491	851	1,240
Other Services	745	1,495	1,855
Government	298	565	697
Other	77	176	238
Total Employment	5,406	10,973	14,300

Table 5: The relative size of office worker categories remains consistent throughout the three drive times, with services and retail trade being the largest categories, and elevated levels in the construction and FIRE sectors.

Construction is the third leading sector of employment within 10 minutes of the site at 960 employees. The Hamptons area, where the Village of Southampton is located, is a popular vacation destination for some of the wealthiest people in the U.S, which creates a high demand for the construction of extravagant estates. The FIRE sector is the fourth largest job creator within 10 minutes with 730 employees working in banks, security brokerages, insurance, and real estate firms. These four categories constitute over 77 percent of employment within a 10-minute drive time of the village's shopping district.

Consumer expenditure from daytime employment compliments that captured in the evenings and on weekends by households in the trade area. “*Office Worker Retail Spending in a Digital Age*,” published by the International Council of Shopping Centers in 2012, provides insight into the impact of office worker employment. Weekly office worker expenditure, adjusted for 2012 dollars, is estimated at \$175. Weekly non-office worker expenditure, in 2012 dollars, is projected at 37 percent of office workers.

Non-office workers are estimated to have slightly less disposable income, to have multiple work locations including at home, and typically are on the road more during their workweek. Retail purchases (general merchandise, apparel, home furnishings, electronics, grocery and convenience items) make up the majority of the office worker dollars, at \$116 per week. Restaurant expenditures (full service, limited service, and drinking places) account for the balance at \$59 per week. Annualized, each office worker expends \$9,100 before, during, and after work. Much of this potential expenditure can be captured within the village due to the office worker’s proximity of a 10-minute drive time.

Table 6: 10-Minute Drive Time Worker Expenditure

	Weekly Expenditure	Annual Expenditure	% Capture	Office Worker Expenditure 6,100	Non-Office Worker 4,800	Total Expenditure
Prepared Food & Beverage						
Limited & Full Service Restaurants	\$43	\$2,236	75.0%	\$10,229,700	\$8,049,600	\$18,279,300
Drinking Places	\$16	\$832	25.0%	\$1,268,800	\$998,400	\$2,267,200
Retail Goods						
General Merchandise, Apparel, Home Furnishings, Electronics	\$68	\$3,536	20.0%	\$4,313,920	\$3,394,560	\$7,708,480
Grocery	\$29	\$1,508	15.0%	\$1,379,820	\$1,085,760	\$2,465,580
Convenience Items	\$19	\$988	33.0%	\$1,990,857	\$1,564,992	\$3,555,849
Total	\$175	\$9,100		\$19,183,097	\$15,093,312	\$34,276,409

Table 6: Employees within 10 minutes of the study site expend over \$34 million dollars annually.

The annual impact of the 10,900 workers within a 10-minute drive time is \$20.5 million in prepared food and beverage establishments, \$13 million in retail goods sales, \$2.4 million in grocery purchases and \$3.5 million in convenience items, totaling \$7.7 million in captured consumer expenditure. Detailed results found above in Table 6.

Further research, including focus groups, are recommended to fully understand the existing policies and physical conditions that are limiting daytime worker shopping and dining.

TRADE AREA CHARACTERISTICS

Location

The primary trade area is constrained by a combination of strong retail competition to the east and northeast and a limited amount of highways to accommodate the heavy seasonal traffic, causing the ratio between distance and travel time to widen considerably. Its geographic advantages include good regional access by way of State Highway 21, Montauk Highway and North Sea Road, a central location within the Hamptons region, strong existing retail offerings and a prestigious global reputation.

Access

Regional linkage to the village is excellent: the commercial area is situated a mile south of New York State Road 27, the region's main highway. Local circulation to neighboring communities is also easy due to the site's location at the intersection of north/south running North Sea Road/Main Street and Montauk Highway/Hill Street/Hampton Road, which runs east and west.

Table 7: Traffic Counts

Location	Traffic Count, AADT	Year
North Road & Magee Street	36,360	2010
State Highway 27 & Henry Road	36,010	2008
State Highway 27 & North Bishop Lane	34,700	2009
Montauk Highway & Station Road	28,670	2010
Montauk Highway & Willow Road	28,520	2008
State Highway 27 & North Main Street	27,320	2010
State Highway 27 & Carriage Lane	27,320	2010
State Highway 27 & David Whites Lane	27,320	2010
Hill Street & Captains Neck Lane	14,200	2010
Hill Street & First Neck Lane	12,700	2010
North Sea Road & Windmill Lane	12,300	1998
North Sea Road & Gondola Garden	11,950	2010
West Neck Road & Swan Hill Road	11,950	2010
North Sea Road & Millstone Drive	11,300	1998
Hampton Road & David Whites Lane	10,850	2010

Table 7: The traffic chart shows heaviest traffic along State Highway 27 and Montauk Highway, caused by the highest concentration of businesses and easiest access along these routes.

High traffic volumes seen in Table 7 depict the routes with the best regional access (State Highway 27, Montauk Highway) and the highest concentration of activity. The heaviest volumes were all recorded within the closest proximity to the Southampton Village commercial area. The traffic counts in the area are provided by Market Planning Solutions, Inc. and measured in terms of average daily traffic volume (two-way).

Other Shopping Areas

As part of GPG's field evaluation, neighborhood, community and regional shopping centers near the village of Southampton were visited to assess their retail appeal, strength of tenant mix, general maintenance and accessibility. In addition to the onsite inspection of the most significant competing shopping concentrations to the study area, GPG used information from the International Council of Shopping Centers' Global Shopping Center Directory.

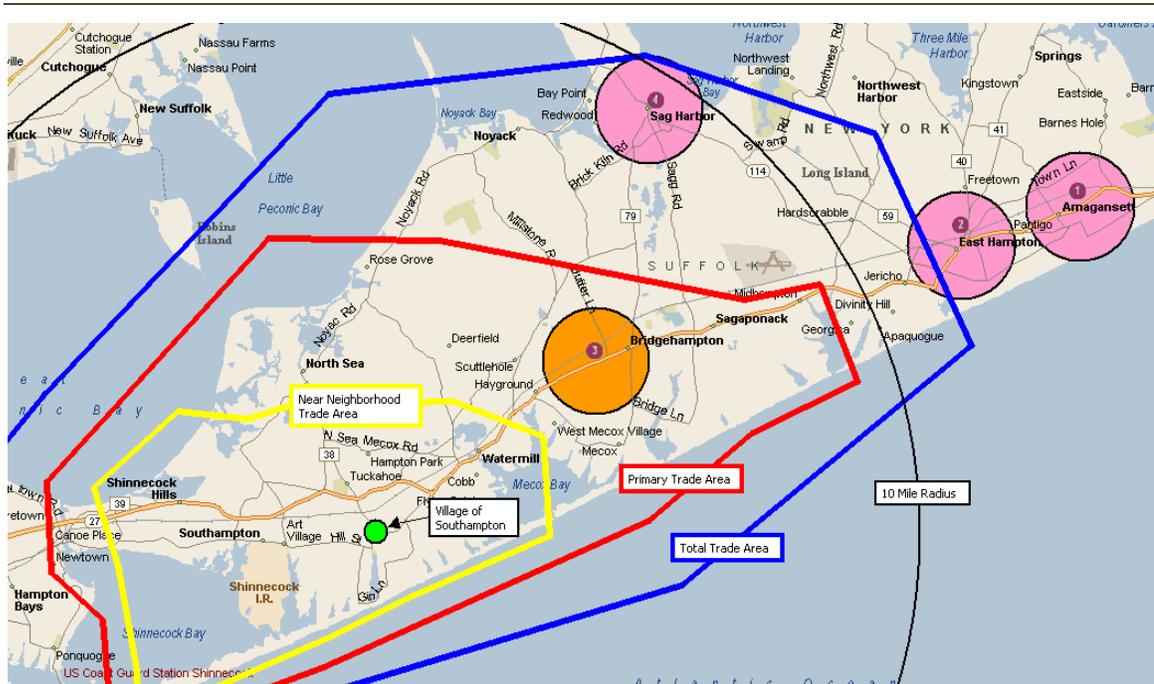


Figure 8: Competing retail location map. There is strong retail competition to the east and northeast of Southampton Village; orange designates community centers and pink signifies retail districts. 1) Amagansett, 2) East Hampton, 3) Bridgehampton Commons, 4) Sag Harbor.

Table 8: Existing Regional & Community Centers

Map Designation	Retail Center Name	Shopping Center Type
1	Amagansett	Retail District
2	East Hampton	Retail District
3	Bridgehampton Commons	Community
4	Sag Harbor	Retail District

Table 8: There are four shopping concentrations competing with the Southampton Village primary trade area.

The strongest competition to the study area is the State Highway 27 retail corridor to the east of the village. Bridgehampton Commons is the Hamptons’ largest community center, located only five miles east of Southampton Village Center, and the strongest regional scale retail concentration in the area. East Hampton and Amagansett serve as the eastern anchors of the State Highway 27 retail corridor. Both are upscale retail districts located 13 and 15 miles, respectively, east along 27/Montauk Highway.

The other major retail competition area in the market is the Sag Harbor retail district ten miles to the northeast of Southampton Village and four miles outside of the primary trade area. Sag Harbor is a popular family destination for food, fun and shopping. An old whaling town with a rich history, views of Sag Harbor Bay and numerous locally owned shops and restaurants make this an up and coming Hamptons hot spot.

Shopping Areas



Figure 9: In the quiet hamlet of Amagansett, a quaint shopping district offers some of the Hamptons' best retail and dining. (Image Source: <http://www.10best.com/destinations/new-york/long-island/amagansett/shopping/amagansett-square/>)

1. Amagansett

Regarded as one of the Hamptons' most prestigious shopping districts, earning a spot on USA Today Travel's list of "10 Best Shopping Districts in Long Island," Amagansett looks like a quintessential New England college town. A central public square is flanked on all sides by locally owned boutiques and a handful of restaurants. The shopping district is located 15 miles east of Southampton along State Highway 27 in the hamlet of Amagansett and is known for being frequented by the area's many celebrity residents.



Figure 10: East Hampton's shopping district features numerous luxury boutiques for local shoppers and visitors alike. (Image Source: (Left) <http://jennysteffens.blogspot.com/2011/03/east-hampton-weekend-barefoot-contessa.html>); (Right) <http://www.hamptonsproperties.net/southampton.shtml>)

2. East Hampton

Located 13 miles east of Southampton Village along Montauk Highway, the East Hampton shopping district is renowned as a shopper's paradise for its upscale boutiques and inviting atmosphere. Featured retailers include Elie Tahari, Gucci, John Varvatos, multiple Ralph Lauren specialty stores, Tiffany & Co. and Tory Burch. Locals and visitors come to East Hampton to enjoy the tree-lined streets and world-class retailers.



Figure 11: Bridgehampton Commons is a 287,000 sf community shopping center located five miles east of Southampton along Montauk Highway. (Image source: (Left) <http://www.27east.com/news/article.cfm/Bridgehampton/454647/TJ-Maxx-Wants-More-Room-In-Bridgehampton>; (Right) <http://hamptonschatter.blogspot.com/2010/10/its-war-of-sneakers-in-bridgehampton.html>)

3. Bridgehampton Commons

Bridgehampton Commons is a community shopping center located five miles east of Southampton along Montauk Highway in Bridgehampton hamlet. The center features over 287,000 sf of retail and limited service restaurants, anchored by King Kullen, Kmart, Staples and TJ Maxx. Dunkin' Donuts and Panera Bread provide refreshment to hungry patrons of the center's notable shops including American Eagle, Banana Republic, the Gap, Payless ShoeSource, Radio Shack, Williams Sonoma and Victoria's Secret. Bridgehampton Commons' central location within the Hamptons and appealing mix of retail makes it a draw to residents and visitors throughout the area.



Figure 12: Sag Harbor is an old whaling town turned popular shopping, dining, and entertainment district. The village is located 10 miles northeast of Southampton Village. (Image Source: (Left) <http://www.partner.viator.com/en/2511/tours/New-York-City/The-Hamptons-Sag-Harbor-and-Outlet-Shopping-Day-Trip-from-New-York-City/d687-3857NYCHAM>; (Right) <http://www.hamptons.com/Style-And-Living/Main-Articles/751/Main-Street-Sag-Harbor.html#.UUjKsxyG3X4>)

4. Sag Harbor

A charming village on the East End of Long Island, Sag Harbor is a historic "old whaling town" filled with a variety of restaurants, boutiques and entertainment. The village is located 10 miles northeast of Southampton along County Road 79/Bridgehampton Sag Harbor Turnpike. Retail in Sag Harbor is comprised of many unique, locally owned shops and eateries centered around the village's main street and directly adjacent to Sag Harbor Bay. The village's distinctive history and port-like atmosphere attracts countless tourists and local residents.

