

LONG ISLAND INDEX

2004



SETTING
GOALS, MEASURING
PROGRESS

FOR THE
LONG ISLAND
REGION

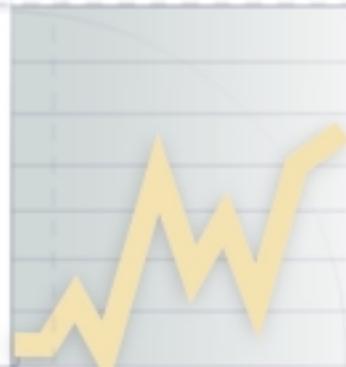
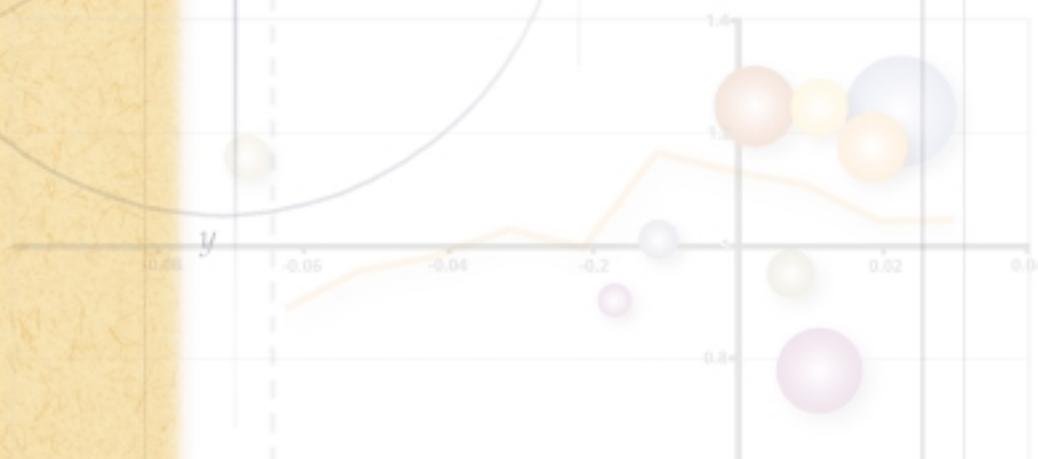
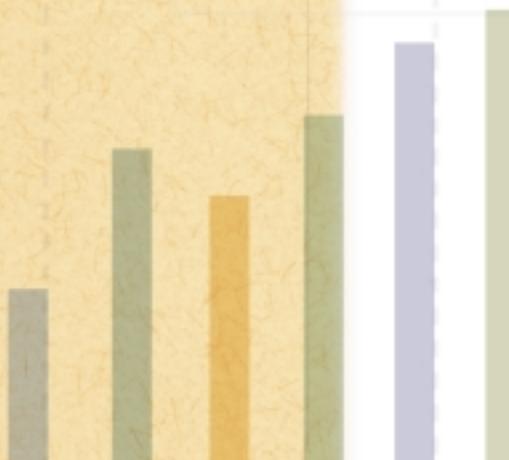
GROWING, INCLUSIVE ECONOMY

HEALTHY, EDUCATED
POPULATIONS

ENVIRONMENTAL STEWARDSHIP

GOVERNANCE

VIBRANT, LIVABLE
COMMUNITIES



LONG ISLAND INDEX

Coming Together For Long Island's Future

The *Index* is a report card on the Long Island region that aims to engage the larger Long Island community in thinking about the region's future and to be a catalyst for corrective action.

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Welcome to the *Long Island Index 2004*, our first annual indicators report on the Long Island region.

In November 2002, a small group of Long Island's civic, academic, labor and business leaders met at the Greentree Foundation's conference center in Manhasset to discuss challenges facing the Long Island region and potential catalysts for new direction. Since then, the group has expanded and meetings have been held at Hofstra University, KeySpan Energy Corporation, North Shore Long Island Jewish Health Systems, Adelphi University, Cold Spring Harbor Laboratory and Stony Brook University. The *Long Island Index 2004* is the product of 15 months of coming together by Long Island's academics, businesses, labor and non profits.

The Advisory Committee has identified twelve goals for the Long Island region that, we believe, can be supported by the Long Island community. Specific indicators have been selected to measure movement toward these goals, and the *Index* will chart how we are doing on an annual basis. It is our objective to provide useful, unbiased information that will lead to greater community awareness of Long Island issues and to concerted action.

Indicator projects such as this have worked in addressing similar challenges in many other places – Boston, Charlotte, Chicago, Jacksonville, Silicon Valley– and we believe that this process can work here as well. Our hypothesis is: **Good information presented in a neutral manner can move policy.**

Specifically, the *Long Island Index* is designed to:

- Measure where we are at this moment and measure our progress over time toward shared goals, and compare our regional condition and progress to other regions.
- Encourage regional thinking. The information is presented from a regional perspective and offers a picture of the current conditions on Long Island. The reasons why these conditions exist are not given nor are any specific prescriptions made for what can be done to address the conditions.
- Inspire action to achieve shared goals. There are already many capable organizations on Long Island working on parts of the regional agenda. It is hoped that the Index will generate debate, discussion and action through greater collaboration and new coalitions.

We hope to challenge Long Islanders' propensity for innovation and independent thinking. We also invite your frank appraisal of the information and your suggestions for new ways to measure progress in preparing future editions.

Sincerely,

The Advisory Committee

I N T R O D U C T I O N

W H A T I S L O N G I S L A N D ?

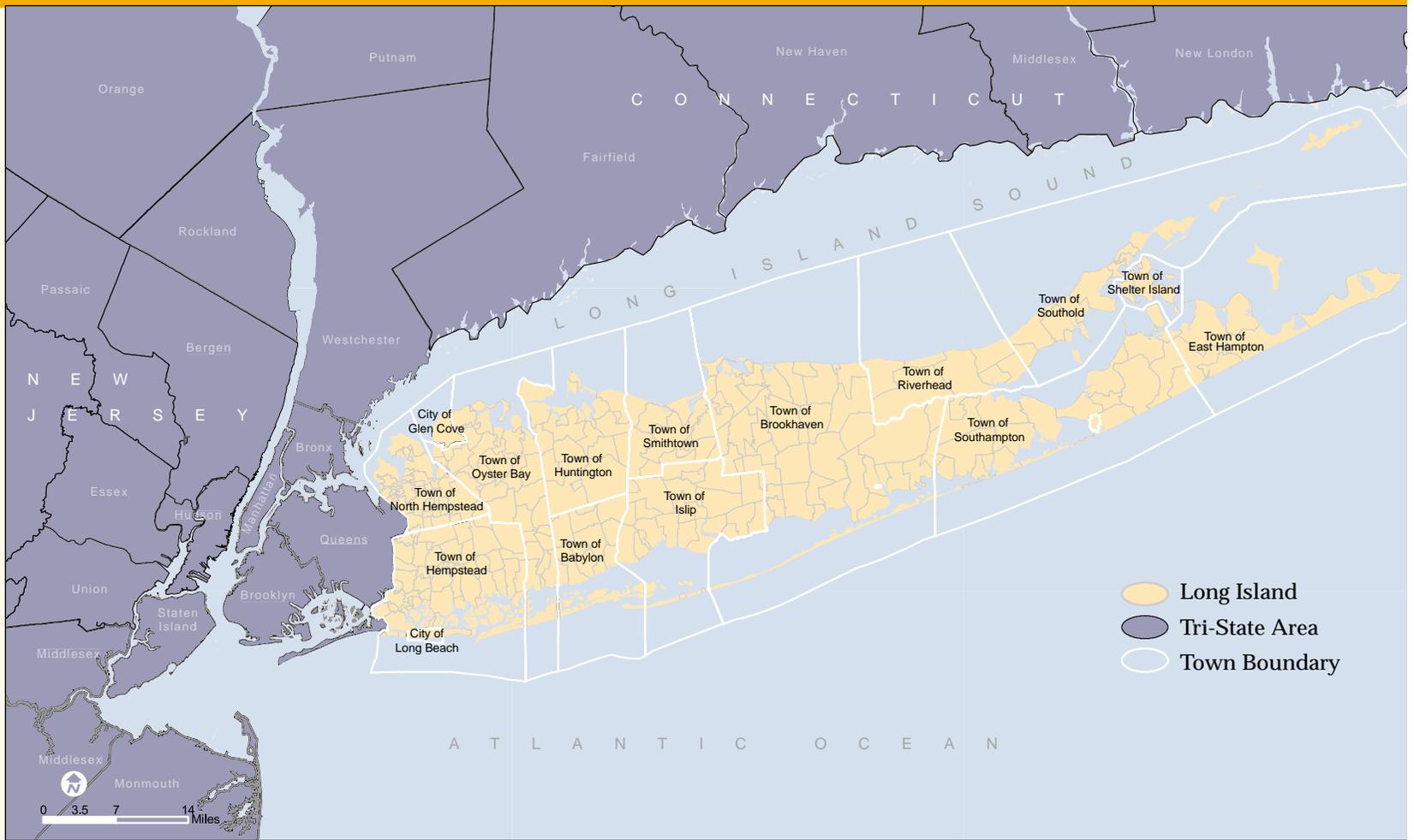
From the Hudson River to Montauk, Long Island is the largest island adjoining the continental USA, extending over 118 miles in length and 20 miles in width. It is geographically surrounded by the Long Island Sound to the North and the Atlantic Ocean to the South. Long Island's linear shoreline extends an estimated 1,600 miles. Technically, the New York City boroughs of Queens and Brooklyn are part of the Long Island mainland, but for the purposes of this report, the region is defined by the "primary metropolitan statistical area" consisting of the 1,198 total square miles in Nassau and Suffolk Counties.

Today, Long Island has a population of 2.8 million people which accounts for 20% of the population of New York State. As of 2000, Suffolk and Nassau Counties, respectively, are the 3rd and 4th most populous counties in the U.S. In fact, Long Island has a total population greater than that of 19 states and, if it were a city, it would rank as the 4th largest in the nation.

With an economy producing \$111.9 billion dollars, Long Island's gross metropolitan product (GMP) ranks among the top 20 Metropolitan areas in the U.S. If Nassau-Suffolk were a nation, together they would rank 51st in the world.

Long Island's government is divided into two counties, each with a separate legislature, and consists of townships and villages with water, fire, library and school districts, each with its own taxing authority. Nassau County has three townships: Hempstead, North Hempstead and Oyster Bay, and two cities, Long Beach and Glen Cove. The county is made up of 64 different villages, 56 school districts, and 19 legislative districts. Suffolk County has ten townships: Huntington, Babylon, Islip, Smithtown, Brookhaven, Riverhead, Southampton, Southold, East Hampton and Shelter Island. It has 31 villages, 72 school districts, and 18 legislative districts.

In part because of this jurisdictional fragmentation and the high cost of running so many separate districts, the residents of Nassau and Suffolk pay some of the highest taxes in the country and have one of the highest costs of living.



Map prepared by NYPIRG's Community Mapping Assistance Project for the Rauch Foundation, 2003. Source: U.S. Census Bureau TIGER/Line Files, 2001

What are Indicators?

Indicators use data to show changes and trends. They can be valuable tools to:

- Identify and track community conditions
- Measure progress toward shared goals
- Mobilize action to improve community outcomes.

Using objective, reliable, quantitative data, we can educate ourselves by comparing our region to other regions, track our progress over time and use this information to help us think about ways to shape our future.

How Indicators Have Been Used in Other Regions

Over 200 cities and regions across the country have carried out indicator projects and many have experienced significant progress because of their efforts. For example:

- *The Chicago Metropolis 2020 Regional Indicators Report* led more than 100 Chicago business leaders to sign a unique pledge to include access to affordable housing and mass transit as key criteria for future business sites. The report is a regional “database” for a civic engagement process that created a Metropolis Plan for regional transportation and housing.

LONG ISLANDERS: WHO ARE WE?

Population — 2.8 million
 Jobs — 1.1 million
 Unemployment Rate — 3.9%
 Number of Households — 926,795

<i>Age Distribution</i>	<i>Ethnic and Racial Breakdown</i>
(0-17) — 26%	African American — 8%
(18-24) — 7%	Asian-American — 4%
(25-34) — 13%	Hispanic or Latino — 10%
(35-49) — 25%	White (non-Hispanic) — 76%
(50-64) — 16%	Other — 2%
(65+) — 13%	

Gross Metropolitan Product — \$111.9 billion

Religion
 Catholic — 51%
 Protestant — 29%
 Other Christian — 4%
 Jewish — 5%
 Other — 1%
 None/Atheist — 4%
 Don't Know/Refused — 5%

Median Household Income, 2002 — \$84,346

Area (Land/Water) — 1,198 sq.mi.

Sources: “Long Islanders: Who Are We? A Quality of Life Survey”, April 2003. U.S. Census of Population 2000.

- *The Index of Silicon Valley* revealed a growing gap between housing supply and demand, resulting in rapidly increasing costs. To address this problem, a regional housing action committee led by business and environmental leaders formed to deal with issues of affordable housing resulting in a “smart” building permit accepted by all municipalities in the region. In addition, indicators identified serious educational disparities between Hispanics, African Americans, Whites and Asians, while finding that many students were unprepared for positions that employers needed to fill throughout the region. In response, local businesses raised a \$24 million venture fund for teacher training and curriculum development as part of a 21st Century Education Plan. As a result, higher test scores and a stronger partnership between the business and education sectors have been achieved.
- *The Boston Foundation’s Indicators* project results led to building a relationship with the Alliance for Regional Stewardship. The Alliance works to bring people together from different sectors to work for social, economic and environmental progress while maintaining a sense of place in Metropolitan areas. As a result, Boston regional stewards have developed a plan to build a more creative and innovative community to counter regional challenges such as “brain drain.”

Creating the Long Island Index

Long Island faces challenges similar to those of these regions. Building on the experience of these other places, the *Long Island Index 2004* was created.

An Advisory Committee developed a framework of desired goals for the region. Working together with a Technical Committee composed of regional experts on Long Island’s demographics, economy, education and transportation systems, the Advisory Committee members recommended indicators to measure Long Island’s progress towards its goals. Together, the 30 indicators in this document track progress towards the individual goals and reflect the overall progress of the region as a whole.

Appendix A provides detail on data sources for each indicator.

INDEX

SUMMARY

The Long Island Index measures annual progress toward the goals of a *growing, inclusive economy that creates a range of job opportunities for an educated population that enjoys a high quality of life*. A high quality of life is based on creative, livable communities with affordable housing and vibrant job centers close to transportation.

Today, Long Island has a number of important regional assets including its universities and K-12 education, an increasingly diversified economy with growing health, information and business services, its natural beauty with open spaces and a nationally recognized health care system.

However, Long Island also faces a number of challenges as a result of its historical fragmentation of governance, independent communities and a growing disparity by income, race and ethnicity that is clear in current housing, education and health indicators.

Long Island has a choice. Its current reality is a region with widening disparities. Or its future could be a region of vital communities

working together to create a vibrant economy with high paying jobs, good education and affordable housing for all.

In our future, our children can go to school here and choose to live here because the region offers a wide range of choices of creative places to live and good job opportunities.

The key to Long Island’s future is growing and retaining talent. Currently, the region is exporting its most valuable product—its talented young people— due to high housing costs, lack of exciting job opportunities and a lack of creative, livable communities for young people.

Achieving this vision will require strong leadership from business, community, education and government working together as stewards for the long-term well being of the region.

The Index is an important tool for assessing progress toward the goals of this vision of creating a region of vital communities based on our current diversity.

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LONG ISLAND GOALS

OUR GROWING ECONOMY NURTURES INNOVATION AND PROSPERITY

GOAL 1: GROWTH AND PROSPERITY

Our economy grows and results in an improved quality of life for all.

GOAL 2: SUPPORTIVE BUSINESS ENVIRONMENT

Long Island provides a business friendly environment for companies to grow.

GOAL 3: INNOVATIVE ECONOMY

Our economy incubates, supports and retains companies.

OUR COMMUNITIES PROMOTE LIVABILITY AND INCREASE HOUSING CHOICE AND MOBILITY

GOAL 4: VIBRANT COMMUNITIES

We create exciting communities and downtown centers that offer people a wide choice of places to live, work and play.

GOAL 5: AFFORDABLE HOUSES

We generate housing options that are affordable to people of all ages and income levels.

GOAL 6: TRANSPORTATION CHOICES

We increase mobility by investing in an integrated, regional transportation system and by encouraging creative problem solving to find transportation alternatives.

OUR INCLUSIVE SOCIETY PROMOTES QUALITY HEALTHCARE AND EDUCATION

GOAL 7: HEALTHY PEOPLE

All people have access to quality affordable health care that focuses on disease and illness prevention.

GOAL 8: EDUCATIONAL READINESS

All students are prepared to learn at each stage of the educational pipeline.

OUR COMMUNITIES PROTECT THE NATURAL ENVIRONMENT AND CONSERVE RESOURCES

GOAL 9: CONSERVE ENERGY

We improve the region's overall energy efficiency and promote conservation.

GOAL 10: PROTECT NATURE

We meet high standards for improving our air and water quality, protecting and maintaining our open spaces, and conserving natural resources.

OUR REGION DEVELOPS BETTER GOVERNANCE AND GREATER CIVIC PARTICIPATION

GOAL 11: MATCHING RESOURCES AND RESPONSIBILITIES

Long Island's counties, towns, villages, and other jurisdictions manage their revenue to provide quality local and regional services.

GOAL 12: CIVIC ENGAGEMENT

All residents and business people are actively engaged in local civic life.

LONG ISLAND 2004 HIGHLIGHTS

**Our Region's Population is Growing and Diversifying
with Continuing Segregation By Race and a Significant "Brain Drain"**

- Population estimates by the U.S. Census indicate that Long Island added 50,000 residents between 2000 and 2002.
- Recent population increases are largely the result of immigration and the growth of racial and ethnic minorities. The rapid expansion of the Latino and Asian population is a central demographic dynamic on Long Island.
- The median age in Nassau and Suffolk has been rising for decades. Now, with the aging of the Baby Boom generation, more Long Islanders are entering their late 40s and 50s.
- Long Island is one of the most racially segregated suburban regions in the nation.
- The region is experiencing a "brain drain" with a 20% decline in its 18 to 34 year old age group, between 1990 and 2000, five times the national average.

Long Island is the Nation's First Mature Suburb; Development Patterns Are Changing

- Following several decades of growth, there is very little undeveloped land left on Long Island that is not protected parkland.
- Although development was most rapid in the 1950s and 1960s when population growth was surging, developed (or "urbanized") land has grown much faster than population. In 1995, Nassau County was 88% urbanized while 64% of Suffolk's land area was developed.
- Long Island is also much more developed than other suburban areas in the New York region that have more forest and farmland, particularly on their outer fringe. While 70% of Long Island is urbanized, only 43% of the suburbs north of New York City and 40% of northern New Jersey are developed.
- While the total amount of open space declined rapidly between 1962 and 1995, land devoted to protected parkland and preserves increased.

**Information and Communication Services, Health and Business Services Jobs are Growing
While Technology Manufacturing Jobs and Regional Average Pay Decline**

- Long Island added approximately 80,500 jobs between 1990 (939,000 jobs) and 2003 (1.01 million jobs). This translates to employment growth of 1% on an annual basis.
- The fastest growing industry clusters were Information and Communication Services (2.3%), Health (2.2%) and Business Services (1.9%).
- Job losses took place in Technology Manufacturing where 29,200 jobs were lost between 1990 and 2003. This was followed by Diversified Manufacturing with net losses of 2,800 jobs.
- Regional average pay peaked in 2000 and has declined by 6% between 2000-2003. Average pay on Long Island is now only \$1,693 higher than the U.S. average.

The Region's Productivity and Innovation Are Increasing but Patents are Declining

- Regional value added per employee, a measure of productivity, has continued to rise in inflation-adjusted terms at an annual rate of 1.3% since 1990.
- The telecommunications sector lead revenue growth among the FAST 50 technology companies.
- Patents per 100,000 are down from a 1998 high. The patent category with the greatest growth from 1997 to 2002 was pharmaceuticals.

Growth Yields Mixed Results For People and Communities

- There is a mismatch of concentrations of housing on Long Island and the region's major employment centers. There is also a lack of public transportation options from one to another.
- Overall, approximately 34% of Long Island's households (owner- and renter-occupied combined) have monthly housing costs that exceed 30% of monthly income (i.e., the housing is considered unaffordable).
- Transit ridership as a whole increased by 10% between 1995 and 2000 before declining in 2001, the last year for which data is available.
- Over the last two decades, automobile ownership has grown much faster than population, and people are commuting longer to get to work.
- Home prices have skyrocketed with the ratio of home prices to median family income increasing from 2.5 times to 4.5 times between 1992 and 2003.
- Poverty persists amidst regional affluence with about 154,000 residents living below the federal poverty line.

Educational and Health Outcomes Are Mixed

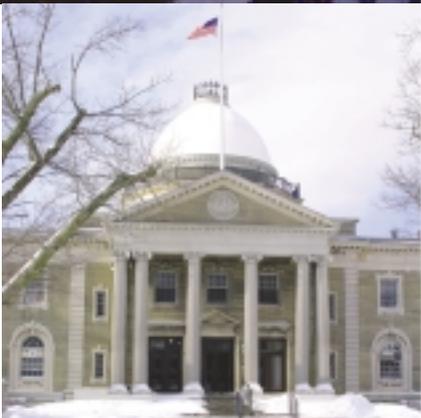
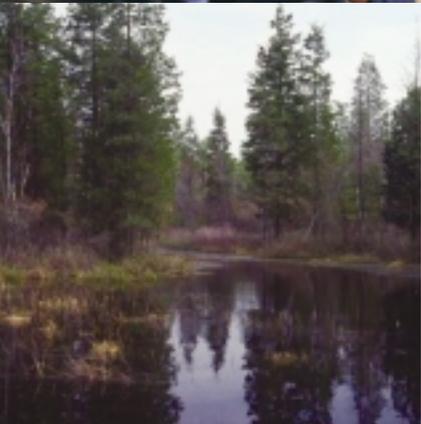
- Long Island students significantly outperform students statewide on the Grade 4 English Language Arts and Grade 8 Mathematics Exams.
- In the nine highest need/ lowest resourced school districts, the poverty index and the number of students designated as having limited English proficiency have increased substantially in the last 10 years.
- The disparity between high need districts and all other school districts is not diminishing.
- Percentage of children with low birth weight rises.
- Mortality rate due to heart disease declines.

Environmental Stewardship is Not a Regional Strength

- Between 1997 and 2001, consumption of electricity increased by 16%, higher than the state or national average.
- Long Island uses 1.64 pounds per capita of pesticides, almost double the state average of 0.89.

Government Performance Shows Room for Improvement

- Both Nassau and Suffolk County each receive low grades on measures of Government Performance.
- Bond ratings are on the rise in both counties.
- Voter turnout is low for local elections.

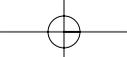


HISTORICAL DEVELOPMENT

In contrast to common belief, Long Island first developed from east to west. When the Europeans first arrived in the 1600s, they displaced the Native American population in order to farm the land and set up fishing and whaling communities on the eastern shores. These early colonialists established local “home rule” governments in the form of townships and villages. The settlements were very independent from one another and represented distinct and separate communities across Long Island.

It wasn't until a few hundred years later that Long Island began to develop quite differently. In the 1930s Robert Moses began building a series of parks and parkways and after World War II, Abraham Levitt and his sons built Levittown as affordable housing for war veterans and their families. At this point Long Island's development moved west to east, as more and more city dwellers bought homes. In 1940, Long Island's regional newspaper *Newsday* was founded. Today it is one of the largest daily papers in the country and is considered to be one of the most important voices of the region. Its Spanish edition *Hoy* has the largest circulation in the U.S. for a newspaper of its kind.

Long Island has grown into a unique and diverse region combining elements of suburbia and small town life. It is home to more than 100 public companies and 77% of its residents (992,227 people) work on Long Island. While there are 41 distinct centers with more than 10,000 jobs, (four of these with more than 30,000 jobs), 80% of Long Island's businesses (69,698) employ fewer than 10 employees.



