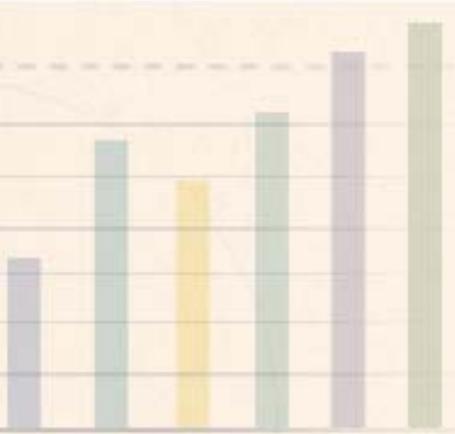


LONG ISLAND INDEX

2005



ENVIRONMENTAL STEWARDSHIP



SETTING GOALS,
MEASURING PROGRESS
FOR THE
LONG ISLAND REGION

GROWING, INCLUSIVE ECONOMY

GOVERNANCE



VIBRANT, LIVABLE
COMMUNITIES

HEALTHY, EDUCATED
POPULATIONS

LONG ISLAND INDEX

Working Together In New Ways For Long Island's Future

The *Index* is a status report 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 2005*, our second annual indicators report on the Long Island region.

The *Long Island Index 2005* is a status report on our region that aims to engage the Long Island community in thinking about the region's future and to be a catalyst for corrective action. Our hypothesis is:

Good information presented in a neutral manner can move policy.

Specifically, the Index is designed to:

- Measure where we are at this moment and the trends over time.
- Compare our situation with other regions having similar characteristics.
- Encourage regional thinking, and an understanding of Long Island's strengths and challenges in relation to other regions.
- Increase awareness and understanding of the issues and their interrelatedness.
- Inspire Long Islanders to work together in new ways to achieve shared goals.

On February 12, 2004, the first *Long Island Index* was launched at the Cold Spring Harbor Laboratory's Genome Research Center. This achievement was the result of 15 months of coming together by Long Island's academics, businesses, labor, and nonprofits. The effort was built on the premise that an indicators project, such as those that have been a catalyst for positive results elsewhere, could work here.

Over the past year the *Long Island Index* has had a noticeable impact on public dialogue in this region. As of December 31, 2004 there have been 102 articles, 1.2 million hits on the website (www.longislandindex.org), 3 radio shows, 11 television programs, and numerous citations by public officials and civic leaders. Most significantly, the *Index* has played a role in increasing the awareness by the general public of issues facing the region. In particular, much media coverage was given to the "brain drain," the loss of young adults 18-34 years old. The December 2004 survey *Where Do We Grow from Here?: Land Use on Long Island*, revealed that about 90% of the general public believed this issue to be a "serious" or "very serious" problem compared to only 60% of the general public the year before.

We encourage you to visit the expanded website www.longislandindex.org to download copies of the surveys, to take an online poll about issues important to the region and to delve deeper into the indicators on a local community by community level. 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

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 U.S., 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 1,198 total square miles in Nassau and Suffolk Counties.

Today, Long Island has a population of 2.8 million people which accounts for 15% of the population of New York State. Long Island has a total population greater than that of 19 states and in fact, if it were a city, it would rank as the 4th largest in the nation. With an economy producing \$122.9 billion dollars, Long Island's gross metropolitan product (GMP) ranks among the top 20 Metropolitan areas in the U.S.

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.



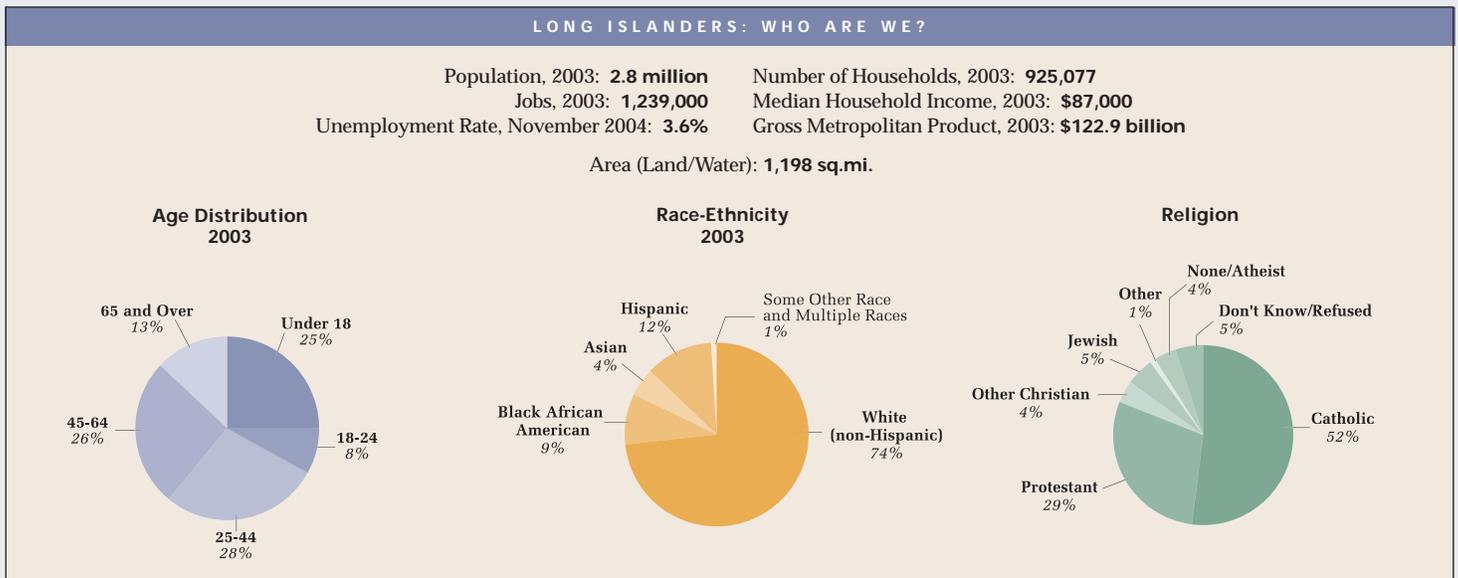
Map prepared by NYPIRG's Community Mapping Assistance Project for the Rauch Foundation, 2003. Source: U.S. Census Bureau TIGER/Line Files, 2001

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.



Sources: American Community Survey, 2003 Data Profiles; Long Islanders: Who Are We?, April 2003; The United States Conference of Mayors and The National Association of Counties, 2004; Standard & Poor's DRI: www.bls.gov www.economagic.com

What Did We Learn?

The first *Long Island Index 2004* presented a picture of the Long Island region at a point in time and provides a baseline for measuring trends. The *Index's* portrait of Long Island revealed a region that appears to have reached the limits of unplanned growth:

- There is little land left. Long Island is the most developed suburban area in the New York Metropolitan region with 70% of its land urbanized.
- Twenty percent of the Island's young adults 18 to 34 years old left the region in the 1990s ("the brain drain"). This was five times the national rate.
- The population is changing rapidly, aging and becoming more diverse with rapid growth of Hispanic and Asian immigrants.
- Racial and ethnic segregation continues, and there is also an increasing geographic separation by age and income.

- Long Island's regional assets remain its robust economy and productive and educated workforce in addition to its education and health sectors.
- While some progress has occurred, environmental stewardship and government performance generally remain poor.

No one piece of this data was new or unknown but what was different in the *Index* and what we learned was how interrelated the issues are. The *Index* provided a context that connected what was happening in various areas and this told a different story. The "brain drain" **relates** to the cost of housing, which **relates** to the predominant housing pattern of single family residences, which **relates** to how zoning is determined (193 local planning and zoning boards) and how schools are paid for.

In response to this finding, this year we are pointing out more of those interrelated issues both in the special analysis and the indicators analyses.

Creating the Long Island Index 2005

The goal of the *Long Island Index* is to provide information and understanding on which public policy can be built. After the release of the first *Index* last year, the Advisory Committee recommended that this year's *Index* emphasize the interrelationship among indicators. In particular, the Committee determined that the Special Analysis should examine land use, which impacts and interconnects with manifold issues, ranging from housing, employment, education and transportation, to open space preservation, environmental protection and even the very character of communities.

The data concerning Long Island's land use were drawn from a land use analysis conducted by the Long Island Regional Planning Board. Projections of future development—"build-out analyses"—were provided by the Regional Plan Association based on projected developed land data. In addition, since land use is very much a matter of public policy, Long Islanders' opinions in this area were also explored, through focus groups, targeted interviews and a major regional public opinion poll.

It is our hope that the findings presented here will provide a resource that will help Long Islanders recognize the challenges before us, understand the issues, formulate sound policy and come together in effective new ways to meet those challenges.

Appendix A provides detail on data sources for each indicator.

* A notation highlighted in red at the bottom of a page will refer the reader to the appropriate page in the *Long Island Index 2004* to see the same indicator for that year.

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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: NATURAL RESOURCE CONSERVATION

We promote the conservation and efficient use of the region's natural resources.

GOAL 10: PROTECT NATURE

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

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.

The “unplanned” patterns of land use over the past 50 years have created many problems.

- High taxes, traffic congestion, segregation, loss of open space, and public transit not matched to current needs, are all related to past land use policies.
- Long Islanders have one of the highest per capita property tax burdens in the U.S. and forty percent of them see taxes as the biggest problem facing their region.
- Nearly two-thirds of Long Island’s land surface is developed and residential property accounts for three-quarters of this land.
- In 2004 only 67,000 acres (10% of Long Island’s total land) are left to be developed.
- By 2050, only 6,000 acres of undeveloped land will remain.

People are very worried about whether they and their families can continue to live on Long Island.

- 71% are concerned that the high cost of housing will force family members to leave.
- 64% think about leaving Long Island to move to an area with lower housing costs and property taxes.
- 73% think the lack of affordable housing is “extremely serious” or “very serious.”

A substantial majority of Long Islanders support new land use policies.

- 67% support government-sponsored affordable housing.
- Building on former industrial, commercial and government properties, putting rental units in downtown areas and near train stations, and easing restrictions on rental apartments in single-family homes all received majority support.
- However, concerns persist as to the potential negative consequences of change.

Health is our largest industry cluster; Government and Military make up largest segment of our economy; and Finance and Insurance cluster has greatest economic impact.

- Growth in Long Island’s average wages (8%) has lagged the U.S. wage growth (12%) over the past 15 years.
- Finance and insurance sector employs 6% of the region’s workers but generates 13% in payroll for the region.
- In 2003 Long Island’s unemployment rate was 4.2% compared to 6.0% for the U.S.

Long Island receives miniscule federal R & D dollars. Patent generation lags nation.

- Long Island received 0.2% of federal R&D investment in 2002.
- Long Island generated 19 patents per 100,000 residents compared to 31 patents per 100,000 residents for the U.S in 2003.

Results are mixed for vibrant, livable communities.

- Long Island continues to diversify as the Hispanic and African-American populations grew between 2000 and 2003.
- Long Island is aging at a faster rate than the U.S.
- Arts organizations continue to grow on Long Island.
- Juvenile arrest rates dropped significantly with Long Island leading Westchester, New York State and the nation.
- Home prices continue to skyrocket and new homeowners spend over 40% of monthly household income on homeownership costs.
- Transit ridership drops but, for the first time ever, motor vehicle registration grew at a slower rate than the population.

Education and health outcomes remain mixed.

- Teen births dropped dramatically for African-Americans since 1990.
- Lower income areas are not accessing primary medical care resulting in higher hospitalization rates.
- Achievement gap continues for high need school districts.
- Number of at-risk students continues to grow.

Conservation of resources is wasteful and pesticide use continues to rise.

- Between 1998 and 2003, residential electricity consumption increased by almost 20% and water consumption by 5% in Nassau and 17% in Suffolk.
- Between 2002 and 2003 Long Island residents increased daily per capita waste generation by 6.3% and decreased recycling by 4.7%.
- Pesticide use on Long Island is more than double the per capita state level and is on the rise.

Local tax burden is growing and the Long Island region sends far more money to Albany and Washington, D.C. than it receives in return.

- Even without including corporate taxes, Long Islanders pay \$3 billion more to New York State than they receive and \$2.7 billion more to the federal government.
- Property taxes per capita were \$2,445 in 2002, with 62.5%, on average, going to fund public education.
- Bond ratings continue to rise in both counties.
- Voter turnout for school district elections increased as more than one-third of first time school budgets did not pass in 2004.



LONG ISLAND LAND USE: ACHIEVEMENTS, CHALLENGES, CHOICES.

Introduction

Long Island has been by design a place for families. Yet today the cherished dream of family life is threatened as high housing costs drive young people, and seniors, away from the region, away from their homes.

Last year's *Long Island Index* identified the “brain drain,” and the related issue of affordable housing, as critical challenges facing the Long Island region. But underlying these challenges is a deeper and broader issue: the central matter of land use.

Examining land use is fundamental to seeing where we are and how we got here—and to determining where we go from here. This Special Analysis investigates land use patterns on Long Island: its history, aims, consequences, and considerations for the future.

Highlights

- The lack of affordable housing is recognized as one of the most urgent challenges facing Long Island.
- Housing is inextricably linked to a complex set of issues relating to land use, including local home rule, property taxes and education.
- Patterns of land use over the past half-century appear increasingly inappropriate for future growth.
- A substantial majority of Long Islanders support new land use policies designed to promote affordable housing; however, simultaneously, Long Islanders are conflicted about what this would mean for their property values, neighborhoods and schools.

HISTORIC DEVELOPMENT: BUILDING THE AMERICAN DREAM

At the end of World War II, most of Long Island was farmland or vacant land, as it had been since it was first settled. The postwar years brought a boom that changed this landscape forever. "Bedroom communities" sprang up, separated by local zoning laws from commercial and industrial space.

Development grew first along the routes of the Long Island Railroad, but soon communities started sprouting everywhere, as new highways brought remote places in easy reach by car. New villages were incorporated, new school districts and water districts, and always more houses, in more and more places.