SUMMARY of FINDINGS

This study finds that the Village of Southampton has the opportunity to significantly expand its retail and restaurant services to better serve its visitors, office workers, students, seasonal residents and surrounding community. The village has an especially strong growth potential: GPG estimates that up to 109,100 sf of additional retail space is presently supportable. This new retail can potentially capture an additional \$47.7 million of expenditure in 2012, growing to \$50.1 million by 2017.

The demographics of the primary trade area show a population base of 16,600, which is projected to grow to 16,800 by 2017, at an annual growth rate of 0.29 percent. The persons-per-household is 2.49, and median age is 44.7 years old. Household incomes of \$86,000 in the primary trade area are significantly higher than the state and national averages. The per-capita income of \$46,600 is also greater than the state and national levels.

Employment in the primary trade area favors the retail trade (26.4 percent) and service (34.2 percent) sectors, while being weak in the communication and utility categories. There are over 10,900 employees within a 10-minute drive of the study site, 62 percent of which are concentrated in the retail trade and service sectors. These daytime consumers expend over \$34 million annually, with the restaurant sector leading at almost \$18 million per year.

Tapestry Lifestyles in the market reflect a majority base of "Urban Chic" households, representing 40.2 percent of all households. Urban Chic residents are professionals who live a sophisticated, exclusive lifestyle. More than half of these households are married-couple families, similar to the U.S. proportion. Fewer than half of them have children.

Supportable 2012 Retail and Potential Tenants

- **30,000 sf Food & Beverage Stores:** A traditional supermarket would work well, or multiple convenience stores 10,000 sf or less. Possible retailers include C-Town Supermarket, Compare Supermarkets, D'Agostino Supermarket, Fairway Market, Garden of Eden Marketplace, Gourmet Garage, Met Food Markets, Morton Williams Supermarkets, Mrs. Greens Natural Market, Peck's Markets, Whole Foods and Zeytuna Markets.
- **26,200 sf Food & Restaurant:** 2,800 sf of full service restaurants, such as Altamarea Group restaurants, Arizona Pizza, BLT Restaurants, Bobby Van's Steakhouse, California Pizza Kitchen, Coromadnel Cuisine, Mad River Grille, Mario Batali restaurants, One Group restaurants, Sophie's Cuban, Two Boots, Turning Point, Union Square Hospitality Group restaurants and Vino Volo.
- **17,400 sf Limited Service Restaurants:** Baja Fresh, Bare Burger, BGR the Burger Joint, Blaze Pizza, Brueggers, California Tortilla, Einstein Bagels, Elevation Burger, Five Guys Burger & Fries, Fresh Healthy Café, Freshii, Great Wraps, Just Salad, Le Pain Quotidien, Rusty Taco, Spicy Pickle and Witchcraft.
- **3,900 sf Food Services:** Candy Bouquet, Citarella, Edible Arrangements, Federal Meats, HoneyBaked Ham, Logan Farms, Uncle Giuseppe's Marketplace and Villarina's.

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- **1,500 sf Specialty Food Establishments:** 16 Handles, Ben & Jerry's, Connecticut Muffin, Crumbs, Dippin' Dots, Doc Popcorn, Freshens, Haagen Dazs, Honey Dew Donuts, Just Baked, Loving Hut, Pinkberry, Rocky Mountain Chocolate Factory, Starbucks Coffee, Sweet Frog, Teavana and We're Rolling Pretzel Company.
 - **17,400 sf Gifts:** Gift and souvenir shops make up this class of retail potential. Possible retailers include Brookstone, Crown Trophy, Ten Thousand Villages and Xpedx Paper.
 - **10,100 sf Health Care & Personal Services:** Drug Stores, convenience products and cosmetics make up this class of retail potential. Possible retailers include Aveda, Bath & Body Works, Chanel, Crabtree & Evelyn, Duane Reid, Fresh, GNC, Kiehl's, L'Occitane, Origins, Sephora, Thriftway Pharmacy and Value Drugs.
 - **9,000 sf Apparel & Shoes:** A broad mix of apparel and shoe stores split the square footage in this category by 6,200 and 2,800 sf respectively. Possible apparel retail includes Allsaints, Ben Sherman, Benetton, Burberry, Cache, Chanel, Diesel, Free People, Lily Pulitzer, LuluLemon, Kenneth Cole, Nicole Miller, Original Penguin, Orvis, Quicksilver, Tommy Hilfiger and White House/Black Market. Possible shoe stores include: Allen Edmonds, Baker Shoes, Charles David, Clark's, Jimmy Choo, Lady Foot Locker, Marmi Shoes, Nine West, Super Runners Shop and Traffic Shoes.
 - **7,300 sf General Merchandise & Department Stores:** 2,600 sf of general merchandise and a 4,700 sf department store type group. Potential retailers include Bolton's, Buffalo Exchange, Cusp by Neiman Marcus and Just-A-Buck.
 - **3,000 sf Electronics & Appliances:** Retailers include AT&T, Bose, Calumet Photo, Camera Spot, CPR Cell Phone Repair, RadioShack, Sony, Sprint, T-Mobile and Verizon Wireless.
 - **2,700 sf Hardware:** The potential demand in this retail group focuses on paint, wall and floor coverings, building materials and supply stores. Possible retailers include Ann Sacks Tile & Stone, Basics Plus, Classy Closets, Fastenal, Home Franchise Concepts stores and the Tile Shop.
 - **1,100 sf Home Furnishings:** Possible retailers are Design Within Reach, The Great Frame Up, J Pocker, Jonathan Adler, MacKenzie-Childs and West Elm.
 - **1,100 sf Sporting Goods, Hobby, Books, & Music Stores:** Prospective retailers include BookOff, the Book Rack, Color Me Mine, Games Workshop, Golftec Improvement Center, Running Room, Super Runners Shop and Surefoot.
 - **800 sf Jewelry, Luggage, and Leather Good Stores:** Christian Dior, Coach, De Beers Diamond Jewelers, Fast-Fix Jewelry & Watch Repair, Francesca's, Innovation Luggage, Jimmy Choo, LeSportsac, Links London, London Jewelers, Mikimoto, Montblanc, Pandora Jewelry and Signet Group Jewelers.

A detailed examination of the supportable sf of retail uses is found in the following Table 9:

**Table 9: Supportable Retail Table
Southampton Village Primary Trade Area**

Business Type	Gross 2012 Demand	Estimated 2012 Sales	Est. 2012 Sales/sf	Est. 2012 Support/sf	Estimated 2017 Sales	Est. 2017 Support/sf	No. of Stores
Retail Stores							
Home Furnishings	\$13,010,094	\$479,729	\$425/sf	1,129 sf	\$503,716	1,185 sf	1
Electronics & Appliance	\$29,234,866	\$1,959,143	\$644/sf	3,042 sf	\$2,057,100	3,194 sf	1
Hardware	\$16,330,200	\$1,005,056	\$365/sf	2,754 sf	\$1,055,309	2,891 sf	1
Grocery	\$87,999,120	\$14,425,613	\$410/sf	30,053 sf	\$15,146,894	31,556 sf	1
Health & Personal Care	\$39,308,276	\$5,915,176	\$545/sf	10,111 sf	\$6,210,935	10,617 sf	1-2
Apparel	\$28,773,462	\$3,028,549	\$385/sf	6,244 sf	\$3,179,976	6,557 sf	4-5
Shoes	\$9,068,561	\$1,723,208	\$525/sf	2,757 sf	\$1,809,369	2,895 sf	1-2
Jewelry	\$7,465,791	\$550,010	\$635/sf	866 sf	\$577,510	909 sf	1
Sporting Goods	\$8,116,552	\$173,370	\$365/sf	475 sf	\$182,039	499 sf	1
Books & Music	\$2,437,070	\$193,585	\$288/sf	672 sf	\$203,264	706 sf	1
Department Stores	\$22,892,592	\$1,698,997	\$310/sf	4,719 sf	\$1,783,947	4,955 sf	1
General Merchandise	\$47,039,026	\$940,706	\$275/sf	2,650 sf	\$987,741	2,782 sf	1-2
Gifts	\$13,684,395	\$6,107,166	\$350/sf	17,449 sf	\$6,412,524	18,321 sf	6-7
Retailer Totals	\$325,360,003	\$38,200,308	\$459/sf	82,923 sf	\$40,110,323	87,069 sf	20-25
Restaurants							
Full-Service Restaurants	\$55,176,219	\$1,608,920	\$520/sf	2,848 sf	\$1,689,366	2,990 sf	1-2
Limited-Service Restaurants	\$71,573,076	\$5,932,545	\$340/sf	17,449 sf	\$6,229,172	18,321 sf	9-10
Food Services	\$11,365,430	\$1,206,613	\$310/sf	3,892 sf	\$1,266,944	4,087 sf	1-2
Drinking Places	\$2,017,403	\$249,408	\$510/sf	489 sf	\$261,878	513 sf	0
Specialty Food	\$16,833,625	\$555,256	\$325/sf	1,521 sf	\$583,019	1,597 sf	1
Restaurant Totals	\$156,965,753	\$9,552,742	\$418/sf	26,199 sf	\$10,030,379	27,509 sf	10-15
Retail & Restaurant Totals	\$482,325,756	\$47,753,050	\$447/sf	109,121 sf	\$50,140,702	114,577 sf	30-40

Table 9: Sales stated in constant 2012 dollars.

Retail Category Definitions

Retail categories in the Supportable Retail Table correspond to the North American Industry Classification System (NAICS), the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The following NAICS codes and definitions are provided by the U.S. Census Bureau:

Retail

Auto Supply Stores (4411): establishments known as automotive supply stores primarily engaged in retailing new, used, and/or rebuilt automotive parts and accessories; automotive supply stores that are primarily engaged in both retailing automotive parts and accessories and repairing automobiles; establishments primarily engaged in retailing and

installing automotive accessories; and establishments primarily engaged in retailing new and/or used tires and tubes or retailing new tires in combination with automotive repair services.

Furniture Stores (4421): establishments primarily engaged in retailing new furniture, such as household furniture (e.g., baby furniture, box springs and mattresses) and outdoor furniture; office furniture (except those sold in combination with office supplies and equipment); and/or furniture sold in combination with major appliances, home electronics, home furnishings, and/or floor coverings.

Home Furnishings Stores (4422): establishments primarily engaged in retailing new home furnishings (except furniture).

Electronics and Appliance Stores (4431): establishments primarily engaged in retailing the following new products: household-type appliances (refrigerator, dishwasher, oven), cameras, computers/software, televisions, and other electronic goods.

Hardware Stores (4441): establishments primarily engaged in retailing new building materials and supplies (lumber, plumbing, electrical, tools, housewares, hardware, paint and wallpaper).

Lawn and Garden Supply Stores (4442): establishments primarily engaged in retailing new lawn and garden equipment and supplies. (Nursery, farm, and garden products, outdoor power equipment).

Grocery Stores (4451): establishments primarily engaged in retailing a general line of food products (canned/frozen food, fruits and vegetables, meat, fish, poultry, milk, bread, eggs, soda).

Specialty Food Stores (4452): establishments primarily engaged in retailing specialized lines of food (meat, fish/seafood, fruits/vegetables, baked goods, candy, nuts, confections, popcorn, ice cream, items not made on the premises).

Beer, Wine, and Liquor Stores (4453): establishments primarily engaged in retailing packaged alcoholic beverages, such as ale, beer, wine, and liquor.

Health & Personal Care Stores (4461): establishments primarily engaged in retailing health and personal care products (pharmacies/drug stores, first aid, beauty products, household supplies, candy, prepackaged snacks, optical goods, vitamins/supplements).

Clothing stores (4481): men's and boys' clothing stores; women's and girls' clothing stores; children's and infants' clothing stores; family clothing stores; clothing accessories stores.

Shoe Stores (4482): Shoes (men's, women's, child/infant, athletic).

Jewelry Stores (4483): Jewelry, luggage and leather goods (silverware, watches, clocks, handbags, briefcases, belts, gloves).

Sporting Goods Stores (4511): establishments primarily engaged in retailing new sporting goods (fitness equipment, bikes, camping, uniforms, footwear).

Book & Music Stores (4512): establishments primarily engaged in retailing new books, newspapers, magazines and prerecorded audio and video media.

Department Stores (4521): establishments known as department stores are primarily engaged in retailing a wide range of the following new products with no one merchandise line predominating: apparel; furniture; appliances and home furnishings; and selected additional items, such as paint, hardware, toiletries, cosmetics, photographic equipment, jewelry, toys and sporting goods. Merchandise lines are normally arranged in separate departments.

General Merchandise Stores (4529): establishments primarily engaged in retailing new goods in general merchandise stores (except department stores) (warehouse clubs, supercenters, apparel, auto parts, dry goods, hardware, groceries, housewares, no line predominating).

Florists (4531): establishments known as florists primarily engaged in retailing cut flowers, floral arrangements, and potted plants purchased from others. These establishments usually prepare the arrangements they sell.