SPECIAL ANALYSIS

CHANGING FACE OF LONG ISLAND

The population profile of Long Island has been changing. In the last fifty years its population has tripled and, over the past decade, while the size of its population has stabilized, it has become older and more diverse

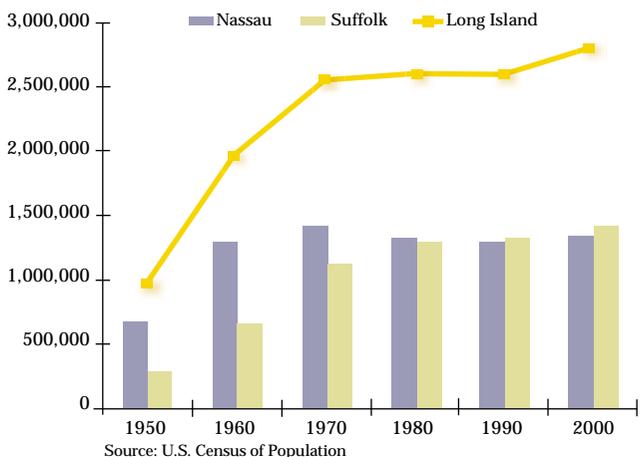
The Nation's First Mature Suburb: Long Island's Postwar Population Growth

As the pioneer of America's suburban expansion, Long Island's population grew rapidly in the 1950s and 1960s when it gained more than 1.6 million people. Nassau's population peaked in 1970, while Suffolk's population grew rapidly through 1980, and has continued to grow at a more modest pace over the last two decades. The slowing population growth in the 1980s and 1990s marked Long Island's transformation to the nation's first mature suburb with its own sources of economic growth, dwindling land for new development and rapidly changing demographics.

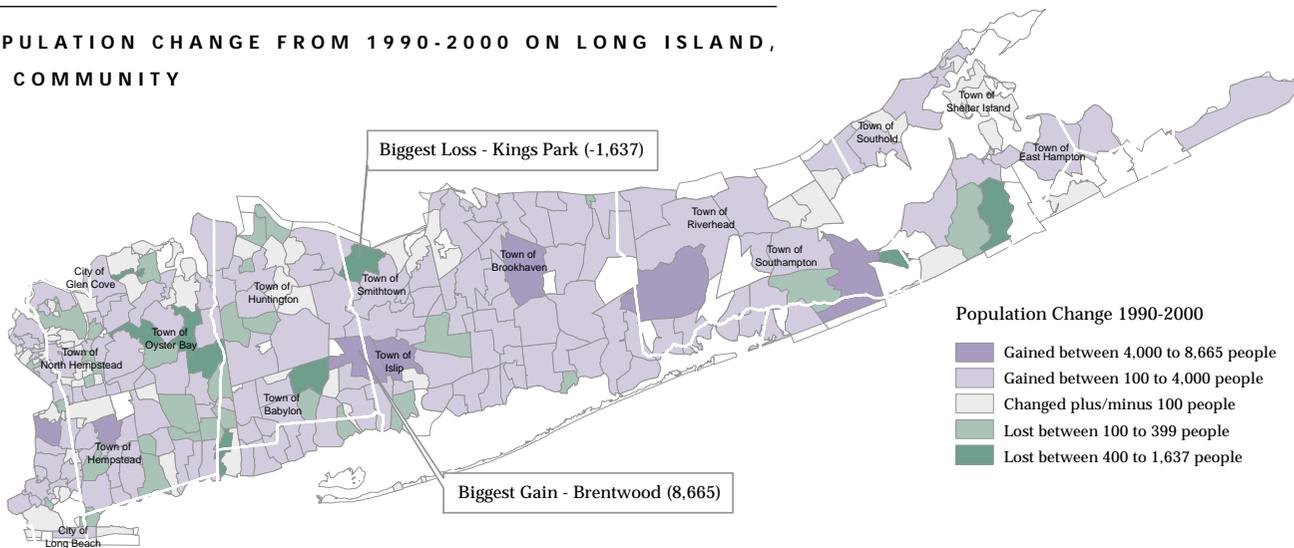
The Island's population is aging along with the rest of the United States. The median age of residents is 38.5 in Nassau and 36.5 in Suffolk. With the aging of the Baby Boom

generation, more Long Islanders are entering their late 40s and 50s. And, with longer life expectancies, our mature senior population is also expanding. Nassau has a somewhat older profile than Suffolk, but the gap is narrowing as the more rural and less populated part of Eastern Suffolk is attracting many retirees and can expect substantial growth in the number of senior citizens. As the Baby Boom generation continues to age, we can expect large increases in retirees and older workers.

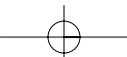
LONG ISLAND'S POPULATION, 1950 - 2000



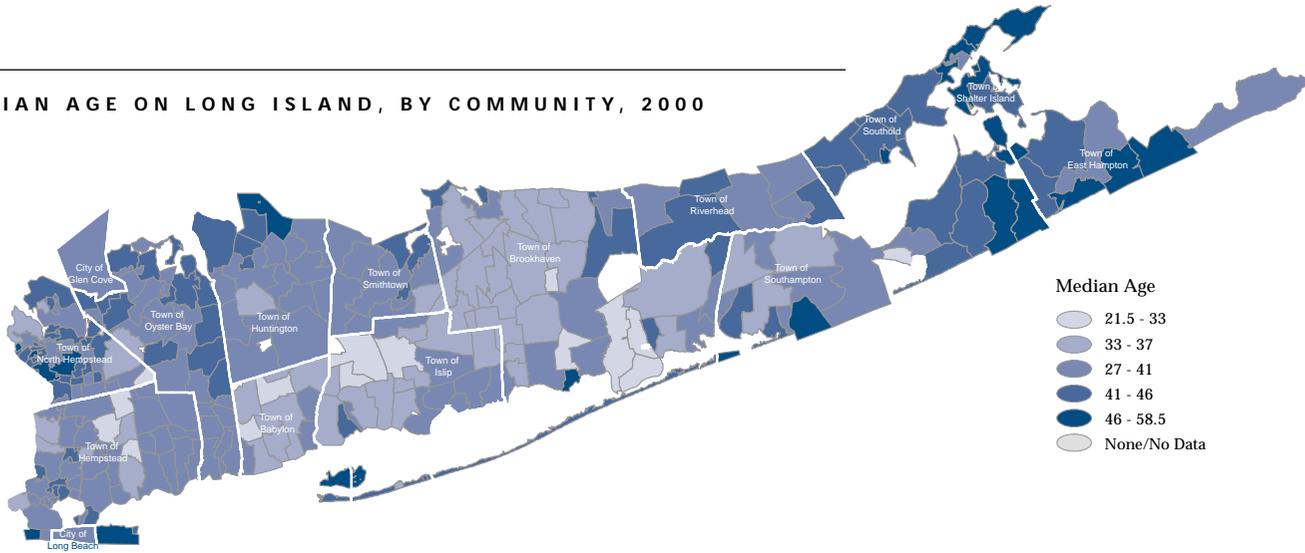
POPULATION CHANGE FROM 1990-2000 ON LONG ISLAND, BY COMMUNITY



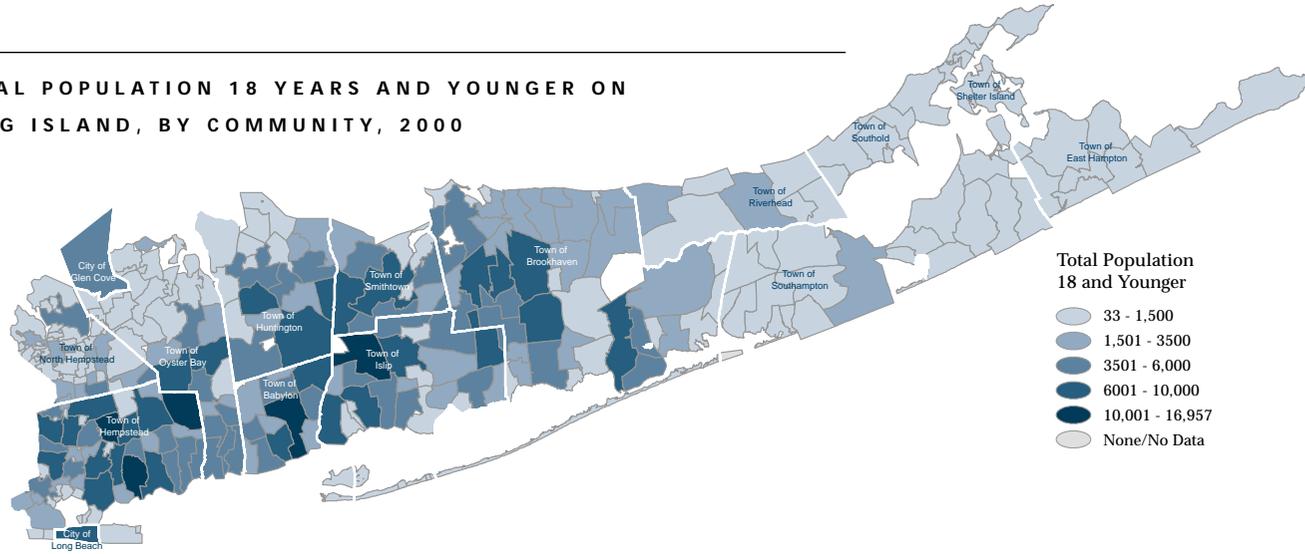
Map prepared by NYPIRG's Community Mapping Assistance Project for the Rauch Foundation, 2003
Sources: U.S. Census Bureau Summary File 3, 2000; STF3A, 1990; TIGER/Line Files, 2001



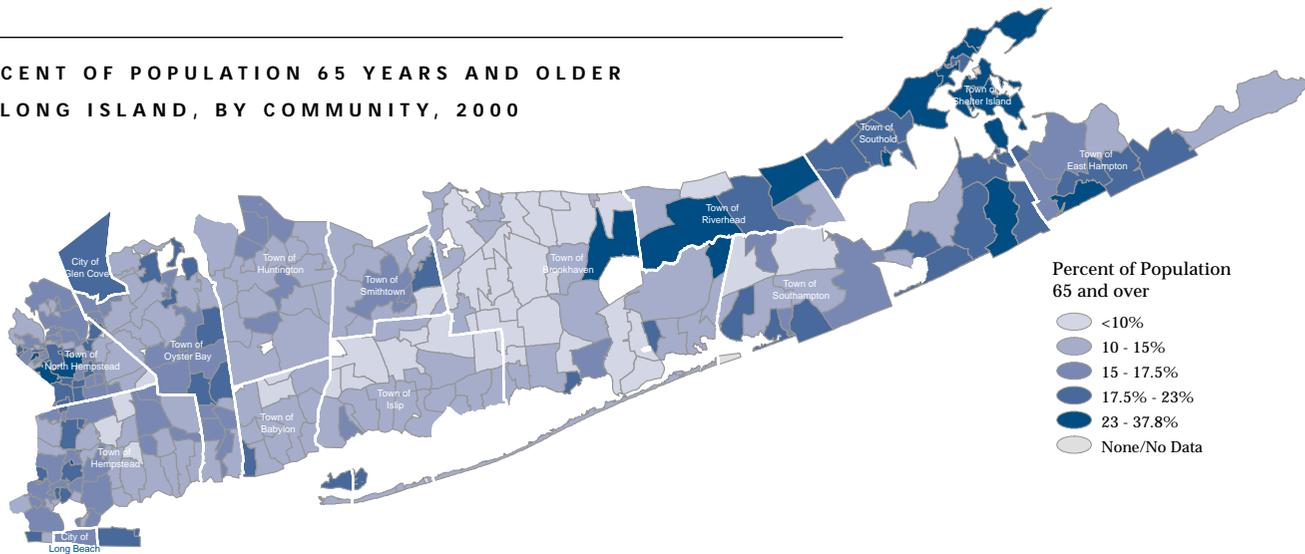
MEDIAN AGE ON LONG ISLAND, BY COMMUNITY, 2000



TOTAL POPULATION 18 YEARS AND YOUNGER ON LONG ISLAND, BY COMMUNITY, 2000

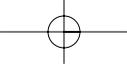


PERCENT OF POPULATION 65 YEARS AND OLDER ON LONG ISLAND, BY COMMUNITY, 2000



Maps prepared by NYPIRG's Community Mapping Assistance Project for the Rauch Foundation, 2003
Sources: U.S. Census Bureau Summary File 3, 2000; TIGER/Line Files, 2001



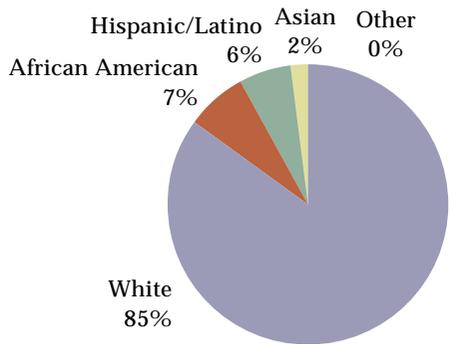


SPECIAL ANALYSIS

Recent population increases are largely the result of immigration and the growth of racial and ethnic minorities. The rapid expansion of the Latino and Asian populations is a central demographic dynamic on Long Island. The non-white population now accounts for 24% of residents, up from approximately 16% in 1990. This growth is consistent with patterns throughout the tri-state metropolitan area, as immigrant communities have taken hold in suburban as well as urban areas. However, whites still comprise 76% of Long Island's population, a higher share than in any other part of the tri-state region.

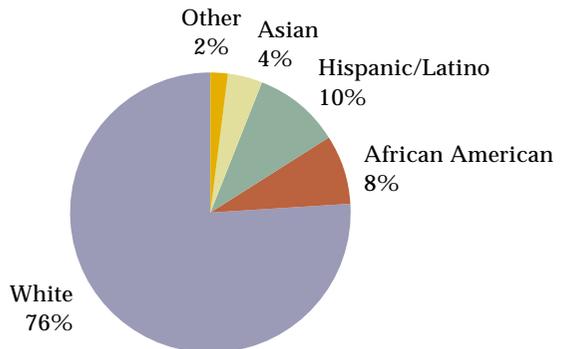
The main demographic trends of the 1990s appear to be continuing. Population estimates by the U.S. Census indicate that Long Island added 50,000 residents between 2000 and 2002. These estimates are not as reliable as the actual Census counts that are recorded every ten years, but they are an indication of how recent

PERCENT OF LONG ISLAND POPULATION BY RACE AND ETHNICITY, 1990



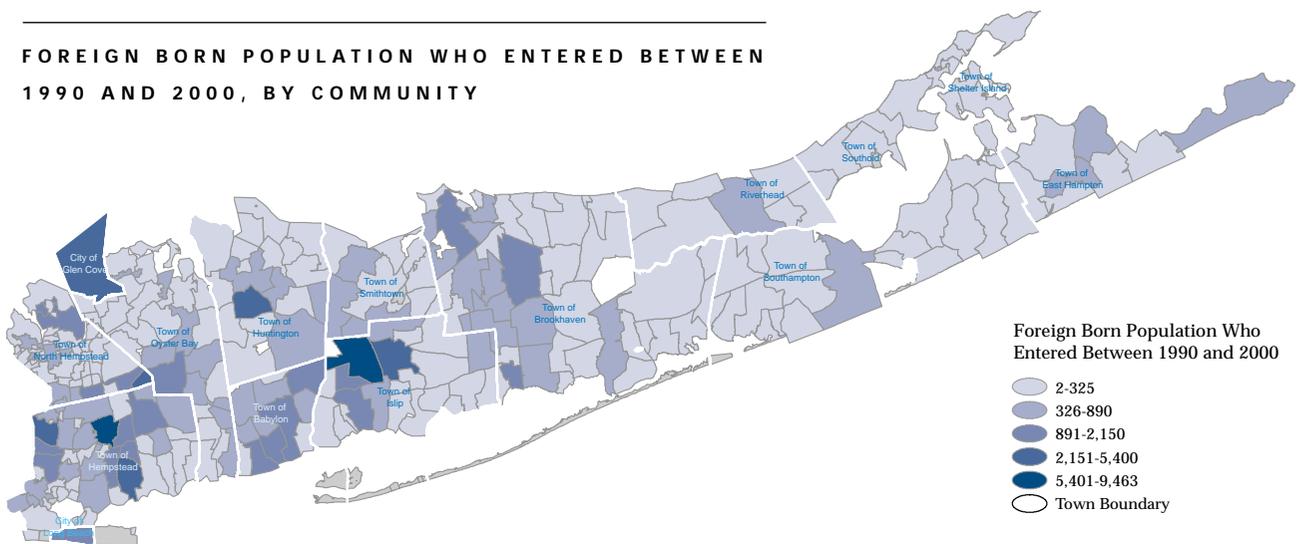
Source: U.S. Census of Population, 1990

PERCENT OF LONG ISLAND POPULATION BY RACE AND ETHNICITY, 2000

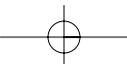


Source: U.S. Census of Population, 2000

FOREIGN BORN POPULATION WHO ENTERED BETWEEN 1990 AND 2000, BY COMMUNITY



Maps prepared by NYPIRG's Community Mapping Assistance Project for the Rauch Foundation, 2003
Sources: U.S. Census Bureau Summary File 3, 2000; TIGER/Line Files, 2001



patterns may be changing. The Island has become more racially and ethnically diverse as the number of African Americans, Latinos and Asians increased while the white population declined. Immigration remains a major source of new residents, as some 196,255 people from outside the country are estimated to have taken up residence on Long Island from 1995-2002.

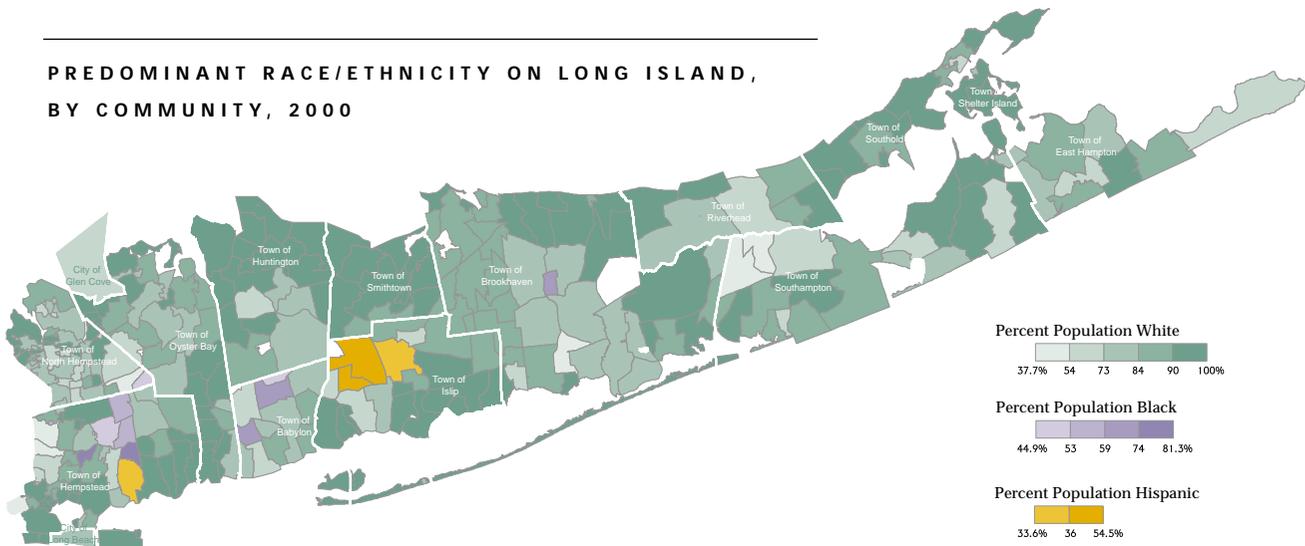
Domestic migration data shows that more people are moving away from Long Island than are moving to Long Island. Between 1995 and 2000 there was a total loss of 86,255 residents from Long Island. The majority of people leaving Long Island moved to other parts of New York, with Florida being the 2nd most significant state to which Long Islanders migrated. The majority of people moving to Long Island also came from other parts of New York, with California being the 2nd most significant state of origin for new Long Island residents.

DOMESTIC MIGRATION FLOWS, LONG ISLAND, 1995-2000

Top Sources by County	Inflow	Top Destinations by County	Outflow
Queens	89,790	Upstate NY Counties	-32,235
Brooklyn	32,590	Queens	-27,013
Upstate NY Counties	15,708	Manhattan	-21,570
Manhattan	13,453	Palm Beach County, FL	-13,189
Bronx	7,364	Broward County, FL	-8,506
Westchester County	3,473	Brooklyn	-7,335
Los Angeles County, CA	1,974	Maricopa County, AZ	-4,762
Staten Island	1,769	Westchester County	-4,645
Broward County, FL	1,552	Bronx	-4,188
Palm Beach County, FL	1,530	Fairfield County, CT	-3,635

Source: U.S. Census Bureau County-to-County Migration Flow Files, www.census.gov/population/www/cen2000/ctytoctyflow.html

PREDOMINANT RACE/ETHNICITY ON LONG ISLAND, BY COMMUNITY, 2000



Maps prepared by NYPIRG's Community Mapping Assistance Project for the Rauch Foundation, 2003
Sources: U.S. Census Bureau Summary File 3, 2000; TIGER/Line Files, 2001



Segregation Patterns

Over the past fifty years, very little has changed in terms of racial segregation on Long Island. In fact, a recent report by Long Island’s Erase Racism, a nonprofit community-based organization, noted that Long Island is the most segregated suburban region in the U.S. This is based on U.S. Census 2000 data and the dissimilarity and exposure indices provided by the Mumford Center for Comparative Urban and Regional Research at the University of Albany.

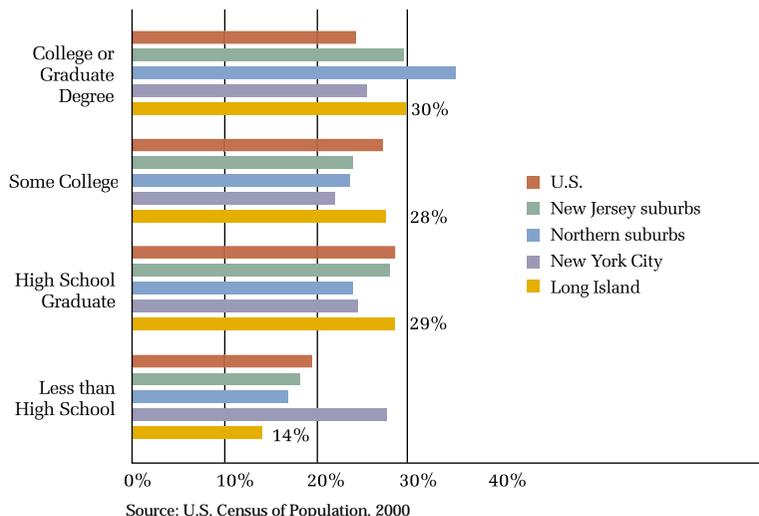
The dissimilarity and exposure indices measure segregation in two different ways. Dissimilarity refers to racial-ethnic group distribution across census tracts in a region (measured as a metropolitan area). On Long Island, 77.6% of African Americans on Long Island would have to move to be equally distributed across the population. On the other hand, the exposure indices measure the racial composition of a tract where the average member of a particular group lives. On Long Island exposure indices show that Whites live mostly around other Whites and have little exposure to African Americans, Hispanics and Asians.

Segregation on Long Island is complex but the statistics do show minor progress in the past decade. Long Island has 210 census tracts. In 1990, 64% of Long Island’s African Americans were concentrated in ten of those tracts. In 2003, those same tracts contained 60% of these African Americans. Overall, 21 of these census tracts now have 10% or more African American residents.

An Educated Workforce

A major asset of Long Island has been its schools. The educated workforce produced by our schools has been an economic incentive for businesses to build and invest in Long Island. Today, 30% of Long Islanders have attained a college or graduate degree, comparing evenly with the New Jersey suburbs, somewhat less than the Northern suburbs and faring significantly better than the U.S. as a whole. In addition, the Long Island region fares better than all comparison regions (New York City, Northern suburbs and

PERCENT OF RESIDENTS IN THE NEW YORK METRO REGION AND U.S. BY LEVEL OF EDUCATIONAL ATTAINMENT



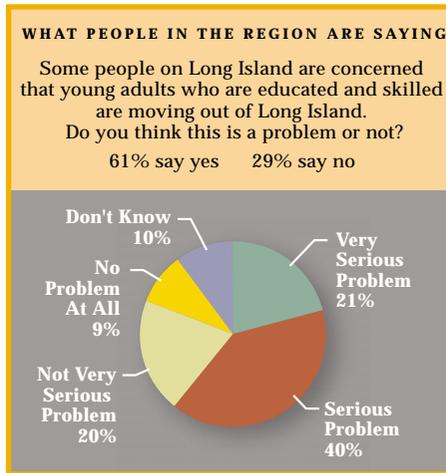
New Jersey suburbs) for those with some college (28%) and for high school graduates (29%) and has the lowest percentage of people with less than a high school degree (14%).