Dreamers, Strivers

Most of the newcomers were transplants from the five boroughs, seeking to build a better life for their families. Their vision was clear: they wanted safe and neighborly communities...a good education for their children...space, comfort and convenience.

They brought with them the talent and energy to make their vision a reality. They built top-notch schools, pioneered successful industries, established outstanding colleges, hospitals and research institutions, set aside land for parks and beaches, and opened huge shopping centers. Before they were done, they had created a whole new world, and with it a new way of life. Suburbia.

The Dream of a Generation

Long Island emerged as a model of modern suburbia. Indeed, a Long Island home became the epitome of the "American Dream," a term which previously had broadly encompassed the ideals of opportunity and material success, but now more and more became identified with owning a home with a yard in a prosperous suburb.

In succeeding decades more people came: some to escape perceived urban ills, all seeking a place to build their dreams. Today Long Island remains a success story, its workers outearning, its children outachieving their counterparts in other regions.

But with our success have also come challenges. Long Island's story is not over. Today a new chapter waits to be written.

THE BIRTH OF SUBURBIA



Alfred Levitt's project to provide housing that working families could afford spurred the postwar development of Long Island.



Dream house for new homeowners, Levittown, New York, 1948. This housing represents the haven strategy of building homes as retreats for male workers and as a workplace for their wives. (Bernard Hoffman, LIFE Magazine, © 1950, Time, Inc.)

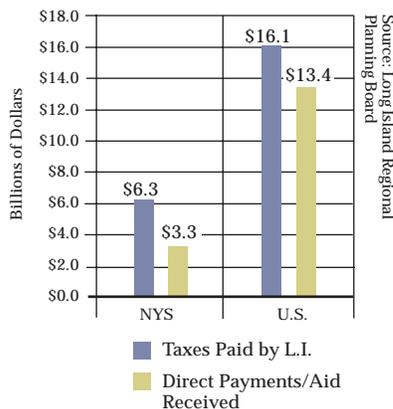
UNSUSTAINABLE

The dynamic growth of the past half-century has brought our region as a whole great success, but also serious problems. For one thing, the sprawl that has typified Long Island's development cannot be sustained. Quite simply, we are running out of space. In addition, sprawl breeds inefficiency. In fact, virtually all of our region's most serious problems are either caused or aggravated by sprawl.

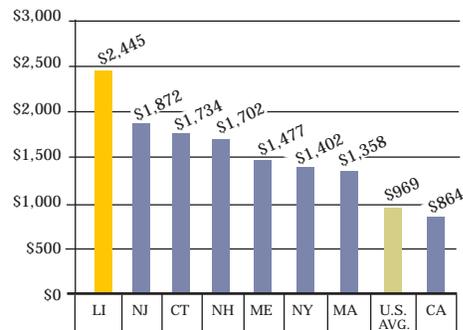
Taxes

Long Island taxes are among the highest in the country. Certainly, the majority of residents do receive a high level of services and enjoy outstanding schools; however, sprawl contributes to taxes, since services and infrastructure are more costly when they must be duplicated in each town and village. Long Island's myriad of local school districts is another example of costly inefficiency. It is estimated that consolidated districts could reduce school taxes 50%.

BALANCE OF PAYMENTS DEFICIT, LONG ISLAND & NEW YORK STATE, LONG ISLAND & U.S., 2000



PROPERTY TAXES PER CAPITA, 2002

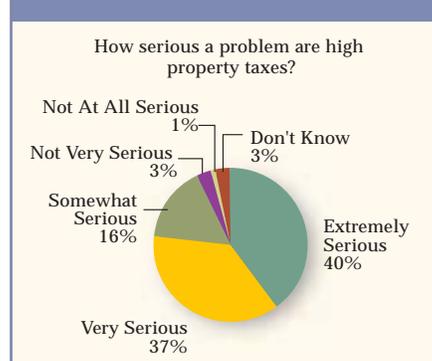


Sources: NYS Comptroller's Report on Municipal Affairs; NYS Statistical Yearbook; U.S. Bureau of Economic Analysis; Suffolk and Nassau County Property Tax Warrants; NYS Department of Taxation and Finance Taxable Sales and Purchases Reports; Massachusetts Taxpayers Foundation.

Multiple Layers of Government

Postwar expansion gave rise to a multitude of separate and sometimes overlapping village governments, school districts and water districts—on top of existing city, town and county governments. Today's patchwork of close to 900 taxing jurisdictions contributes to the tax burden and makes it difficult to get things done, including addressing regional inequities. Issues of local home rule compound the problem by increasing governmental fragmentation through the proliferation of special districts in each community, such as school, library, water, fire, lighting, and highway districts.

WHAT PEOPLE IN THE REGION ARE SAYING

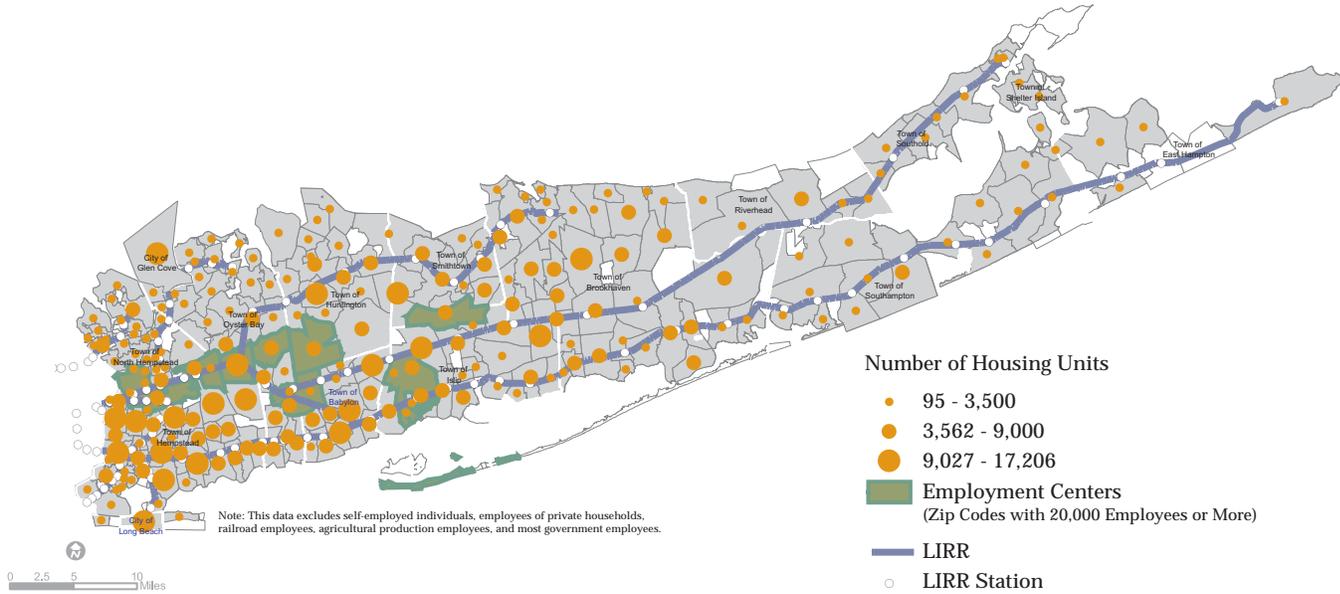


Traffic Congestion

This is the inevitable consequence of spreading communities across the Island—and separating them from workplaces and centers for shopping, entertainment, etc. Today, close to 80% of Long Islanders work on the Island, yet our transportation routes are still designed to move people into and out of New York City, rather than within the Island.

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

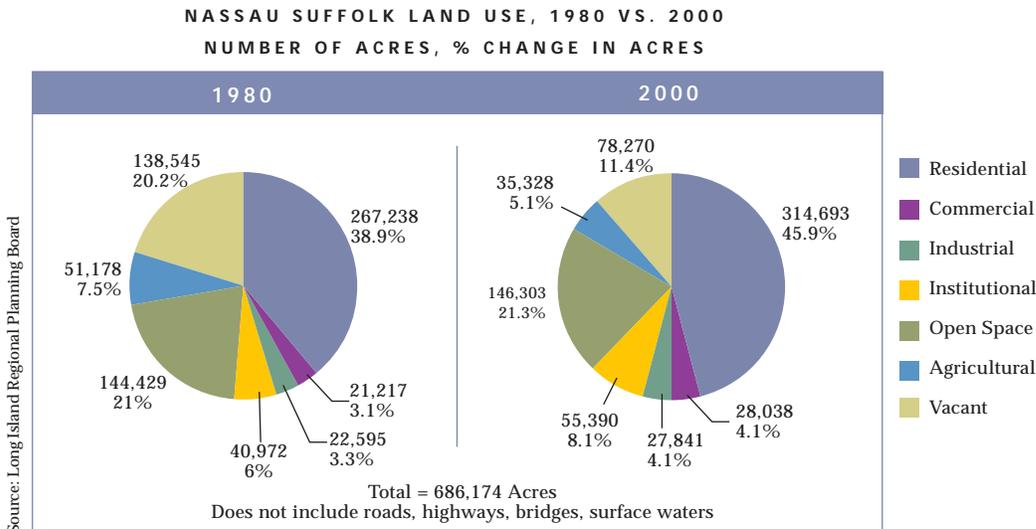
Map shows the disconnect between Long Island housing, jobs and transit. Residential centers are scattered and mostly far from major job centers. Housing does center along Long Island Railroad lines, but these lines mainly provide access to New York City, not to Long Island employment centers. The resulting long commutes cause congestion, raise transportation time and cost, contribute to pollution and make the region a less desirable place to live.



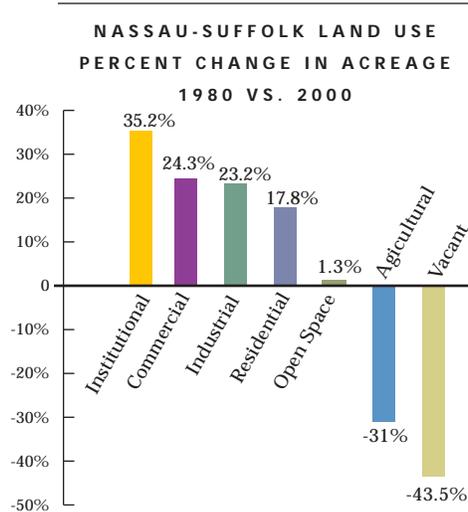
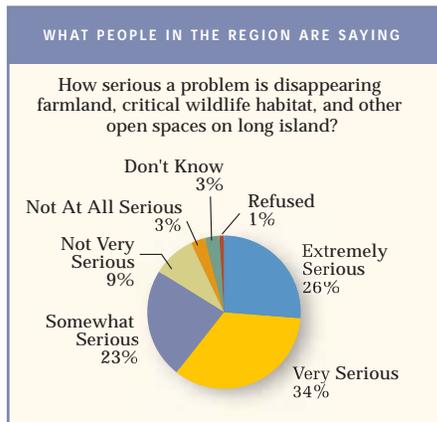
Map prepared by NYPIRG's Community Mapping Assistance Project for the Rauch Foundation, 2003
Sources: U.S. Census Bureau Summary File 3, 2000; Zip Code Business Patterns, 2001; TIGER/Line Files, 2001; MTA Long Island Railroad, 2001.

Loss of Open Space

Sprawling, large-lot development consumes open space, the key feature that attracts people to the region in the first place. Loss of open space threatens our economy as well. Our agriculture and tourism industries depend on preserving large areas of land. Finally, sprawl promotes environmental degradation and threatens our drinking water.



In the two decades, residential development consumed nearly 50,000 additional acres and commercial, industrial and institutional development 25,000 more. The growth came at the expense of farmland, which shrank 31%, and vacant land, which fell 43.5%.



Segregation

Our history of building individual, homogeneous sub-divisions, as well as an unfortunate legacy of institutionalized racism, has made Long Island the third most segregated suburban region in the nation, according to U.S. Census data. Long Islanders are separated by income, age and education, as well as ethnicity and race.

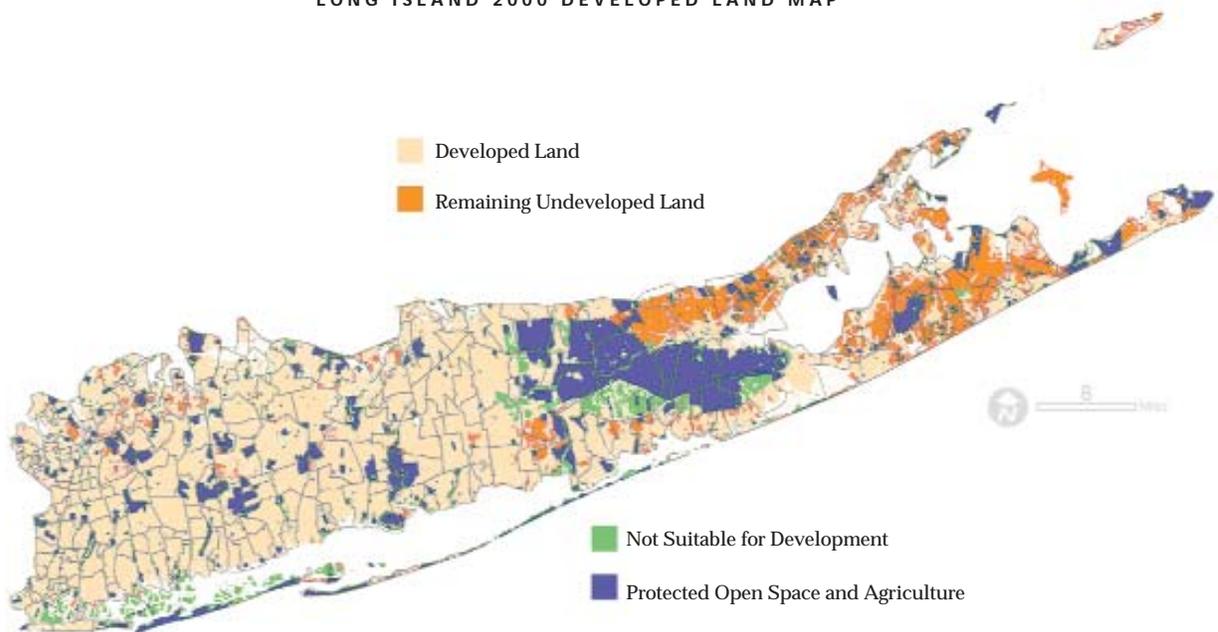
Not Much Room to Grow

Long Island’s growth over the past half-century was fueled by the rapid development of open space. Now there is little land left to develop.