Office Supplies & Gift Stores (4532): establishments primarily engaged in one or more of the following: (1) retailing new stationery, school supplies and office supplies; (2) retailing a combination of new office equipment, furniture and supplies; (3) retailing new office equipment, furniture and supplies in combination with retailing new computers; and (4) retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations, and curios.

Miscellaneous Retailers (4539): establishments primarily engaged in retailing new miscellaneous specialty store merchandise (except motor vehicle and parts dealers; furniture and home furnishings stores; consumer-type electronics and appliance stores; building material and garden equipment and supplies dealers; food and beverage stores; health and personal care stores; gasoline stations; clothing and clothing accessories stores; sporting goods, hobby, book and music stores; general merchandise stores; florists; office supplies, stationery and gift stores; and used merchandise stores). Pet supplies, art dealers, manufactured home dealers, tobacco/cigar stores,

Restaurants

Full-Service Restaurants (7221): establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating. Establishments that provide these types of food services to patrons with any combination of other services, such as carryout services, are classified in this industry.

Limited-Service Restaurants (7222): establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or

providing off-site delivery (cafeterias, snack/ juice bar, ice cream/soft serve shops, cookie shops, popcorn shops, donut shops, coffee shops, bagel shops)

Special Food Services (7223): establishments primarily engaged in providing one of the following food services:

- **Food Service Contractors:** Establishments may be engaged in providing food services at institutional, governmental, commercial, or industrial locations of others based (cafeteria, restaurant, and fast food eating-place) on contractual arrangements with these types of organizations for a specified period of time. Management staff is always provided by the food services contractor.
- **Caterers:** providing single event-based food services. These establishments generally have equipment and vehicles to transport meals and snacks to events and/or prepare food at an off-premise site. Banquet halls with catering staff are included in this industry. Examples of events catered by establishments in this industry are graduation parties, wedding receptions, business or retirement luncheons, and trade shows.
- **Mobile Food Services:** establishments primarily engaged in preparing and serving meals and snacks for immediate consumption from motorized vehicles or non-motorized carts. The establishment is the central location from which the caterer route is serviced, not each vehicle, or cart. Included in this industry are establishments primarily engaged in providing food services from vehicles, such as hot dog cart, and ice cream truck.

Drinking Places (Alcoholic Beverages) (7224): establishments primarily engaged in preparing and serving alcoholic beverages for immediate consumption (bars, taverns, nightclubs).

Shopping Center Definitions

This study utilizes the shopping centers typologies defined by the International Council of Shopping Centers (ICSC) as follows:

- **Convenience Centers:** Convenience centers are 30,000 sf or less, unanchored, and generally will service a trade area of up to one mile. These centers include banking, carryout foods, florists, mail centers, small restaurants, small food markets, and professional services such as real estate and financial consulting. The centers typically include six to eight businesses.
- **Neighborhood Centers:** Neighborhood centers are anchored with a full-sized supermarket and typically range from 60,000 to 100,000 sf. They service a trade area of two to three miles and can include apparel, banks, carryout food, hardware, mail centers, restaurants, sporting goods and professional services such as financial consulting and real estate.
- **Community Centers:** Community centers typically range from 150,000 to 300,000 sf and are almost always anchored with a full-sized department store. They also include junior anchor retailers selling books, crafts, shoes, and sporting goods. Community centers often include large home improvement stores and medium-sized discount apparel stores. Their service area is typically five to seven miles in suburban locations.

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- **Lifestyle Centers:** Lifestyle centers average 150,000 to 200,000 sf and feature popular apparel, book and home furnishing stores, as well as cinemas and a wide selection of themed restaurants. The centers are frequently planned as walkable areas with main streets. Recently, lifestyle centers have included large anchors such as department stores, public libraries, and supermarkets. These centers typically have a trade area of four to six miles when developed in suburban settings. Lifestyle centers that include civic, employment and residential buildings along with the retail land use are defined as ‘town centers.’
 - **Regional Centers:** Regional centers average trade areas of eight to 12 miles and are anchored with multiple department stores. The centers can range from 800,000 to 1,500,000 sf, and often include cinemas along with 200,000 sf of national brand fashion.

Rationale

The rationale for the findings in this study follows:

- **Existing retail infrastructure development:** The Village of Southampton is underserving its potential demographic base, represented by a gap between primary trade area demand and supply of over \$283 million. In addition, there is a considerable amount of sales leakage among visitors, students, employees and seasonal residents that could be captured with the expansion of retail and restaurant offerings in the Village Center.
- **Strong daytime employment base:** There are over 10,900 employees within a 10-minute drive of the study area, and an additional 3,400 within a 15-minute drive. These daytime consumers supplement the residential consumer base with an additional \$34 million in expenditure.
- **Demographic growth:** Average and median household incomes are desirable for retail growth and the encouraging annual growth rate in population and incomes will favorably affect new retail development. Regardless of disposable income levels, the growing base of population households and employees in the primary study area need daily goods.
- **Single site critical mass development:** The Village of Southampton has potential as a prominent single site retail development to attract new retailers to the market.
- **Access to surrounding neighborhoods:** The village shopping area is situated at one of the most favorable intersections in the region based on traffic volumes, surrounding neighborhood access, proximity to the region’s main thoroughfare State Highway 27, visibility, nearby attractions and central geographic location in the Hamptons.

Limits of Study

The findings of this study represent GPG’s best estimates for the amounts and types of retail projects that should be supportable in the study area. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. This study is based on estimates, assumptions, and other information developed by GPG independent research effort, general knowledge of the industry, and consultations with the client and its representatives. This study is designed as

objective third party research and GPG does not recommend that any or all of the supportable retail be developed in the study area.

No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives or in any other data source used in preparing or presenting this study. This report is based on information that was current as of 20 March 2013, and GPG has not undertaken any update of its research effort since such date.

This report may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time, but such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted.

Actual results achieved during the period covered by our prospective financial analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved.

This study **should not** be the sole basis for programming, planning, designing, financing, or development of any commercial center. This study is for the use of the Village of Southampton for general planning purposes only, and is void for other site locations or developers.

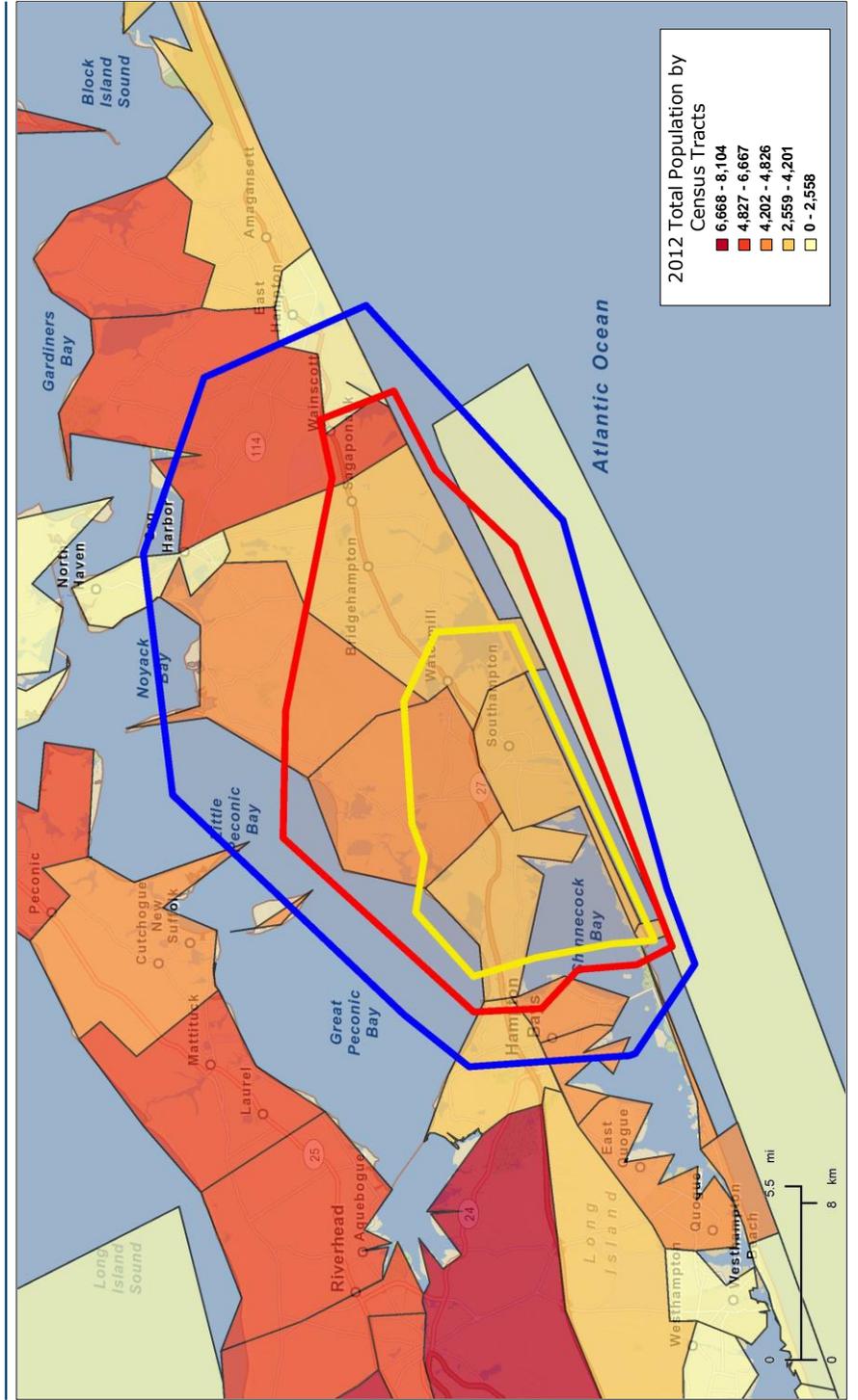
-- END of ANALYSIS --

APPENDIX EXHIBIT A: POPULATION MAP

Gibbs Planning Group, Inc.

Southampton Trade Areas Population Map

2012 Total Population by Census Tracts

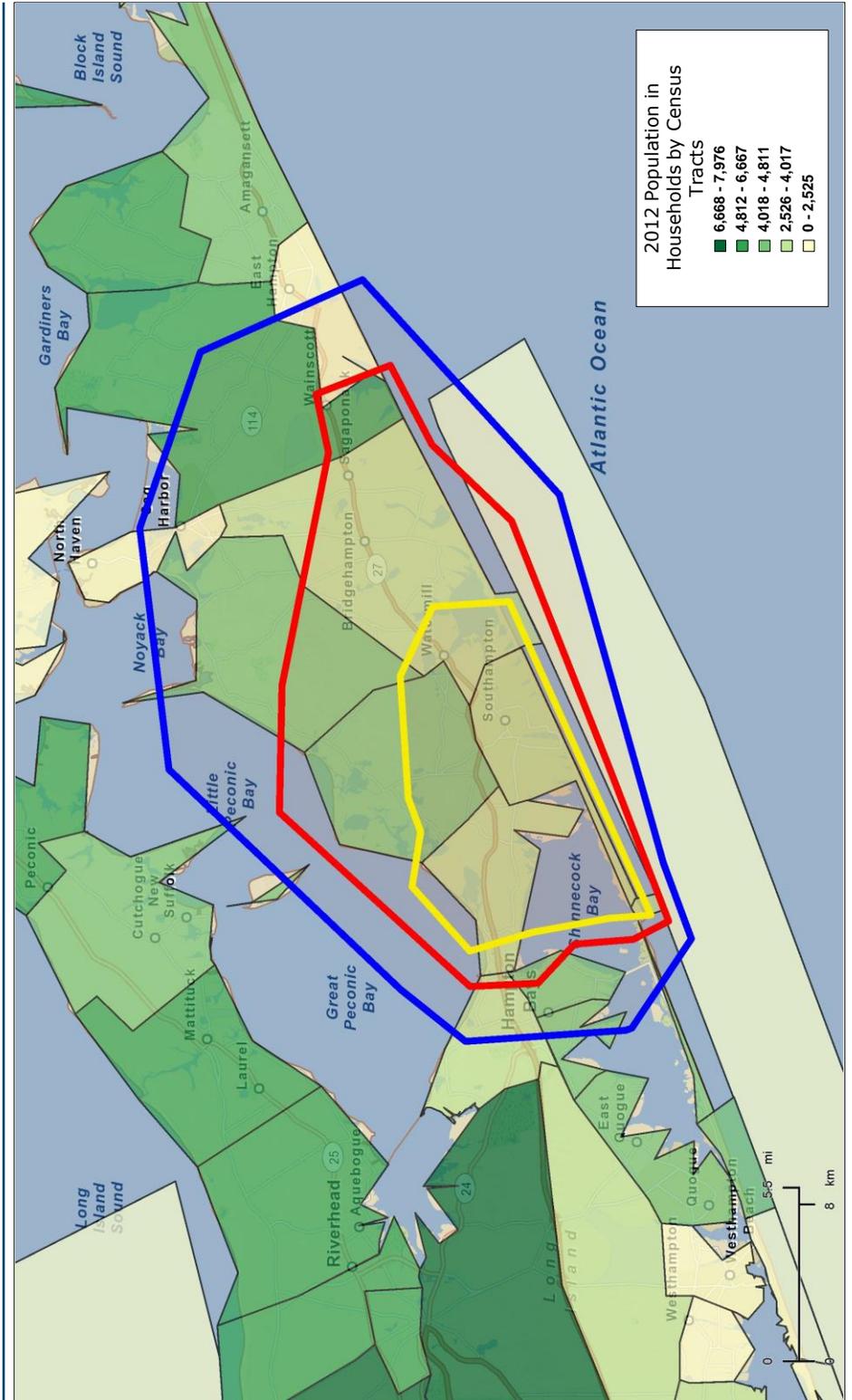


APPENDIX EXHIBIT B: HOUSEHOLDS MAP

Gibbs Planning Group, Inc.