One important indicator, related to both education and migration, concerns the ability of a community to both attract and retain its next generation of talent. Since the 1950s, Long Island has been a net exporter of young, talented college educated people. In other words, more of its college-educated population has left the Island and moved elsewhere than has stayed. This phenomenon has been

referred to as a “brain drain” and has been used as a concept by researchers, scholars, policymakers and the media alike over the last 20 years. It is used to quantify the amount of human capital, measured by job skill-level or educational attainment, that leaves a particular area for another. Often times, young singles and couples move to where they are able to further their education, find jobs, or to find a community with affordable housing and one that shares their values.

From 1990-2000, the percentage of 18-34 year olds has declined both in the region and in the U.S., partly due to the “baby bust” generation born between the late 1960s and early 1980s. However, the percentage of 18-34 year olds declined on Long Island more rapidly than the U.S., indicating a “drain” away from Long Island. In 2001, 18,000 of Long Island’s young adults, aged 24-35, moved elsewhere, representing 5% of that age group living on Long Island. Within the region, all suburban areas experienced an 18-34 year old population decline; however, Long Island’s decline was greater than that of New Jersey or the Northern suburbs. The exception in our area was New York City, which remained stable.

A recent poll reveals that 53% of Long Island’s 18-34 year olds have considered leaving the Island. Forty-two percent of these young adults have college degrees. The reasons for leaving relate directly to the high cost of living, taxes and lack of affordable housing. This “brain drain” phenomenon is a very serious issue for the region and has major implications for our future economy and our ability to remain competitive.



Source: “Room for Growth: Long Island’s Changing Economy”, March 2004

AGE COUNT AND PERCENT, 18-34 YEAR OLDS, 1990-2000

	Percent of Population 1990	Count 1990	Percent of Population 2000	Count 2000	Change	% Change
Long Island	27%	698,836	20%	555,652	(143,184)	-20%
New York City	29%	2,126,195	27%	2,132,497	6,302	0%
Northern suburbs	26%	600,746	20%	494,616	(106,130)	-18%
New Jersey suburbs	28%	1,675,004	22%	1,478,729	(196,275)	-12%
TOTAL New York Metro	28%	5,100,781	23%	4,661,494	(439,287)	-9%
U.S.	28%	69,701,927	24%	66,644,867	(3,057,060)	-4%

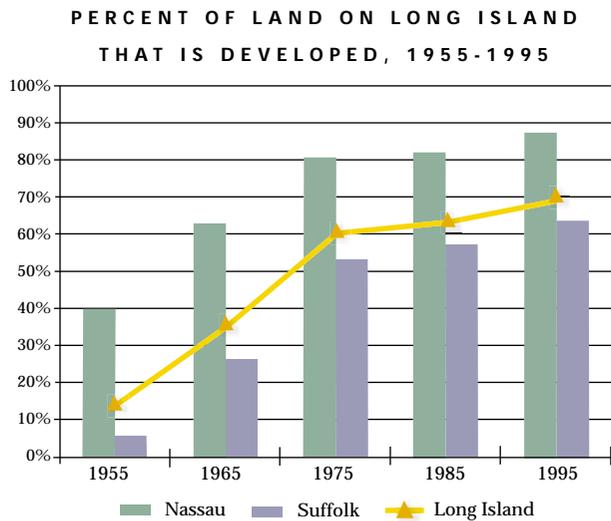
Source: U.S. Census of Population 1990 and 2000

LONG ISLAND: A CHANGING PLACE

The urbanization of Long Island has greatly reduced the amount of open space and farmland. Understanding the various and changing dimensions of the region's new environment – its remaining open space, farms, beaches, and historic towns– is essential for preservation and finding new types of development.

Development and Open Space-Urbanization Rates

Following several decades of growth, there is very little undeveloped land left on Long Island that is not protected parkland. Homes, buildings and pavement cover most of the Island and it is not until one reaches the William Floyd Parkway, some 60 miles from Manhattan, that there is rural, undeveloped land. Only the East End remains largely undeveloped, and that area is now under severe pressure for development.



Source: Regional Plan Association, U.S. Geological Survey, Cornell University.

The Committee for the East End Community Preservation Fund estimates the amount of undeveloped land in the five eastern towns at 90,000 acres—one tenth of the combined area of Nassau and Suffolk counties. Some vacant land in western Suffolk remains, but it is rapidly disappearing.

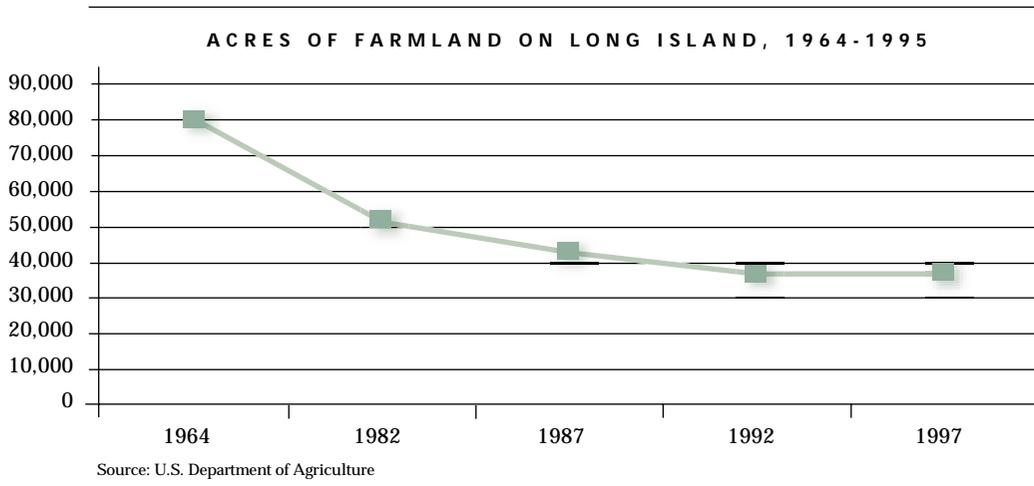
Although development was most rapid in the 1950s and 1960s when population growth was surging, developed (or “urbanized”) land has grown much faster than population. In fact, land developed at twice the rate of population between the mid-1950s and the mid-1990s.

By 1995 Nassau County was 88%

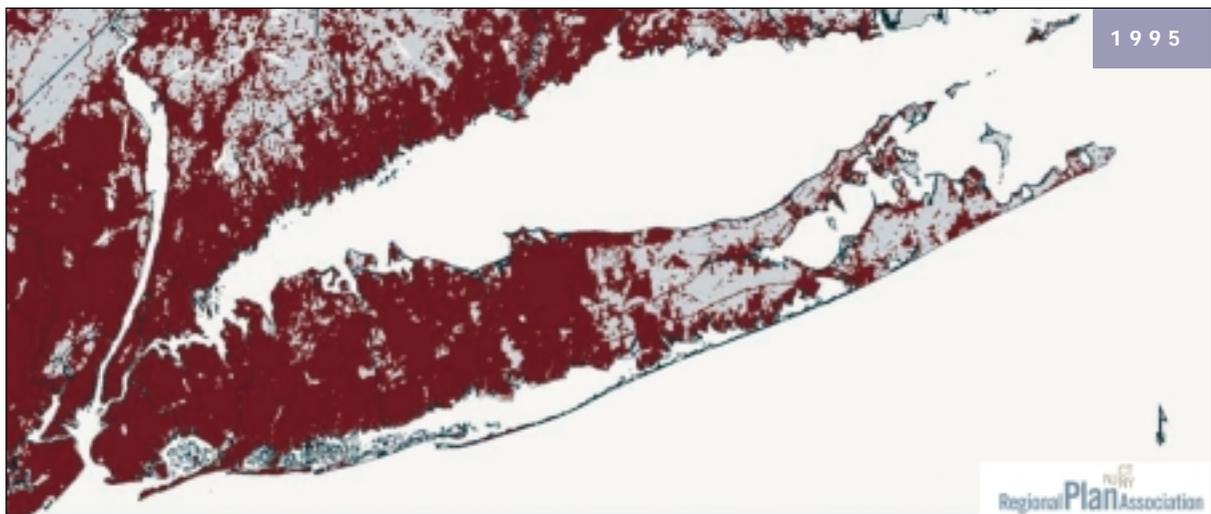
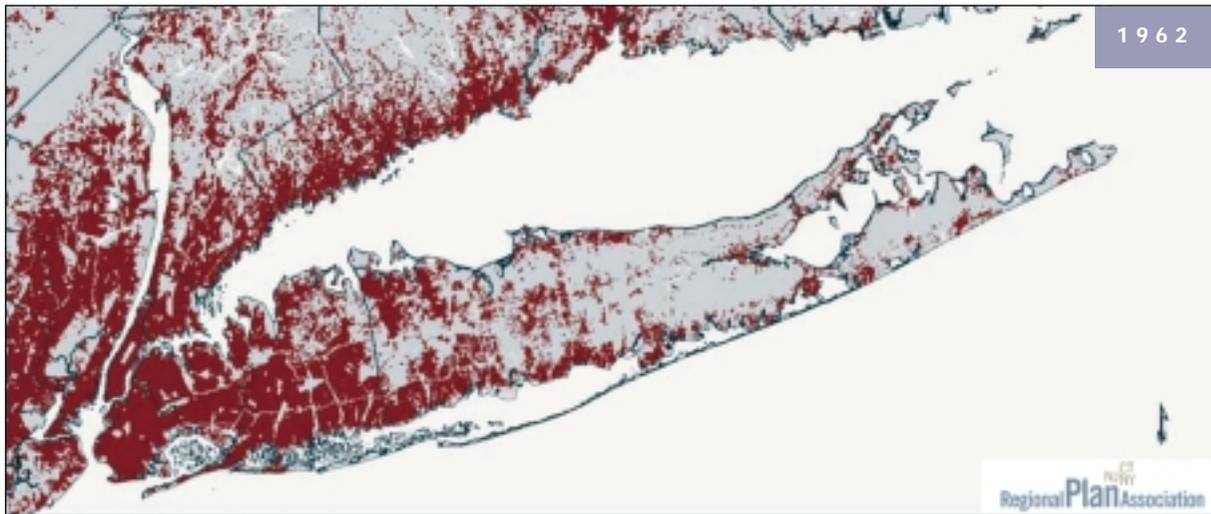
urbanized and Suffolk was 64%. During these four decades, over 400,000 acres were developed, representing more than half of Nassau and Suffolk's total land mass.

Comparatively, Long Island is also more developed than other suburban areas in the New York region that have more forest and farmland, particularly on their outer fringe. Seventy percent of Long Island is urbanized, while only 43% of the suburbs north of New York City and 40% of northern New Jersey suburbs have been developed.

Despite the decline in the total amount of open space, land devoted to protected parkland and preserves increased. New state parks such as Nissequogue State Park and areas protected by the Central Pine Barrens Commission were created. Since 1962, total open space declined by 126,000 acres, but the amount of federal, state and municipal parkland increased by 44,000 acres. There is now a total of 89,000 protected acres with all but 8,000 of these acres in Suffolk County. New York State parks account for about two-thirds of the total, federal parks 23% and municipal parks 10%. Between 1964 and 1997, the amount of farmland was reduced by half, from 80,000 to 37,000 acres. However, farm protection and reclamation programs have succeeded in stabilizing the amount of farmland in the 1990s.



URBANIZED LAND ON LONG ISLAND, 1962 AND 1995



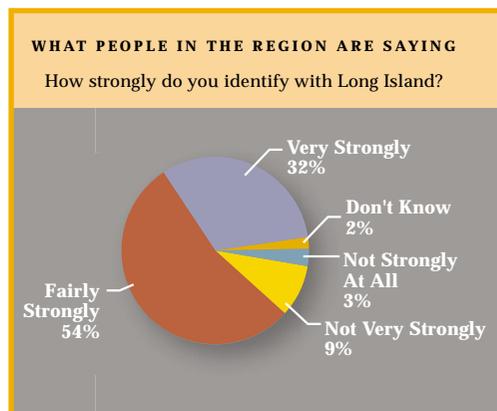
Sources: Maps prepared by the Regional Plan Association for the Rauch Foundation, 2003. U.S. Geological Survey, Cornell University

THE NEXT GROWTH PHASE

The face of Long Island has changed. There are 2.8 million people. We are older, more ethnically and racially diverse, and are increasingly separated by age, race, and income. We have truly excellent schools and a well-educated workforce but Long Island is losing, at an alarming rate, its young people who have grown up and been educated here.

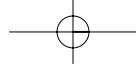
What does this mean and what are the implications for the region? It is hard to say but inter-group relations between different ethnic groups, different socioeconomic groups, different age groups, and different towns and villages are all being put under great pressure. The resulting tensions have already started to take the form of increased hate and prejudice crimes, gang behavior, and political fights to restrict the growth of school age populations in certain districts.

In many ways, Long Island is not well positioned to address its challenges. Social fragmentation mirrors political fragmentation and there is no real focal point for civic and non-governmental leaders to coordinate a response to problems. Nevertheless, the time might never be better for Long Islanders and their leaders to address the following questions:



Source: "Long Islanders: Who Are We? A Quality of Life Survey", April 2003

- How can we find a new way to grow, while preserving our remaining farmland and open space and accommodating the housing needs of the old, the young and the workforce?
- What changes are needed to stop the "brain drain" and allow the next generation to be able to live on Long Island?
- How can we assure all Long Island children will have an excellent education?
- How can we cut through the complex web of political structures to advocate effectively for the region?



G R O W I N G , I N C L U S I V E E C O N O M Y

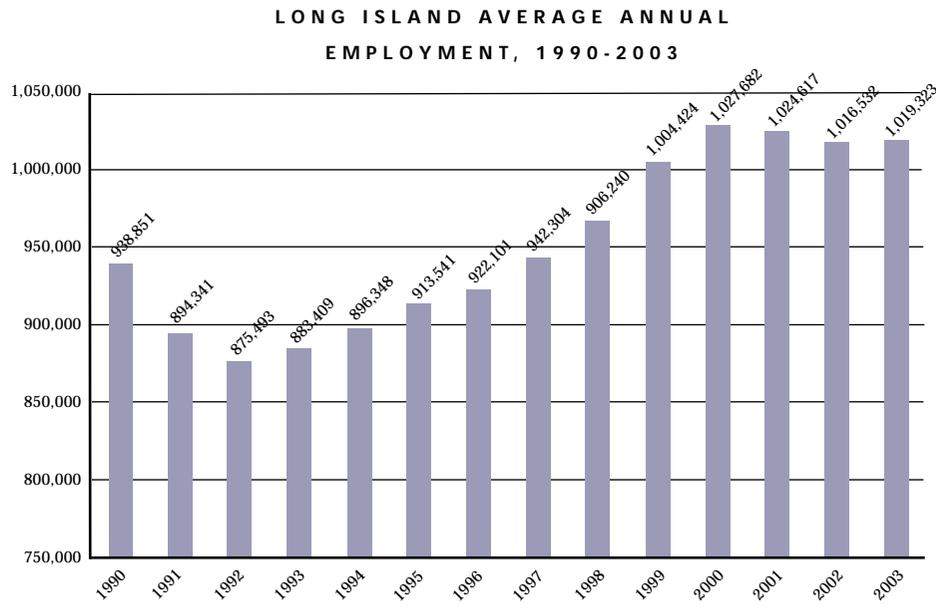


**GOAL 1:
GROWTH AND PROSPERITY**

Our economy grows and results in an improved quality of life for all.

G R O W I N G , I N C L U S I V E E C O N O M Y

Region Adds More Than 80,000 Jobs From 1990 to 2003



Why is this important?

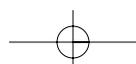
Job gains or losses measure regional economic vitality. This chart shows annual average employment on Long Island during the past thirteen years.

How are we doing?

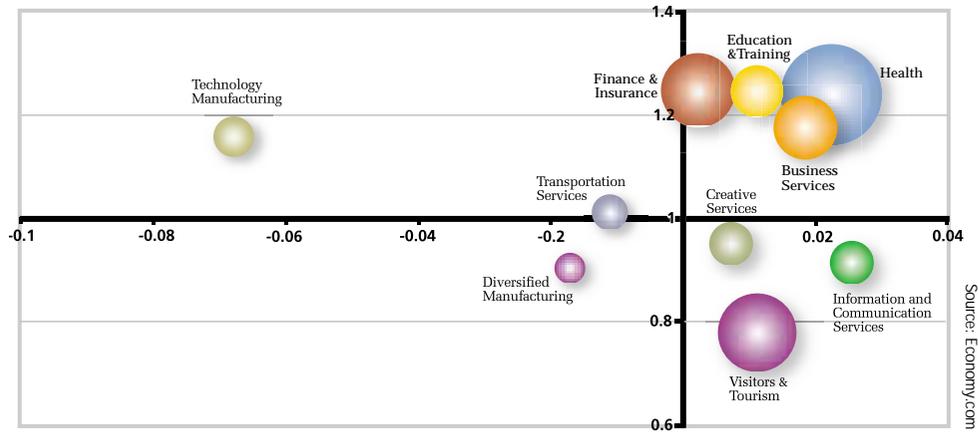
Long Island added approximately 80,500 jobs between 1990 (939,000 jobs) and 2003 (1.01 million jobs). This translates to employment growth of 1% on an annual basis, or gains of 8.6% over the thirteen-year period.

Long Island experienced three distinct periods of economic activity between 1990 and 2003 and generally followed national economic trends. During the period from 1990 through 1994, the region lost nearly 43,000 jobs. Between 1994 and 2000, Long Island added approximately 131,000 jobs and, during the most recent economic recession, the region lost nearly 8,400 jobs.

During the same time period, the region's unemployment was highest in 1992 at 7.7% and was lowest at 2.9% in 2000. As of October 2003, unemployment stood at 3.9% for Long Island. Average unemployment was 4.6% over the past 13 years, compared to the national average of 5.9%.



CURRENT PORTFOLIO OF LONG ISLAND INDUSTRY CLUSTERS BY EMPLOYMENT CONCENTRATION IN 2003 (Vertical Axis)
 AVERAGE ANNUAL EMPLOYMENT GROWTH, 1990-2003 (Horizontal Axis)
 AVERAGE ANNUAL EMPLOYMENT IN 2003 (Bubble Size)



Source: Economy.com

Information and Communication Services, Health and Business Services Are the Fastest Growing Industry Clusters

Why is this important?

Long Island's industry clusters make up approximately 41% of Long Island's employment base. An Industry Cluster is a geographic concentration of interdependent firms in related industries, and includes a significant number of companies that sell their products and services outside the region. The following chart illustrates three key dimensions of Long Island's industry clusters; the cluster's employment concentration, relative to the nation (vertical axis), average annual growth rate from 1990 to 2003 (horizontal axis) and employment size, 2003 (size of bubble). Employment concentration measures the percentage of employment on Long Island compared to the same cluster, nationally. A concentration greater than one indicates that Long Island has a comparative employment advantage. Average annual employment growth measures jobs created over the past thirteen years. Average annual employment growth in 2003 shows the size of the cluster.

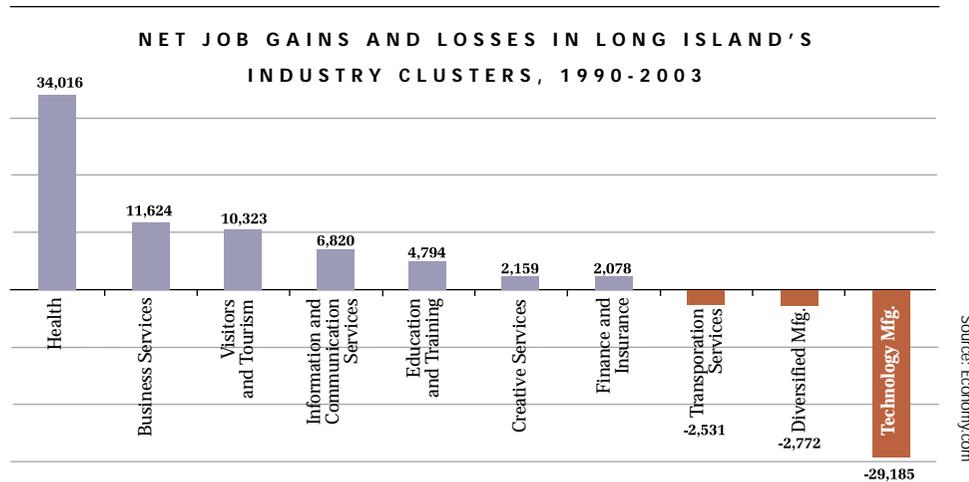
How are we doing?

Seven of the ten industry clusters identified showed employment growth from 1990 to 2003. Of these, the fastest growing industry clusters were Information and Communications Services (2.3%), Health (2.2%) and Business Services (1.9%). The industry clusters that experienced job losses during the same period were Technology Manufacturing, Diversified Manufacturing, and Transportation Services.

The industry clusters with the highest employment concentrations are Education and Training (1.2), Finance and Insurance (1.2), and Health (1.2). Each of the industry clusters shown on this chart have employment concentrations that are above or close to one.

The largest industry cluster was Health, which employed more than 146,000 people in 2003. The next largest was Visitors and Tourism (including employment in all restaurants and drinking establishments) which employed approximately 83,000. The third largest was Finance and Insurance, which employed nearly 78,000.

If government employment were considered a standard industry cluster, it would actually be the largest industry cluster on Long Island, employing 195,540 people in 2002. This represents a gain of 10,560 government positions since 1990, a 5.7% increase.



Health Gains 34,000 Jobs; Technology Manufacturing Loses 29,200 Since 1990

Why is this important?

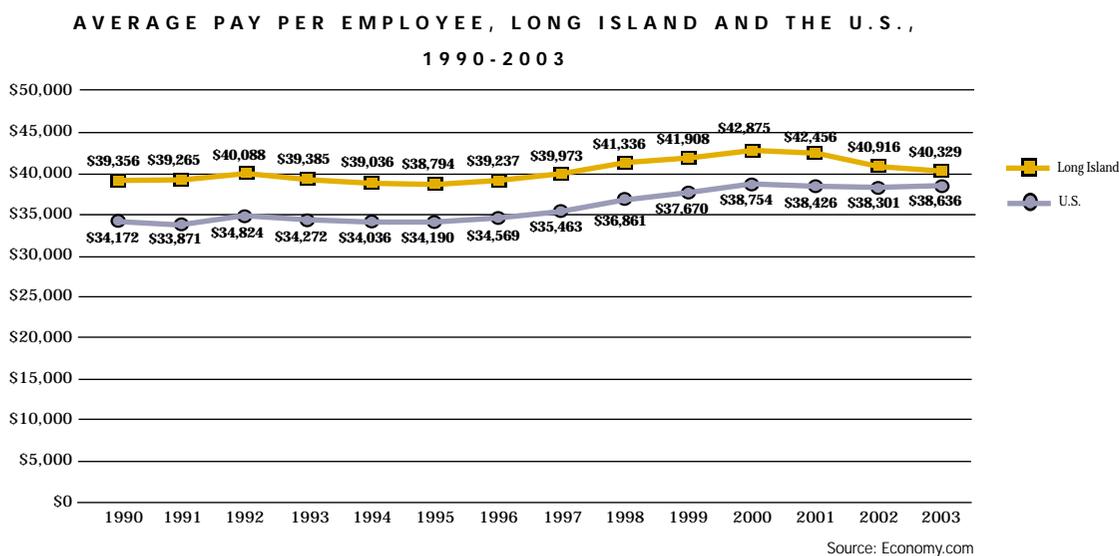
This chart shows the net gains and losses in employment across Long Island's industry clusters from 1990 through 2003.

How are we doing?

In the thirteen-year period from 1990 to 2003, seven of Long Island's ten industry clusters had net job gains. The largest job gains were in Health, which added more than 34,000 jobs, Business Services 11,600 and Visitors and Tourism 10,300.

Three industry clusters had net job losses during the period of 1990 to 2003. The largest job losses took place in Technology Manufacturing, with 29,200 jobs lost, Diversified Manufacturing, with 2,800 jobs lost, and Transportation Services, with 2,500 jobs lost.

Regional Average Pay per Employee Declines 6% During Recent Recession



Why is this important?