- Today, nearly two-thirds of Long Island’s land surface is covered with buildings, pavement or other man-made structures. Residential property accounts for three-fourths of this land.
- Approximately 67,000 acres are left that could be developed—less than 10% of the Island’s total land.
- By 2020 over half of this land is likely to be built out. By 2050 only 6,000 acres will remain.
- New land preservation efforts, recently approved by voters, will further reduce the acreage available for development.

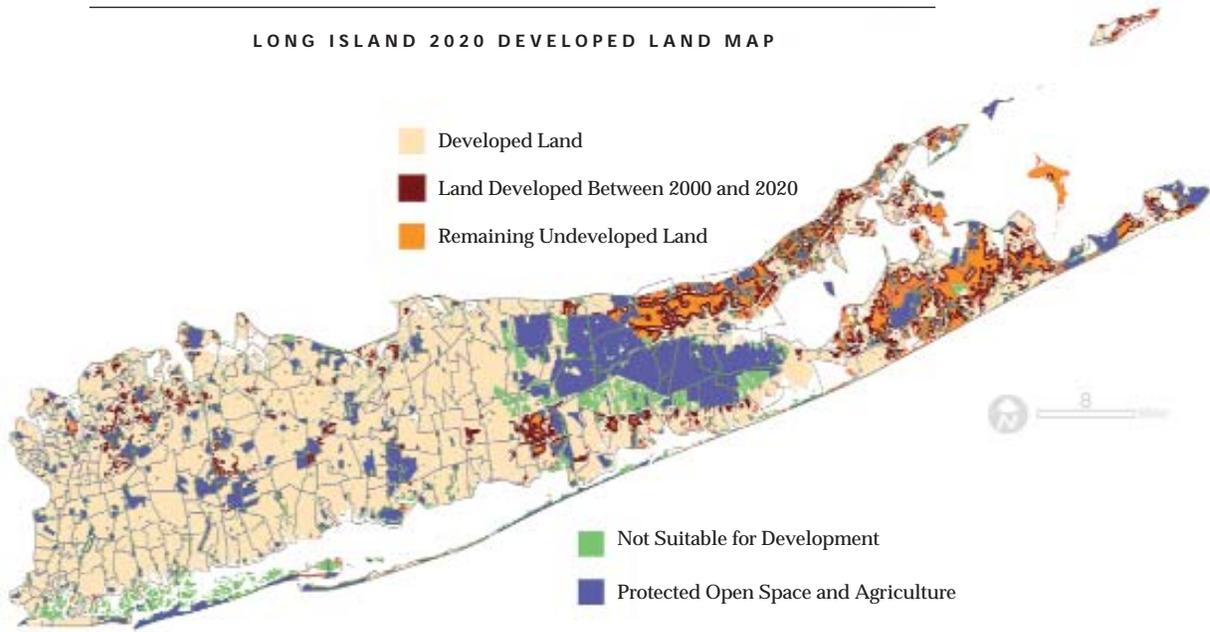
As Long Island runs out of space our ability to grow is constrained as never before. If we are to remain a vibrant and prosperous region, we now face critical choices about where, how and what type of growth will occur.

LONG ISLAND 2000 DEVELOPED LAND MAP

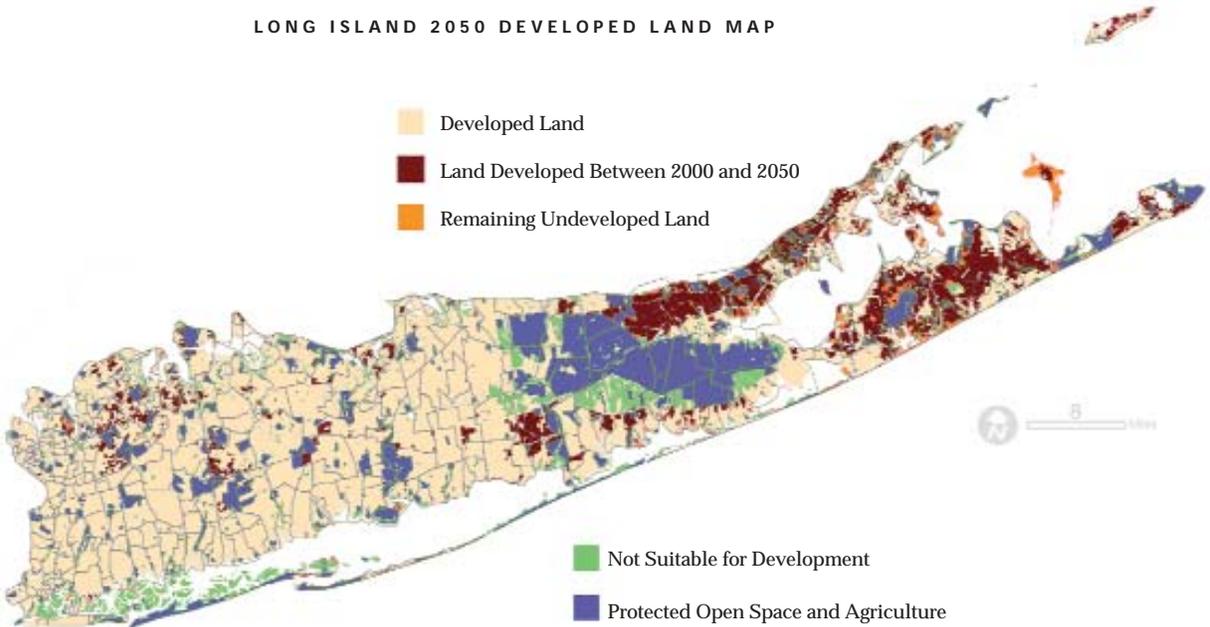


Source: Map prepared by Regional Plan Association (RPA) for the Rauch Foundation, 2004.

LONG ISLAND 2020 DEVELOPED LAND MAP



LONG ISLAND 2050 DEVELOPED LAND MAP



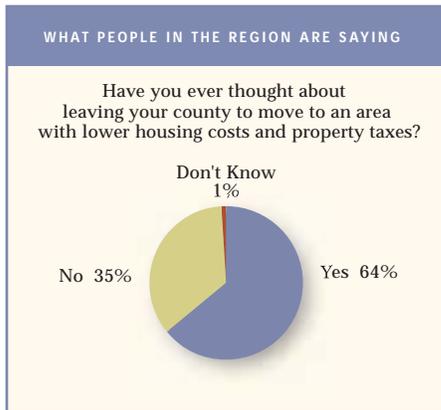
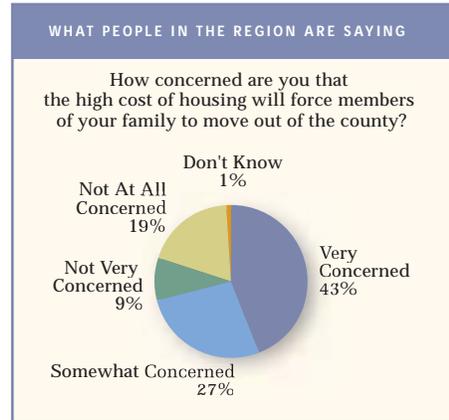
Source: Maps prepared by Regional Plan Association (RPA) for the Rauch Foundation, 2004.

CLEAR AND PRESENT CRISIS: LACK OF HOUSING

The ultimate irony of our development is that after fifty years of home-building Long Island’s residents today face a dire shortage of housing. Driven mostly by market economics, developers have focused almost exclusively on large lot housing for middle and upper-middle class families with children. Few options exist for seniors, recent graduates in entry-level positions and members of the workforce earning modest incomes.

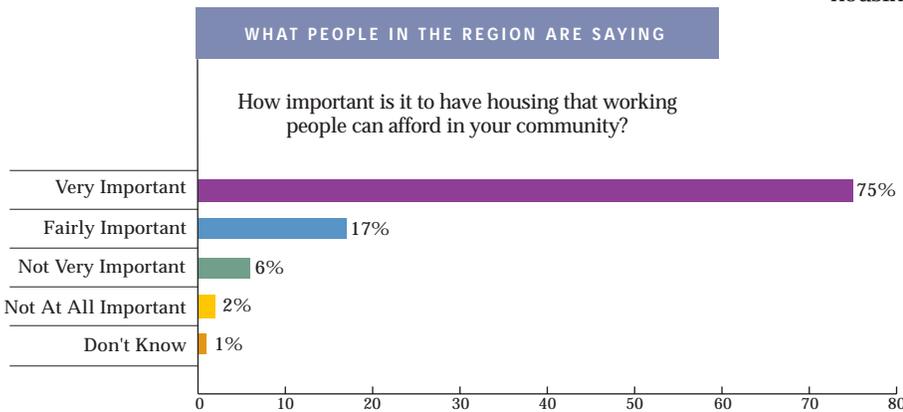
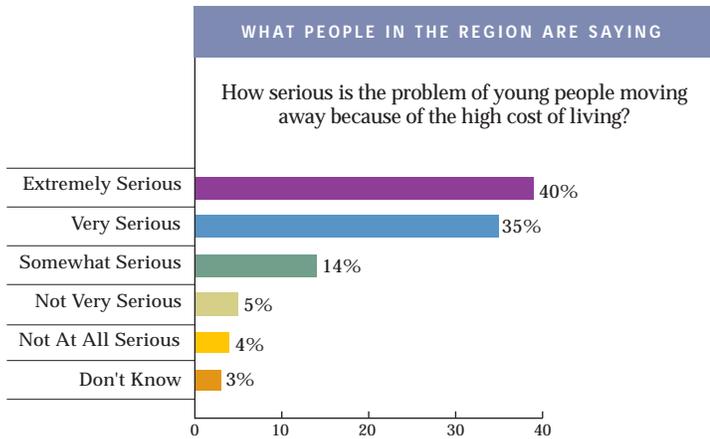
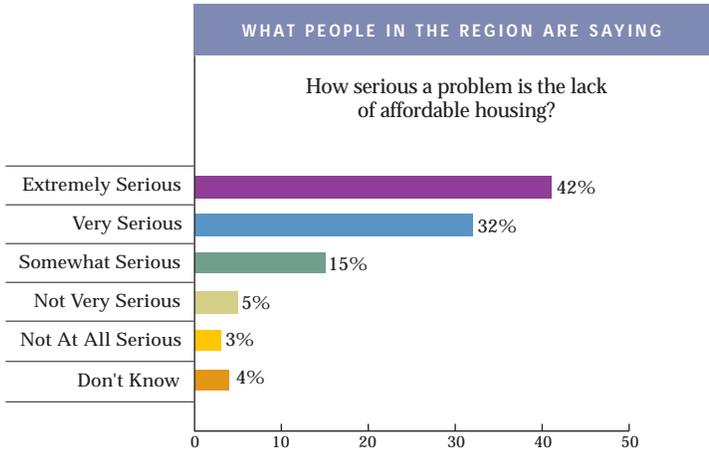
In addition, as remaining undeveloped acreage dwindles, land prices have spiked. The result has been a dramatic decrease in housing affordability over the last five years. Today the median price of a house on Long Island— \$394,900—is more than twice the national average.

More ominously, the median house costs 4.7 times the median family income, far above the 2.5 ratio considered affordable. In fact, a majority of Long Islanders could not afford to purchase the homes they now live in.



“Extremely Serious”

Long Islanders are very concerned about the lack of affordable housing and its consequences.



Exodus

The lack of housing options has forced large numbers of residents to leave Long Island for other regions. From 1990 to 2000, 20% of Long Islanders aged 18-34 left the Island—a rate five times the national average. Retirees also are moving away.

Housing patterns that were designed for families are now ironically undermining the ability of most extended families to remain together in the region. 43% of Long Islanders are very concerned that the high cost of housing will force members of their family to move away; 70% are at least somewhat concerned.

Brain drain

The problem is also economic. Long Island businesses and education and health-care institutions depend for success on recruiting and retaining talented young people. Our region also depends on large numbers of service workers—from teachers, firefighters and police, to tradespeople, hospital aides and retail sales staff—who now are struggling to meet Long Island’s high housing costs on their moderate incomes.

SUPPORT FOR CHANGE

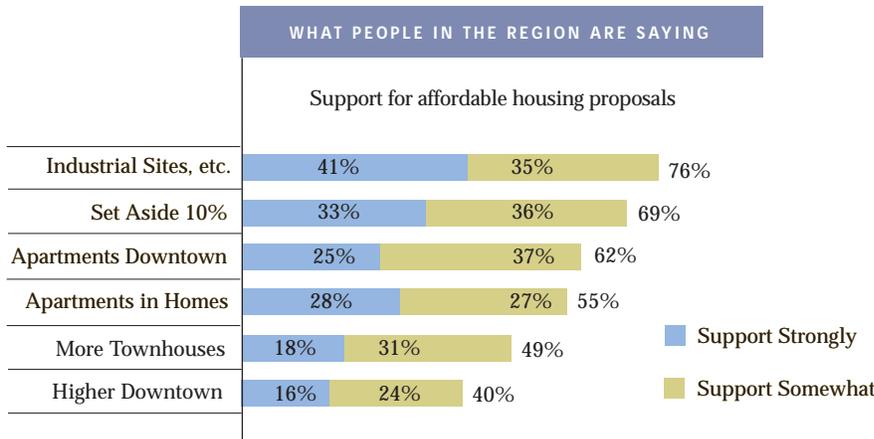
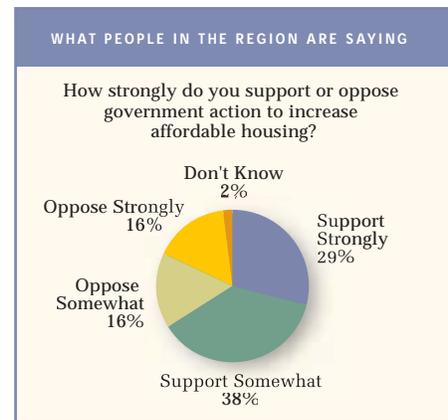
Long Islanders are not only aware of the housing problem; they strongly support new efforts to address it. Two-thirds (67%) either strongly support or somewhat support government action to increase the supply of affordable, middle class and starter housing.