Southampton Trade Areas Household Population Map

2012 Household Population by Census Tracts

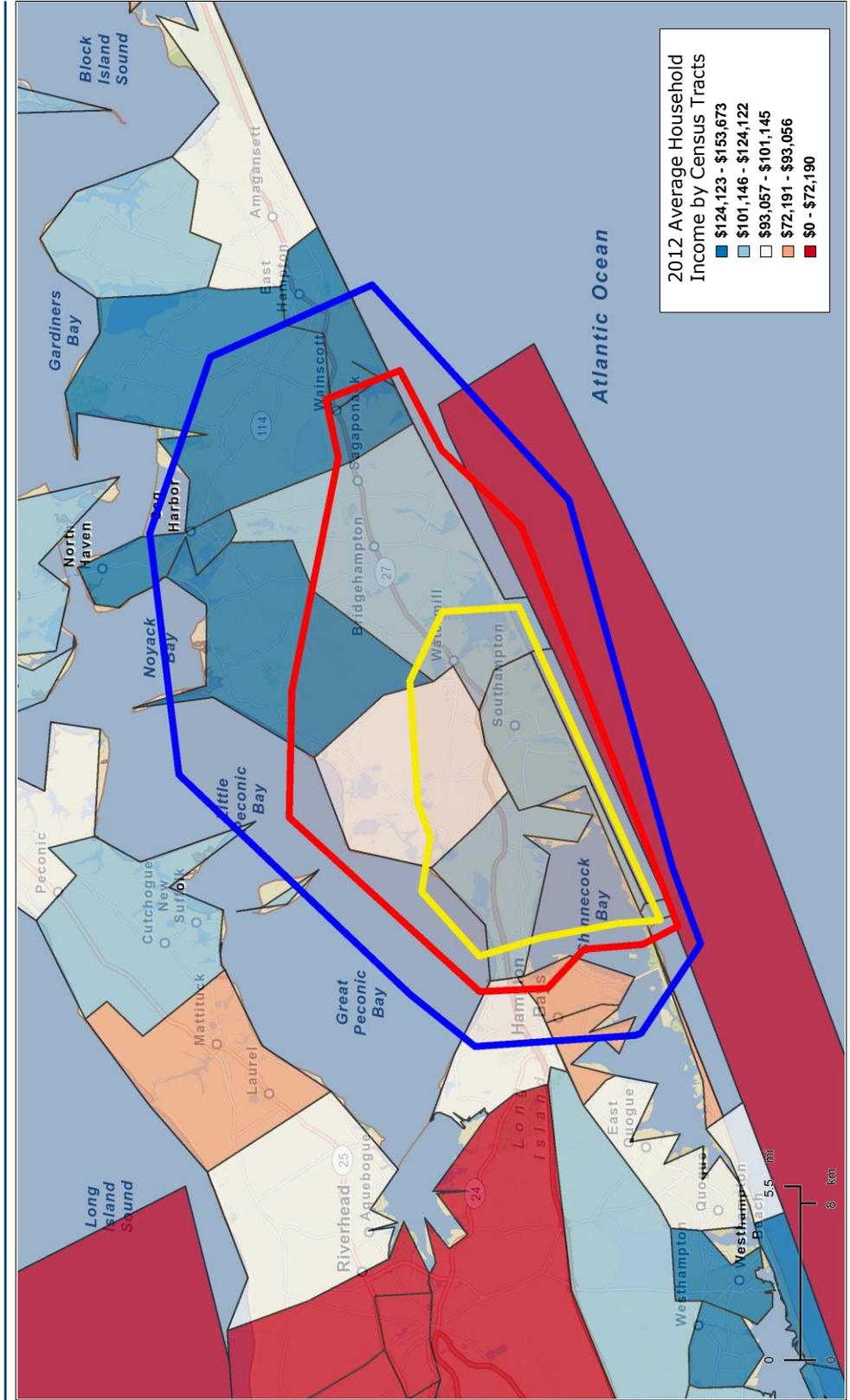


APPENDIX EXHIBIT C: INCOME MAP

Gibbs Planning Group, Inc.

Southampton Trade Areas Average Income Map

2012 Average Household Income by Census Tracts



Southampton Primary Trade Area
Area: 82.75 Square Miles

Summary	Census 2010		2012		2017	
Population	16,531		16,627		16,868	
Households	6,462		6,478		6,578	
Families	4,048		4,031		4,064	
Average Household Size	2.48		2.49		2.49	
Owner Occupied Housing Units	4,669		4,600		4,762	
Renter Occupied Housing Units	1,793		1,878		1,815	
Median Age	44.2		44.7		45.6	
Trends: 2012 - 2017 Annual Rate	Area		State		National	
Population	0.29%		0.35%		0.68%	
Households	0.31%		0.44%		0.74%	
Families	0.16%		0.30%		0.72%	
Owner HHs	0.69%		0.80%		0.91%	
Median Household Income	2.39%		3.18%		2.55%	
Households by Income	2012				2017	
	Number		Percent		Number	Percent
<\$15,000	434		6.7%		371	5.6%
\$15,000 - \$24,999	339		5.2%		236	3.6%
\$25,000 - \$34,999	473		7.3%		326	5.0%
\$35,000 - \$49,999	659		10.2%		557	8.5%
\$50,000 - \$74,999	959		14.8%		935	14.2%
\$75,000 - \$99,999	742		11.5%		960	14.6%
\$100,000 - \$149,999	1,243		19.2%		1,338	20.3%
\$150,000 - \$199,999	598		9.2%		730	11.1%
\$200,000+	1,031		15.9%		1,124	17.1%
Median Household Income	\$86,024				\$96,794	
Average Household Income	\$116,027				\$137,392	
Per Capita Income	\$45,976				\$54,352	
Population by Age	Census 2010		2012		2017	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	847	5.1%	849	5.1%	857	5.1%
5 - 9	907	5.5%	907	5.5%	912	5.4%
10 - 14	895	5.4%	884	5.3%	893	5.3%
15 - 19	1,014	6.1%	972	5.8%	936	5.5%
20 - 24	887	5.4%	896	5.4%	834	4.9%
25 - 34	1,887	11.4%	1,922	11.6%	1,946	11.5%
35 - 44	2,006	12.1%	1,959	11.8%	1,913	11.3%
45 - 54	2,597	15.7%	2,521	15.2%	2,342	13.9%
55 - 64	2,399	14.5%	2,495	15.0%	2,613	15.5%
65 - 74	1,566	9.5%	1,672	10.1%	2,002	11.9%
75 - 84	1,029	6.2%	1,025	6.2%	1,069	6.3%
85+	497	3.0%	524	3.2%	550	3.3%
Race and Ethnicity	Census 2010		2012		2017	
	Number	Percent	Number	Percent	Number	Percent
White Alone	13,738	83.1%	13,704	82.4%	13,545	80.3%
Black Alone	816	4.9%	844	5.1%	941	5.6%
American Indian Alone	603	3.6%	612	3.7%	636	3.8%
Asian Alone	217	1.3%	225	1.4%	250	1.5%
Pacific Islander Alone	24	0.1%	24	0.1%	29	0.2%
Some Other Race Alone	765	4.6%	832	5.0%	1,031	6.1%
Two or More Races	368	2.2%	386	2.3%	436	2.6%
Hispanic Origin (Any Race)	3,156	19.1%	3,391	20.4%	4,104	24.3%

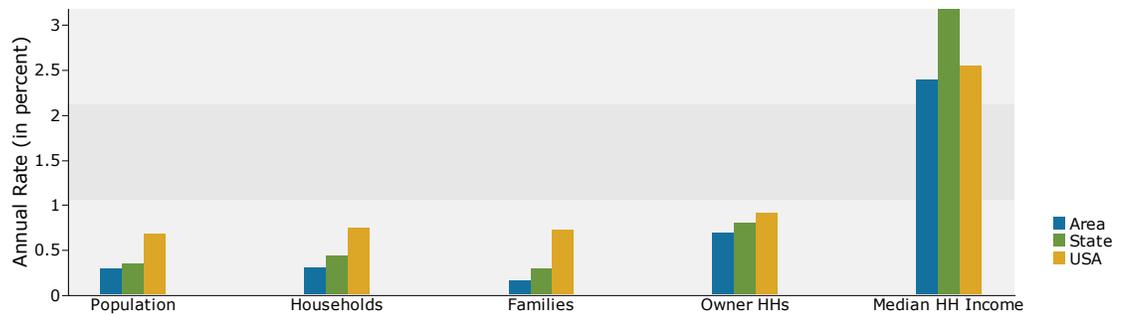
Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri for recasts for 2012 and 2017.

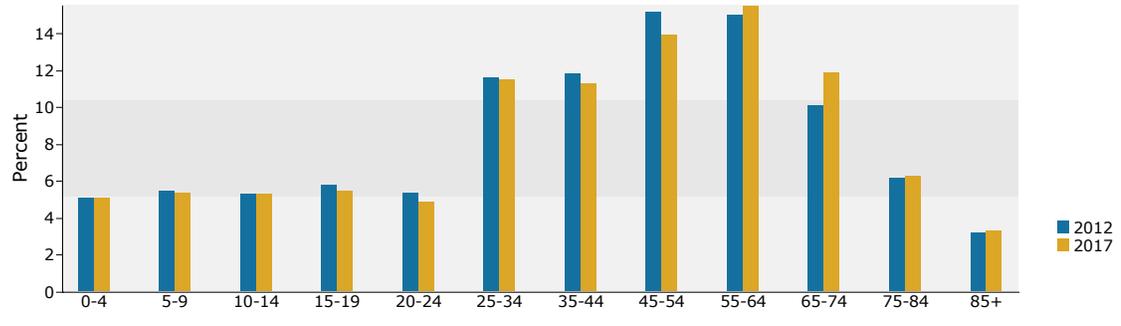
Gibbs Planning Group, Inc. Exhibit D: Demographic and Income Profile

Southampton Primary Trade Area
 Area: 82.75 Square Miles

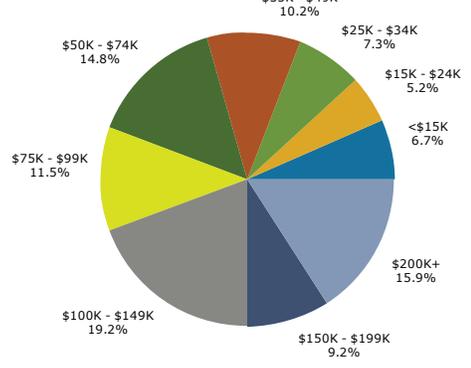
Trends 2012-2017



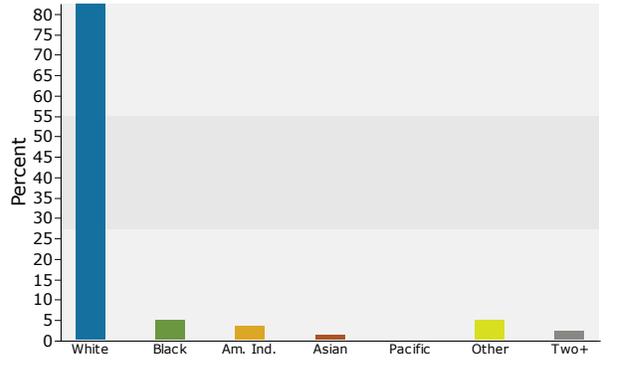
Population by Age



2012 Household Income



2012 Population by Race



2012 Percent Hispanic Origin: 20.4%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2012 and 2017.

Southampton Primary Trade Area
Area: 82.75 Square Miles

Data for all businesses in area

Total Businesses:	2,199
Total Employees:	17,799
Total Residential Population:	16,500
Employee/Residential Population Ratio:	108

by SIC Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture & Mining	119	5.4%	722	4.1%
Construction	265	12.1%	1,831	10.3%
Manufacturing	50	2.3%	429	2.4%
Transportation	64	2.9%	451	2.5%
Communication	14	0.6%	258	1.5%
Utility	5	0.2%	59	0.3%
Wholesale Trade	93	4.2%	942	5.3%
Retail Trade Summary	556	25.3%	4,695	26.4%
Home Improvement	46	2.1%	354	2.0%
General Merchandise Stores	6	0.3%	379	2.1%
Food Stores	40	1.8%	401	2.3%
Auto Dealers, Gas Stations, Auto Aftermarket	47	2.1%	733	4.1%
Apparel & Accessory Stores	74	3.4%	371	2.1%
Furniture & Home Furnishings	62	2.8%	348	2.0%
Eating & Drinking Places	109	5.0%	1,364	7.7%
Miscellaneous Retail	172	7.8%	745	4.2%
Finance, Insurance, Real Estate Summary	176	8.0%	1,193	6.7%
Banks, Savings & Lending Institutions	29	1.3%	209	1.2%
Securities Brokers	20	0.9%	96	0.5%
Insurance Carriers & Agents	20	0.9%	135	0.8%
Real Estate, Holding, Other Investment Offices	108	4.9%	754	4.2%
Services Summary	702	31.9%	6,079	34.2%
Hotels & Lodging	28	1.3%	445	2.5%
Automotive Services	48	2.2%	181	1.0%
Motion Pictures & Amusements	59	2.7%	434	2.4%
Health Services	74	3.4%	1,128	6.3%
Legal Services	34	1.6%	128	0.7%
Education Institutions & Libraries	38	1.7%	1,501	8.4%
Other Services	421	19.1%	2,262	12.7%
Government	57	2.6%	821	4.6%
Other	98	4.4%	319	1.8%
Totals	2,199	100%	17,799	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011.