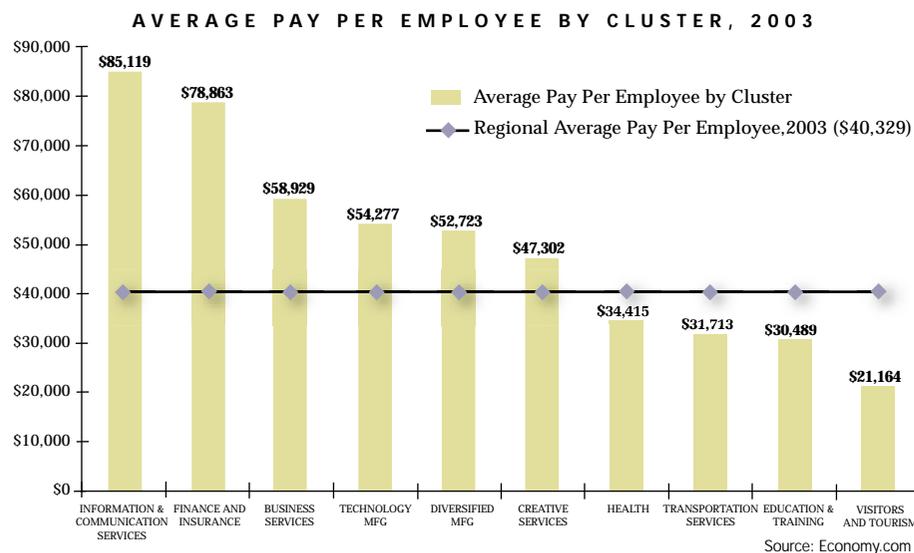
Average pay per employee is a basic measure of job quality and a key component of Long Island's economic vitality. Increasing inflation-adjusted average pay per employee reflects rising levels of education and productivity.

How are we doing?

Average pay per employee has increased 2% from \$39,355 in 1990 to \$40,328 in 2003. Average pay per employee peaked in 2000 when it reached \$42,874 in inflation adjusted terms. Average pay per employee on Long Island has declined by 6% since 2000 putting the decline of Long Island salaries significantly ahead of the national average, which declined by less than 1% over the same time period.

In 2003, average pay per employee on Long Island was \$1,700 higher than the national average.

Information and Communication Services Was Highest Paying Industry Cluster



Why is this important?

Average pay across Long Island's industry clusters reflects the level of demand for the skills of the regional workforce. This measure also shows the wealth-generating impact of industries that market their goods and services to customers outside of the region.

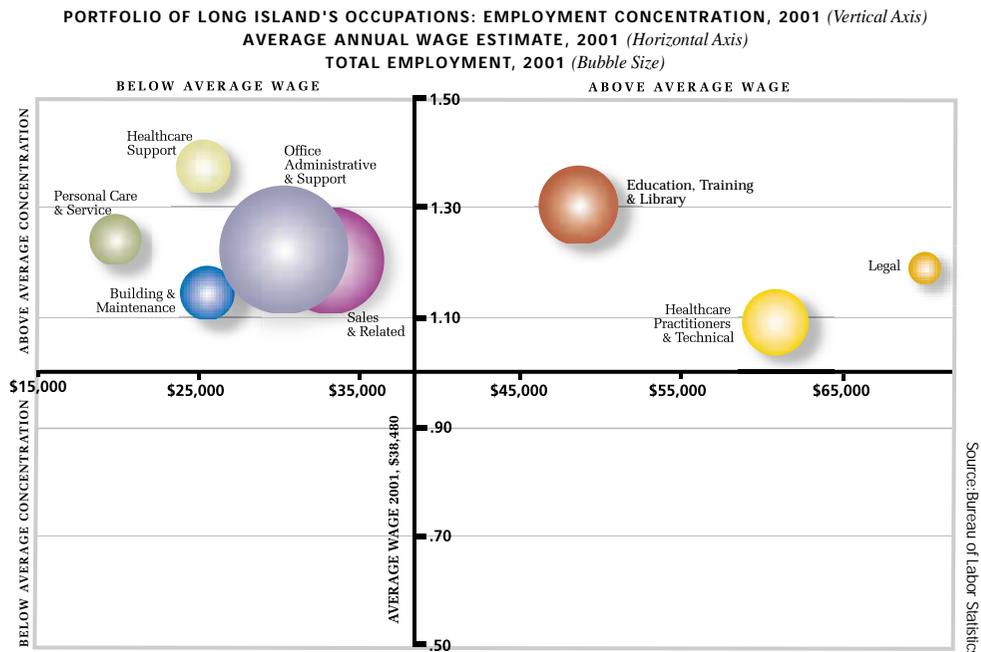
How are we doing?

In 2003, the highest-paying industry clusters on Long Island were Information and Communication Services, which paid an annual average wage of \$85,120 per employee, Finance and Insurance, paying \$78,900, and Business Services paying \$58,900.

Six of Long Island's ten industry clusters paid average wages that were above the regional average of \$40,329. The industry clusters whose average pay per employee fell below the regional average were Health, Transportation Services, Education and Training, and Visitors and Tourism.

One important challenge for Long Island is the cost of our governments. We employ more government workers than other regions and pay them more. Government jobs, including federal and state, now account for roughly 16.6% of all non-farm jobs on Long Island and almost 16% of total non-farm personal income from salaries and wages. Long Island has 494 local government employees for every 10,000 of population, compared with 407 nationwide. We also pay our local government

employees \$45,750 on average compared to the U.S. average of \$38,020, not including pension benefits and health insurance costs.



Health and Education Occupations are Highly Concentrated on Long Island and Pay Wages Above Regional Average

Why is this Important?

This chart illustrates Long Island's portfolio of eight occupational clusters and provides perspective on the region's human capital strengths and specializations. An Occupational Cluster is a geographic concentration of related occupations that share the same or similar training and skills, but cut across several industries. The chart shows three dimensions of Long Island's occupational clusters; employment concentration (vertical axis), average annual wage in 2001 (horizontal axis) and employment size (size of bubble).

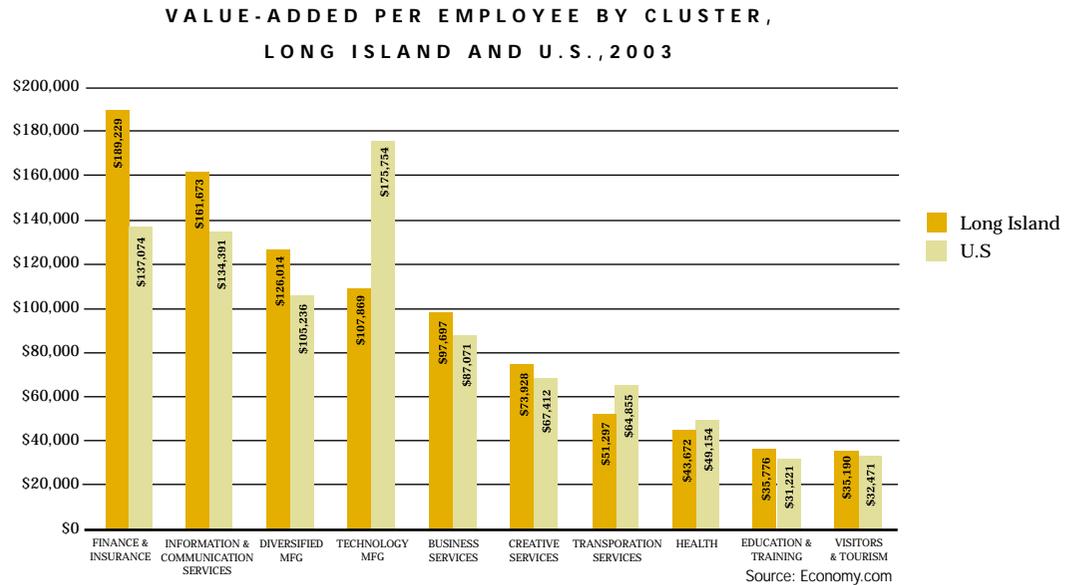
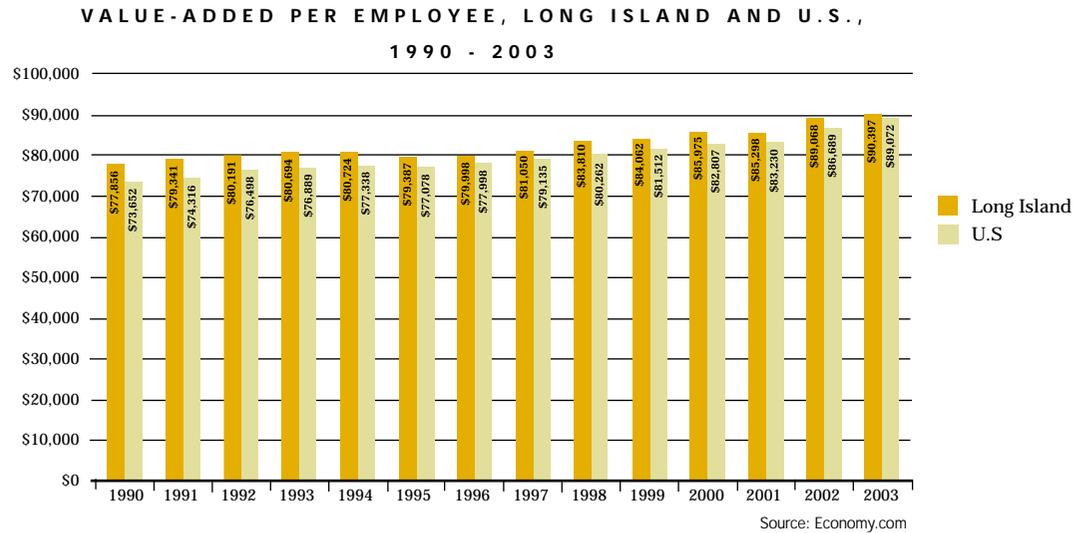
A breakdown of occupational employment is an indicator of what kinds of work Long Islanders engage in and to what extent. This information tells us what occupations Long Island, as a region, specializes in and may help identify regional skill gaps. Moreover, businesses, government and specialized industries are often drawn to a population of potential workers that may already have the appropriate skills.

Wages are a measure of job quality and the skills and educational attainment demands of regional employers. High paying occupations offer residual economic benefits and serve to increase the standard of living for workers.

How are we doing?

Long Island's residents have a diverse set of skills and strengths that help to drive the region's economy. Three occupational clusters, Education, Training and Library, Healthcare Practitioners and Technical, and Legal Occupations are all highly concentrated on Long Island and offer wages that pay above the regional average wage of \$38,480 (2001 dollars).

Value-added Increases 1.3% Annually; Finance and Insurance is Industry Cluster with Highest Value-Added per Employee



Why is this important?

Value added per employee is a proxy measure of productivity. It is the sum of revenue less inputs and other costs such as contracted labor and materials, divided by employment. Increasing value added is a prerequisite for rising wages.

How are we doing?

Regional value added per employee has continued to rise in inflation-adjusted terms at an annual rate of 1.3% since 1990 (when it was \$77,857 per employee). In 2003, value added per employee reached \$90,397 on Long Island. Nationally, value-added increased at an annual rate of 1.6% to \$89,073 in 2003.

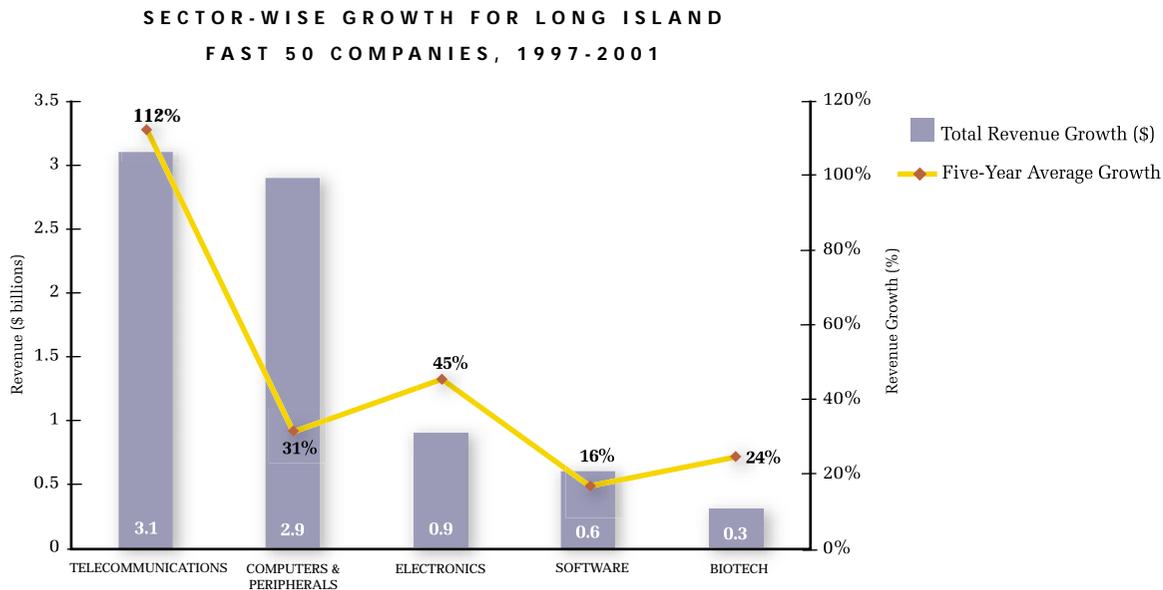
Finance and Insurance had the highest value-added in 2003 at \$189,229 per employee compared to \$137,074 nationally.

Seven of Long Island's ten industry clusters had value-added that out-performed their national counterparts. High value-added in these Long Island industry clusters helps to explain their higher than average wages.

**GOAL 2:
SUPPORTIVE BUSINESS
ENVIRONMENT**

*Long Island provides a
business friendly environment
for companies to grow.*

Telecommunications Sector Leads Growth among FAST 50



Source: Deloitte-Long Island Technology FAST 50

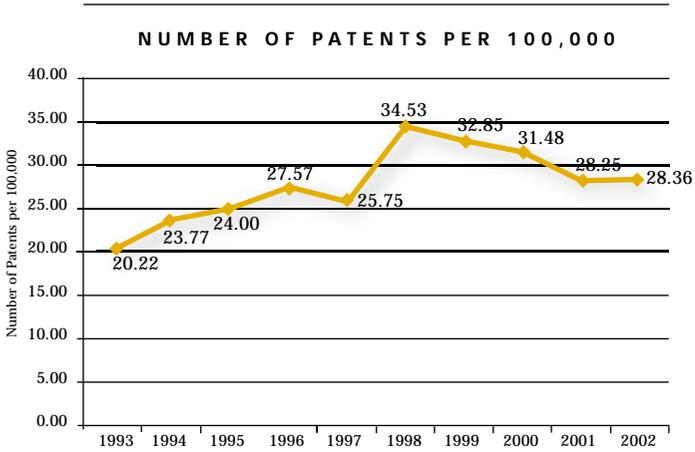
Why is this important?

Technology companies can serve as major assets to any world region. The production of innovative technologies and their economic contributions, both monetarily and as employment sources for Long Islanders, help keep Long Island economically sustainable. FAST 50 is a list (compiled annually) of the 50 technology companies in Nassau and Suffolk Counties which had the highest revenue growth over the last 5 years.

How are we doing?

During the years 1997-2001, telecommunications companies within the FAST 50 experienced the most growth in revenue, totaling \$3.1 billion by 2001. Computers and Peripherals companies had the next highest total growth at \$2.9 billion. Telecommunications companies also led the 5-year average growth rate at 112%, with Electronics companies experiencing a 5-year average growth rate of 45%.

Number of Patents per 100,000 is Down from 1998 High



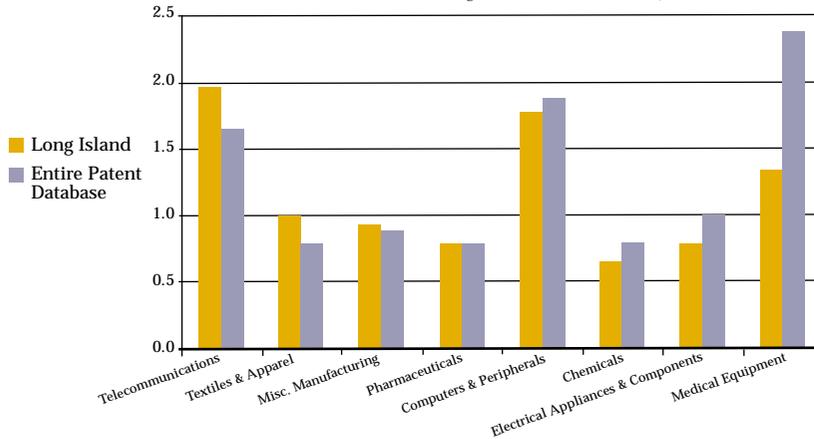
Source: CHI Research Inc., "CHI MSA Patent Profile". Population data are from the U.S. Census Bureau, as configured by the Real Estate Center at Texas A&M University.

**GOAL 3:
INNOVATIVE ECONOMY**

Our economy incubates, supports and retains companies.

LONG ISLAND CII COMPARED TO ENTIRE PATENT DATABASE CII FOR CORRESPONDING TECHNOLOGY AREAS

(Selected Technology Areas Comprise 5% or More of the Patents Produced on Long Island in the Last 5 Years)



Source: CHI Research Inc., "CHI MSA Patent Profile". Population data are from the U.S. Census Bureau, as configured by the Real Estate Center at Texas A&M University.

Why is this important?

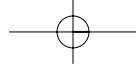
Patents reflect a region's capacity to innovate by creating and applying new knowledge.

The Current Impact Index (CII) measures how frequently recent regional patents (within the last five years) are cited in the front pages of patents filed in the current year, relative to similar patents in the patent database. Technology areas in which the regional CII is higher than the database average suggest that Long Island is laying important building blocks to future innovation.

How are we doing?

The rate of patents issued per 100,000 people, measured annually, declined steadily from 1998 (34.53) to 2001 (28.25), and rose slightly from 2001 to 2002 (28.36).

During the last five years, most patents were generated in the categories of Computers and Peripherals, Miscellaneous Manufacturing, Telecommunications, Electrical Appliances and Components, Chemicals, and Pharmaceuticals.



VIBRANT, LIVABLE COMMUNITIES



GOAL 4:

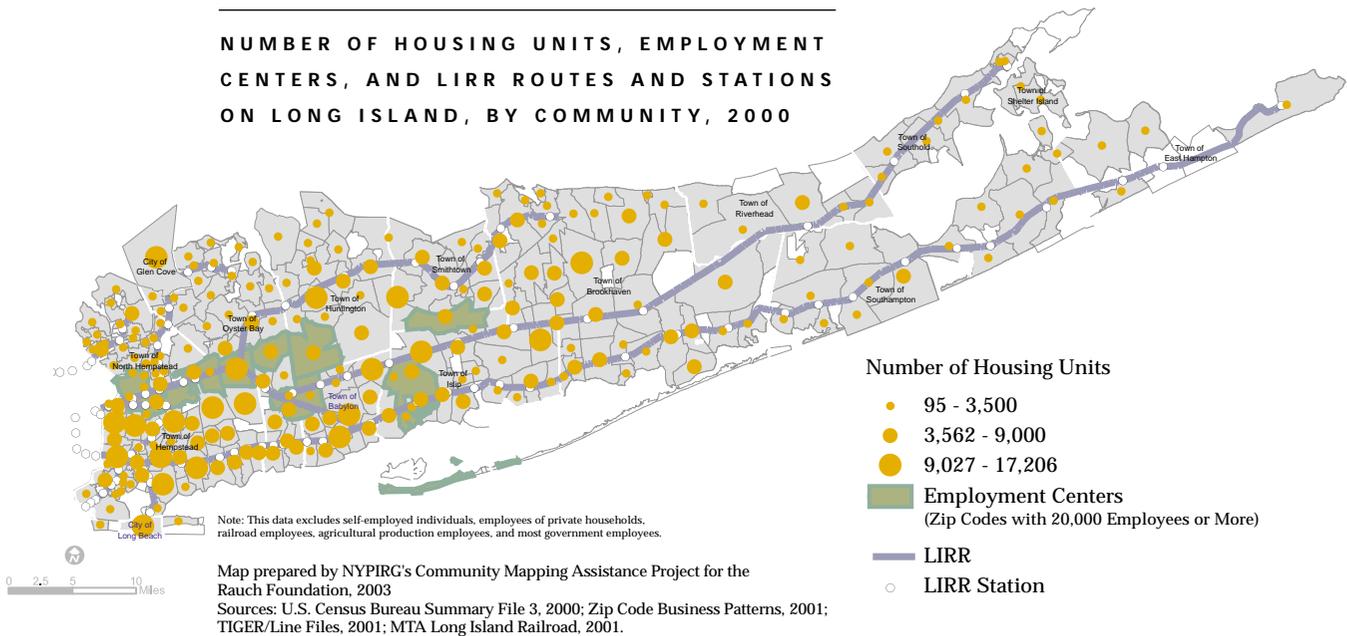
VIBRANT COMMUNITIES

We create exciting communities and downtown centers that offer people a wide choice of places to live, work, and play.

VIBRANT, LIVABLE COMMUNITIES

Jobs-Housing-Transit Mismatch

NUMBER OF HOUSING UNITS, EMPLOYMENT CENTERS, AND LIRR ROUTES AND STATIONS ON LONG ISLAND, BY COMMUNITY, 2000



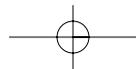
Why is this important?

Long Island is no longer a “bedroom community” of residents who mainly commute to and from jobs in New York City. If designed well, an improved intra-island transit system would reduce traffic congestion, improve the environment, and help foster more vibrant downtown centers combining livable communities and employment opportunities.

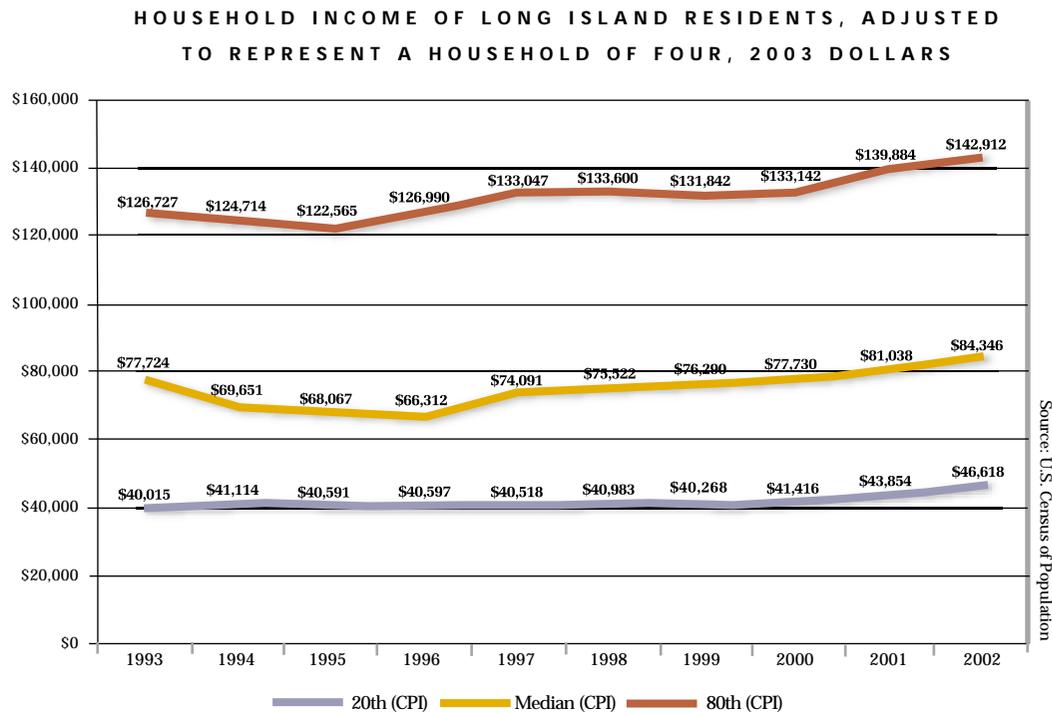
How are we doing?

Suburban Long Island was designed so that residential neighborhoods would be separate from industrial and office areas. The map illustrates this geographic distinction between concentrations of housing on Long Island and the region’s major employment centers. The map also shows the lack of meaningful public transportation options from one to the other.

Bus travel is an option, but relatively few people rely on buses due to limited access and availability. Similarly, the Route 110 corridor along the Nassau-Suffolk border from Farmingdale to Huntington – home to more than 97,000 jobs in 2001 – is primarily accessible by car. With the exception of Hicksville, none of Long Island’s employment centers is located in close proximity to a major train station or population center.