Presumed public opposition from current homeowners is often cited as the greatest obstacle to dealing with the housing crisis. The current data show that the public looks far more favorably toward affordable housing than was supposed. Only a 20% minority strongly opposes government efforts to reduce the problem.

Support for Specific Proposals

The data show public support not only for the general goal of affordable housing, but for several specific policy proposals.

A substantial majority of Long Islanders (76%) support building affordable housing on former industrial, commercial and government properties—a key element in “smart growth” planning. And 70% support requiring developers to include a minimum of 10% affordable units in new developments of five houses or more.

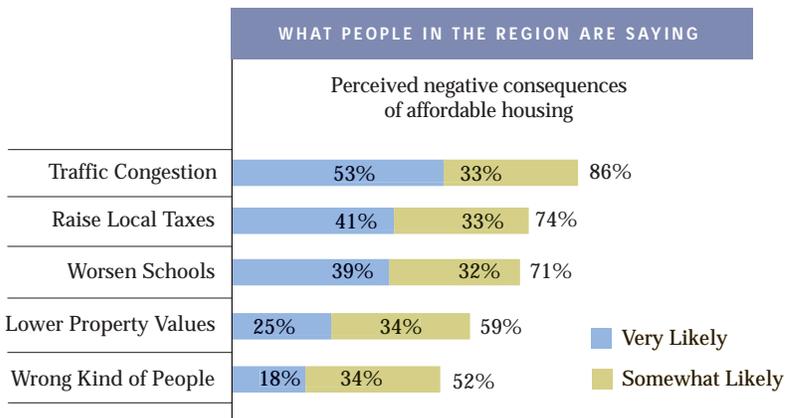
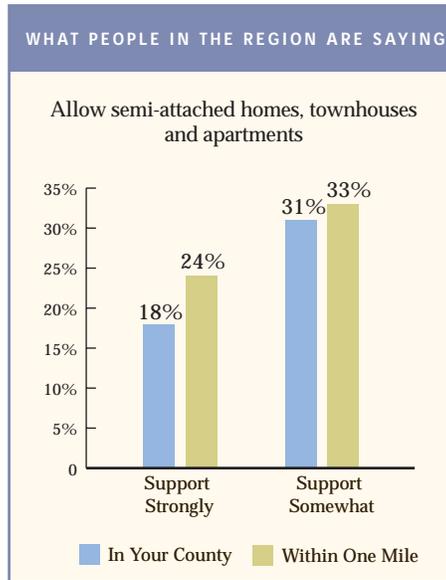


Smaller majorities support policies to increase the availability of rental units, either by building in downtown shopping areas and near train stations and bus terminals (62%), or by easing restrictions on rental apartments in single-family homes (55%).

Two proposals received less support: the building of semi-attached houses, townhouses and apartments in areas now zoned for single-family homes (49%), and raising height limits in downtown areas from two to four stories, to allow apartments above shops (40%).

NIMBYism Not Apparent

Another presumed obstacle to affordable housing is the belief that residents will support programs if they are located elsewhere on the Island, but not in their own areas (NIMBYism—“Not In My Backyard”). Poll results reveal that this obstacle, too, has been overestimated. Support for affordable housing projects remains strong, even when respondents were asked if they would support such projects within one mile of their homes.



Long Islanders’ support for affordable housing comes despite their belief it is likely to produce these negative results. Simultaneously, Long Islanders are conflicted about what this would mean for their property values, neighborhoods and schools.

THE DREAM OF THE NEXT GENERATION

Today Long Island stands on the brink, confronting choices critical to our future. Behind us is a record of remarkable accomplishments. Before us lie serious challenges—some, indeed, born of our very success. As this Special Analysis has indicated, the ways in which we have used land over the past half-century can no longer be sustained.

But this Special Analysis has also revealed a broad consensus among us: wide agreement on the nature of the problem and deep support for change.

Long Islanders have a better understanding today of where we are and how we got here; of the interrelated consequences of land-use decisions; and of the need for comprehensive, region-wide planning.

The Next Steps

The next stage toward effective action involves a process of envisioning. Long Islanders must conceive new paradigms for growth. Scenarios must be presented that Long Islanders will embrace as providing new options, while preserving and enhancing the

quality of our communities. Planning tools must be provided to show clearly what proposed changes would mean in practice.

Perhaps most challenging, Long Islanders must create new ways of working together. Though citizens, businesses and interest groups of varying perspectives are united in recognizing the need for change, the structures for regional action do not exist. New alliances must be formed, and new relationships forged among government entities.

A window of opportunity is open, but also a difficult challenge. Suburbia has matured, and Long Island stands, as it did a half-century ago, needing to re-invent itself once more. Can the region find ways to translate the consensus for change into effective action? The next generation of America's dream is waiting to be built.

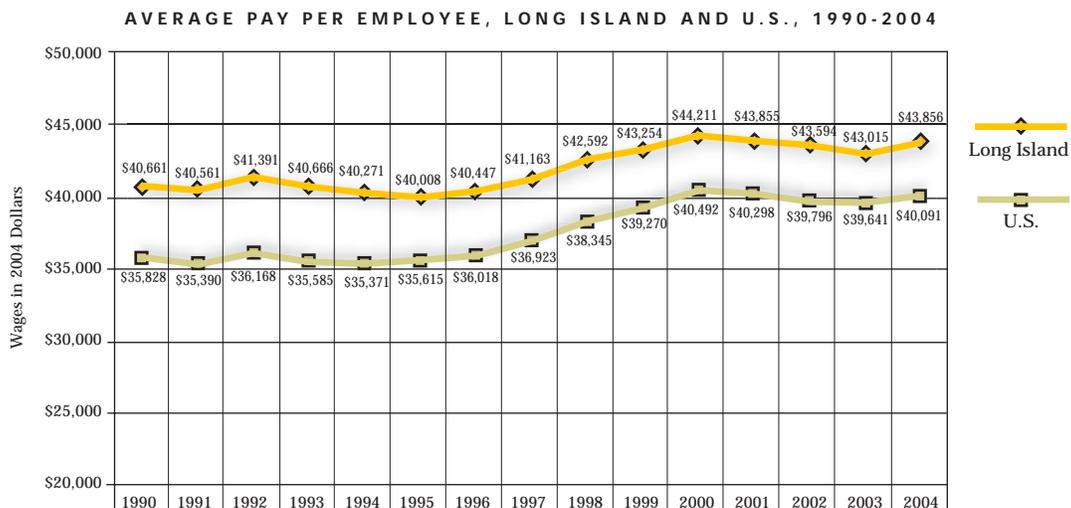




**GOAL 1:
GROWTH AND PROSPERITY**

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

Growth in Long Island Wages (8%) Lags U.S. Wage Growth (12%) Over Past 15 Years*



Sources: Economy.com, Collaborative Economics

Why is this important?

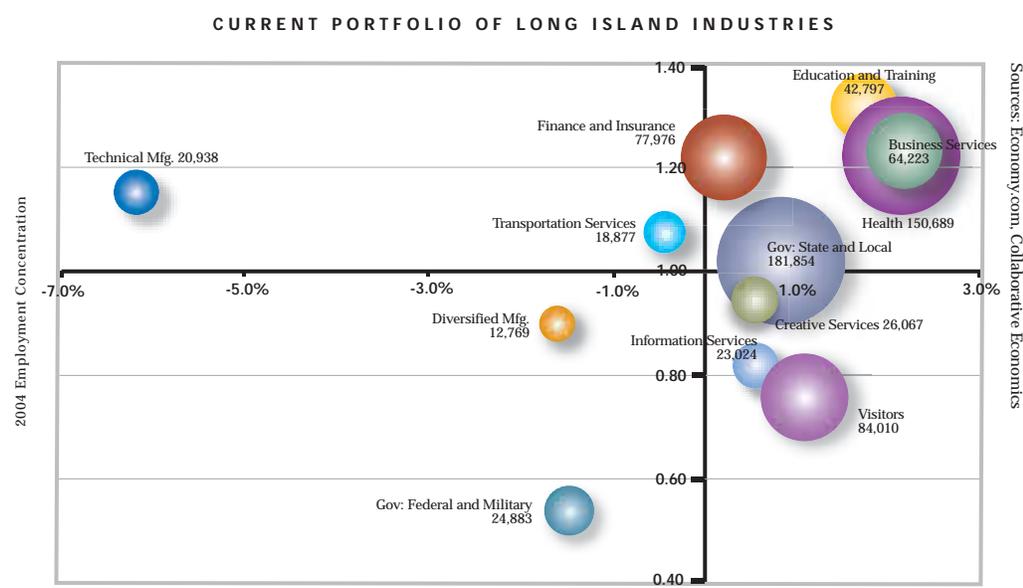
Average pay per employee is a basic measure of job quality and a key component of Long Island’s economic vitality. Increasing inflation-adjusted average pay per employee reflects rising levels of education and productivity.

How are we doing?

On Long Island, average pay per employee has increased by almost 8% from \$40,661 in 1990 to \$43,856 in 2004. Nationally, average pay per employee has increased by almost 12% from \$35,828 in 1990 to \$40,091 in 2004. On Long Island, average pay per employee increased 2% from 2003 to 2004. Nationally, average wages rose about 1% in that same period. In 2004, average pay per employee on Long Island was \$3,765 higher than it was nationally. Even though average pay per employee on Long Island continues to be higher than the national average, the gap is narrowing. In 1990, Long Island jobs paid 13% more than the national average. Now that difference has shrunk to 9%. It appears that Long Island is creating lower paying jobs.

*See page 21 of *Long Island Index 2004* for previous indicator. NB: All figures are inflation-adjusted in 2004 dollars.

Health is Our Largest Industry Cluster; Government and Military is the Largest Segment of our Economy; and Finance and Insurance Cluster Has the Greatest Economic Impact.*



Average Annual Employment Growth, 1990-2004
 vertical axis = 2004 employment concentration; horizontal axis = growth in employment 1990-2004;
 size of circle = 2004 employment

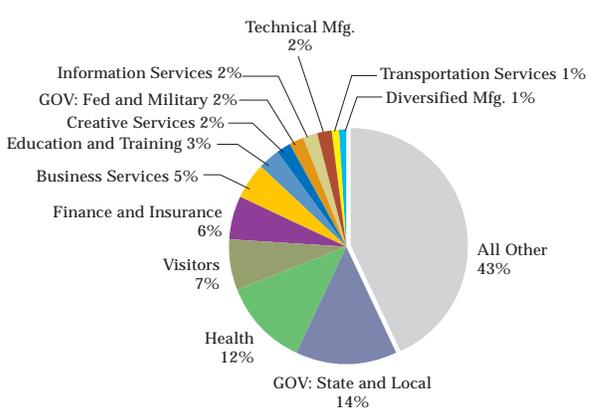
Sources: Economy.com, Collaborative Economics

Why is this important?

Long Island's industry clusters make up approximately 50% 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 above bubble 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 2004 (horizontal axis); and employment size, 2004 (size of circle).

BREAKDOWN OF LONG ISLAND EMPLOYMENT BY INDUSTRY, 2004



Sources: Economy.com, Collaborative Economics

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 fourteen years, and average annual employment shows the size of the cluster.

Breakdown of Long Island employment by industry gives us a better sense of what percentage of the economy each industry cluster comprises.

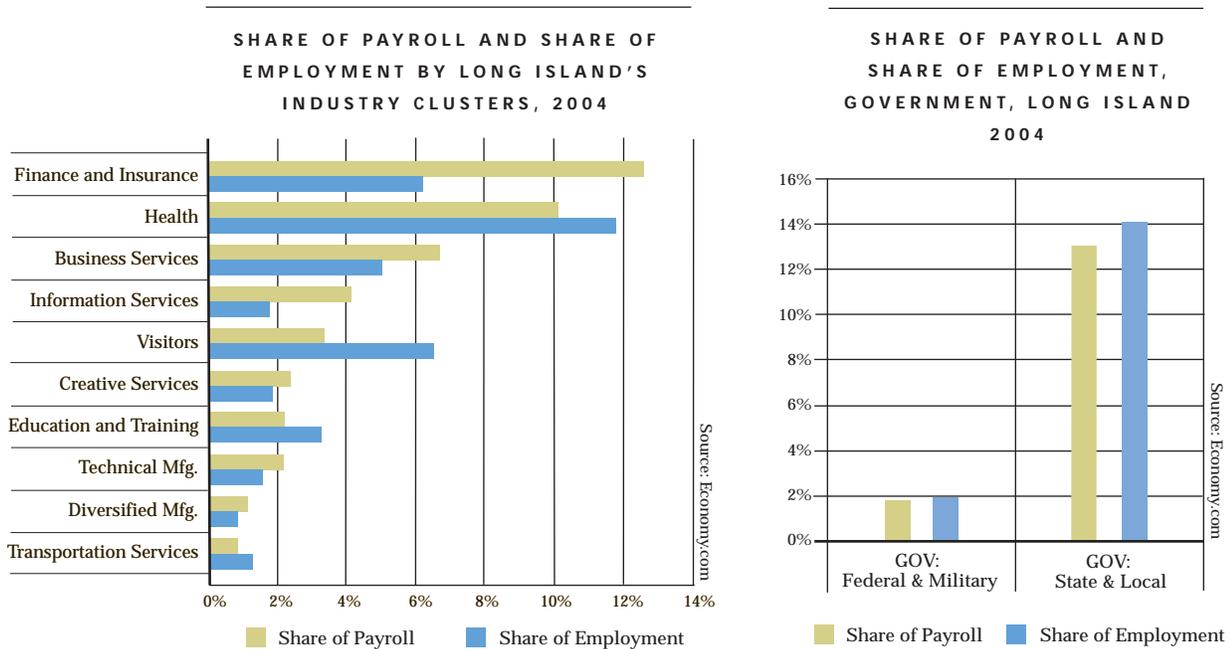
Share of employment and share of payroll by Long Island's industry clusters shows which industries generate the greatest amount of economic impact on the region.