Southampton Primary Trade Area
Area: 82.75 Square Miles

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	14	0.6%	49	0.3%
Mining	1	0.0%	4	0.0%
Utilities	1	0.0%	2	0.0%
Construction	299	13.6%	1,979	11.1%
Manufacturing	53	2.4%	352	2.0%
Wholesale Trade	93	4.2%	924	5.2%
Retail Trade	429	19.5%	3,237	18.2%
Motor Vehicle & Parts Dealers	32	14%	627	3.5%
Furniture & Home Furnishings Stores	36	16%	178	1.0%
Electronics & Appliance Stores	25	12%	178	1.0%
Bldg Material & Garden Equipment & Supplies Dealers	46	2.1%	354	2.0%
Food & Beverage Stores	36	17%	369	2.1%
Health & Personal Care Stores	15	0.7%	112	0.6%
Gasoline Stations	15	0.7%	106	0.6%
Clothing & Clothing Accessories Stores	83	3.8%	410	2.3%
Sport Goods, Hobby, Book, & Music Stores	26	12%	81	0.5%
General Merchandise Stores	6	0.3%	379	2.1%
Miscellaneous Store Retailers	107	4.9%	435	2.4%
Nonstore Retailers	2	0.1%	8	0.0%
Transportation & Warehousing	47	2.1%	358	2.0%
Information	33	1.5%	508	2.9%
Finance & Insurance	68	3.1%	439	2.5%
Central Bank/Credit Intermediation & Related Activities	29	13%	209	1.2%
Securities, Commodity Contracts & Other Financial	20	0.9%	96	0.5%
Insurance Carriers & Related Activities; Funds, Trusts & Other	20	0.9%	135	0.8%
Real Estate, Rental & Leasing	115	5.2%	714	4.0%
Professional, Scientific & Tech Services	190	8.6%	718	4.0%
Legal Services	38	1.7%	142	0.8%
Management of Companies & Enterprises	4	0.2%	68	0.4%
Administrative & Support & Waste Management & Remediation	162	7.4%	887	5.0%
Educational Services	42	1.9%	1,471	8.3%
Health Care & Social Assistance	95	4.3%	1,437	8.1%
Arts, Entertainment & Recreation	65	3.0%	495	2.8%
Accommodation & Food Services	141	6.4%	1,826	10.3%
Accommodation	28	1.3%	445	2.5%
Food Services & Drinking Places	113	5.1%	1,381	7.8%
Other Services (except Public Administration)	193	8.8%	1,171	6.6%
Automotive Repair & Maintenance	33	1.5%	134	0.8%
Public Administration	57	2.6%	821	4.6%
Unclassified Establishments	99	4.5%	339	1.9%
Total	2,199	100%	17,799	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011.

59 W Main St, Southampton, NY, 11968
 Drive Time: 5, 10, 15 minutes

Latitude: 40.88521
 Longitude: -72.39104

Data for all businesses in area	0 - 5 minutes		0 - 10 minutes		0 - 15 minutes	
Total Businesses:	629		1324		1722	
Total Employees:	5,406		10,973		14,300	
Total Residential Population:	2,435		8,552		14,577	
Employee/Residential Population Ratio:	2.22		1.28		0.98	

by SIC Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture & Mining	21	3.3%	90	1.7%	64	4.8%	358	3.3%	91	5.3%	495	3.5%
Construction	65	10.3%	431	8.0%	140	10.6%	957	8.7%	199	11.6%	1,383	9.7%
Manufacturing	13	2.1%	109	2.0%	30	2.3%	248	2.3%	38	2.2%	313	2.2%
Transportation	15	2.3%	136	2.5%	38	2.8%	328	3.0%	49	2.8%	389	2.7%
Communication	2	0.3%	113	2.1%	7	0.5%	166	1.7%	11	0.6%	232	1.6%
Utility	2	0.2%	5	0.1%	3	0.2%	39	0.4%	4	0.2%	57	0.4%
Wholesale Trade	24	3.7%	199	3.7%	57	4.3%	529	4.8%	75	4.3%	727	5.1%
Retail Trade Summary	163	25.9%	1,328	24.6%	344	26.0%	2,809	25.6%	444	25.8%	3,743	26.2%
Home Improvement	10	1.6%	72	1.3%	29	2.2%	246	2.2%	39	2.3%	323	2.3%
General Merchandise Stores	3	0.4%	143	2.6%	4	0.3%	206	1.9%	5	0.3%	287	2.0%
Food Stores	12	2.0%	235	4.3%	26	2.0%	331	3.0%	33	1.9%	363	2.5%
Auto Dealers, Gas Stations, Auto Aftermarket	10	1.7%	160	3.0%	27	2.0%	457	4.2%	40	2.3%	637	4.5%
Apparel & Accessory Stores	32	5.1%	125	2.3%	50	3.8%	182	1.8%	59	3.4%	268	1.9%
Furniture & Home Furnishings	14	2.2%	61	1.1%	40	3.0%	227	2.1%	49	2.8%	274	1.9%
Eating & Drinking Places	28	4.5%	329	6.1%	61	4.6%	747	6.8%	87	5.0%	1,077	7.5%
Miscellaneous Retail	53	8.4%	203	3.8%	107	8.1%	402	3.7%	133	7.7%	514	3.6%
Finance, Insurance, Real Estate Summary	58	9.3%	448	8.3%	108	8.2%	722	6.6%	138	8.0%	903	6.3%
Banks, Savings & Lending Institutions	10	1.7%	98	1.8%	21	1.6%	142	1.3%	25	1.5%	175	1.2%
Securities Brokers	8	1.3%	53	1.0%	15	1.1%	82	0.8%	17	1.0%	88	0.6%
Insurance Carriers & Agents	7	1.1%	68	1.3%	10	0.8%	101	0.9%	14	0.8%	113	0.8%
Real Estate, Holding, Other Investment Offices	33	5.2%	229	4.2%	62	4.7%	397	3.6%	82	4.8%	527	3.7%
Services Summary	224	35.7%	2,170	40.1%	443	33.4%	4,057	37.0%	556	32.3%	5,122	35.8%
Hotels & Lodging	6	1.0%	70	1.3%	15	1.1%	273	2.5%	23	1.3%	418	2.9%
Automotive Services	9	1.4%	39	0.7%	34	2.5%	139	1.3%	43	2.5%	167	1.2%
Motion Pictures & Amusements	11	1.8%	33	0.6%	29	2.2%	151	1.4%	39	2.3%	268	1.9%
Health Services	43	6.9%	731	13.5%	67	5.1%	1,059	9.7%	71	4.1%	1,076	7.5%
Legal Services	16	2.6%	61	1.1%	24	1.8%	88	0.8%	27	1.5%	99	0.7%
Education Institutions & Libraries	12	1.8%	491	9.1%	20	1.5%	851	7.8%	27	1.6%	1,240	8.7%
Other Services	127	20.2%	745	13.8%	254	19.2%	1,495	13.6%	327	19.0%	1,855	13.0%
Government	24	3.7%	298	5.5%	39	3.0%	565	5.1%	46	2.7%	697	4.9%
Other	20	3.1%	77	1.4%	51	3.8%	176	1.6%	71	4.1%	238	1.7%
Totals	629	100%	5,406	100%	1,324	100%	10,973	100%	1,722	100%	14,300	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011.

59 W Main St, Southampton, NY, 11968
 Drive Time: 5, 10, 15 minutes

Latitude: 40.88521
 Longitude: -72.39104

by NAICS Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	1	0.0%	2	0.0%	3	0.2%	10	0.1%	8	0.5%	28	0.2%
Mining	1	0.1%	3	0.1%	1	0.1%	4	0.0%	1	0.1%	4	0.0%
Utilities	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.0%
Construction	74	11.8%	488	9.0%	164	12.4%	1060	9.7%	228	13.3%	1505	10.5%
Manufacturing	5	2.4%	98	1.8%	31	2.4%	218	2.0%	39	2.3%	260	1.8%
Wholesale Trade	23	3.7%	193	3.6%	57	4.3%	511	4.7%	75	4.3%	709	5.0%
Retail Trade	128	20.4%	956	17.7%	272	20.5%	1995	18.2%	343	19.9%	2,592	18.1%
Motor Vehicle & Parts Dealers	8	12%	50	2.8%	18	1.3%	418	3.8%	27	1.6%	564	3.9%
Furniture & Home Furnishings Stores	8	12%	25	0.5%	24	1.8%	120	1.1%	29	1.7%	143	1.0%
Electronics & Appliance Stores	6	10%	37	0.7%	15	1.1%	109	1.0%	19	1.1%	135	0.9%
Bldg Material & Garden Equipment & Supplies Dealers	10	16%	72	1.3%	29	2.2%	246	2.2%	39	2.3%	323	2.3%
Food & Beverage Stores	11	18%	208	3.9%	24	1.8%	293	2.7%	30	1.8%	326	2.3%
Health & Personal Care Stores	6	0.9%	39	0.7%	10	0.7%	54	0.5%	12	0.7%	73	0.5%
Gasoline Stations	3	0.4%	10	0.2%	10	0.7%	38	0.4%	13	0.7%	73	0.5%
Clothing & Clothing Accessories Stores	37	5.9%	148	2.7%	58	4.4%	229	2.1%	68	3.9%	306	2.1%
Sport Goods, Hobby, Book, & Music Stores	8	13%	22	0.4%	17	1.3%	46	0.4%	22	1.3%	61	0.4%
General Merchandise Stores	3	0.4%	143	2.6%	4	0.3%	206	1.9%	5	0.3%	287	2.0%
Miscellaneous Store Retailers	29	4.6%	97	1.8%	63	4.7%	230	2.1%	80	4.6%	295	2.1%
Nonstore Retailers	1	0.1%	5	0.1%	1	0.1%	6	0.1%	1	0.1%	6	0.0%
Transportation & Warehousing	10	16%	103	1.9%	29	2.2%	272	2.5%	35	2.0%	306	2.1%
Information	8	13%	221	4.1%	19	1.5%	347	3.2%	26	1.5%	425	3.0%
Finance & Insurance	25	4.0%	219	4.1%	46	3.5%	325	3.0%	56	3.3%	376	2.6%
Central Bank/Credit Intermediation & Related Activities	10	17%	98	1.8%	21	1.6%	142	1.3%	25	1.5%	175	1.2%
Securities, Commodity Contracts & Other Financial	8	13%	53	1.0%	15	1.1%	82	0.8%	17	1.0%	88	0.6%
Insurance Carriers & Related Activities; Funds, Trusts & Other	7	11%	68	1.3%	10	0.8%	101	0.9%	14	0.8%	113	0.8%
Real Estate, Rental & Leasing	35	5.6%	229	4.2%	65	4.9%	397	3.6%	86	5.0%	507	3.5%
Professional, Scientific & Tech Services	68	10.8%	266	4.9%	114	8.6%	438	4.0%	140	8.1%	528	3.7%
Legal Services	18	2.8%	66	1.2%	27	2.0%	98	0.9%	30	1.7%	110	0.8%
Management of Companies & Enterprises	1	0.1%	4	0.1%	2	0.1%	12	0.1%	3	0.1%	36	0.2%
Administrative & Support & Waste Management & Remediation	32	5.0%	120	2.2%	95	7.2%	491	4.5%	132	7.6%	672	4.7%
Educational Services	11	18%	446	8.2%	21	1.6%	805	7.3%	30	1.8%	1206	8.4%
Health Care & Social Assistance	51	8.2%	857	15.9%	84	6.3%	1317	12.0%	90	5.2%	1384	9.7%
Arts, Entertainment & Recreation	13	2.0%	60	1.1%	33	2.5%	194	1.8%	46	2.6%	325	2.3%
Accommodation & Food Services	36	5.7%	401	7.4%	78	5.9%	1029	9.4%	113	6.5%	1504	10.5%
Accommodation	6	10%	70	1.3%	15	1.1%	273	2.5%	23	1.3%	418	2.9%
Food Services & Drinking Places	29	4.7%	331	6.1%	64	4.8%	756	6.9%	90	5.2%	1087	7.6%
Other Services (except Public Administration)	53	8.5%	358	6.6%	118	8.9%	786	7.2%	153	8.9%	977	6.8%
Automotive Repair & Maintenance	4	0.7%	18	0.3%	23	1.7%	101	0.9%	30	1.7%	122	0.9%
Public Administration	24	3.7%	298	5.5%	39	3.0%	565	5.1%	46	2.7%	697	4.9%
Unclassified Establishments	20	3.2%	83	1.5%	52	3.9%	196	1.8%	72	4.2%	258	1.8%
Total	629	100%	5,406	100%	1,324	100%	10,973	100%	1,722	100%	14,300	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011