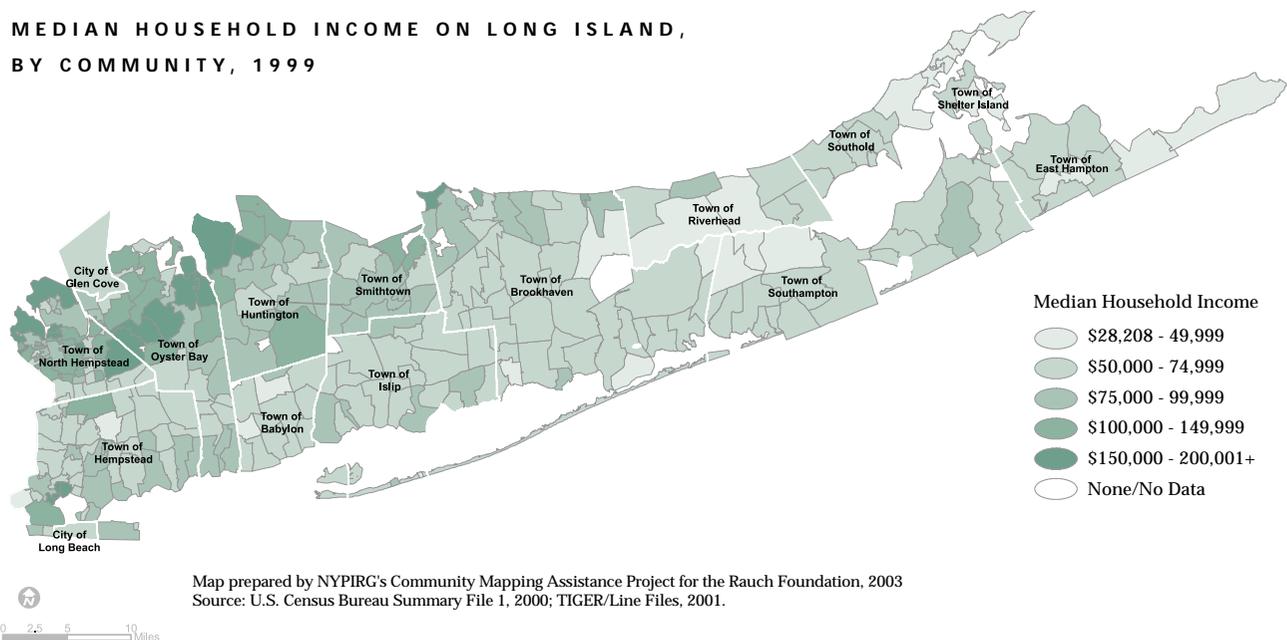
Income Disparity



Why is this important?

This measure shows how Long Island's standard of living among households at different income levels has changed from year to year. It tracks the income of a representative four-person household at the 80th percentile, the median and the 20th percentile of the income distribution. Household income includes income from wages, investments, Social Security and welfare payments for all people residing in a household.

MEDIAN HOUSEHOLD INCOME ON LONG ISLAND, BY COMMUNITY, 1999



How are we doing?

In 2002, inflation-adjusted incomes of households in the 20th percentile continued to rise. A representative household at the 20th percentile earned approximately \$46,600 in 2002, compared to \$43,900 in 2001, an increase of 7% (in inflation adjusted dollars). Between 1993 and 2002 household incomes at the 20th percentile rose nearly 17% from \$40,015 to \$46,600 in 2002 on Long Island.

Incomes for households at the 80th percentile continued to rise in 2001-2002, following steady growth over the last ten years. Inflation-adjusted incomes of households at the 80th percentile increased 13% from \$126,700 in 1993 to an estimated \$142,900 in 2002.

Long Island's median income is estimated at \$84,300 for a representative household of four in 2002.

Poverty Persists Amidst Affluence

Why is this important?

The concentration or dispersion of poverty within a society is a leading indicator of equity, one of the foundations of sustainability. On the whole, we are far more affluent than the average American and have the highest incomes in the New York region. In spite of this affluence, we include many low-income families and individuals.

How are we doing?

About 154,000 Long Islanders live below the federal poverty line. At 5.6%, this is low by national standards. However, the federal poverty level for a family of three is only \$13,738. In a high-cost area like Long Island, this means that many more people living above the poverty line ought to be considered low-income. In addition, as shown in the map, there are many "pockets of poverty" that have concentrated numbers of low-income households.

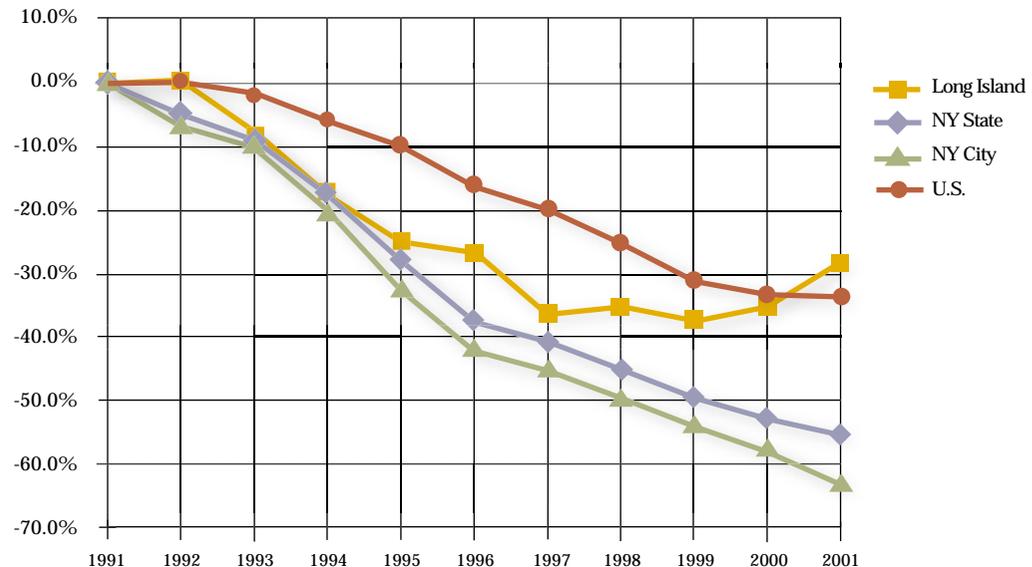
COMMUNITIES ON LONG ISLAND WHERE MORE THAN 10% OF THE POPULATION LIVES IN POVERTY



U.S. Census of Population, 2000

Violent Crime Rate on Long Island

PERCENT CHANGE IN VIOLENT CRIME RATE
(PER 100,000 RESIDENTS), LONG ISLAND, NEW
YORK STATE, NEW YORK CITY AND U.S., 1991-2001



Source: New York State Division of Criminal Justice Services, FBI Uniform Crime Reports (UCR) and U.S. Census Bureau

Why is this important?

The amount and perception of crime on Long Island are important factors that affect our individual and shared quality of life. Crime and fear of crime undercut our sense of community and hurt our ability to prosper.

How are we doing?

Violent crimes on Long Island have decreased considerably since the early 1990s, but a public debate has emerged over the reliability of crime data. A recent *Newsday* investigation reported that violent crime statistics are significantly understated because thousands of offenses in villages and cities are not included in the tallies. When these numbers are added to county police figures, violent crimes have risen.

Available data shows that even though there has been a decrease in violent crimes since 1990, between 2000 and 2001 in Nassau and Suffolk County the number of violent crimes increased slightly. Unlike Long Island, New York City and New York State's violent crime rate continued to fall between 2000 and 2001, but the U.S. as a whole experienced a slight 0.8% crime rate increase.

As of publication, national crime statistics were not available for 2002, and we cannot predict if this is the beginning of an increasing trend of violent crimes on Long Island. However, as *Newsday's* report shows, further collaboration between county, village and city officials is needed to provide valid and reliable data.

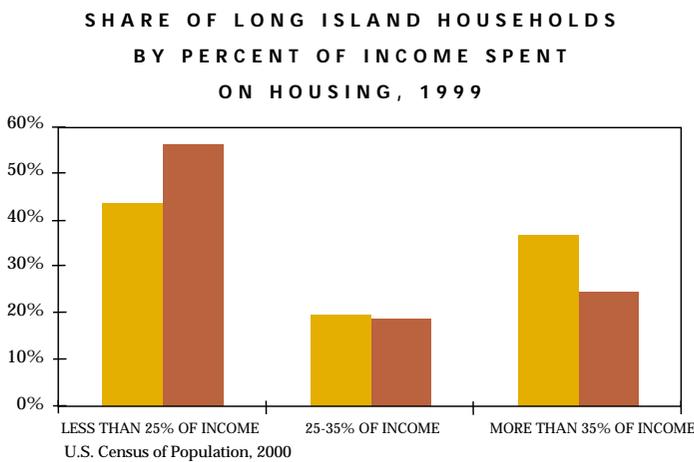
Households Spend More than 30% of Income on Housing

Why is this important?

Strong economic growth requires affordable housing. Households that spend more than 30% of their monthly income on housing face a housing burden.

**GOAL 5:
AFFORDABLE HOUSES**

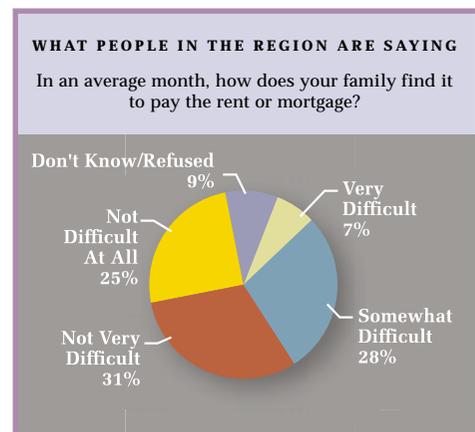
We generate housing options that are affordable to people of all ages and income levels.



How are we doing?

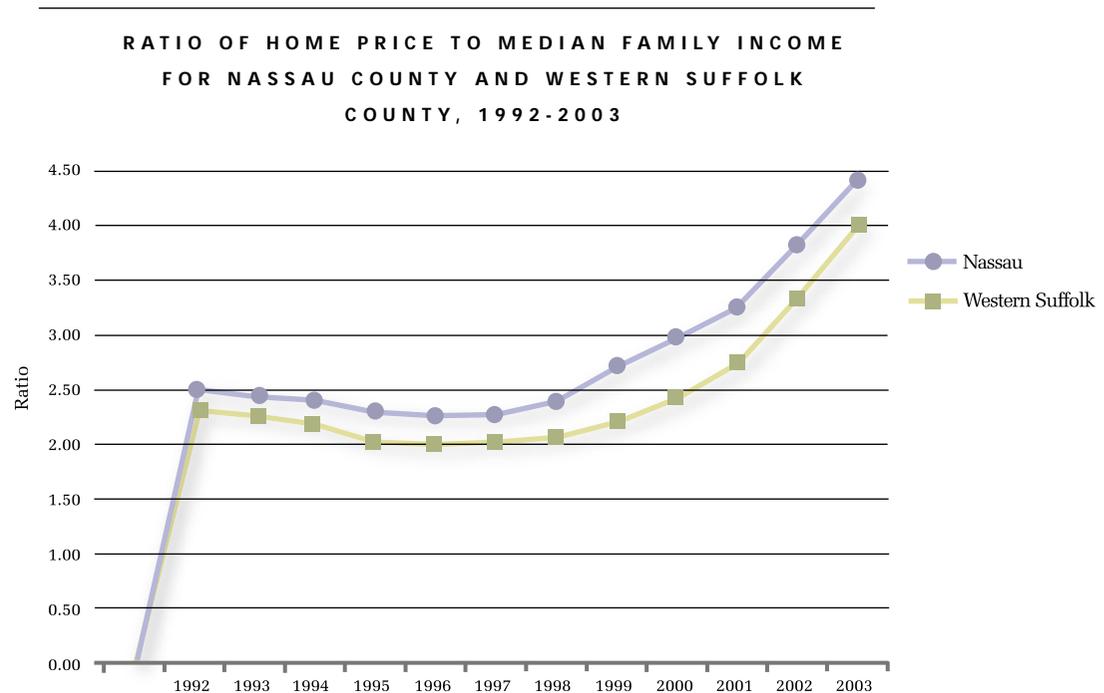
Overall, approximately 34% of Long Island's households (owner- and renter-occupied combined) have monthly housing costs that exceed 30% of monthly income. Our housing prices are more than twice as high as the national average, but comparable to other suburban counties in the New York metropolitan area. Compared to the national median home value for metropolitan areas of \$168,900, the median home value on Long Island is \$363,700, up 18.4% from a year ago. As of October 2003, Nassau's median home price of \$405,000 is substantially higher than Suffolk's at \$324,500.

Renters spend even more of their income on housing than homeowners, with more than a third of renters spending more than 35% of their monthly income on rent. Unlike housing prices, we have some of the highest rents in the metropolitan region. Although Long Island has the smallest proportion of renters (20%) of any of the major areas of the New York region, it has the lowest vacancy rates and highest rents.



Source: "Room for Growth, Long Island's Changing Economy", March 2004

Housing Affordability Continues to Decline



Sources: Long Island Board of Realtors, Inc., Multiple Listing Service of Long Island Inc., Long Island Regional Planning Board

Why is this important?

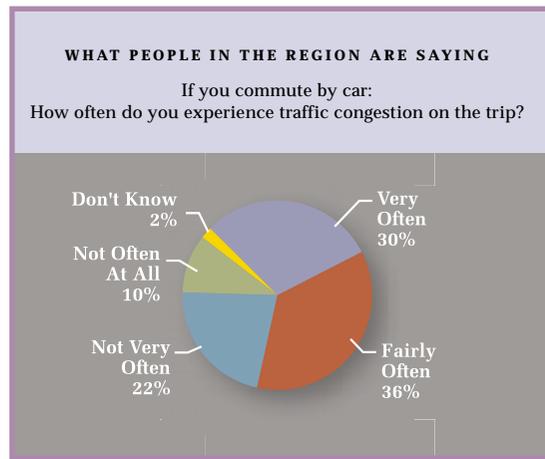
The scarcity of affordable housing has become one of the most significant challenges facing Long Island. According to Fannie Mae, a home is considered affordable if the purchase price is no more than 2.5 times higher than the buyer's annual household income.

How are we doing?

Housing affordability on Long Island has decreased dramatically over the past 4 years. Between 1992 and 1998, housing on Long Island was fairly affordable with the ratio of home price to median family income at or below 2.5. It now stands at 4 in Suffolk and almost 4.5 in Nassau, meaning that home prices in Suffolk are now 4 times the median family income and home prices in Nassau are now 4.5 times the median family income.

A recent study by the New York State AFL-CIO reported that a household would have to earn at least \$64,000 a year to afford the median monthly costs of owning a home with a mortgage on Long Island. This leaves approximately 436,000 (47%) Long Island households unable to afford the median monthly costs of owning a home with a mortgage.

Transportation System Not Meeting our Needs



Source: "Long Islanders: Who Are We? A Quality of Life Survey", April 2003

GOAL 6: TRANSPORTATION CHOICES

We increase mobility by investing in an integrated, regional transportation system and by encouraging creative problem solving to find transportation alternatives.

Why is this important?

Efficient transportation systems help improve the overall livability of our communities and our quality of life by providing easier access to jobs, home, recreation and entertainment.

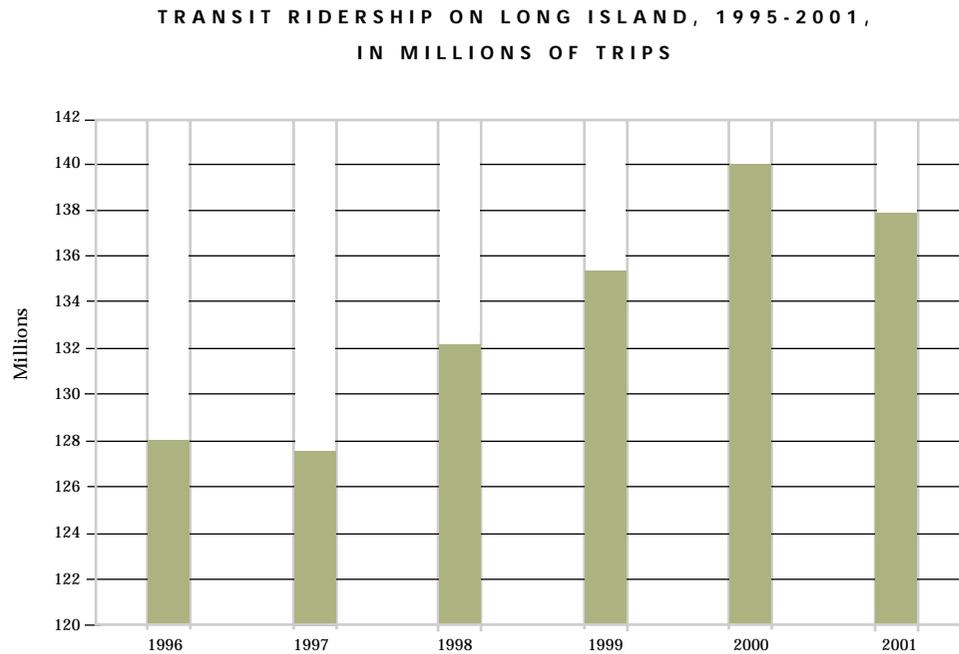
How are we doing?

A transportation system that was largely built for east-west travel and commutation to Manhattan must now deal with both greater volume and more complex travel flows. Traffic exceeds design capacity on the Long Island Expressway and the Parkways at rush hour, and many arterial highways are also crowded.

Congestion results from both demand (the number, type and length of trips that people make) and supply (the capacity of highways, streets and commuter rails to handle the demand). Tracking both vehicle and transit use provides a good indication of whether congestion is getting better or worse. Monitoring how often people use buses and the Long Island Rail Road is important. However, a few facts from the 2000 U.S. Census and a 1997/1998 travel survey by the New York Metropolitan Transportation Council (NYMTC) indicate just how dependent Long Islanders are on their cars:

- 83% of Long Islanders drive to work (Census).
- For both work and non-work travel, the average Long Islander makes three-and-a-half trips per day (NYMTC).
- Two out of every three households own two or more cars. About 6% of households (60,000) do not own a car (Census).

Transit Ridership Increased in the late 1990s



Source: American Public Transportation Association/ Federal Transit Administration Database

Why is this important?

Increased transit ridership helps reduce traffic congestion by taking motor vehicles off the road. An efficient transit system helps provide quicker access to jobs, helps to improve the overall livability of our communities and reduces pollution.

How are we doing?

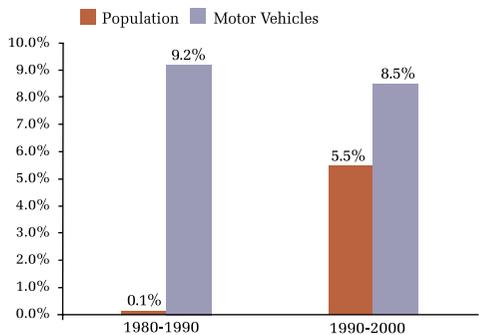
Between 1990 and 2000, there was little change in the number of people who took buses, the Long Island Rail Road and other means of public transit to work. 11.5% of commuters took public transit to work in 1990, and 11.3% did so in 2000; however, transit ridership as a whole increased by 10% between 1995 and 2000 before declining in 2001, the last year for which data is available.

Over 100 million trips were recorded on the LIRR in 2001. 31 million trips were made on MTA Long Island Bus and 5 million trips on Suffolk County Transit. All three systems increased ridership between 1995 and 2000, but the largest increases were in bus riders—21% on LI Bus and 15% in Suffolk County.

Transit ridership can rise or fall for many reasons—changes in job opportunities, income and the availability, price and quality of service can all affect changes. The late 1990s were a time of rapid job growth, expanded bus service in some parts of Nassau and Suffolk, and the introduction of free transfers and other discounts on MTA services. All of these likely contributed to an increased number of transit riders. The weakening economy in 2001 was also a probable cause of transit ridership declining in 2001.

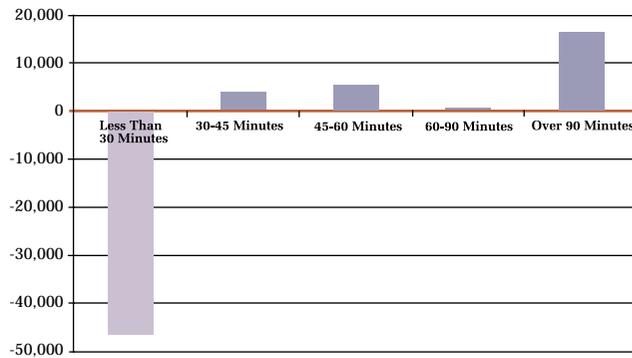
More Cars, Longer Commutes

PERCENT INCREASE IN POPULATION AND MOTOR VEHICLE REGISTRATIONS ON LONG ISLAND, 1980-2000



Sources: U.S. Census of Population and New York State Department of Motor Vehicles

CHANGE IN NUMBER OF LONG ISLAND WORKERS BY TIME IT TAKES TO GET TO WORK, 1990-2000



Source: U.S. Census of Population, 1990 and 2000

Why is this important?

The more motor vehicles registered in an area, the more cars are on the road, leading to increased traffic congestion and longer commutes for everyone. Time spent commuting represents time we can't spend pursuing activities.

How are we doing?

From 1980 to 2000, the number of motor vehicles registered to residents of Nassau and Suffolk grew by 19%, more than three times the rate of population growth. There are now 2.3 cars for every household on Long Island. In both Nassau and Suffolk, the number of automobiles is beginning to approach the number of people.

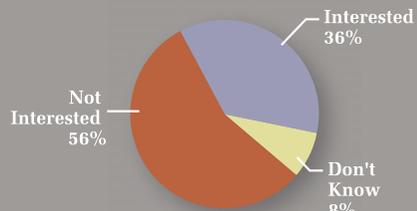
In the 1990s commuting times increased in both Nassau and Suffolk. There was a significant reduction in the number of people who commuted less than 30 minutes, and a large increase in the number of people who commuted more than 90 minutes. Average commuting time increased from 35 to 37 minutes for residents of Nassau

County and from 31 to 33 minutes for Suffolk residents.

Traffic issues are hardly unique to Long Island. Other suburban areas of the New York metropolitan region have similar levels of auto ownership and commuting times. Average commuting times are slightly higher on Long Island, but workers in northern New Jersey, Connecticut and the Hudson Valley experienced even greater increases in commuting times during the 1990s.

WHAT PEOPLE IN THE REGION ARE SAYING

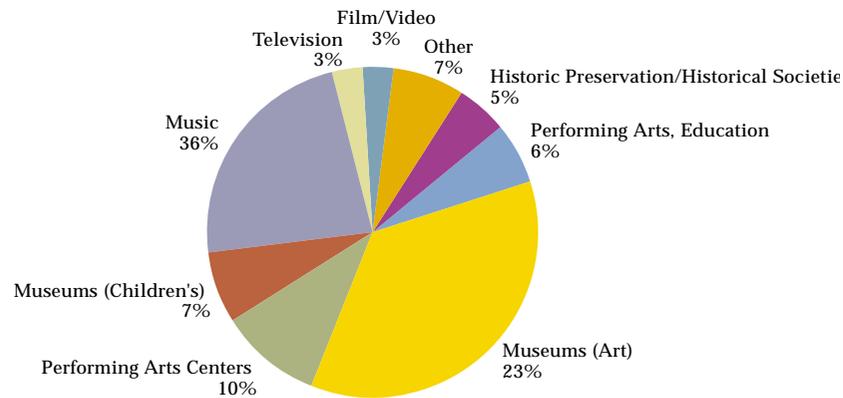
If there were "dollar vans" in your area that ran short routes not served by public transport, would you be interested or not in using them to commute, shop, or go out?



Source: "Long Islanders: Who Are We? A Quality of Life Survey", April 2003

Music Organizations Receive Most Funding from National Foundations

FUNDING OF THE ARTS ON LONG ISLAND BY LARGE NATIONAL FOUNDATIONS, BROKEN INTO MAJOR CATEGORIES, 2001



Source: The Foundation Center, Grants Sample, 2001.

Why is this important?

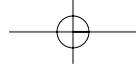
Access to art museums, musical venues, performing arts centers, historical centers and similar cultural amenities make a community intellectually exciting and vibrant.

How are we doing?