*See page 20 of *Long Island Index 2004* for previous indicator. NB: Government and military employment were added this year.

How are we doing?

The largest industry cluster on Long Island is Health with more than 150,000 employees. Health-related employment is about 22% more concentrated on Long Island than it is nationally. Health employment grew at an annual rate of 2.1% between 1990 and 2004, outpacing average regional job growth (0.7%) during the same period.

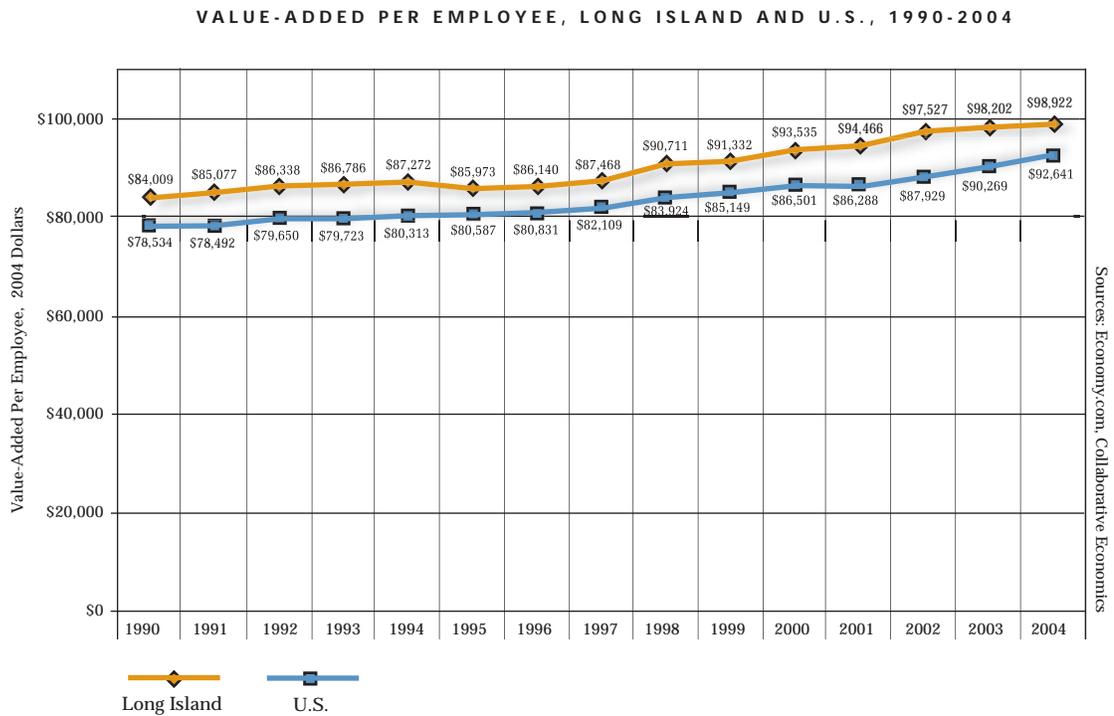
Technically not an industry cluster, Government and Military, including all public school employees, comprises the largest segment of the region's economy. Between 1990 and 2004 this cluster grew by 7%, from 193,000 employees to almost 207,000 employees.



Long Island has seven industry clusters with employment concentrations that are greater than one. The cluster with the highest concentration of employment is Education and Training, which is about 30% more concentrated on Long Island than it is nationally. About 43,000 Long Islanders are employed in the Education & Training cluster; this cluster is largely made up of employment in Elementary and Secondary Schools (33%), followed by employment in Colleges, Universities, and Professional Schools (30%). Other important segments within the cluster are newspaper and periodical publishers and other schools and instruction. Business Services and Finance and Insurance employ 64,223 and 77,976 respectively. Both have similar levels of employment concentration; about 22% more concentrated on Long Island than nationally. Business Services grew at an annual rate of 2.1% while Finance and Insurance grew about 0.2% annually.

Government and military employment make up 16% of our economy and provide 15% of payroll in the region. Private industry clusters make up about 41% of all employment and 47% of payroll on Long Island. All other industries are 43% of our economy and include industries such as construction and real estate, retail and miscellaneous manufacturing. Industry clusters such as business services, creative services, finance and insurance and information services have tremendous impact on our economy because their share of employment is smaller than their share of payroll. Of these clusters, finance and insurance has the greatest economic impact, employing 6% of the region's workers but generating more than double that amount (13%) in payroll for the region.

Productivity is Higher Than the U.S. Average But Rises at the Same Pace*



Why is this important?

Value added per employee is a proxy measure for 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?

Long Island value added per employee has continued to rise in inflation-adjusted terms at an average annual rate of 1.2% from 1990 to 2004, or 18% overall.

Nationally, value-added increased at the same rate.

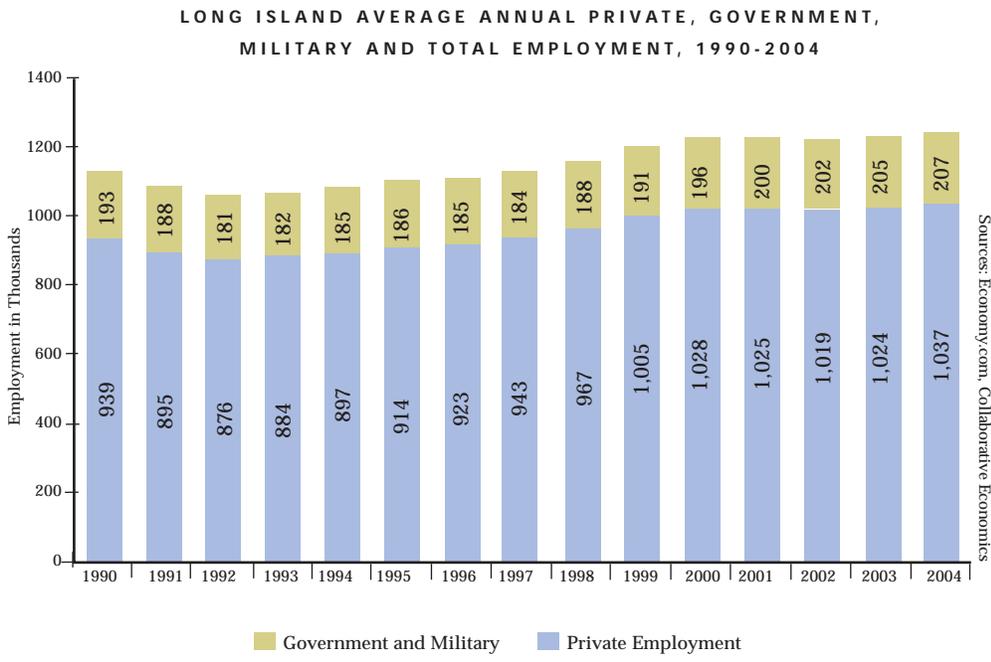
Despite a national recession, Long Island's value added per employee has continued to rise slightly during the past three years. In addition, value-added per employee on Long Island has consistently outperformed the national average.

*See page 24 of *Long Island Index 2004* for previous indicator. NB: All figures are inflation-adjusted in 2004 dollars.

Long Island's Job Growth Continues*

**GOAL 2:
SUPPORTIVE BUSINESS
ENVIRONMENT**

Long Island provides a business friendly environment for companies to grow



Why is this important?

Job gains or losses measure regional economic vitality. This chart shows annual average private nonfarm employment, government & military and total employment on Long Island during the past fourteen years.

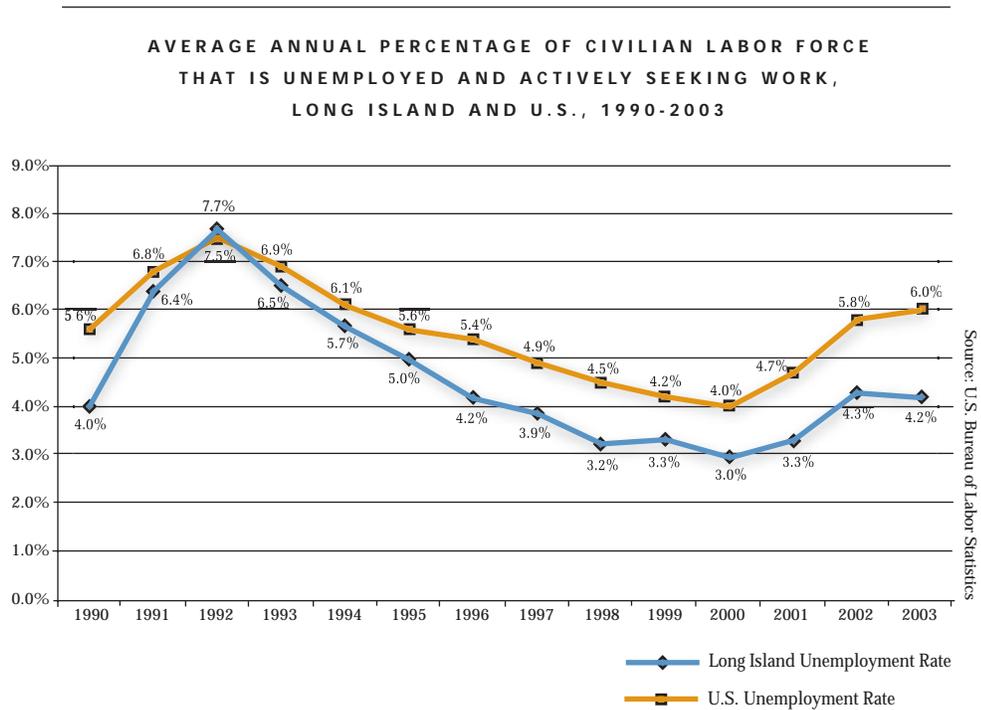
How are we doing?

Long Island added about 15,165 jobs growing from 1.23 million in 2003 to 1.24 million in 2004; this is an increase of 1.2%. Of these 15,165 new jobs, 12,945 or about 85% were added in private industry; the remaining 2,220 jobs were added in the government and military sectors.

Long Island's total employment increased by about 10% or 111,000 jobs from 1990 to 2004. Private industry employment increased by more than 10% and Government & Military employment increased 7%.

*See page 19 of Long Island Index 2004 for previous indicator. NB: Government and military employment were added this year.

Long Island Maintains Low Unemployment Rate



Why is this important?

The unemployment rate is the number of unemployed persons (including those looking for work and those waiting to be recalled to work) as a percentage of the civilian labor force. It is a measure of labor market efficiency; how well the skills of the regional labor force match regional job opportunities. A rising unemployment rate suggests that there are fewer job opportunities for those seeking employment.

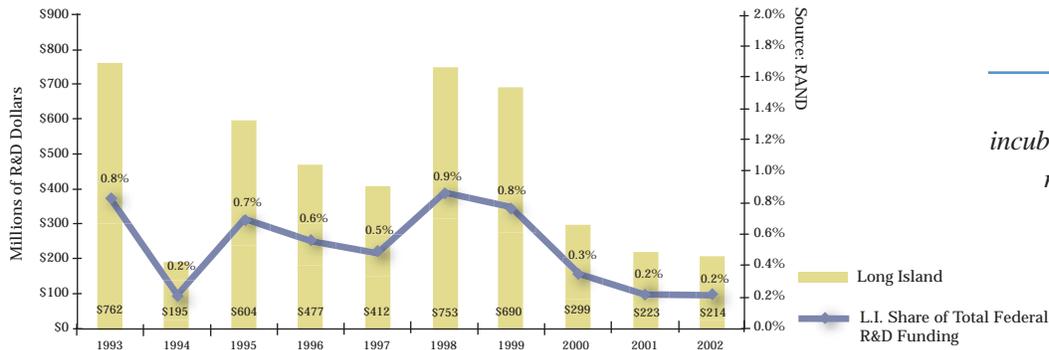
How are we doing?

Long Island's unemployment rate fell off slightly (0.1%) from 2002 to 2003. At its lowest point, in 2000, the unemployment rate was about 3%. At its highest point, the regional unemployment rate reached 7.7%, just above the national average during the height of the national recession in 1992.

In general, Long Island's unemployment rate follows national trends, yet it remains well below that of the U.S. While low unemployment is a sign of a strong economy, it can present problems for employers trying to hire new employees.

Region Receives Less Than 1% of Federal Research & Development Dollars

FEDERAL R&D DOLLARS AWARDED TO LONG ISLAND AND L.I. SHARE OF TOTAL FEDERAL R&D FUNDING, 1993-2002



**GOAL 3:
INNOVATIVE
ECONOMY**

Our economy incubates, supports and retains companies.

Why is this important?