Southampton Primary Trade Area
Area: 82.75 Square Miles

Population		Households	
2010 Total Population	16,531	2012 Median Household Income	\$86,024
2012 Total Population	16,627	2017 Median Household Income	\$96,794
2017 Total Population	16,868	2012-2017 Annual Rate	2.39%
2012-2017 Annual Rate	0.29%		

Housing Units by Occupancy Status and	Census 2010		2012		2017	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	15,502	100.0%	15,256	100.0%	14,836	100.0%
Occupied	6,462	41.7%	6,478	42.5%	6,577	44.3%
Owner	4,669	30.1%	4,600	30.2%	4,762	32.1%
Renter	1,793	11.6%	1,878	12.3%	1,815	12.2%
Vacant	9,040	58.3%	8,778	57.5%	8,258	55.7%

Owner Occupied Housing Units by Value	2012		2017	
	Number	Percent	Number	Percent
Total	4,601	100.0%	4,762	100.0%
<\$50,000	69	1.5%	27	0.6%
\$50,000-\$99,999	259	5.6%	95	2.0%
\$100,000-\$149,999	213	4.6%	221	4.6%
\$150,000-\$199,999	221	4.8%	253	5.3%
\$200,000-\$249,999	200	4.3%	189	4.0%
\$250,000-\$299,999	223	4.8%	141	3.0%
\$300,000-\$399,999	672	14.6%	423	8.9%
\$400,000-\$499,999	611	13.3%	845	17.7%
\$500,000-\$749,999	1,067	23.2%	1,288	27.0%
\$750,000-\$999,999	434	9.4%	509	10.7%
\$1,000,000+	632	13.7%	771	16.2%
Median Value		\$472,647		\$536,327
Average Value		\$551,983		\$609,691

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2012 and 2017.

Southampton Primary Trade Area
Area: 82.75 Square Miles

Census 2010 Owner Occupied Housing Units by Mortgage Status			Number	Percent
Total			4,669	100.0%
Owned with a Mortgage/Loan			2,536	54.3%
Owned Free and Clear			2,133	45.7%

Census 2010 Vacant Housing Units by Status			Number	Percent
Total			9,040	100.0%
For Rent			285	3.2%
Rented- Not Occupied			45	0.5%
For Sale Only			322	3.6%
Sold - Not Occupied			78	0.9%
Seasonal/Recreational/Occasional Use			7,493	82.9%
For Migrant Workers			2	0.0%
Other Vacant			732	8.1%

Census 2010 Occupied Housing Units by Age of Householder and Home Ownership			
	Occupied	Owner Occupied Units	
		Number	% of Occupied
Total	6,461	4,668	72.2%
15- 24	136	38	27.9%
25- 34	628	165	26.3%
35- 44	971	553	57.0%
45- 54	1,406	1,034	73.5%
55- 64	1,403	1,160	82.7%
65- 74	977	867	88.7%
75- 84	649	596	91.8%
85+	291	255	87.6%

Census 2010 Occupied Housing Units by Race/Ethnicity of Householder and Home			
	Occupied	Owner Occupied Units	
		Number	% of Occupied
Total	6,462	4,669	72.3%
White Alone	5,637	4,187	74.3%
Black/African American	281	186	66.2%
American Indian/Alaska	210	184	87.6%
Asian Alone	65	28	43.1%
Pacific Islander Alone	7	0	0.0%
Other Race Alone	172	32	18.6%
Two or More Races	90	52	57.8%
Hispanic Origin	729	162	22.2%

Census 2010 Occupied Housing Units by Size and Home Ownership			
	Occupied	Owner Occupied Units	
		Number	% of Occupied
Total	6,460	4,667	72.2%
1- Person	1,898	1,313	69.2%
2- Person	2,209	1,769	80.1%
3- Person	923	659	71.4%
4- Person	788	560	71.1%
5- Person	374	245	65.5%
6- Person	119	70	58.8%
7+ Person	149	51	34.2%

Data Note: Persons of Hispanic Origin maybe of any race.

Source: U.S. Census Bureau, Census 2010 Summary File 1

New York
Geography: State

Summary	Census 2010	2012	2017			
Population	19,378,102	19,532,811	19,877,930			
Households	7,317,755	7,361,992	7,526,062			
Families	4,649,791	4,652,566	4,723,450			
Average Household Size	2.57	2.57	2.56			
Owner Occupied Housing Units	3,897,837	3,847,261	4,004,082			
Renter Occupied Housing Units	3,419,918	3,514,731	3,521,980			
Median Age	37.9	38.1	38.6			
Trends: 2012 - 2017 Annual Rate	Area	State	National			
Population	0.35%	0.35%	0.68%			
Households	0.44%	0.44%	0.74%			
Families	0.30%	0.30%	0.72%			
Owner HHs	0.80%	0.80%	0.91%			
Median Household Income	3.18%	3.18%	2.55%			
Households by Income	2012		2017			
	Number	Percent	Number	Percent		
<\$15,000	1,014,375	13.8%	986,641	13.1%		
\$15,000 - \$24,999	748,567	10.2%	578,951	7.7%		
\$25,000 - \$34,999	704,093	9.6%	555,618	7.4%		
\$35,000 - \$49,999	942,561	12.8%	847,254	11.3%		
\$50,000 - \$74,999	1,279,431	17.4%	1,303,797	17.3%		
\$75,000 - \$99,999	826,199	11.2%	1,125,934	15.0%		
\$100,000 - \$149,999	984,699	13.4%	1,125,524	15.0%		
\$150,000 - \$199,999	406,022	5.5%	504,185	6.7%		
\$200,000+	455,906	6.2%	498,019	6.6%		
Median Household Income	\$53,826		\$62,961			
Average Household Income	\$77,281		\$88,855			
Per Capita Income	\$29,922		\$34,449			
Population by Age	Census 2010		2012		2017	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	1,155,822	6.0%	1,159,985	5.9%	1,180,189	5.9%
5 - 9	1,163,955	6.0%	1,164,448	6.0%	1,179,250	5.9%
10 - 14	1,211,456	6.3%	1,199,515	6.1%	1,228,752	6.2%
15 - 19	1,366,278	7.1%	1,314,891	6.7%	1,277,589	6.4%
20 - 24	1,410,935	7.3%	1,443,316	7.4%	1,360,298	6.8%
25 - 34	2,659,337	13.7%	2,721,172	13.9%	2,790,574	14.0%
35 - 44	2,610,017	13.5%	2,559,210	13.1%	2,539,866	12.8%
45 - 54	2,878,691	14.9%	2,811,619	14.4%	2,641,879	13.3%
55 - 64	2,303,668	11.9%	2,420,662	12.4%	2,562,338	12.9%
65 - 74	1,360,602	7.0%	1,459,846	7.5%	1,767,807	8.9%
75 - 84	866,467	4.5%	866,764	4.4%	913,994	4.6%
85+	390,874	2.0%	411,383	2.1%	435,394	2.2%
Race and Ethnicity	Census 2010		2012		2017	
	Number	Percent	Number	Percent	Number	Percent
White Alone	12,740,974	65.7%	12,748,474	65.3%	12,710,686	63.9%
Black Alone	3,073,800	15.9%	3,089,483	15.8%	3,136,818	15.8%
American Indian Alone	106,906	0.6%	108,193	0.6%	115,931	0.6%
Asian Alone	1,420,244	7.3%	1,476,226	7.6%	1,635,885	8.2%
Pacific Islander Alone	8,766	0.0%	9,316	0.0%	11,534	0.1%
Some Other Race Alone	1,441,563	7.4%	1,485,164	7.6%	1,587,537	8.0%
Two or More Races	585,849	3.0%	615,955	3.2%	679,539	3.4%
Hispanic Origin (Any Race)	3,416,922	17.6%	3,533,461	18.1%	3,844,292	19.3%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forcasts for 2012 and 2017.

Gibbs Planning Group, Inc. Exhibit I: NY Business Summary

New York
Geography: State

Data for all businesses in area	New York (36)
Total Businesses:	752,375
Total Employees:	9,342,658
Total Residential Population:	19,425,339
Employee/Residential Population Ratio:	0.48

by SIC Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture & Mining	12,454	1.7%	70,868	0.8%
Construction	50,193	6.7%	329,878	3.5%
Manufacturing	25,645	3.4%	659,257	7.1%
Transportation	22,209	3.0%	288,426	3.1%
Communication	6,464	0.9%	99,097	1.1%
Utility	2,151	0.3%	33,844	0.4%
Wholesale Trade	37,404	5.0%	386,041	4.1%
Retail Trade Summary	177,225	23.6%	1,822,329	19.5%
Home Improvement	8,336	1.1%	91,388	1.0%
General Merchandise Stores	5,039	0.7%	149,688	1.6%
Food Stores	21,133	2.8%	258,090	2.8%
Auto Dealers, Gas Stations, Auto Aftermarket	12,629	1.7%	135,534	1.5%
Apparel & Accessory Stores	16,347	2.2%	145,980	1.6%
Furniture & Home Furnishings	16,020	2.1%	117,372	1.3%
Eating & Drinking Places	52,053	6.9%	608,436	6.5%
Miscellaneous Retail	45,668	6.1%	315,841	3.4%
Finance, Insurance, Real Estate Summary	70,336	9.3%	828,811	8.9%
Banks, Savings & Lending Institutions	14,524	1.9%	17,1679	1.8%
Securities Brokers	10,292	1.4%	161,553	1.7%
Insurance Carriers & Agents	11,847	1.6%	184,543	2.0%
Real Estate, Holding, Other Investment Offices	33,673	4.5%	311,036	3.3%
Services Summary	298,173	39.6%	4,171,499	44.7%
Hotels & Lodging	5,573	0.7%	141,480	1.5%
Automotive Services	21,950	2.9%	91,073	1.0%
Motion Pictures & Amusements	20,130	2.7%	206,015	2.2%
Health Services	36,232	4.8%	1,009,331	10.8%
Legal Services	17,046	2.3%	184,447	2.0%
Education Institutions & Libraries	17,971	2.4%	961,949	10.3%
Other Services	179,271	23.8%	1,577,204	16.9%
Government	23,301	3.1%	553,799	5.9%
Other	26,820	3.6%	98,809	1.1%
Totals	752,375	100%	9,342,658	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011.

New York
Geography: State

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	3,889	0.5%	20,994	0.2%
Mining	439	0.1%	4,335	0.0%
Utilities	967	0.1%	21,406	0.2%
Construction	53,893	7.2%	360,268	3.9%
Manufacturing	25,834	3.4%	579,967	6.2%
Wholesale Trade	36,333	4.8%	376,349	4.0%
Retail Trade	119,250	15.9%	1,168,618	12.5%
Motor Vehicle & Parts Dealers	9,286	12%	115,196	12%
Furniture & Home Furnishings Stores	6,514	0.9%	43,847	0.5%
Electronics & Appliance Stores	8,707	12%	71,506	0.8%
Bldg Material & Garden Equipment & Supplies Dealers	8,229	1.1%	90,796	1.0%
Food & Beverage Stores	18,465	2.5%	219,603	2.4%
Health & Personal Care Stores	10,077	1.3%	106,358	1.1%
Gasoline Stations	3,345	0.4%	20,340	0.2%
Clothing & Clothing Accessories Stores	21,770	2.9%	171,911	1.8%
Sport Goods, Hobby, Book, & Music Stores	7,522	10%	60,644	0.6%
General Merchandise Stores	5,039	0.7%	149,688	1.6%
Miscellaneous Store Retailers	18,718	2.5%	100,250	1.1%
Nonstore Retailers	1,578	0.2%	18,479	0.2%
Transportation & Warehousing	17,395	2.3%	235,186	2.5%
Information	18,685	2.5%	297,691	3.2%
Finance & Insurance	37,711	5.0%	536,576	5.7%
Central Bank/Credit Intermediation & Related Activities	14,666	19%	171,291	1.8%
Securities, Commodity Contracts & Other Financial	11,042	15%	175,941	1.9%
Insurance Carriers & Related Activities; Funds, Trusts & Other	12,003	16%	189,344	2.0%
Real Estate, Rental & Leasing	36,715	4.9%	267,620	2.9%
Professional, Scientific & Tech Services	68,742	9.1%	730,383	7.8%
Legal Services	18,614	2.5%	196,471	2.1%
Management of Companies & Enterprises	807	0.1%	38,588	0.4%
Administrative & Support & Waste Management & Remediation	36,747	4.9%	279,676	3.0%
Educational Services	20,125	2.7%	949,654	10.2%
Health Care & Social Assistance	52,830	7.0%	1,302,666	13.9%
Arts, Entertainment & Recreation	14,802	2.0%	193,806	2.1%
Accommodation & Food Services	59,877	8.0%	772,567	8.3%
Accommodation	5,573	0.7%	141,480	1.5%
Food Services & Drinking Places	54,304	7.2%	631,087	6.8%
Other Services (except Public Administration)	96,714	12.9%	544,212	5.8%
Automotive Repair & Maintenance	15,617	2.1%	59,605	0.6%
Public Administration	23,474	3.1%	559,392	6.0%
Unclassified Establishments	27,146	3.6%	102,704	1.1%
Total	752,375	100%	9,342,658	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011.