In 2001, 63 grants totaling \$3,162,169 were awarded by large foundations to Nassau and Suffolk County arts and culture organizations. Music organizations received more than \$1 million, followed by art museums, with \$740,000 in grants. Performing arts centers and children's museums were 3rd and 4th on the funding list, receiving \$316,669 and \$220,000 respectively.

When compared to such funding in the U.S., Long Island's arts and culture funding stands out by its focus on music organizations. In 2001, foundation giving in the U.S. went primarily to art museums (\$315,792,331) and theater and performing arts centers (each over \$100,000,000). Visual arts, orchestra (symphonies) and historical preservation also topped the list with corporation funding awards.

The numbers also imply that the majority of the funding to local arts organizations comes directly from local foundations, corporations and individual patrons.



HEALTHY, EDUCATED POPULATIONS

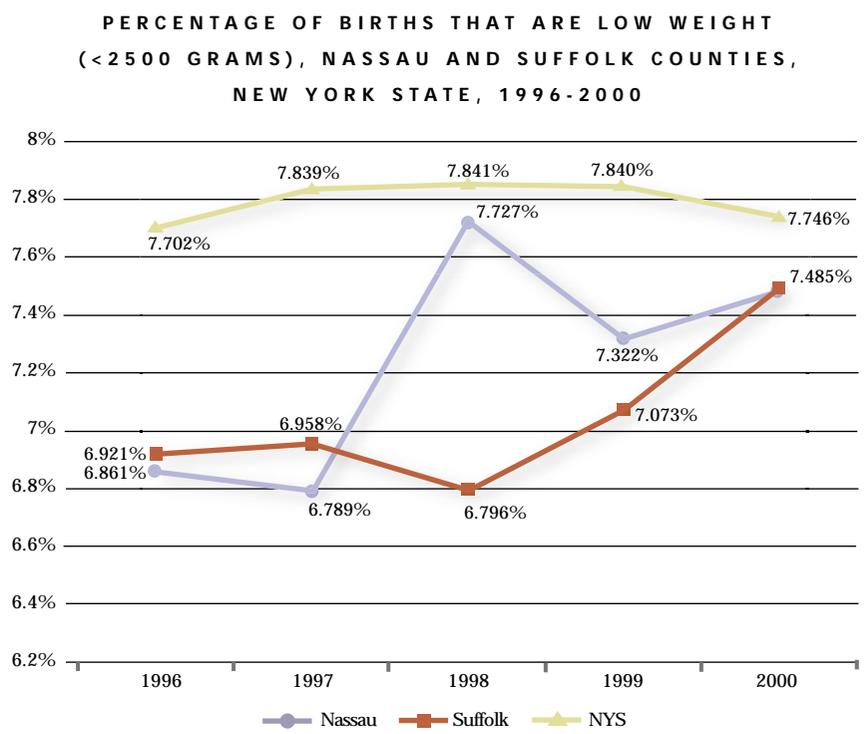


**GOAL 7:
HEALTHY PEOPLE**

All people have access to quality affordable health care that focuses on disease and illness prevention.

HEALTHY, EDUCATED POPULATIONS

Percentage of Children with Low Birth Weights Rises

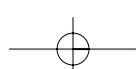


Why is this important?

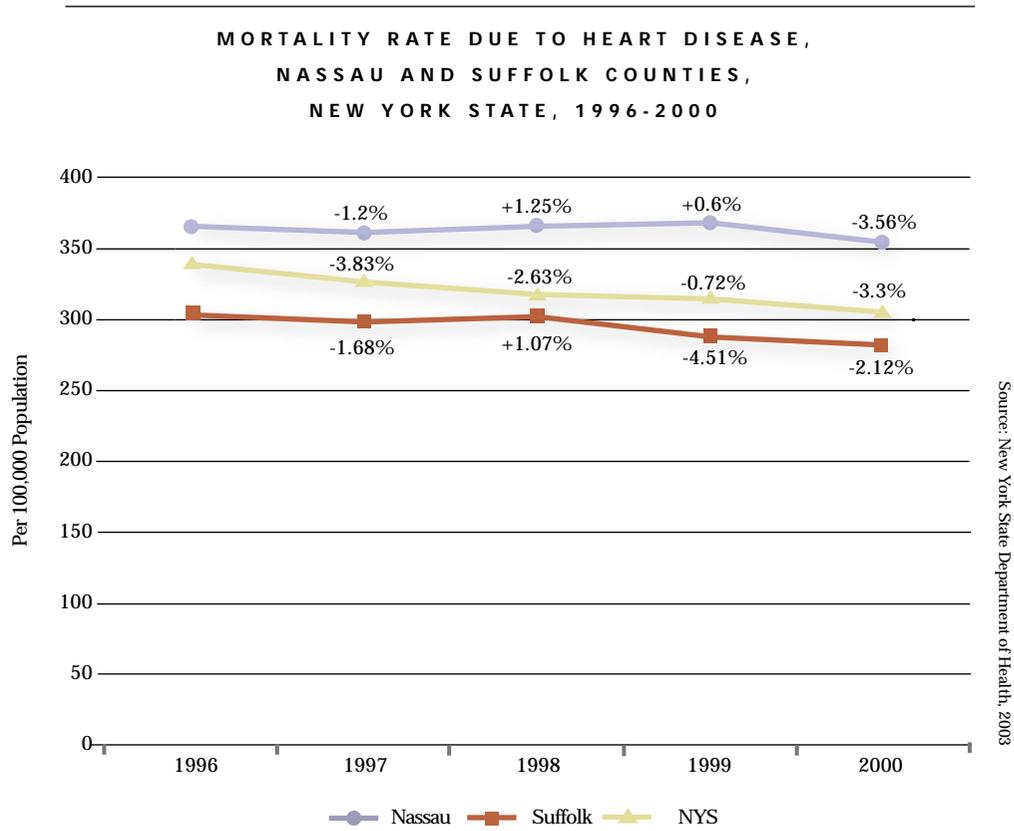
Research indicates babies who are born underweight often experience serious health problems as newborns and are at greater risk for long-term disabilities as they grow older. In addition, increased proportions of low birth weight children can be a predictor of rising costs for preventable health problems, special education and crime. This indicator measures the percentage of babies born under 2500 grams (5.5 lbs.), which serves as the medical threshold for a healthy baby's weight.

How are we doing?

Since 1996, the percentages of low birth weight babies in Nassau and Suffolk Counties have averaged consistently less than New York State percentages. However, data indicates that while the state percentages have stayed relatively stable from 1996 to 2000, Long Island's percentages of low birth weight babies are rising and beginning to approach statewide averages.



Mortality Rate Due to Heart Disease Declines

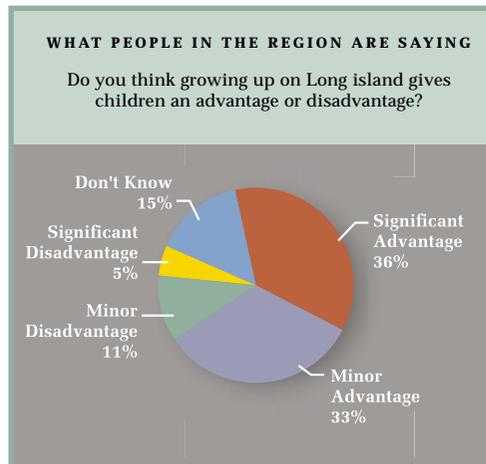


Why is this important?

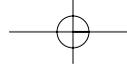
Mortality rates are important indicators of a region's overall quality of life. This indicator uses heart disease, one of the leading causes of death on Long Island, as a measure of Long Island's health.

How are we doing?

From 1996 to 2000 the indicator demonstrates an overall decline in the number of deaths due to heart disease on Long Island and in New York State. However, the chart identifies that Nassau County's mortality rate from heart disease has remained consistently higher than the statewide rates, while Suffolk County's rate remains consistently lower.



Source: "Caring for Long Island's Children", September 2003

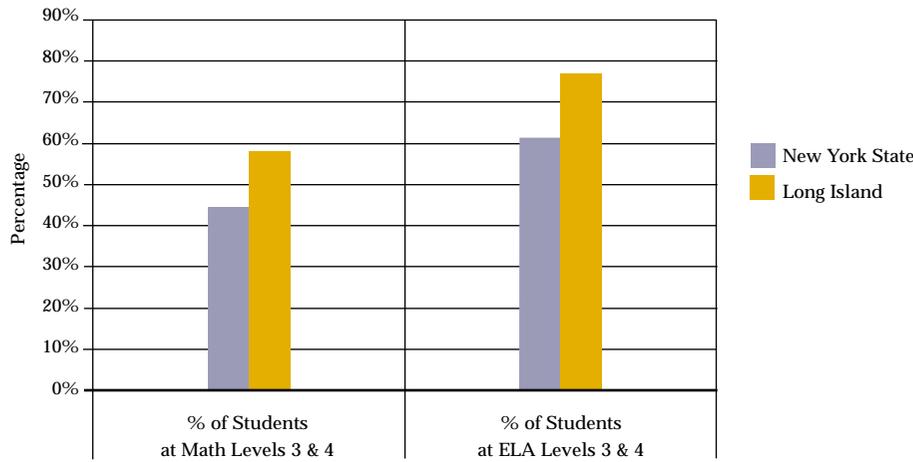


More Students are Performing At or Above Grade Level in English and Math

**GOAL 8:
EDUCATIONAL READINESS**

All students are prepared to learn at each stage of the educational pipeline.

PERCENT OF STUDENTS PERFORMING AT LEVELS 3 AND 4, 8TH GRADE MATHEMATICS AND 4TH GRADE ENGLISH LANGUAGE ARTS, NEW YORK STATE AND LONG ISLAND, 2002



Source: Eastern Suffolk BOCES Regional Report Card, Issued June 2003.

Why is this important?

PERCENT OF LONG ISLAND STUDENTS PERFORMING AT LEVELS 1 AND 2, 3 AND 4 FOR 4TH GRADE ENGLISH LANGUAGE ARTS, 2000 AND 2002

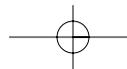
	% Of Students at Levels 1 & 2		% Of Students at Levels 3 & 4	
	2000	2002	2000	2002
High Need School Districts	65%	38%	35%	62%
Total All Other School Districts	35%	19%	65%	81%

Source: New York State Chapter 655 Report, Volume 2, Table 5 (using LEAP, Local Educational Agency Plan)

PERCENT OF LONG ISLAND STUDENTS PERFORMING AT LEVELS 1 AND 2, 3 AND 4 FOR 8TH GRADE MATHEMATICS, 2000 AND 2002

	% Of Students at Levels 1 & 2		% Of Students at Levels 3 & 4	
	2000	2002	2000	2002
High Need School Districts	79%	61%	21%	39%
Total All Other School Districts	48%	27%	52%	73%

Source: New York State Chapter 655 Report, Volume 2, Table 5 (using LEAP, Local Educational Agency Plan)



According to the New York State Education Department, the Grade 4 English Language Arts (ELA) and Grade 8 Mathematics exams reflect benchmarks that identify those students who should pass, and those who may have difficulty passing the Regents Exams that are now required for high school graduation. Students who score at Levels 1 & 2 are predicted to need additional assistance, while those that score a Levels 3 & 4 are considered to meet or exceed standards set by the state.

How are we doing?

As a whole, Long Island students significantly outperform students statewide on the Grade 4 ELA and Grade 8 Mathematics exams. In 2002, the averages for all Long Island students exceeded statewide averages for Levels 3 & 4 by more than 15% on the Grade 4 ELA exam, and by close to 14% on the Grade 8 Mathematics exam. However, indicators show significant disparities between the Long Island school districts that have high needs and low resources and all other Long Island school district scores.

Overall, while indicators suggest Long Island school districts have displayed consistent growth in helping 4th and 8th graders reach proficiency and mastery levels on required exams, the disparity between high need districts and all other school districts is not diminishing.

More of Long Island's Students Are At Risk

Why is this important?

Not all children experience economic and social conditions that allow them to perform their best in our public school system. This section explores school dropout rates and the growing numbers of children in our public schools who are living in poverty, are participating in free/reduced lunch programs and are identified as having limited English proficiency. All of these are indicative of students at risk of performing poorly in school. They also reflect Long Island's changing population and the resulting increase in disparity.

How are we doing?

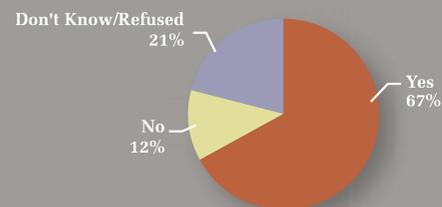
Drop Out Rates

From 2000 to 2002, the overall dropout rates for Long Island schools increased. However, in high need school districts the rate increased from just over 3% to almost 5%, while the dropout rate for all other school districts increased less dramatically, from 1.4% to just over 2%.

Poverty Index

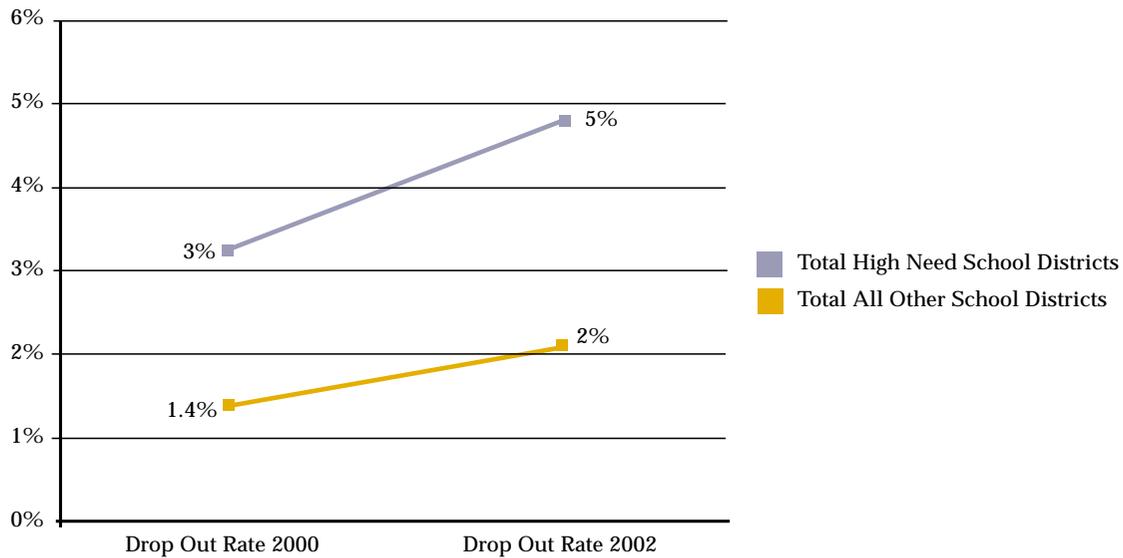
WHAT PEOPLE IN THE REGION ARE SAYING

Ask of all with children under 5:
If local preschools and child care services were rated for quality, for instance on a five star basis, would you use these ratings to help decide where to send your child?



Source: "Caring for Long Island's Children", September 2003

PERCENT OF LONG ISLAND STUDENTS WHO DROP OUT OF HIGH SCHOOL, 2000-2002

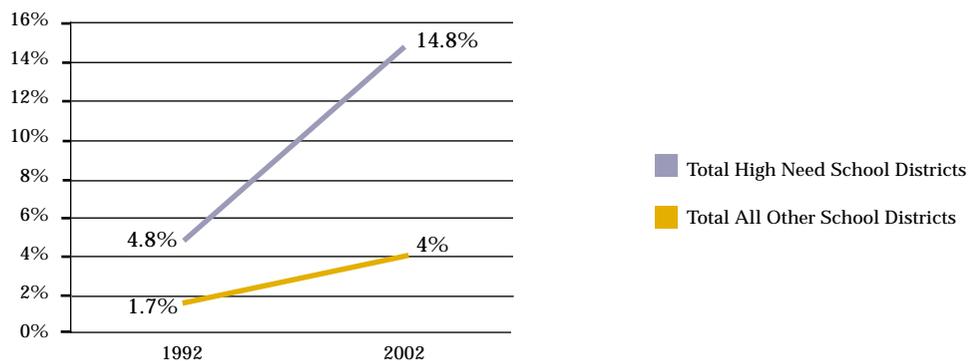


Source: New York State Chapter 655 Report, Volume 2, 2000 and 2002, Table 1 (using Basic Educational Data System)

The number of children in all Long Island school districts living under the poverty level has increased significantly in the past decade, with numbers in high need districts growing at a faster pace than in other districts. In 1992, nearly 1 in 21 children in high need districts were living under the poverty level. By 2002, the number had tripled to 1 in 7 children. During the same period, the poverty rate in all other Long Island school districts more than doubled from 1.7% in 1992 to 4.0% in 2002.

Free/Reduced Lunch Participation

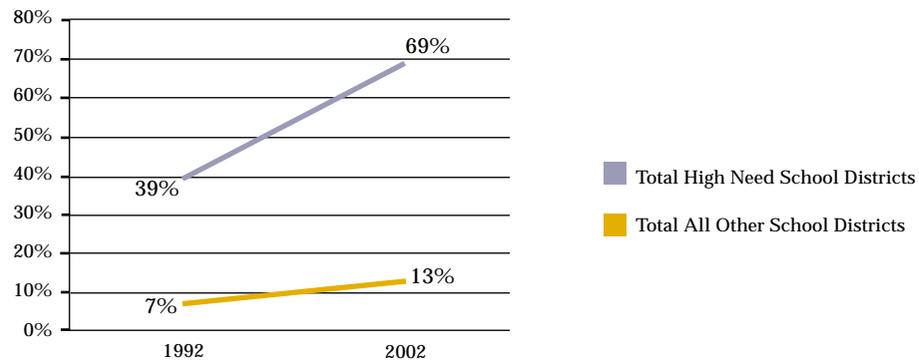
PERCENT OF LONG ISLAND STUDENTS LIVING BELOW THE POVERTY LEVEL, 1992-2002



Source: New York State Chapter 655 Report, Volume 2, 1992 and 2002, Table 1 (using Basic Educational Data System)

The percentage of students participating in free and reduced lunch programs is also on the rise for all Long Island school districts. In the decade from 1992 to 2002, the number of children in high need districts receiving free or reduced lunch rose from just over 1 in 3 children to more than 2 in 3. During that same period, all other school districts experienced an increase in participation from 1 in 14 students in 1992 to just under 1 in 8 in 2002.

PERCENT OF LONG ISLAND STUDENTS PARTICIPATING IN THE FREE-AND-REDUCED-PRICE LUNCH PROGRAM, 1992-2002

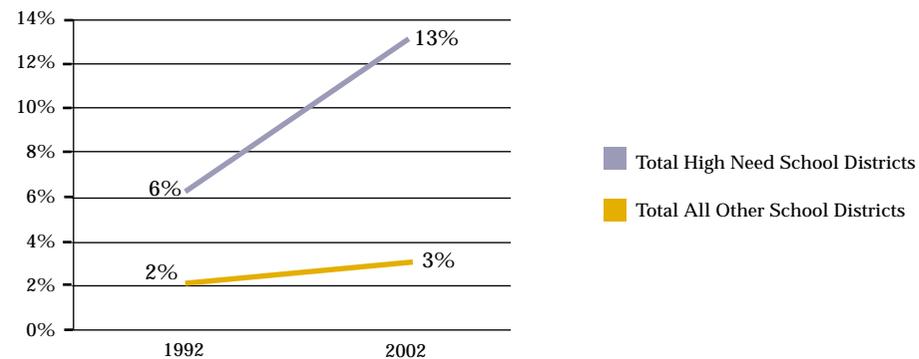


Source: New York State Chapter 655 Report, Volume 2, 1992 and 2002, Table 1 (using Basic Educational Data System)

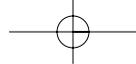
Limited English Proficiency

Long Island high need school districts are experiencing a dramatic increase in students with limited English proficiency, while all other school districts have significantly fewer students in this category. In 1992, 6% of children in high need school districts had limited English proficiency. By 2002, there was a sharp increase to 13%, more than doubling the previous rate. During the same period, all other school districts increased from 2% to 3% of students identified with limited English proficiency.

PERCENT OF LONG ISLAND STUDENTS WITH LIMITED ENGLISH PROFICIENCY, 1992-2002



Source: New York State Chapter 655 Report, Volume 2, 1992 and 2002, Table 1 (using Basic Educational Data System)



ENVIRONMENTAL STEWARDSHIP

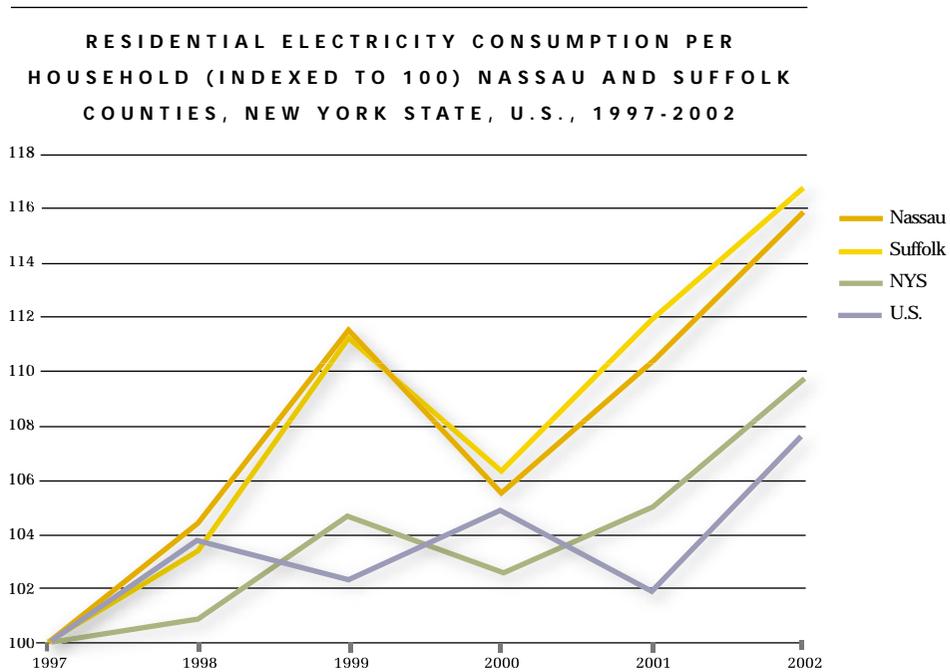


**GOAL 9:
CONSERVE ENERGY**

We improve the region's overall energy efficiency and promote conservation.

ENVIRONMENTAL STEWARDSHIP

Region is Consuming More Energy



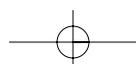
Sources: Long Island Power Authority, Long Island Regional Planning Board, U.S. Census Bureau, Energy Information Administration (EIA), New York State Energy Research and Development Authority

Why is this important?

High-energy consumption has large economic and environmental costs. Responsible energy use will be a key factor in building a sustainable Long Island in the future.

How are we doing?

Long Islanders consume a considerable amount of energy and recent figures show no signs of a potential decline. Between 1997 and 2002, residential electricity consumption increased 16%. Trends in New York State and the U.S. also show increases in electricity consumption, but not as dramatic as on Long Island.



GOAL 10: PROTECT NATURE

We meet high standards for improving our air and water quality, protecting and maintaining our open spaces, and conserving natural resources.

Acres of Open Space Per Capita are Low

Why is this Important?

One of the initial reasons people moved to the suburbs was to be close to the natural environment. Protected open space is an important measure of the ability of the region to conserve its natural environment and preserve its quality of life.

How are we doing?

Open space per capita on Long Island is low, but comparable to the other New York Metro Region suburbs when the amount of total land mass and population density for each region is taken into consideration. Currently, there are 0.06 acres of open space per capita on Long Island. In order to maintain this level of open space for each resident, preservation of remaining open space is critical in the face of aggressive development across the island.