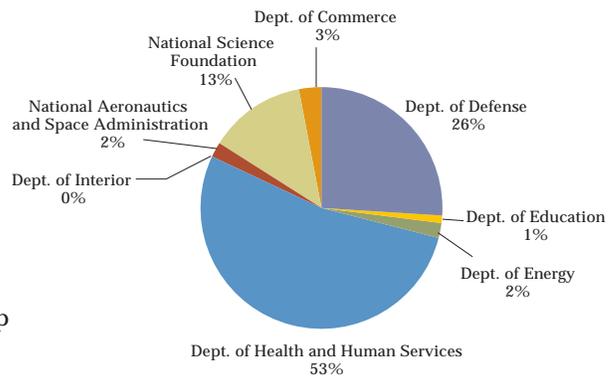
Federal R&D investment in Long Island’s universities, labs and private sector helps to drive regional innovation. Federal R&D dollars support the development of technologies that create enormous economic benefits for the regions in which they are developed and for the nation as a whole. They are a separate funding stream from government contracts for operating expenses. According to RAND, “Specific federal R&D activities are often deeply rooted in the communities in which they are conducted. Such activities attract new businesses to these areas, thereby stimulating local economies and improving the quality of local schools. High-technology start-up companies often co-locate with Federal laboratories and major Federally-funded R&D activities at universities”.

How are we doing?

The total amount of Federal R&D dollars awarded to Long Island research universities, labs and private companies fluctuated from year to year on the basis of specific contracts awarded to companies in the region. Long Island’s share of U.S. R&D dollars reached a peak in 1998 when it was 0.9%; the share fell 77%, to 0.2%, from 1998 to 2002.

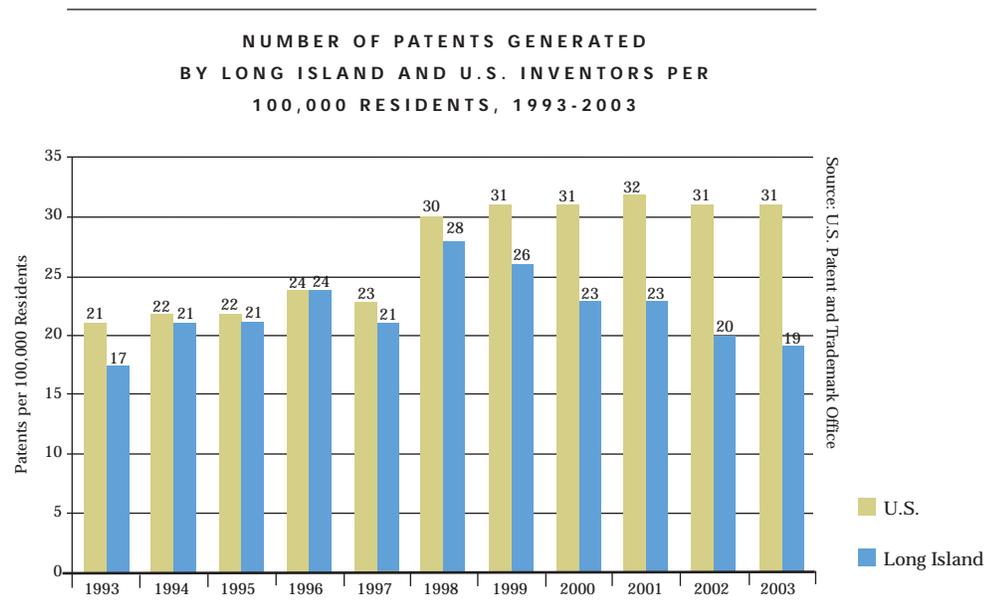
On average, between 1993 and 2002, Long Island took about 15% of New York State’s R&D dollars. Many of these dollars went to fulfill Department of Defense (DOD) contracts. Three entities on Long Island, Northrop Grumman, SUNY Stony Brook and Cold Spring Harbor Labs, consistently receive the majority of the region’s R&D dollars. In “spike” years, e.g. 1993, 1995, 1998, 1999 the majority of R&D dollars allocated to Long Island went to Northrop Grumman. In 2002, SUNY Stony Brook and Cold Spring Harbor Labs combined received 76% of the of the regional R&D dollars that came from the Department of Health and Human Services, mainly for basic research in biomedicine and health.

2002 LI R&D DOLLARS BY FEDERAL AGENCY



Source: RAND

Region Lags Nation in Patents Generated*



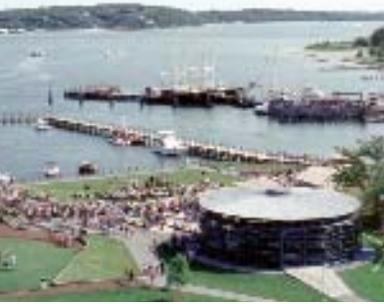
Why is this important?

Patents reflect a region’s capacity to innovate by creating and applying new knowledge. The ability to generate and protect new ideas, products and processes is an important source of regional comparative advantage.

How are we doing?

The rate of patents issued per 100,000 people on Long Island, measured annually, rose to a peak of 28 in 1998 and then declined steadily to 19 patents per 100,000 residents in 2003. In contrast, the number of patents per 100,000 people issued to all U.S. inventors has increased fairly steadily over this same time period, from 21 patents per 100,000 people in 1993 to 31 patents per 100,000 people in 2003. For a region long renown for its tradition of technological innovation, the current trend stands in sharp contrast to the region’s history.

*See page 26 of Long Island Index 2004 for previous indicator

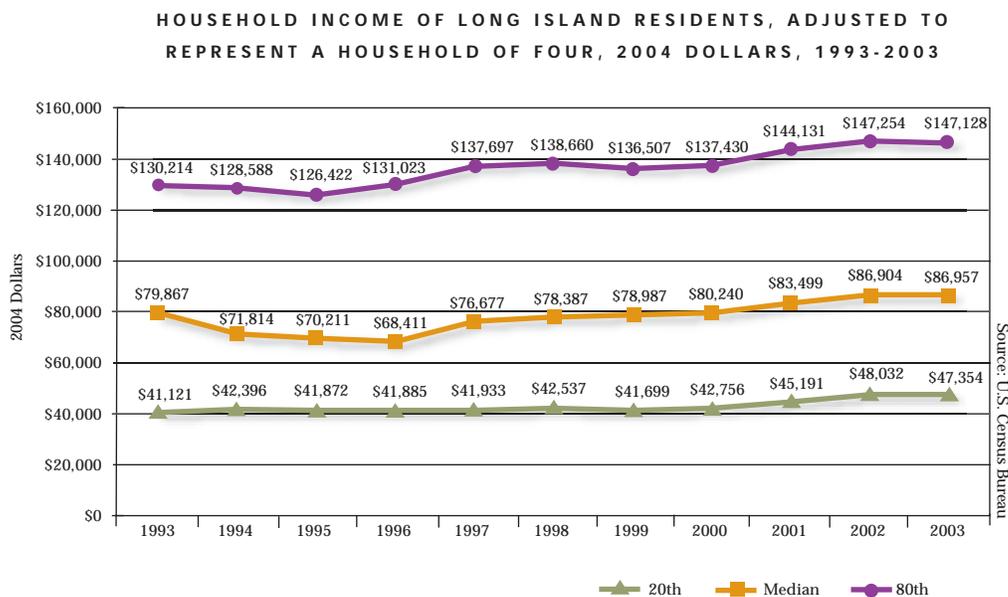


GOAL 4:

VIBRANT COMMUNITIES

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

Disparities in Household Incomes Persist*



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.

How are we doing?

In 2003, inflation-adjusted incomes of households at all levels of the distribution changed very slightly. The largest change was in the 20th percentile where household incomes declined by 1.4%. Between 1993 and 2003, households at the median of income distribution gained only 9% as compared to those at the 20th percentile that gained 15% and those at the 80th percentile that gained 13%. This pattern follows the national trend in terms of income growth.

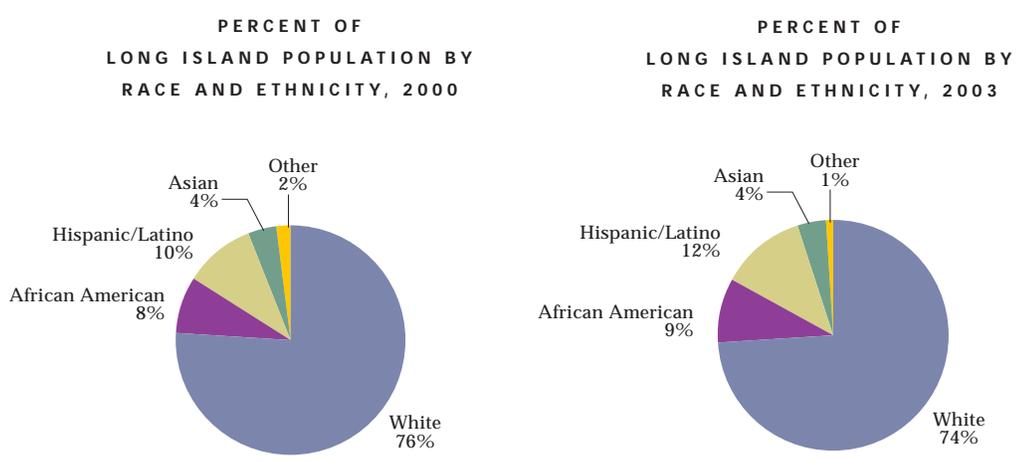
*See page 28 of *Long Island Index 2004* for previous indicator. NB: All figures are inflation adjusted in 2004 dollars

Population Continues to Diversify

Why is this important?

Racial and ethnic trends are one indication of how Long Island is affected by global population and migration patterns. Increasing diversity can provide a cultural richness that many people value, but can also add to social tensions. In addition, some economists have found that workforce diversity leads to a stronger regional economy.

LONG ISLAND'S POPULATION CONTINUES TO DIVERSIFY



Sources: 2000 U.S. Census of Population and 2003 U.S. Census County Estimates

How are we doing?

The rapid expansion of Long Island's Hispanic, African-American and Asian population that occurred in the 1990s appears to have continued between 2000 and 2003. Although less reliable than 2000 Census, the 2003 Census County Estimates indicate that Hispanics increased from 10% to 12% of the population in those three years after growing from 6% to 10% between 1990 and 2000. African-Americans increased from 8% to 9% of the population, while Asians remained at 4%.

Population Aging Faster than the U.S.

Why is this important?

Age distribution can have a dramatic effect on the size of the workforce and the types of services that are required on Long Island. A growing population under 18 indicates the need for child care and school services, while an increase in those over 65 implies a need for more medical services and senior housing.

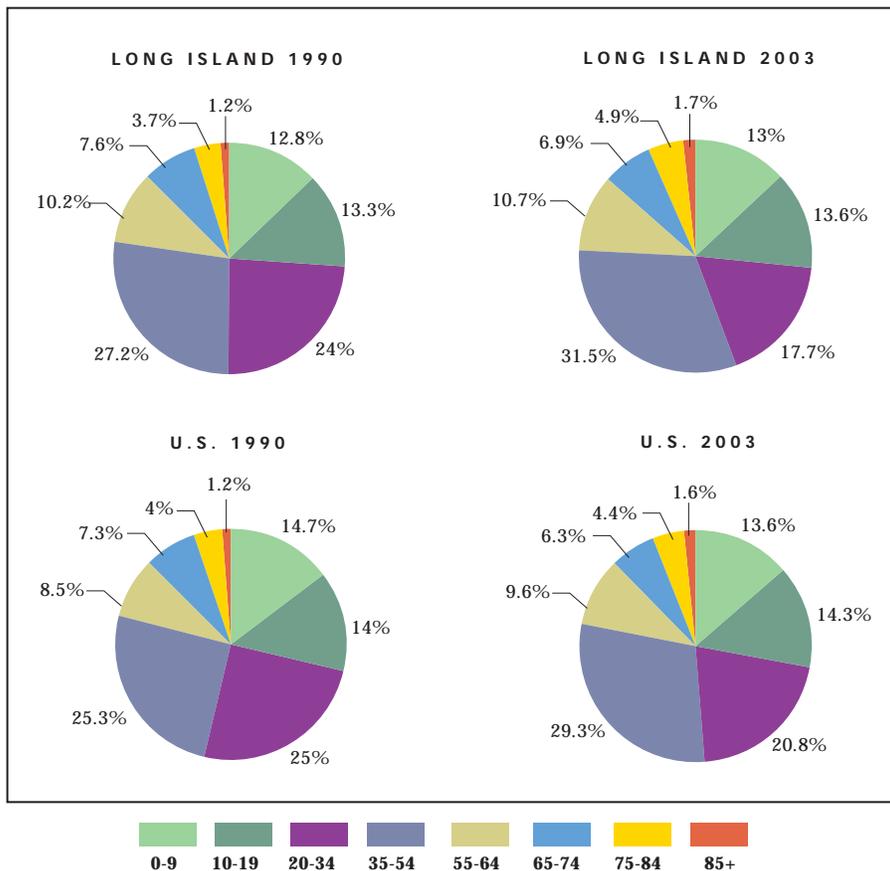
How are we doing?

Between 1990 and 2003, Long Island lost population under the age of 35 and gained population over the age of 35. In 1990, 50% of the population was under 35 and 50% was over 35. By 2003, 44% of the population was younger than 35 and 56% was older than 35. One important story from the *2004 Index* was that Long Island is losing its young adults at five times the national rate.