United States of America

Summary	Census 2010	2012	2017			
Population	308,745,538	313,129,017	323,986,227			
Households	116,716,292	118,208,713	122,665,498			
Families	77,538,296	77,957,858	80,816,843			
Average Household Size	2.58	2.58	2.58			
Owner Occupied Housing Units	75,986,074	75,420,523	78,931,371			
Renter Occupied Housing Units	40,730,218	42,788,190	43,734,127			
Median Age	37.1	37.3	37.8			
Trends: 2012 - 2017 Annual Rate	Area	State	National			
Population	0.68%		0.68%			
Households	0.74%		0.74%			
Families	0.72%		0.72%			
Owner HHs	0.91%		0.91%			
Median Household Income	2.55%		2.55%			
Households by Income	2012		2017			
	Number	Percent	Number	Percent		
<\$15,000	15,930,921	13.5%	15,673,121	12.8%		
\$15,000 - \$24,999	13,235,854	11.2%	10,529,063	8.6%		
\$25,000 - \$34,999	12,592,251	10.7%	10,308,687	8.4%		
\$35,000 - \$49,999	17,132,127	14.5%	15,844,587	12.9%		
\$50,000 - \$74,999	21,990,567	18.6%	24,513,070	20.0%		
\$75,000 - \$99,999	13,385,393	11.3%	17,714,618	14.4%		
\$100,000 - \$149,999	14,227,290	12.0%	16,490,921	13.4%		
\$150,000 - \$199,999	5,016,492	4.2%	6,312,420	5.1%		
\$200,000+	4,696,574	4.0%	5,277,767	4.3%		
Median Household Income	\$50,157		\$56,895			
Average Household Income	\$68,162		\$77,137			
Per Capita Income	\$26,409		\$29,882			
Population by Age	Census 2010		2012		2017	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	20,201,362	6.5%	20,415,489	6.5%	21,149,937	6.5%
5 - 9	20,348,657	6.6%	20,496,335	6.5%	21,126,993	6.5%
10 - 14	20,677,194	6.7%	20,608,360	6.6%	21,475,585	6.6%
15 - 19	22,040,343	7.1%	21,328,197	6.8%	21,035,708	6.5%
20 - 24	21,585,999	7.0%	22,231,483	7.1%	21,262,583	6.6%
25 - 34	41,063,948	13.3%	42,313,013	13.5%	44,134,367	13.6%
35 - 44	41,070,606	13.3%	40,522,998	12.9%	40,946,564	12.6%
45 - 54	45,006,716	14.6%	44,232,770	14.1%	42,206,524	13.0%
55 - 64	36,482,729	11.8%	38,571,640	12.3%	41,468,623	12.8%
65 - 74	21,713,429	7.0%	23,447,390	7.5%	28,854,169	8.9%
75 - 84	13,061,122	4.2%	13,145,289	4.2%	14,086,246	4.3%
85+	5,493,433	1.8%	5,816,053	1.9%	6,238,928	1.9%
Race and Ethnicity	Census 2010		2012		2017	
	Number	Percent	Number	Percent	Number	Percent
White Alone	223,553,265	72.4%	225,289,662	71.9%	228,784,341	70.6%
Black Alone	38,929,319	12.6%	39,536,577	12.6%	41,359,936	12.8%
American Indian Alone	2,932,248	0.9%	3,010,559	1.0%	3,244,199	1.0%
Asian Alone	14,674,252	4.8%	15,239,038	4.9%	16,950,165	5.2%
Pacific Islander Alone	540,013	0.2%	552,594	0.2%	615,508	0.2%
Some Other Race Alone	19,107,368	6.2%	20,008,464	6.4%	22,299,085	6.9%
Two or More Races	9,009,073	2.9%	9,492,123	3.0%	10,732,993	3.3%
Hispanic Origin (Any Race)	50,477,594	16.3%	52,821,902	16.9%	59,613,635	18.4%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri for recasts for 2012 and 2017.

United States of America

Data for all businesses in area

Total Businesses:	12,239,616
Total Employees:	146,234,698
Total Residential Population:	310,704,322
Employee/Residential Population Ratio:	0.47

by SIC Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture & Mining	333,257	2.7%	2,308,466	1.6%
Construction	970,434	7.9%	6,853,199	4.7%
Manufacturing	431,635	3.5%	13,233,356	9.0%
Transportation	373,510	3.1%	4,431,017	3.0%
Communication	98,688	0.8%	1,397,750	1.0%
Utility	49,201	0.4%	862,689	0.6%
Wholesale Trade	585,649	4.8%	7,036,452	4.8%
Retail Trade Summary	2,577,695	21.1%	30,442,930	20.8%
Home Improvement	168,231	14%	1,972,921	1.3%
General Merchandise Stores	77,323	0.6%	3,144,175	2.2%
Food Stores	275,290	2.2%	3,920,116	2.7%
Auto Dealers, Gas Stations, Auto Aftermarket	295,975	2.4%	3,100,262	2.1%
Apparel & Accessory Stores	180,508	1.5%	1,379,682	0.9%
Furniture & Home Furnishings	244,447	2.0%	1,889,312	1.3%
Eating & Drinking Places	686,614	5.6%	10,643,986	7.3%
Miscellaneous Retail	649,307	5.3%	4,392,476	3.0%
Finance, Insurance, Real Estate Summary	1,206,304	9.9%	10,025,223	6.9%
Banks, Savings & Lending Institutions	281,020	2.3%	2,569,152	1.8%
Securities Brokers	128,794	1.1%	1,071,883	0.7%
Insurance Carriers & Agents	255,833	2.1%	2,469,066	1.7%
Real Estate, Holding, Other Investment Offices	540,657	4.4%	3,915,122	2.7%
Services Summary	4,866,159	39.8%	58,829,454	40.2%
Hotels & Lodging	112,500	0.9%	2,440,746	1.7%
Automotive Services	383,861	3.1%	1,813,175	1.2%
Motion Pictures & Amusements	325,006	2.7%	3,383,518	2.3%
Health Services	619,100	5.1%	14,697,895	10.1%
Legal Services	213,656	1.7%	1,659,617	1.1%
Education Institutions & Libraries	273,162	2.2%	12,233,107	8.4%
Other Services	2,938,874	24.0%	22,601,396	15.5%
Government	445,131	3.6%	9,600,333	6.6%
Other	301,953	2.5%	1,213,829	0.8%
Totals	12,239,616	100%	146,234,698	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011.

United States of America

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	14,285	0.9%	710,973	0.5%
Mining	22,820	0.2%	388,582	0.3%
Utilities	26,489	0.2%	574,458	0.4%
Construction	1,060,582	8.7%	7,566,291	5.2%
Manufacturing	450,669	3.7%	12,766,728	8.7%
Wholesale Trade	567,576	4.6%	6,872,474	4.7%
Retail Trade	1,815,411	14.8%	19,285,414	13.2%
Motor Vehicle & Parts Dealers	223,193	1.8%	2,608,070	1.8%
Furniture & Home Furnishings Stores	99,399	0.8%	717,658	0.5%
Electronics & Appliance Stores	127,895	1.0%	1,101,438	0.8%
Bldg Material & Garden Equipment & Supplies Dealers	164,490	1.3%	1,951,819	1.3%
Food & Beverage Stores	247,651	2.0%	3,602,137	2.5%
Health & Personal Care Stores	142,247	1.2%	1,385,987	0.9%
Gasoline Stations	72,868	0.6%	494,157	0.3%
Clothing & Clothing Accessories Stores	226,518	1.9%	1,589,931	1.1%
Sport Goods, Hobby, Book, & Music Stores	117,502	1.0%	855,885	0.6%
General Merchandise Stores	77,323	0.6%	3,144,175	2.2%
Miscellaneous Store Retailers	289,618	2.4%	1,525,823	1.0%
Nonstore Retailers	26,707	0.2%	308,334	0.2%
Transportation & Warehousing	293,000	2.4%	3,839,545	2.6%
Information	243,617	2.0%	3,418,235	2.3%
Finance & Insurance	683,655	5.6%	6,234,884	4.3%
Central Bank/Credit Intermediation & Related Activities	287,285	2.3%	2,574,898	1.8%
Securities, Commodity Contracts & Other Financial	138,015	1.1%	1,157,540	0.8%
Insurance Carriers & Related Activities; Funds, Trusts & Other	258,355	2.1%	2,502,446	1.7%
Real Estate, Rental & Leasing	654,556	5.3%	3,982,621	2.7%
Professional, Scientific & Tech Services	1,092,770	8.9%	9,132,744	6.2%
Legal Services	242,960	2.0%	1,842,056	1.3%
Management of Companies & Enterprises	10,820	0.1%	299,842	0.2%
Administrative & Support & Waste Management & Remediation	564,772	4.6%	4,413,957	3.0%
Educational Services	308,422	2.5%	12,167,913	8.3%
Health Care & Social Assistance	902,989	7.4%	18,914,078	12.9%
Arts, Entertainment & Recreation	229,785	1.9%	3,135,789	2.1%
Accommodation & Food Services	818,123	6.7%	13,245,629	9.1%
Accommodation	112,500	0.9%	2,440,746	1.7%
Food Services & Drinking Places	705,623	5.8%	10,804,883	7.4%
Other Services (except Public Administration)	1,620,177	13.2%	8,303,183	5.7%
Automotive Repair & Maintenance	297,436	2.4%	1,305,490	0.9%
Public Administration	449,611	3.7%	9,683,958	6.6%
Unclassified Establishments	309,487	2.5%	1,297,400	0.9%
Total	12,239,616	100%	146,234,698	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. Esri forecasts for 2011.