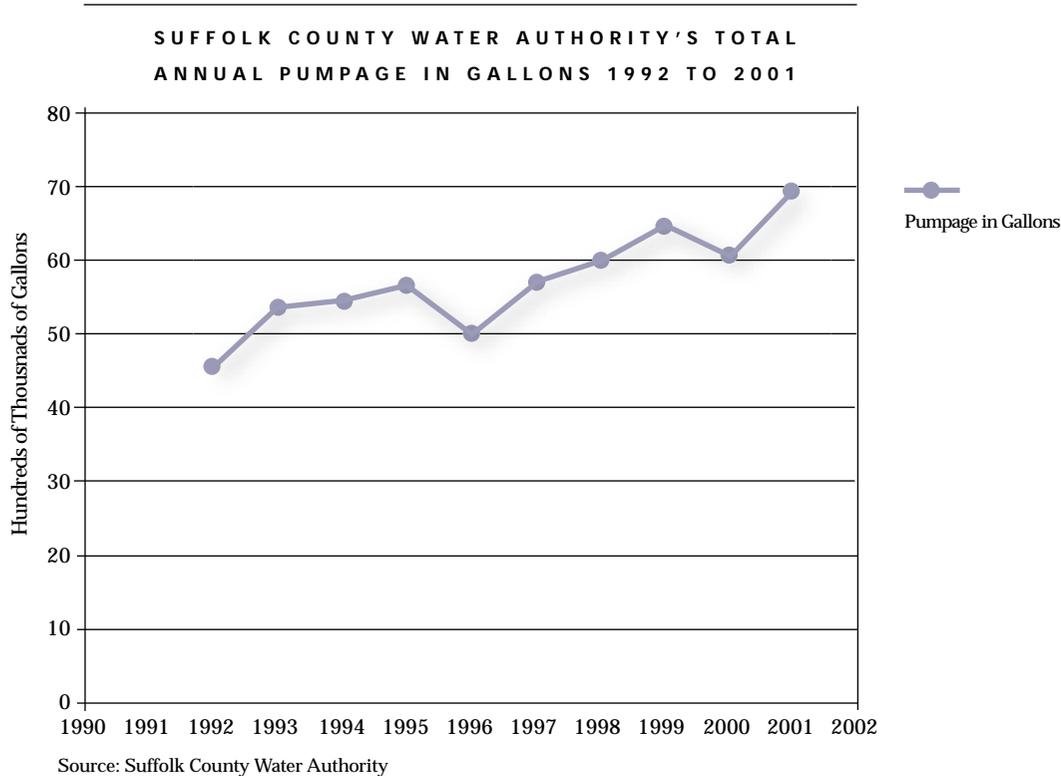
In the region, the New Jersey suburbs have the most open space per capita (0.09 acres) followed by the northern suburbs (0.08).

OPEN SPACE BY ACRES PER CAPITA (MUNICIPAL, STATE AND FEDERAL PARKS) IN THE NEW YORK METROPOLITAN REGION

	Municipal	State	Federal	Total Open Space	Total Population	Open Space per Capita
Long Island	87,908	44,108	20,427	152,443	2,753,913	0.06
Northern suburbs	74,264	108,638	3,245	186,147	2,434,146	0.08
New Jersey suburbs	146,949	277,599	180,009	604,557	6,661,750	0.09

Sources: Long Island Regional Planning Board, Regional Plan Association

Monthly Water Consumption Increases in Suffolk County

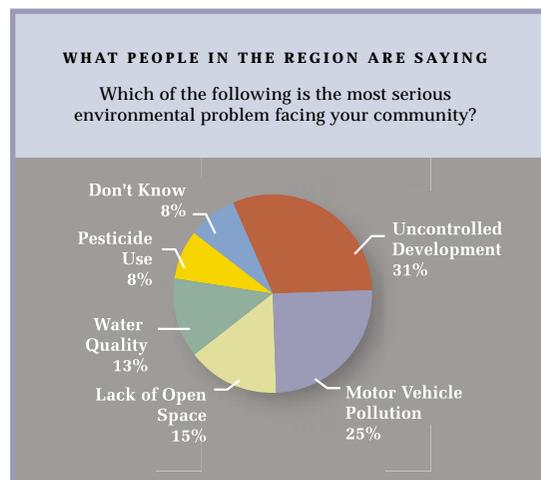


Why is this important?

Overt water consumption is costly; both environmentally and economically. Potential shortages, especially during droughts, affect the entire region.

How are we doing?

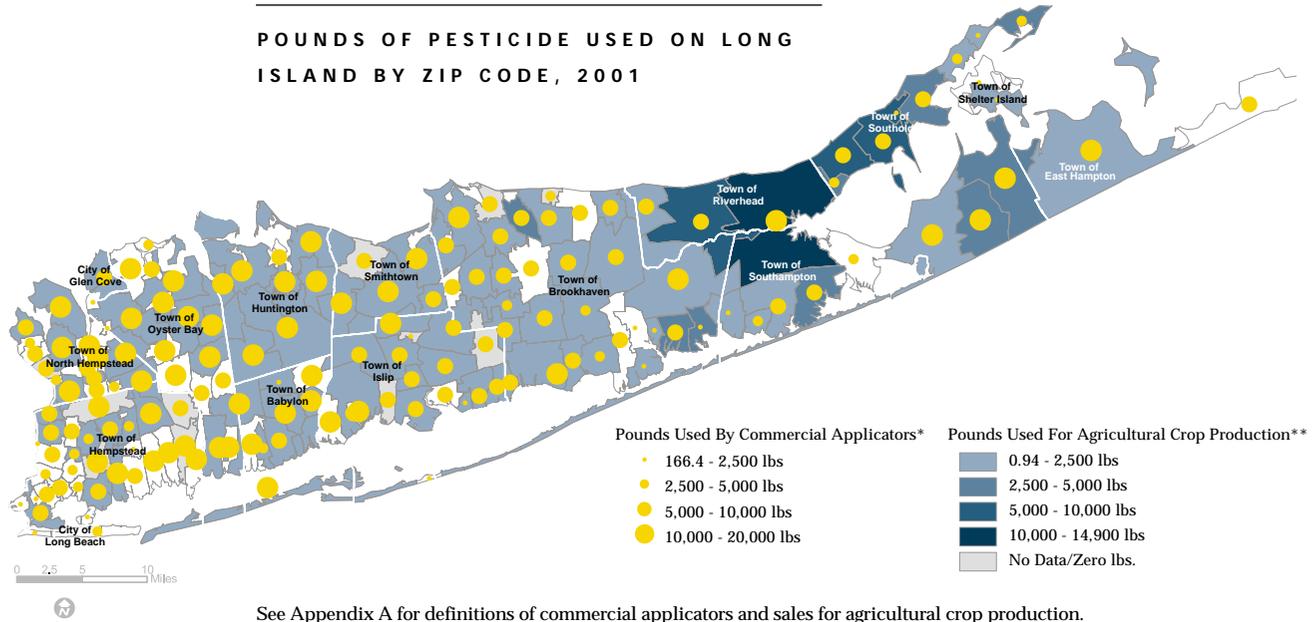
Suffolk County residents consume a considerable amount of water, and their annual consumption per capita is increasing. From 1992 to 2001, the total annual pumpage increased by over 51%, while population during that same period grew at a much slower rate.



Source: "Long Islanders: Who Are We? A Quality of Life Survey", April 2003

Long Islanders Use Almost Double the Amount of Pesticides Per Capita Compared to New York State

POUNDS OF PESTICIDE USED ON LONG ISLAND BY ZIP CODE, 2001



See Appendix A for definitions of commercial applicators and sales for agricultural crop production. Source: New York State Pesticide Sales & Use Reports Database

Why is this important?

Use of toxic chemicals and their release into the environment can cause public health and environmental hazards.

How are we doing?

According to data collected by the New York State Department of Environmental Conservation (DEC) for 2001, Suffolk and Nassau counties are the first and third highest pesticide consuming counties in the state. In 2001, New Yorkers statewide used less than a pound of pesticides (0.89 lbs) per person, whereas on Long Island, the per capita pesticide usage was almost double at 1.64 pounds.

Despite the agricultural activity in Suffolk County, a smaller amount of pesticides was involved in agriculture on Long Island (0.16 lbs per capita) than was used in New York State (0.29 lbs per capita). Overall, agricultural and commercial usage on Long Island accounted for just over 1/5th of all pesticides reported in the state in 2001.

G O V E R N A N C E


**GOAL 11:
MATCHING RESOURCES
AND RESPONSIBILITY**

Long Island's counties, towns, villages, and other jurisdictions manage their revenue to provide quality local and regional services.

G O V E R N A N C E

Room For Improvement On Measures of Government Performance
Why is this important?

Nassau and Suffolk Counties are two of the largest counties in the U.S. with a population of 2.8 million residents. Their combined budgets total \$4.78 billion (Nassau County \$2.28 billion and Suffolk County \$2.5 billion). Governing a population of this size and managing the two counties are enormous and difficult tasks and ones that need improvement if the region is to address its challenges.

How are we doing?

Between March 2001 and January 2002, Nassau and Suffolk County were each evaluated as part of the Government Performance Project, which was a collaboration between *Governing* magazine and the Maxwell School of Citizenship and Public Affairs at Syracuse University. The project evaluated and graded the management capacity of the 40 largest U.S. counties. Nassau and Suffolk County each received low grades:

Nassau County

Financial Management: F
Capital Management: D-
Human Resources: D
Managing for Results: F
Information Technology: D+
Average Grade: D-

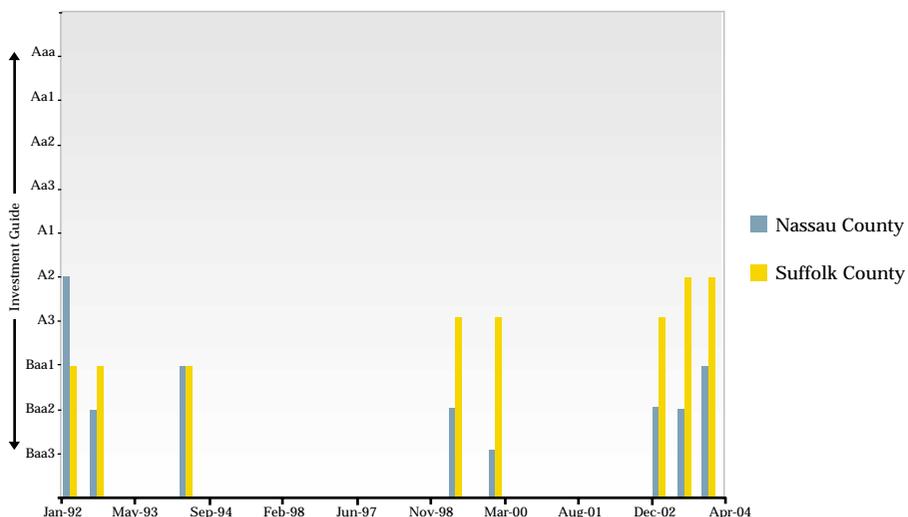
Suffolk County

Financial Management: B-
Capital Management: B-
Human Resources: C-
Managing for Results: F
Information Technology: C
Average Grade: C-

While the results for Long Island are disappointing, it should be noted that Maricopa County in Arizona, with a population of 3.3 million people emerged from a near bankruptcy crisis in the mid-1990s to achieve a renewed sense of unity and become one of the nation's best-managed local governments. Their average grade in the Maxwell study was A-. Orange County in California, similarly, brought itself back from bankruptcy to financial respectability in well under a decade. In both Nassau and Suffolk Counties, change appears to have started as voters have recently elected new county officials in each county.

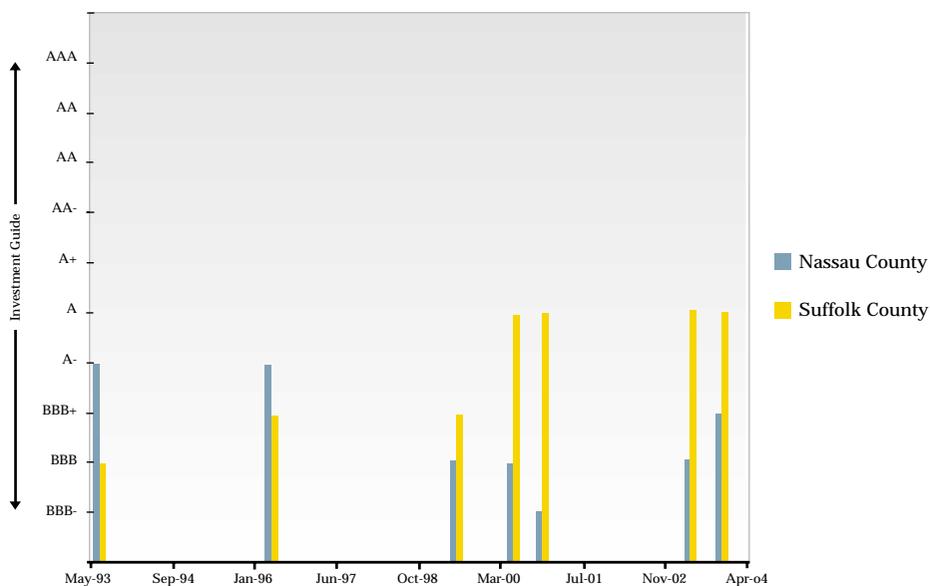
Bond Ratings on the Rise in Both Counties

BOND RATINGS BY MOODY'S FOR NASSAU AND SUFFOLK COUNTIES, 1992-2004



Source: Nassau County Budget Office, Suffolk County Budget Office, Moody's Investor Service

BOND RATINGS BY STANDARD & POOR'S FOR NASSAU AND SUFFOLK COUNTIES, 1993-2004



Source: Nassau County Budget Office, Suffolk County Budget Office, Standard and Poor's

Why is this important?

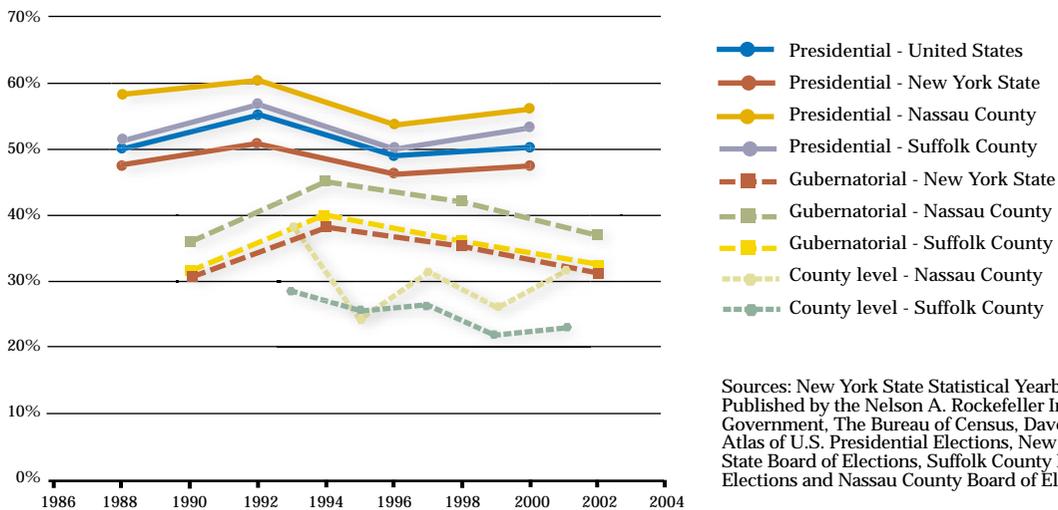
The credit rating agencies are a nationally recognized measure of local municipal financial strength and have been used extensively by individual and institutional investors as a benchmark for the purchase of municipal bonds. The credit rating of a local entity, such as Nassau or Suffolk County, is a critical building block in its fiscal structure. The rating is one of the key factors in how much interest the Counties must pay to borrow money.

How are we doing?

Moody's and Standard & Poor's ratings, during the past ten years, put both Counties in the lower half of the 'Investment Grade' category, even though they are considered by many to be among the wealthiest counties in the country. Poor ratings have a direct effect on the cost of doing business, be it for capital projects or refinancing existing debt. Recently, Nassau County saw two upgrades as a result of their cost cutting efforts. The higher the rating, the lower the cost of debt.

Voter Turnout Low for Local Elections

VOTER TURNOUT FOR PRESIDENTIAL, GUBERNATORIAL AND COUNTY LEVEL ELECTIONS AS A PERCENT OF VOTING AGE POPULATION, NASSAU AND SUFFOLK COUNTIES, NEW YORK STATE, U.S., 1988-2002



Sources: New York State Statistical Yearbook- Published by the Nelson A. Rockefeller Institute of Government, The Bureau of Census, Dave Leip's Atlas of U.S. Presidential Elections, New York State Board of Elections, Suffolk County Board of Elections and Nassau County Board of Elections.

GOAL 12: CIVIC ENGAGEMENT

All residents and business people are actively engaged in local civic life.

Why is this important?

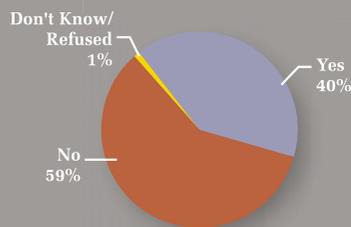
Voter participation is an indicator of civic engagement and reflects community members' commitment to the democratic process and confidence in political institutions.

How are we doing?

Nassau County voters consistently vote at a higher rate than Suffolk County voters. In Presidential elections both Nassau and Suffolk Counties vote at a higher rate (over 50%) than either the New York State or the U.S. average. For New York State gubernatorial elections, turnout drops for both counties but is higher than the state average. Unfortunately, despite the fact that 86% of the residents of Long Island say that they identify with the region, voter turnout for local elections is the lowest of all, not going over 30% for Suffolk County and ranging from 25% to 40% for Nassau County.

WHAT PEOPLE IN THE REGION ARE SAYING

In the past five years, have you contacted any government officials, in person, by phone, e-mail, or letter, about problems or issues with which you were concerned?



Source: "Long Islanders: Who Are We? A Quality of Life Survey", April 2003

APPENDIX A : DATA SOURCES

INTRODUCTION

While Long Island may geographically extend to include Kings (Brooklyn and vicinity) and Queens Counties, this indicators report specifically focuses on Nassau and Suffolk Counties. Kings and Queens Counties are technically studied as part of the New York Metropolitan Statistical Area. General demographic data are from the U.S. Census of Population. Gross Metropolitan Product data are from the United States Conference of Mayors, 2001. Data on religious affiliation are from “Long Islanders: Who Are We? A Quality of Life Survey of Long Island and the New York Metropolitan Region”, conducted by Charney Research, Inc. and published by the Rauch Foundation 2003. General geographic and government information are from Nassau and Suffolk County Government official websites, Advantage Long Island and *Newsday’s Long Island: Our Story*, 1998.

For a more informative look at indicators and how they have been applied to different regions in the U.S. please see *The Community Indicators Handbook* (Redefining Progress, 1997). Collaborative Economics also provided valuable information on various regional indicator projects and their outcomes for this section.

SPECIAL ANALYSIS

All poll results in this section are from “Long Islanders: Who are We? A Quality of Life Survey of Long Island and the New York Metropolitan Region” and “Room for Growth: Long Island’s Changing Economy,” conducted by Charney Research, Inc. and published by the Rauch Foundation, 2003 and 2004. Maps in this section prepared by NYPIRG’s Community Mapping Assistance Project for the Rauch Foundation, 2003 and the Regional Plan Association.

HISTORICAL DEVELOPMENT

Historical development information from *Newsday’s Long Island: Our Story*, 1998 and the following books which provide a more in-depth historical picture of the way Long Island developed: Baxandall, Rosalyn and Ewen, Elizabeth, *Picture Windows. How the Suburbs Happened*, Pantheon Books, 2000 and Kelly, Barbara M. ed, *Long Island – The Suburban Experience*, Long Island Studies Institute, Hofstra University, Heart of the Lakes Publishing, New York, 1990.

CHANGING FACE OF LONG ISLAND

The Nation’s First Mature Suburb: Long Island’s Postwar Population Growth

Long Island’s Population, 1950-2000 data are from the U.S. Census of Population.

Population Change from 1990 to 2000 on Long Island, by Community data are from the U.S. Census Bureau Summary File 3, 2000; STF3A, 1990; TIGER/Line Files, 2001.

Median Age on Long Island, by Community data are from the U.S. Census Bureau Summary File 1, 2000; TIGER/Line Files, 2001.

Total Population 18 Years and Younger on Long Island, by Community data are from the U.S. Census Bureau Summary File 3, 2000; TIGER/Line Files, 2001.

Percent of Population 65 years and Older on Long Island, by Community data are from the U.S. Census Bureau Summary File 3, 2000; TIGER/Line Files, 2001.

Percent of Long Island Population by Race and Ethnicity, 1990 data are from the U.S. Census of Population, 1990.

Percent of Long Island Population by Race and Ethnicity, 2000 data are from the U.S. Census of Population, 2000. Note: Because of changes in how the U.S. Census categorized race and ethnic groups, percentages from 1990 are not completely comparable to those of 2000. The growth in Hispanics, in particular, is likely to be understated because more were likely to list "Other" as their ethnicity in 2000 than in 1990.

Foreign-born Population Who Entered Between 1990 and 2000, by Community data are from the U.S. Census Bureau Summary File 3, 2000; TIGER /Line Files, 2001.

Domestic Migration Flows, Long Island, 1995-2000 data are from the U.S. Census Bureau County-to-County Migration Flow Files, www.census.gov/population/www/cen2000/ctytoctyflow.html.

Predominant Race/Ethnicity on Long Island, by Community data are from the U.S. Census Bureau Summary File 3, 2000; TIGER/Line Files, 2001. Note: This map was prepared by sorting the communities according to the largest race/ethnicity group in each one. The communities were then shaded based on the dominant group's percentage of total population for each community.

Segregation Patterns

Segregation Data was analyzed using the Metropolitan Racial and Ethnic Change database created by the Mumford Center for Comparative Urban and Regional Research at the University at Albany. The Metropolitan Racial and Ethnic Change database is based on U.S. Census 2000 figures.

For a more in-depth look at the implications of segregation please read Gross, Elaine. "New Horizons for Long Island: Undoing Institutional Racism and Overcoming Regional Inequalities." Erase Racism, 2002 and Powell, John. "Racism and the Opportunity Divide on Long Island," Institute on Race and Poverty, June 2002.

An Educated Workforce

Percent of Residents in the New York Metro Area Region and U.S. by Level of Educational Attainment data are from the U.S. Census of Population, 2000.

Age Count and Percent, 18-34 Year Olds, 1990-2000 data are from the U.S. Census of Population, 1990 and 2000. General information on Brain Drain based on "Preventing a Brain Drain, Talent Retention in Greater Boston," Greater Boston Chamber of Commerce and the Boston Foundation, Conducted by Boston Consulting Group, October, 2003. Regional data provided by the Regional Plan Association using U.S. Census of Population, 2000 tables.

LONG ISLAND: A CHANGING PLACE

Development and Open Space - Urbanization Rates

Percent of Developed Land 1955-1995 data are from the Regional Plan Association, U.S. Geological Survey and Cornell University.

Acres of Farmland on Long Island, 1964-1995 data are from the U.S. Department of Agriculture.

Urbanized Land on Long Island 1962 to 1995 data are from the Regional Plan Association, U.S. Geological Survey and Cornell University. Data for this section are based on satellite imagery that captured what is "urbanized" on Long Island, defined by anything that is built on or paved. This includes roads and highways that are otherwise classified as open space by county planning departments.

GROWING INCLUSIVE ECONOMY

Region Adds More Than 80,000 Jobs from 1990-2003

Data are from Economy.com.

Information and Communications Services, Health and Business Services are the Fastest Growing Industry Clusters

Data are from Economy.com. Note: Appendix B identifies the specific sub sectors that comprise each cluster.

Health Gains 34,000 Jobs; Technology Manufacturing Loses 29,200 Since 1990

Data are from Economy.com.

Regional Average Pay per Employee Declines 6% During Recent Recession

Data are from Economy.com. Average pay per employee was calculated by dividing total annual payroll by total non-farm employment. All values reported are adjusted for inflation. Long Island wages were adjusted using the New York-Northern New Jersey-Long Island, NY-NJ-CT-PA Consumer Price Index (CPI) as reported by the Bureau of Labor Statistics in October of 2003. U.S. wages were adjusted using the U.S. city average CPI.

Information and Communication Services was Highest Paying Industry Cluster

Data are from Economy.com.

Health and Education Occupations are Highly Concentrated on Long Island and Pay Wages Above Regional Average

Data are from the Bureau of Labor Statistics (BLS) and consist of average annual employment estimates and average wages by occupational categories for Nassau and Suffolk Counties in 2001. The BLS also provided national data. Note: Appendix B provides Standard Occupational Classification (SOC) codes for each cluster.

Value-Added Increases 1.3% Annually; Finance and Insurance is Industry Cluster with Highest Value-Added per Employee

Data are from Economy.com. Value added is the sum of compensation paid to labor within a sector and profits accrued by firms. Value-added estimates are constructed using productivity estimates at higher geographic levels (state and national) and applying them to employment and wage/income data at the metropolitan level.