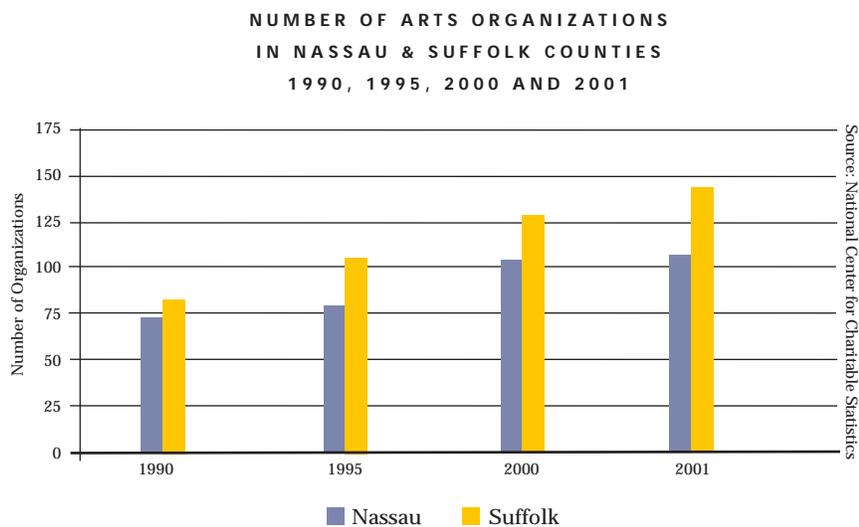
The U.S. experienced a similar demographic shift in the population between 1990 and 2003, but there was still a more equal balance between the under and over 35-age population. In 1990, 54% of the population was under 35 and 46% was over 35. By 2003, 49% of the population was younger than 35 and 51% was older than 35.

This trend can only be expected to continue as the baby boomers stay on Long Island, as opposed to moving to the sunbelt, and as medical advances increase life expectancy. An aging population will require the region to look for new sources to replenish the workforce, new mechanisms for accommodating an elderly population, and creative ways of financing the added public expenditures associated with an older, retired population.

POPULATION BY AGE GROUP, LONG ISLAND AND U.S.,
1990 AND 2003



Long Island Arts Organizations Increase and Offer a Variety of Cultural Activities



Long Island arts organizations served 855,750 patrons during the 2003/2004 fiscal year.

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?

The number of arts organizations in Nassau County increased from 74 in 1990 to 102 in 2001. During this same period, the number of arts organizations in Suffolk County increased from 82 to 144.

A survey conducted over the summer of 2004 of 186 arts and cultural organizations on Long Island found more self-identified “music” organizations (41%) than other cultural offerings. “Education” (25%), “museum” (24%), “theater” and “other” (both 21%) were the next most frequented responses.

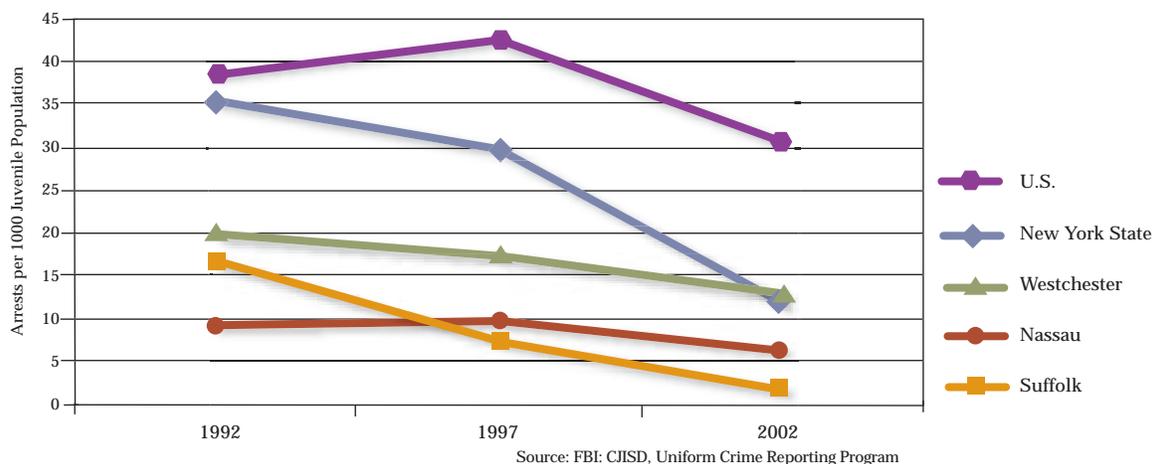
Events organized specifically for children, families and students (college-aged) serve as an important indicator of making art a vital part of young people’s life. Our survey found that nearly half (49%) of Long Island arts and cultural organizations organized from 1 to 20 events specifically for children, families and students during the fiscal year. There was a greater emphasis on events for children and families (81%) as compared to students/young people (61%).

Significant Drop in Juvenile Arrests

Why is this important?

Juvenile arrest rates serve as an indicator of the level of safety in our communities. Crimes committed by young adults threaten our general sense of safety and overall quality of life in our communities. The less safe we feel, the less likely we will be involved in our communities. Moreover, juvenile arrests often set a pattern for adult criminal behavior. The more we know about juvenile arrest rates on Long Island, the more we can implement crime prevention policies and programs to build a strong sense of community for our young people, improve schools, fund youth educational activities and get parents and neighbors involved in neighborhood safety and community activities.

JUVENILE ARRESTS PER 1000 JUVENILE POPULATION, NASSAU, SUFFOLK, WESTCHESTER COUNTIES, NEW YORK STATE AND U.S., 1992-2002



How are we doing?

From 1992-2002, Long Island saw a significant decrease in juvenile arrests. During this time period, Suffolk County's juvenile arrest rate per 1,000 juvenile population declined by over 75% from 17.1 arrests per 1,000 juvenile population to 2 arrests per 1,000 juvenile population. Nassau County's rate declined by 40%, from 8.8 arrests per 1,000 juvenile population to 6.3 arrests per 1,000 juvenile population.

Both counties saw an increase in their juvenile population between 1992 and 2002 while experiencing a decline in juvenile arrests. The trend in Nassau and Suffolk mirrors a statewide and national trend of decreasing juvenile arrests during this same time period. Both Nassau and Suffolk continue to have lower juvenile arrest rates than New York State and the U.S.

**GOAL 5:
AFFORDABLE HOUSES**

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

Housing Affordability Declines Further*

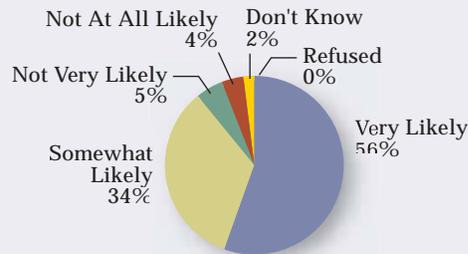
RATIO OF HOME PRICE TO MEDIAN FAMILY INCOME FOR NASSAU COUNTY AND WESTERN SUFFOLK COUNTY, 1992-2004



Sources: Prepared by the Long Island Regional Planning Board from data provided by the Long Island Board of Realtors, Multiple Listing Service of Long Island, and the U.S. Census Bureau, American Community Survey.

WHAT PEOPLE IN THE REGION ARE SAYING

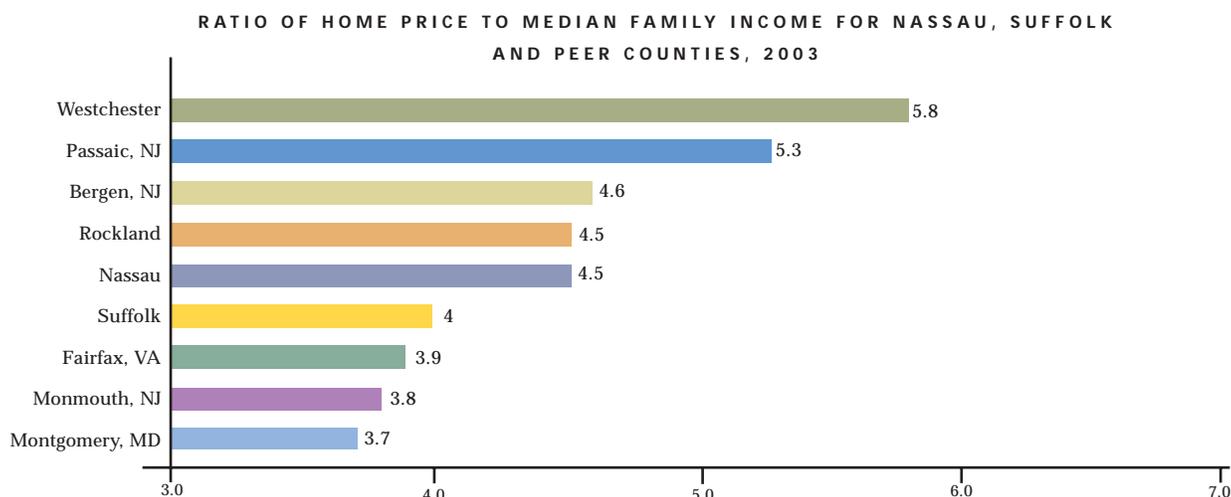
How likely is it that an increase in more affordable middle class and starter housing would increase the number of local young people who stay and raise a family on Long Island?



*See page 32 of Long Island Index 2004 for previous indicator

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 the buyer's annual household income.



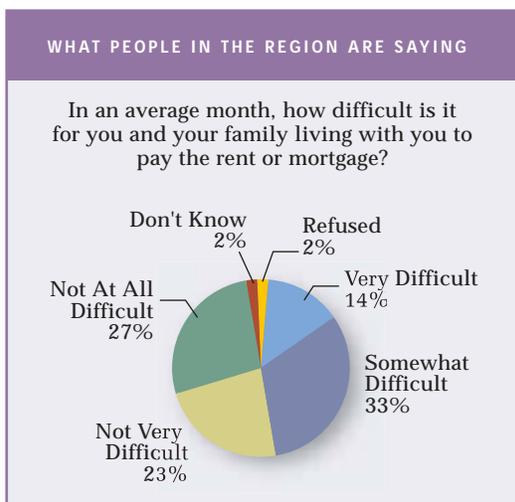
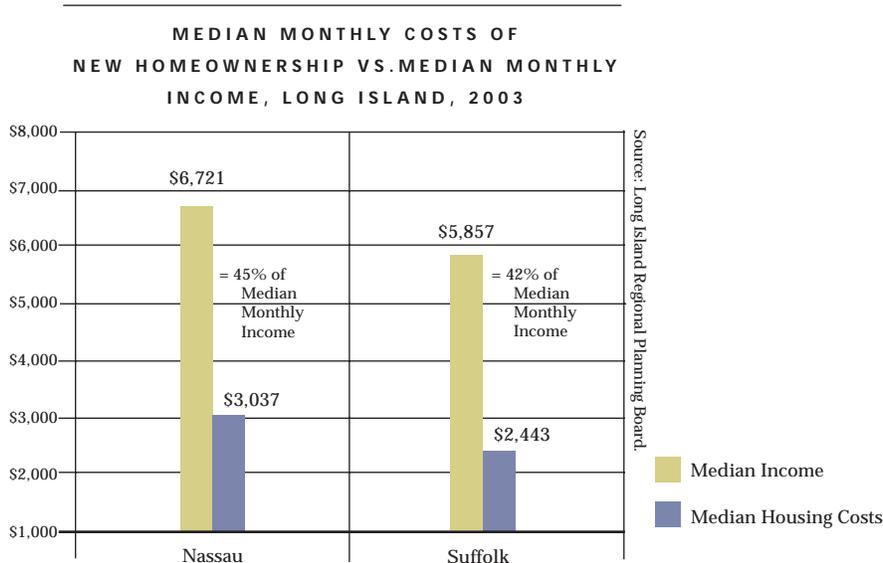
Sources: Prepared by the Long Island Regional Planning Board from data provided by the Long Island Board of Realtors, Multiple Listing Service of Long Island, and the U.S. Census Bureau, *American Community Survey*. 2004 data not yet available. Suffolk County data is for Western Suffolk.

How are we doing?

The cost of housing on Long Island has increased dramatically over the past 5 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 4.2 in Western Suffolk County and 4.7 in Nassau County, meaning that home prices in Western Suffolk are now 4.2 times the median family income and home prices in Nassau are now 4.7 times the median family income. The majority of Long Island homeowners could not now afford to purchase the home they currently live in.

Long Island is not alone in experiencing a housing affordability crisis. Compared to our peer counties in the Metro NY and Washington DC areas, in 2003 about half of them were less affordable than Long Island and half of them were more affordable than Long Island. The peer region with the least affordable housing in 2003 was Westchester County with a housing affordability ratio of 5.8. The peer region with the most affordable housing in 2003 was Montgomery County, MD with a housing affordability ratio of 3.7.

New Homeowners Face Housing Burden, Spending Over 40% of Monthly Household Income on Homeownership Costs



Why is this important?

The Census Bureau defines spending 30% or more of monthly household income on housing as a “burden”. It defines spending 50% or more of monthly household income on housing as a “critical housing burden”. Housing burden is an indicator of housing affordability, housing choice and quality of life. Households that must spend 30% or more of their monthly income on housing have less money available for their present and future needs. Basic monthly housing costs include mortgage payments, property taxes, and homeowner’s insurance.

How are we doing?

On Long Island, housing has become a “burden” to more and more of the region’s households due to the fact that rising homeownership costs have outpaced increases in household incomes in a tightening housing market. New homeowners in Nassau County now must spend approximately 45% of their monthly household income (\$3,037) on housing. In Suffolk County, new homeowners must spend approximately 42% of their monthly household income (\$2,443) on housing. Aspiring homeowners in both counties, especially our young people just starting out in the workforce and our middle class working families, are finding it increasingly difficult to find housing they can afford, causing many of them to seriously consider leaving Long Island for more affordable regions. In October 2003, only 35% of Long Islanders reported having difficulty paying their monthly rent or mortgage (7% very difficult, 28% somewhat difficult). One year later that number had jumped to 47% (14% very difficult, 33% somewhat difficult).