APPENDIX EXHIBIT L: ESTIMATED PEAK SEASONAL POPULATION SUFFOLK COUNTY, NEW YORK

ESTIMATED PEAK SEASONAL POPULATION SUFFOLK COUNTY, NEW YORK

Town or Community	Seasonal Homes			Seasonal Guests			Camping		Lodging		Seasonal				
	Seasonal Homes (2010)	Estimated Pers. Per Household	Pop. in Seasonal Homes	Year Round Households (2010)	Est. Guest Factor	Seasonal Guest Pop.	Campsite Units (2011)	Pop. Camping	Rooms (2011)	Est. Capacity	Year Round Population (2010)	Additional Seasonal Population	Year Round Population	Percentage Increase	Factor Increase
EASTERN SUFFOLK COUNTY:															
East Hampton Town:															
Amagansett	1,166	4.0	4,664	513	1.5	770	0	0	108	398	1,165	5,832	6,997	501%	6.0
East Hampton (village)	1,168	4.5	5,256	533	1.0	533	0	0	108	282	1,083	6,071	7,154	561%	6.6
East Hampton North	857	4.5	3,857	1,536	1.0	1,536	0	0	80	320	4,142	5,713	9,855	138%	2.4
Montauk	2,942	4.5	13,239	1,422	1.5	2,133	165	660	2,173	8,650	3,326	24,682	28,008	742%	8.4
Napeague	617	4.0	2,468	107	1.0	107	0	0	366	1,464	200	4,039	4,239	2020%	21.2
Northwest Harbor	1,909	5.0	9,545	1,313	1.0	1,313	189	756	32	128	3,317	11,742	15,059	354%	4.5
Springs	1,781	4.5	8,015	2,318	1.0	2,318	0	0	11	44	6,592	10,377	16,969	157%	2.6
Sag Harbor (village, part)	377	4.0	1,508	404	1.0	404	0	0	0	0	982	1,912	2,894	195%	2.9
Wainscott	549	4.5	2,471	264	1.0	264	0	0	38	152	650	2,887	3,537	444%	5.4
East Hampton Town Total	11,366	4.5	51,022	8,410	1.1	9,378	354	1,416	2,916	11,438	21,457	73,253	94,710	341%	4.4
Riverhead Town:															
Aquebogue	137	3.5	480	932	0.5	466	0	0	37	148	2,438	1,094	3,532	45%	1.4
Baiting Hollow	459	4.0	1,836	719	0.5	360	0	0	40	160	1,642	2,356	3,998	143%	2.4
Calverton (part)	68	4.0	272	2,550	0.0	0	0	0	303	1,212	5,358	1,484	6,842	28%	1.3
Jamesport	392	4.0	1,568	715	0.5	358	0	0	33	120	1,710	2,046	3,756	120%	2.2
Northville	203	4.0	812	531	0.0	0	0	0	4	8	1,340	820	2,160	61%	1.6
Riverhead	188	3.5	658	4,827	0.0	0	137	548	77	308	13,299	1,514	14,813	11%	1.1
Wading River	281	4.5	1,265	2,716	0.5	1,358	331	1,324	82	328	7,719	4,275	11,994	55%	1.6
Riverhead Town Total	1,728	4.0	6,890	12,990	0.2	2,541	468	1,872	576	2,284	33,506	13,587	47,093	41%	1.4
Shelter Island Town:															
Dering Harbor (village)	26	3.5	91	5	1.0	5	0	0	0	0	11	96	107	873%	9.7
Shelter Island	452	4.0	1,808	598	1.5	897	0	0	5	10	1,333	2,715	4,048	204%	3.0
Shelter Island Heights	981	4.0	3,924	525	1.0	525	0	0	211	796	1,048	5,245	6,293	500%	6.0
Shelter Island Town Total	1,459	4.0	5,823	1,128	1.3	1,427	0	0	216	806	2,392	8,056	10,448	337%	4.4
Southampton Town:															
Bridgewater	1,514	4.5	6,813	748	0.5	374	0	0	16	52	1,756	7,239	8,995	412%	5.1
East Quogue	1,073	4.0	4,292	1,832	1.0	1,832	0	0	42	158	4,757	6,282	11,039	132%	2.3
Eastport (part)	24	4.0	96	313	0.5	157	0	0	10	20	853	273	1,126	32%	1.3
Flanders	224	5.0	1,120	1,345	0.0	0	0	0	0	0	4,472	1,120	5,592	25%	1.3
Hampton Bays	2,265	5.0	11,325	5,079	1.5	7,619	170	680	399	1,596	13,603	21,220	34,823	156%	2.6
North Haven (village)	375	3.5	1,313	332	0.5	166	0	0	0	0	833	1,479	2,312	177%	2.8
North Sea	1,263	5.0	6,315	1,771	0.5	886	0	0	31	124	4,458	7,325	11,783	164%	2.6
Northampton	31	4.0	124	191	0.0	0	0	0	0	0	570	124	694	22%	1.2
Noyack	1,209	5.0	6,045	1,510	0.5	755	0	0	3	6	3,568	6,806	10,374	191%	2.9
Quogue	218	4.5	981	307	1.0	307	0	0	0	0	816	1,288	2,104	158%	2.6
Quogue (village)	1,075	4.5	4,838	424	1.5	636	0	0	70	280	967	5,754	6,721	595%	6.9
Rensselaer - Speonk	550	4.5	2,475	984	1.5	1,476	0	0	5	10	2,642	3,961	6,603	150%	2.5
Riverside	27	5.0	135	716	0.0	0	0	0	68	272	2,911	407	3,318	14%	1.1
Sagaponock (village)	482	4.5	2,169	146	1.0	146	0	0	36	144	313	2,459	2,772	786%	8.9
Sag Harbor (village, part)	446	4.0	1,784	596	1.5	894	0	0	116	464	1,187	3,142	4,329	265%	3.6
Shinnecock Hills	622	4.5	2,799	744	1.5	1,116	0	0	79	316	2,188	4,231	6,419	193%	2.9
Shinnecock Indian Res. (est.)	20	3.5	70	219	0.0	0	0	0	0	0	631	70	701	11%	1.1
Southampton (village)	1,765	4.5	7,943	1,263	1.5	1,895	0	0	196	740	3,109	10,577	13,686	340%	4.4
Tuckahoe	294	4.5	1,323	480	1.5	720	0	0	73	292	1,373	2,335	3,708	170%	2.7
Water Mill	1,261	4.5	5,675	652	1.0	652	0	0	9	18	1,559	6,345	7,904	407%	5.1
Westhampton	890	4.5	4,005	1,045	1.5	1,568	0	0	16	54	3,079	5,627	8,706	183%	2.8
Westhampton Beach (village)	1,553	5.5	8,542	691	2.0	1,382	0	0	209	836	1,721	10,760	12,481	625%	7.3
West Hampton Dunes (village)	235	5.5	1,293	24	2.0	48	25	100	0	0	55	1,441	1,496	2619%	27.2
Southampton Town Total	17,416	4.7	81,472	21,412	1.1	22,627	195	780	1,378	5,382	57,421	110,261	167,682	192%	2.9
Southold Town:															
Cutchoque	608	4.0	2,432	1,347	0.5	674	24	96	16	32	3,349	3,234	6,583	97%	2.0
East Marion	509	4.0	2,036	409	0.5	205	0	0	38	134	926	2,375	3,301	256%	3.6
Fishers Island	527	5.0	2,635	120	0.5	60	0	0	7	28	236	2,723	2,959	1154%	12.5
Greenport (village)	278	4.0	1,112	820	0.5	410	30	120	121	436	2,197	2,078	4,275	95%	1.9
Greenport West	577	4.0	2,308	960	0.5	480	148	592	196	784	2,124	4,164	6,288	196%	3.0
Laurel	253	4.0	1,012	524	1.0	524	0	0	14	56	1,394	1,592	2,986	114%	2.1
Mattituck	694	4.0	2,776	1,693	1.0	1,693	0	0	14	50	4,219	4,519	8,738	107%	2.1
New Suffolk	115	4.0	460	177	0.5	89	0	0	0	0	349	549	898	157%	2.6
Orient	377	4.0	1,508	353	0.5	177	0	0	5	10	743	1,695	2,438	228%	3.3
Pecanic	179	4.0	716	273	1.0	273	0	0	4	8	683	997	1,680	146%	2.5
Southold	1,378	4.0	5,512	2,414	1.0	2,414	0	0	97	342	5,748	8,268	14,016	144%	2.4
Southold Town Total	5,495	4.1	22,507	9,090	0.8	6,997	202	808	512	1,880	21,968	32,192	54,160	147%	2.5
EASTERN SUFFOLK TOTAL															
	37,464	4.5	167,714	53,030	0.8	42,969	1,219	4,876	5,598	21,790	136,744	237,349	374,093	174%	2.7

Source: Suffolk County Planning Department, 2010 U. S. Census
 Prepared by Suffolk County Department of Planning, Peter Lambert
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APPENDIX EXHIBIT M; ESTIMATED PEAK SEASONAL POPULATION NASSAU & SUFFOLK COUNTIES, NEW YORK

ESTIMATED PEAK SEASONAL POPULATION NASSAU AND SUFFOLK COUNTIES, NEW YORK

Town or Community	Seasonal Homes			Seasonal Guests			Camping		Lodging		Year Round Population (2010)	Total Additional Seasonal Population	Seasonal Plus Year Round Population
	Seasonal Homes (2010)	Estimated Pers. Per Household	Pop. in Seasonal Homes	Year Round Households (2010)	Est. Guest Factor	Seasonal Guest Pop.	Campsite Units (2011)	Pop. Camping	Rooms (2011)	Estimated Capacity			
WESTERN SUFFOLK COUNTY:													
Babylon Town places with significant seasonal population:													
Gilgo	79	5.0	395	53	1.5	80	0	0	0	0	131	475	606
Oak Beach-Captree	103	5.0	515	129	1.5	194	0	0	0	0	286	709	995
Total	182	5.0	910	182	1.5	273	0	0	0	0	417	1,183	1,600
Brookhaven Town places with significant seasonal population:													
Bellport (village)	196	4.0	784	921	0.0	0	0	0	6	12	2,084	796	2,880
East Moriches	178	4.0	712	1,896	0.0	0	0	0	0	0	5,249	712	5,961
Mastic Beach	213	4.0	852	4,231	0.0	0	0	0	21	84	12,930	936	13,866
Ridge	139	4.0	556	5,714	0.0	0	0	0	0	0	13,336	556	13,892
Rocky Point	239	4.0	956	4,820	0.0	0	0	0	0	0	14,014	956	14,970
Shirley	152	4.0	608	8,353	0.0	0	0	0	47	188	27,854	796	28,650
Sound Beach	127	4.0	508	2,729	0.0	0	0	0	0	0	7,612	508	8,120
Yaphank	21	4.0	84	1,872	0.0	0	104	416	0	0	5,945	500	6,445
Total	1,265	3.9	4,976	30,536	0.0	0	104	416	74	284	89,024	5,760	94,784
Islip Town places with significant seasonal population:													
Ocean Beach (village)	562	4.0	2,248	39	1.5	59	0	0	71	284	79	2,591	2,670
Saltire (village)	444	4.0	1,776	15	1.5	23	0	0	0	0	37	1,799	1,836
West Sayville	308	3.5	1,078	1,771	0.0	0	0	0	0	0	5,011	1,078	6,089
Total	1,314	3.9	5,102	1,825	0.0	81	0	0	71	284	5,127	5,467	10,594
Brookhaven/Islip Towns:													
Fire Island	3,256	5.5	17,908	131	1.5	197	296	116	274	1,084	292	19,305	19,597
South Shore Barrier Islands:													
Gilgo	79	5.0	395	53	1.5	80	0	0	0	0	131	475	606
Oak Beach-Captree	103	5.0	515	129	1.5	194	0	0	0	0	286	709	995
Fire Island (total)	4,262	5.1	21,932	185	1.5	278	296	116	345	1,368	408	23,694	24,102
South Shore Barrier Islands	4,444	5.1	22,842	367	1.5	551	296	116	345	1,368	825	24,877	25,702

Source: Suffolk County Planning Department, 2010 U. S. Census
Prepared by Suffolk County Department of Planning, Peter Lambert
6/30/11 K:\PLambert\Census and Demographics\Seasonal\Seasonal.xls

NASSAU COUNTY:

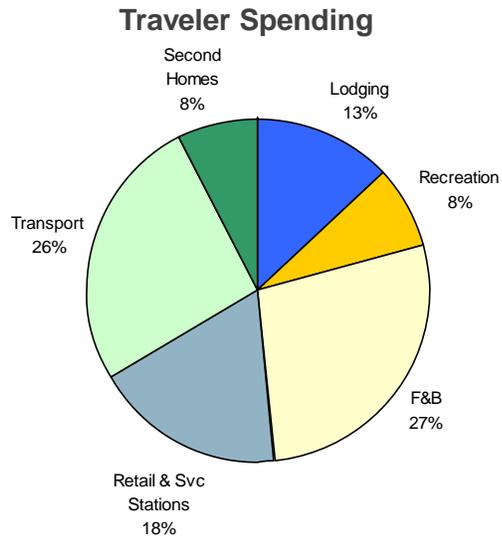
Nassau County places with significant seasonal population:

Atlantic Beach (village)	189	3.0	567	857	0.0	0	0	0	0	0	1,891	567	2,458
Lido Beach	146	3.0	438	1,192	0.0	0	82	328	0	0	2,897	766	3,663
Long Beach (city)	823	3.0	2,469	14,809	0.0	0	0	0	263	1,052	32,275	3,521	35,796
Point Lookout	140	3.0	420	500	0.0	0	0	0	0	0	1,219	420	1,639
Total	1,298	3.0	3,894	17,358	0.0	0	82	328	263	1,052	38,282	5,274	43,556

Source: Suffolk County Planning Department, 2010 U. S. Census
Prepared by Suffolk County Department of Planning, Peter Lambert
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APPENDIX EXHIBIT N: LONG ISLAND TOURISM IMPACT

- Travelers spent \$4.8 billion in Long Island in 2011.
- Spending at restaurants and on transportation services comprised 27% and 26% of the total, respectively.



2011 Traveler Spend '000s	Lodging	Recreation	F&B	Retail & Svc Stations	Transport	Second Homes	Total
Nassau	\$270,689	\$228,824	\$744,076	\$460,654	\$519,809	\$21,304	\$2,245,356
Suffolk	\$359,397	\$154,237	\$580,259	\$416,456	\$736,741	\$343,158	\$2,590,247
TOTAL	\$630,086	\$383,061	\$1,324,335	\$877,109	\$1,256,549	\$364,462	\$4,835,602

SOURCE: 2011 ECONOMIC IMPACT OF TOURISM IN NEW YORK, LONG ISLAND FOCUS by TOURISM ECONOMICS