Telecommunications Sector Leads Growth among FAST 50

Data are from Deloitte-Long Island Technology FAST 50. For a complete list of FAST 50 Companies since the program began in 1997, visit www.public.deloitte.com/fast500/ and click on the link to FAST 50.

Number of Patents per 100,000 is Down from 1998 High

Data are from CHI Research Inc., "CHI MSA Patent Profile". The "entire patent database" consists of patents tracked in the Tech-Line database, which captures most of the top 1,100 patenting companies. Companies with recent rapid increases in patenting may be included in the database. Approximately 52% of the innovations patented in the database originated outside of the U.S.

The Current Impact Index (CII) measures the number of times a company's most recent five years

of patents are cited in the current year, relative to similar patents. A value of 1.0 represents average citation frequency; 2.0 represents 200 percent of average frequency and 0.25 represents 25 percent of average citation frequency. Citation frequency typically varies by technology area. Some technologies depend heavily upon existing patents in the process of innovation while others innovate in a less linear fashion. For this reason, the CII for technology areas should only be compared with corresponding technology areas and not be compared across groupings.

Population data are from the U.S. Census Bureau, as configured by the Real Estate Center at Texas A&M University.

VIBRANT LIVABLE COMMUNITIES

Photo courtesy of the Hon. David E. Kappell, Mayor of the Village of Greeport

Poll results are from “Long Islanders: Who are We? A Quality of Life Survey of Long Island and the New York Metropolitan Region” and “Room for Growth: Long Island’s Changing Economy” conducted by Charney Research, Inc. and published by the Rauch Foundation, 2003, 2004. All maps in this section prepared by NYPIRG’s Community Mapping Assistance Project, 2003 and the Regional Plan Association.

Jobs-Housing-Transit MisMatch

Data are from the U.S. Census Bureau Summary File 3, 2000; Zip Code Business Patterns, 2001; TIGER/Line Files 2001; MTA Long Island Railroad, 2001.

Income Disparity

Data are from the U.S. Census of Population and the U.S. Census Bureau Summary File 1, 2000; TIGER/Line Files, 2001.

Poverty Persists Amidst Affluence

Data are from the U.S. Census of Population, 2000.

Violent Crime Rate on Long Island

Data are from the New York State Division of Criminal Justice Services, Federal Bureau of Investigation Uniform Crime Reports (UCR) and the U.S. Census Bureau. Note: Violent crime rate (per 100,000) data is compiled from monthly law enforcement reports or individual crime incident records transmitted to the FBI or to state agencies that report them directly to the FBI. Violent crimes are defined as offenses of murder, forcible rape, robbery and aggravated assault. Additional information from *Newsday*, 12/3/03, Cockfield Jr., Errol A., “Crunching Nassau’s Crime Numbers: Higher rates with villages, cities factored in.”

Households Spend More than 30% of Income on Housing

Data are from the U.S. Census of Population, 2000.

Housing Affordability Continues to Decline

Data are from the Long Island Board of Realtors, Inc., Multiple Listing Service of Long Island Inc. and the Long Island Regional Planning Board.

Transportation System Not Meeting Our Needs

Data are from the U.S. Census of Population, 2000 and the New York Metropolitan Transportation Council (NYMTC) 1997/1998 travel survey.

Transit Ridership Increased in the late 1990s

Data are from the American Public Transportation Association/Federal Transit Administration (APTA/FTA) National Database.

More Cars, Longer Commutes

Data are from U.S. Census of Population, 1990 and 2000 and the New York State Department of Motor Vehicles.

Music Organizations Receive Most Funding from National Foundations

Data are from the Foundation Center's Grants Sample, 2001. This includes grants of \$10,000 or more awarded to organizations by a sample of 1,007 larger foundations. For community foundations, only discretionary grants are included. Grants to individuals are not included in the file. For more information visit the Foundation Center's web site at <http://fdncenter.org>.

HEALTHY, EDUCATED POPULATIONS

Poll results are from "Caring for Long Island's Children: Regional Attitudes Toward Children, Families, Education and Our Community" and "Long Islanders: Who are We? A Quality of Life Survey of Long Island and the New York Metropolitan Region" conducted by Charney Research, Inc. and published by the Rauch Foundation, 2003.

Percentage of Children with Low Birth Weights Rises

Data are from the New York State Department of Health, 2003.

Mortality Rate Due to Heart Disease Declines

Data are from the New York State Department of Health, 2003.

More Students Performing at or Above Grade Level in English and Math, but Students from High Need School Districts are Falling Behind

Data are from the New York State Chapter 655 Report, Volume 2, Table 5, using LEAP-Local Educational Agency Plan and Eastern Suffolk BOCES Regional Report Card, Issued June 2003.

The designated Long Island High Need Districts are based on New York State's Need/Resource Capacity (N/RC) Category Codes, which are 1. New York City Public Schools; 2. Large City Districts, 3. High Need Urban-Suburban Districts; 4. High Need Rural Districts; 5. Average Need Districts; and 6. Low Need Districts. These categories are based on their N/RC Index. The N/RC Index is a measure of a district's ability to meet the needs of its students with local resources. This measure is calculated by dividing a district's estimated poverty percentage by its Combined Wealth Ratio. The list of High Needs/Low Resource School Districts are as follows (in ranking order), 1. Amityville; 2. Brentwood; 3. Central Islip; 4. Freeport; 5. Hempstead; 6. Roosevelt; 7. Westbury; 8. William Floyd; 9. Wyandanch.

More of Long Island's Students are at Risk

Data are from the New York State Chapter 655 Report, Volume 2, 1992, 2000 and 2002, Table 1, using BEDS-Basic Educational Data System and Graduation and Dropout Report.

Dropout Rate is the number of dropouts divided by the grades 9-12 enrollment, including the portion of ungraded secondary enrollment that can be attributed to grades 9-12 expressed as a percentage. Dropouts are defined as students who have left school before graduation for any reason except death and have not enrolled in another high school or high school equivalency program.

Poverty Index is defined as the number of children 5 to 17 years of age in families living below the poverty level, divided by the total number of children within the district boundaries who are 5 to 17 years of age. Poverty as defined by the U.S. Census of Population is a measure of whether a family's income is below the designated poverty threshold. For more information on the poverty threshold please visit www.census.gov/hhes/poverty/threshold/thresh02.html.

Percent of students participating in the Free-and-Reduced Price Lunch Program is the number of students in kindergarten through grade 6 participating in the free-and-reduced-price lunch program divided by the enrollment in full-day kindergarten through grade 6. For more information on eligibility guidelines for the Free/Reduced Price Lunch Program, please see the New York State Department of Education Child Nutrition Program Administration. Note: Statistics may underestimate the number of eligible students because not all school districts participate in the program, and the percentage of eligible students who apply for the program varies across participating districts.

Limited English Proficiency rate is defined as the number of limited English proficient students (English language learners) as defined by Section 154.2(a) of the Regulations of the Commissioner of Education divided by the total district enrollment in grades PreK-12, expressed as a percentage.

For a more thorough explanation and additional information on these categories and their definitions please visit: http://emsc.nysed.gov/irts/ch655_2002/home.html and click on "glossary" link.

ENVIRONMENTAL STEWARDSHIP

Photo courtesy of the Long Island Pine Barrens Society

Region is Consuming More Energy

Data are from the Long Island Power Authority, Long Island Regional Planning Board, U.S. Census of Population, Energy Information Administration (EIA), New York State Energy Research and Development Authority.

Acres of Open Space Per Capita Are Low

Open Space per capita figures for Long Island were compiled by the Long Island Regional Planning Board. Open Space per capita figures for the other regions analyzed were compiled by the Regional Plan Association from the New York State Department of Transportation Open space data 1999, the NYC DOITT, NJ DEP Green Acres Program, CT DEP (Open Space Data 1998), Nature Conservancy Long Island Office, Westchester Land Trust, and Other County GIS databases.

The calculation of Open Space per Capita takes the total park area (provided in two formats: for Federal and State Open Space or for Federal, State and Municipal Open Space), and divides it by the total population of the area. This results in a figure that shows the amount of open space per person for each county and sub-region.

Monthly Water Consumption Increases in Suffolk County

Data are from the Suffolk County Water Authority.

Long Islanders Use Almost Double the Amount of Pesticides Per Capita Compared to New York State

Data are from the NYS Pesticide Sales & Use Reports Database. Data for pesticide use is recorded under the Pesticide Reporting Law of 1996, which mandates reporting of pesticide used by the state's commercial pesticide applicators and information on sales to farmers. Note: Commercial applicators include anyone who applies pesticides for hire, such as lawn and garden applicators; exterminators; custodial and groundskeeping staff in schools, office buildings, and other structures; and municipal employees who apply pesticides in such places as parks or on roadsides. Sales for crop production: these data represent the intended location of use of pesticides that are sold or offered for sale to farmers who apply pesticides only on property he or she owns or rents for the purpose of producing an agricultural commodity.

GOVERNANCE

Photo by Jim Johnson, local photographer.

General governmental information is from official Nassau and Suffolk County Government web sites, Advantage Long Island, *Newsday* and the Rauch Foundation archives. Poll results are from "Long Islanders, Who Are We? A Regional Quality of Life Survey of Long Island and the New York Metropolitan Region" conducted by Charney Research, Inc. and published by the Rauch Foundation, 2003.

Room for Improvement on Measures of Government Performance

Data are from the Government Performance Project, a collaboration between *Governing* magazine and the Maxwell School of Citizenship and Public Affairs at Syracuse University. For more information about the methodology and criteria used to determine study results, see the Government Performance Project web site at www.maxwell.syr.edu/gpp/.

Bond Ratings on the Rise in Both Counties

Data are from the Nassau County Budget Office, Suffolk County Budget Office, Moody's Investor's Service and Standard & Poor's.

Voter Turnout Low for Local Elections

Data are from the New York State Statistical Yearbook-Published by the Nelson A. Rockefeller Institute of Government, Dave Leip's Atlas of U.S. Presidential Elections, New York State Board of Elections, Suffolk County Board of Elections and Nassau County Board of Elections, U.S. Census of Population.

APPENDIX B: INDUSTRY AND OCCUPATIONAL CLUSTER DEFINITIONS

Cluster definitions were provided by Collaborative Economics for the *Long Island Index 2004*.

Finance and Insurance

- 5211 Monetary Authorities - Central Bank
- 5221 Depository Credit Intermediation
- 5222 Nondepository Credit Intermediation
- 5223 Activities Related to Credit Intermediation
- 5231 Securities and Commodity Contracts Intermediation and Brokerage
- 5232 Securities and Commodity Exchanges
- 5239 Other Financial Investment Activities
- 5241 Insurance Carriers
- 5242 Agencies, Brokerages, and Other Insurance Related Activities
- 5251 Insurance and Employee Benefit Funds
- 5259 Other Investment Pools and Funds
- 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services

Creative Services

- 5122 Sound Recording Industries
- 5413 Architectural, Engineering and Related Services
- 5414 Specialized Design Services
- 5416 Management, Scientific, and Technical Consulting Services
- 5418 Advertising and Related Services
- 7111 Performing Arts Companies
- 7112 Spectator Sports
- 7114 Agents and Managers for Artists
- 7115 Independent Artists, Writers and Performers

Diversified Manufacturing

- 3149 Other Textile Product Mills
- 3169 Other Leather and Allied Product Manufacturing
- 3256 Soap, Cleaning Compound, and Toilet Preparation Manufacturing
- 3259 Other Chemical Product and Preparation Manufacturing
- 3322 Cutlery and Handtool Manufacturing
- 3323 Architectural and Structural Metals Manufacturing
- 3325 Hardware Manufacturing
- 3332 Industrial Machinery Manufacturing
- 3333 Commercial and Service Industry Machinery Manufacturing
- 3335 Metalworking Machinery Manufacturing
- 3339 Other General Purpose Machinery Manufacturing

Education and Training

- 5111 Newspaper, Periodical, Book and Directory Publishers
- 6111 Elementary and Secondary Schools
- 6112 Junior Colleges
- 6113 Colleges, Universities, and Professional Schools
- 6114 Business Schools and Computer and Management Training
- 6115 Technical and Trade Schools
- 6116 Other Schools and Instruction
- 6117 Educational Support Services

Information and Communication Services

- 5112 Software Publishers
- 5152 Cable and Other Subscription Programming
- 5161 Internet Publishing and Broadcasting
- 5171 Wired Telecommunications Carriers
- 5172 Wireless Telecommunications Carriers (except Satellite)
- 5173 Telecommunications Resellers
- 5175 Cable and Other Program Distribution
- 5179 Other Telecommunications
- 5181 Internet Service Providers and Web Search Portals
- 5182 Data Processing, Hosting, and Related Services
- 5191 Other Information Services
- 5415 Computer Systems Design and Related Services

Health

- 3391 Medical Equipment and Supplies Manufacturing
- 5417 Scientific Research and Development Services
- 6211 Offices of Physicians
- 6212 Offices of Dentists
- 6213 Offices of Other Health Practitioners
- 6214 Outpatient Care Centers
- 6215 Medical and Diagnostic Laboratories
- 6216 Home Health Care Services
- 6219 Other Ambulatory Health Care Services
- 6221 General Medical and Surgical Hospitals
- 6222 Psychiatric and Substance Abuse Hospitals
- 6223 Specialty (except Psychiatric and Substance Abuse) Hospitals
- 6231 Nursing Care Facilities
- 6232 Residential Mental Retardation, Mental Health and Substance Abuse Facilities
- 6233 Community Care Facilities for the Elderly
- 6239 Other Residential Care Facilities
- 8122 Death Care Services

Transportation Services

- 3366 Ship and Boat Building
- 4811 Scheduled Air Transportation
- 4812 Nonscheduled Air Transportation
- 4821 Rail Transportation
- 4831 Deep Sea, Coastal, and Great Lakes Water Transportation
- 4832 Inland Water Transportation
- 4851 Urban Transit Systems
- 4852 Interurban and Rural Bus Transportation
- 4853 Taxi and Limousine Service
- 4854 School and Employee Bus Transportation
- 4859 Other Transit and Ground Passenger Transportation
- 4881 Support Activities for Air Transportation
- 4882 Support Activities for Rail Transportation
- 4883 Support Activities for Water Transportation
- 4884 Support Activities for Road Transportation
- 4885 Freight Transportation Arrangement
- 4889 Other Support Activities for Transportation
- 4922 Local Messengers and Local Delivery

Visitors and Tourism

- 4870 Scenic and Sightseeing Transportation
- 5615 Travel Arrangement and Reservation Services
- 7121 Museums, Historical Sites, and Similar Institutions
- 7131 Amusement Parks and Arcades
- 7132 Gambling Industries
- 7139 Other Amusement and Recreation Industries
- 7211 Traveler Accommodation
- 7212 RV (Recreational Vehicle) Parks and Recreational Camps
- 7221 Full-Service Restaurants
- 7222 Limited-Service Eating Places
- 7224 Drinking Places (Alcoholic Beverages)

Business Services

- 3231 Printing and Related Support Activities
- 5331 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
- 5411 Legal Services
- 5419 Other Professional, Scientific, and Technical Services
- 5511 Management of Companies and Enterprises
- 5611 Office Administrative Services
- 5612 Facilities Support Services
- 5614 Business Support Services
- 5619 Other Support Services

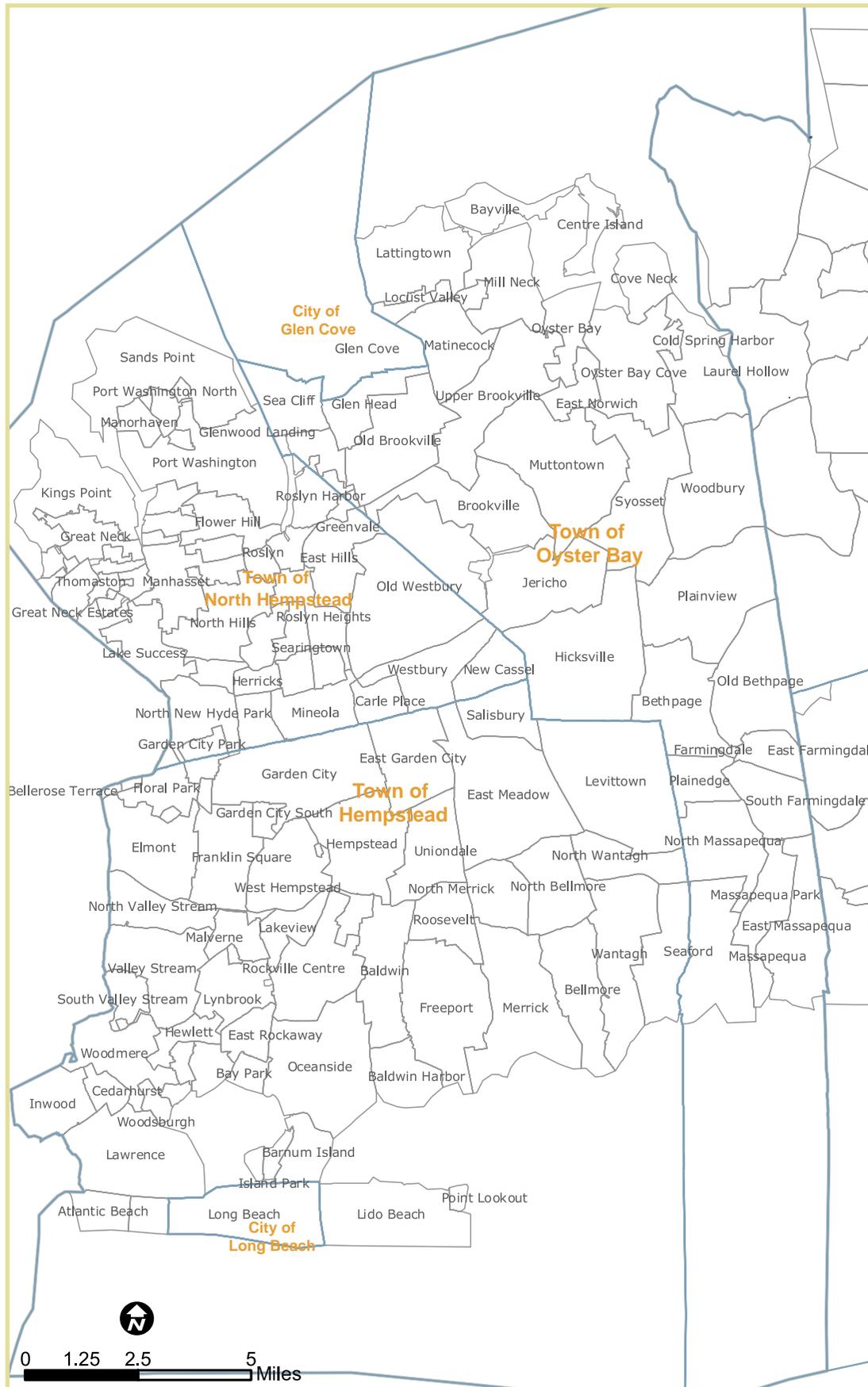
Technology Manufacturing

- 3341 Computer and Peripheral Equipment Manufacturing
- 3342 Communications and Equipment Manufacturing
- 3343 Audio and Video Equipment Manufacturing
- 3344 Semiconductor and Other Electronic Component Manufacturing
- 3345 Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
- 3346 Manufacturing and Reproducing Magnetic and Optical Media
- 3353 Electrical Equipment Manufacturing
- 3364 Aerospace Product and Parts Manufacturing

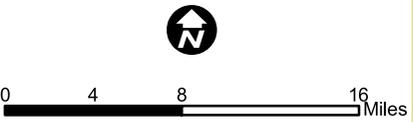
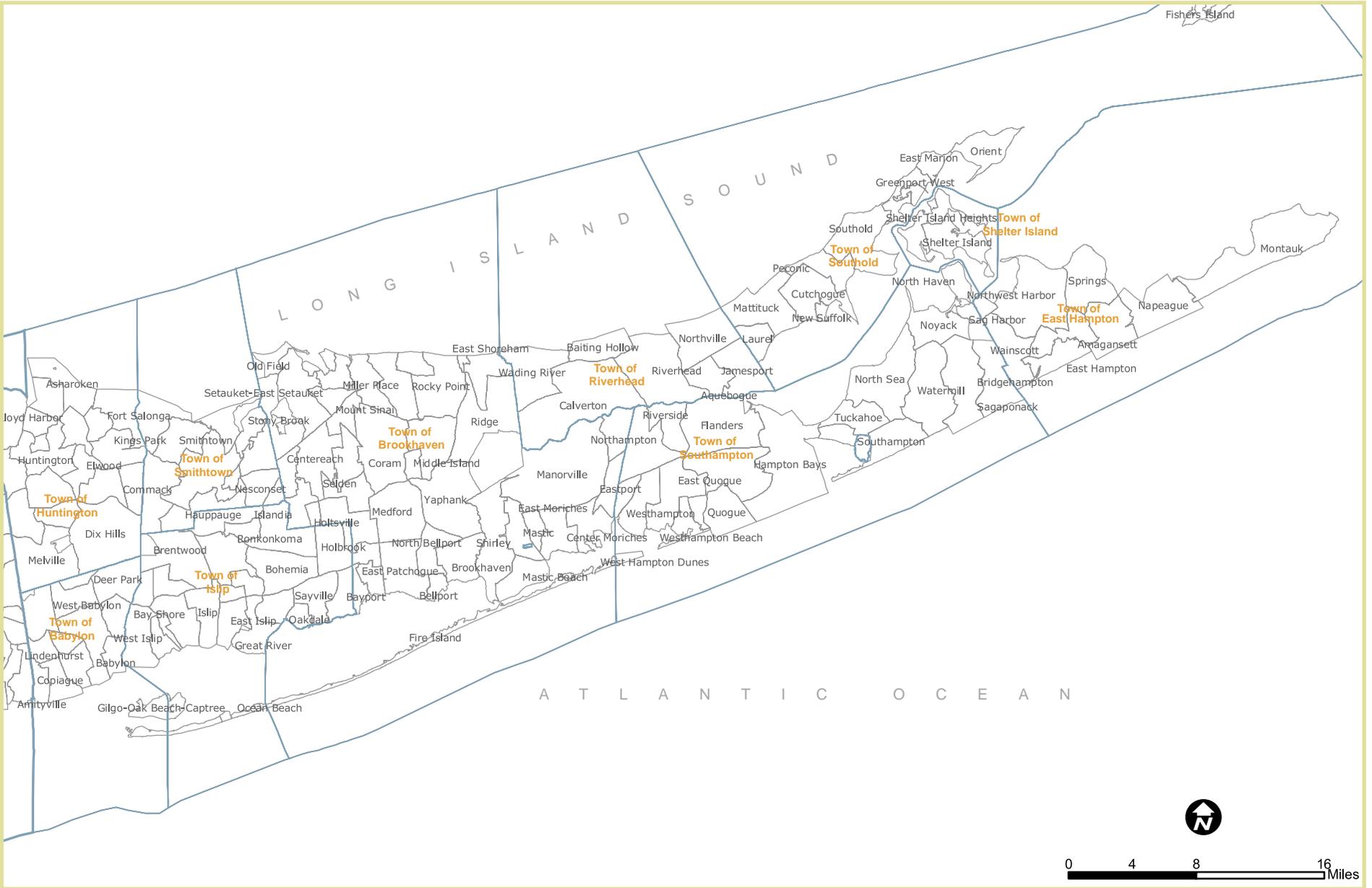
Standard Occupational Cluster (SOC) Codes

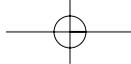
- 31-0000 Healthcare Support
- 25-0000 Education, Training, and Library
- 39-0000 Personal Care and Service
- 43-0000 Office and Administrative Support
- 41-0000 Sales and Related
- 23-0000 Legal
- 37-0000 Building and Grounds Cleaning and Maintenance
- 29-0000 Healthcare Practitioners and Technical

Nassau County Cities, Towns, Villages and Hamlets



Suffolk County Towns, Villages and Hamlets





**LONG ISLAND
INDEX**

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*Coming Together
For Long Island's
Future*



ACKNOWLEDGMENTS

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MULTIPLE LISTING SERVICE OF LONG ISLAND
NASSAU COUNTY BOARD OF ELECTIONS
NASSAU COUNTY OFFICE OF THE COUNTY EXECUTIVE
NATIONAL ASSOCIATION OF HOME BUILDERS
NEW YORK STATE DEPARTMENT OF EDUCATION
NEW YORK STATE ENERGY RESEARCH DEVELOPMENT AUTHORITY
NORTH SHORE-LONG ISLAND JEWISH HEALTH SYSTEM
PROJECT GRAD ROOSEVELT
STONY BROOK UNIVERSITY
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