**GOAL 6:
TRANSPORTATION
CHOICES**

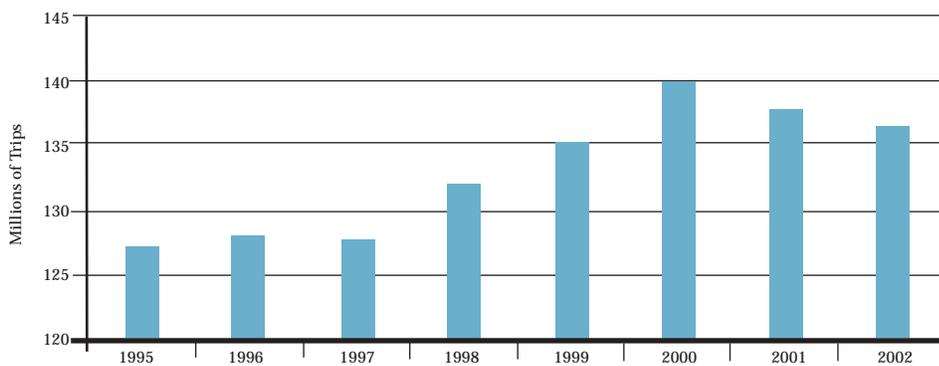
We increase mobility by investing in an integrated, regional transportation system and by encouraging creative problem solving to find transportation alternatives.

Transit Ridership Down Again*

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, improves the overall livability of our communities and reduces pollution.

TRANSIT RIDERSHIP ON LONG ISLAND, 1995-2002 IN MILLIONS OF TRIPS



Source: American Public Transportation Association/FTA Database

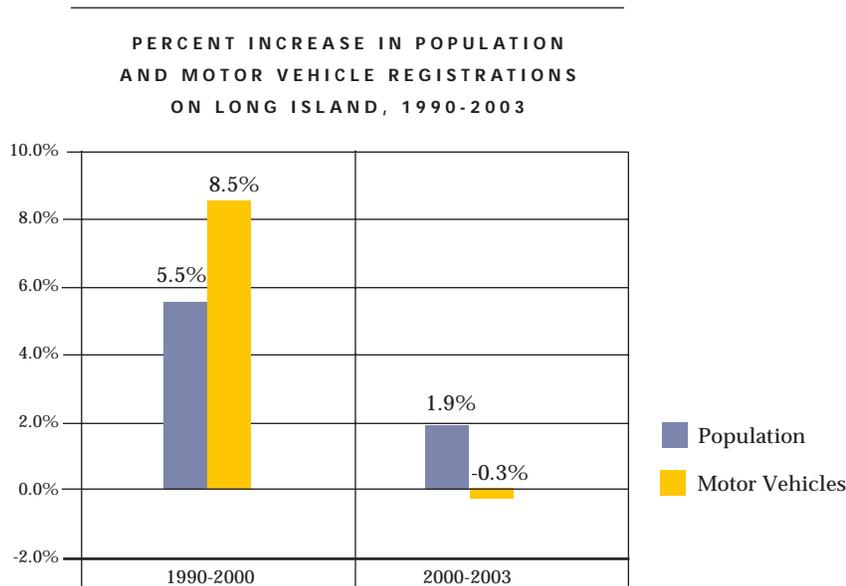
How are we doing?

The breakdown of ridership by transit provider in 2002, the last year for which data is available, shows that at least 100 million trips were recorded on LIRR in 2002; 31 million trips were made on M.T.A. Long Island Bus (Nassau County) and 5 million trips on Suffolk County Transit. After transit ridership on Long Island increased by 10% between 1995 and 2000, it has since declined by 3% between 2000 and 2002. This amounts to 3,500 less trips per year since 2000.

This decrease in ridership is not evenly divided across transit providers. Long Island Bus ridership has increased by 3% since 2000 and Suffolk Transit by 4%, while Long Island Rail Road use decreased by 5% since 2000. The economy appears to be the primary cause for these changes. Given the steep loss of jobs in New York City since 2000, it is likely that this reduced Long Island Rail Road ridership. Demographic changes related to the increase of new, lower income immigrants and an aging population might have affected the rise in bus ridership. Furthermore, the locations where new jobs were created on Long Island were not within close proximity to public transit.

*See page 34 of Long Island Index 2004 for previous indicator

■ A Change in Pattern: Fewer Cars Since 2000*



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

Why is this important?

The number of motor vehicles registered in an area is directly related to cars on the road, increased traffic congestion and longer commutes. Time spent commuting represents time we can't spend pursuing other activities.

How are we doing?

From 1990 to 2000, the number of motor vehicles registered to residents of Nassau and Suffolk grew by 8.5% while population grew 5.5%, continuing a long-term trend of the number of cars growing faster than the number of people. However, from 2000 to 2003 a change in pattern has taken place. Population increased in this period by 54,000 persons but motor vehicle registrations dropped by 0.3%, or 7,097. It is too early to tell if this represents the beginning of a long-term trend or is a short-term aberration. One likely explanation is that fewer people bought cars in a period when the economy was weak, stock prices plummeted and housing costs soared. It is also possible that an aging population buys fewer cars per household and that the new, lower income immigrants cannot afford to buy automobiles.

*See page 35 of *Long Island Index 2004* for previous indicator



**GOAL 7:
HEALTHY PEOPLE**

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

Long Island is Average Among Suburban Peers on Child Well-Being Index

CHILD WELL-BEING INDEX* RANKINGS FOR 10 SUBURBAN COUNTIES OF CONNECTICUT, NEW JERSEY, NEW YORK, VIRGINIA, BY BEST 2000 RANK

County	State	1990 Rank	2000 Rank	Difference in Ranks
Morris County	New Jersey	1	1	0
Bergen County	New Jersey	3	2	-1
Fairfax County	Virginia	4	3	-1
Somerset County	New Jersey	2	4	2
Nassau County	New York	5	5	0
Suffolk County	New York	6	6	0
Rockland County	New York	8	7	-1
Fairfield County	Connecticut	10	8	-2
Middlesex County	New Jersey	7	9	2
Westchester County	New York	9	10	1

Sources: Family and poverty indicators from 1990 and 2000 U.S. Census; health indicators from CDC/National Center for Health Statistics, 1990 and 2000.

* Indicators included in index are the percent of families headed by single mothers; the child poverty rate; the percent of births to mothers under age 20; the percent of low birth weight babies; and the infant mortality rate.

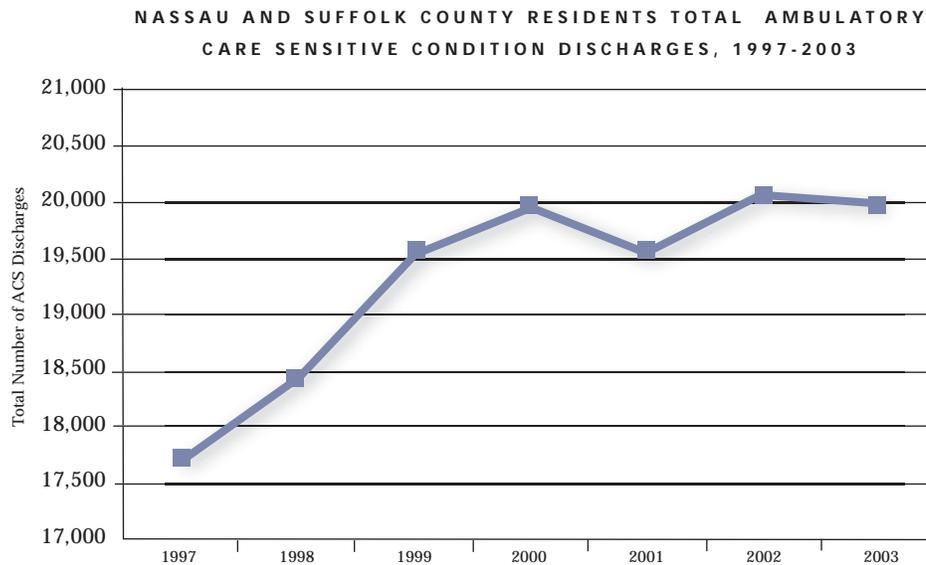
Why is this important?

The Child Well-Being Index (CWBI) was created to provide an overall assessment of child health and economic well-being based on a ranking of composite scores of five well-tested indicators. Improving child well-being is important to the future of our communities economically, socially and in many other intangible ways. Children who arrive at school healthy and ready to learn will require fewer tax dollars to educate than those who require remedial services due to physical, cognitive, social or emotional deficits suffered early in life. The CWBI is intended to give communities a snapshot of how well they are doing in supporting children and families relative to their peers.

How are we doing?

The Child Well-Being Index showed Nassau and Suffolk Counties in the middle of the rankings—5th and 6th out of ten counties—for both 1990 and 2000. If the counties were combined into four suburban regions, Long Island would have ranked third, behind the New Jersey suburbs and Fairfax County, followed by the Northern NYC suburbs. Ranked among the suburban areas of the 100 largest cities in the U.S., Nassau and Suffolk Counties also ranked in the middle in both 1990 and 2000.

Preventable Emergency Room Visits That Result in Hospitalization Remain High



Sources: North Shore-LIJ Health System Planning Office Analysis, New York State Department of Health Office of Statewide Planning and Research Cooperative System

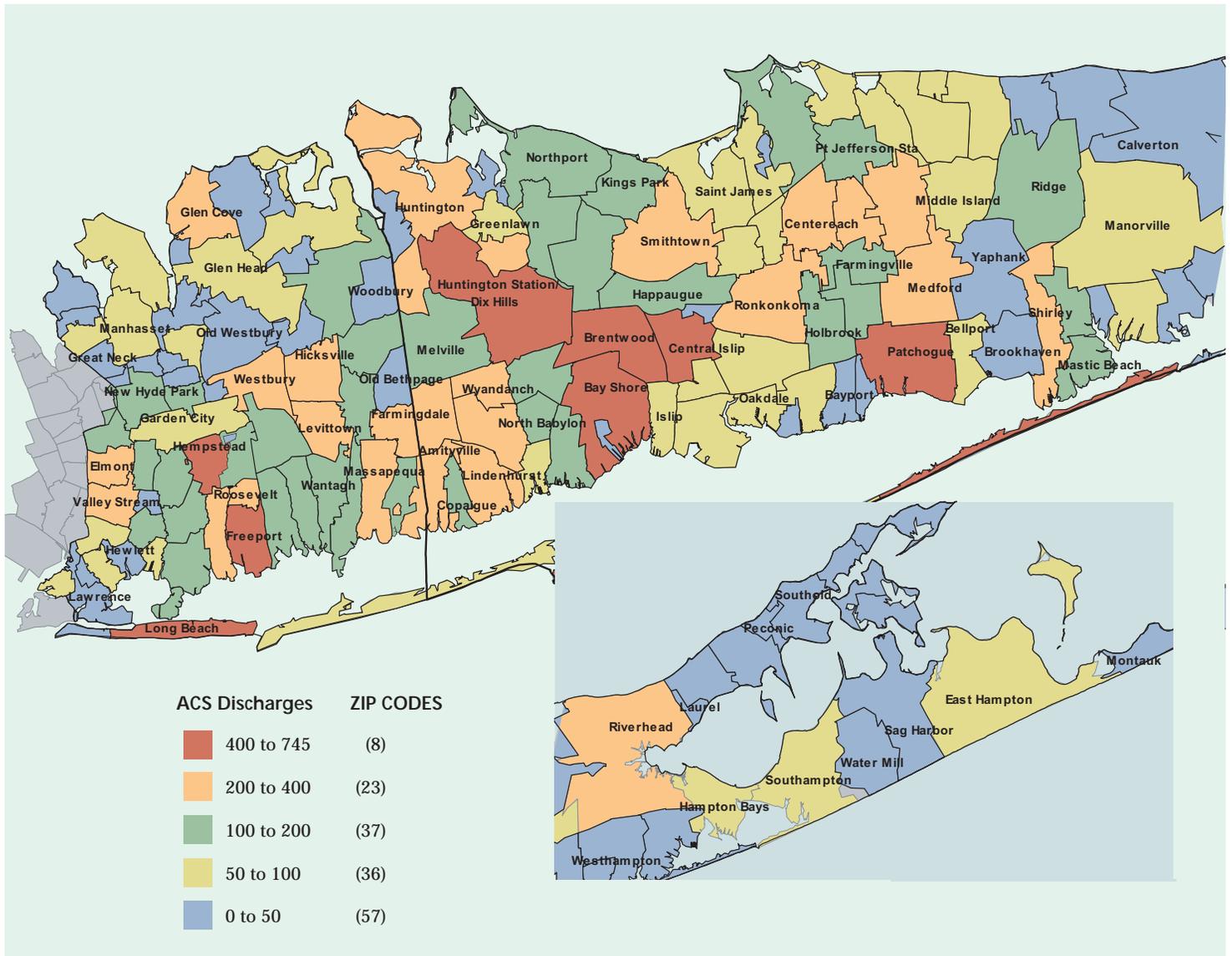
Why is this important?

Ambulatory care sensitive (ACS) conditions represent conditions like ear infections, adult asthma, high blood pressure and diabetes that could be prevented with timely medical care in the 0-64 age population. Prior care could prevent the onset of certain illnesses, help control an acute episodic illness or condition, or manage a chronic disease or condition. When these conditions are undetected or untreated they can result in emergency room visits and consequent hospitalizations.

How are we doing?

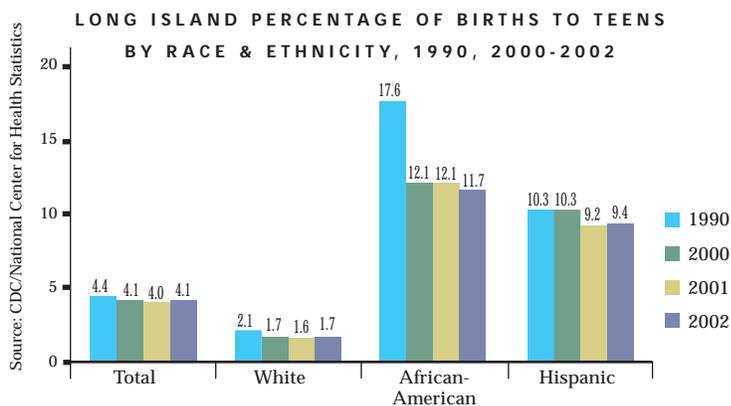
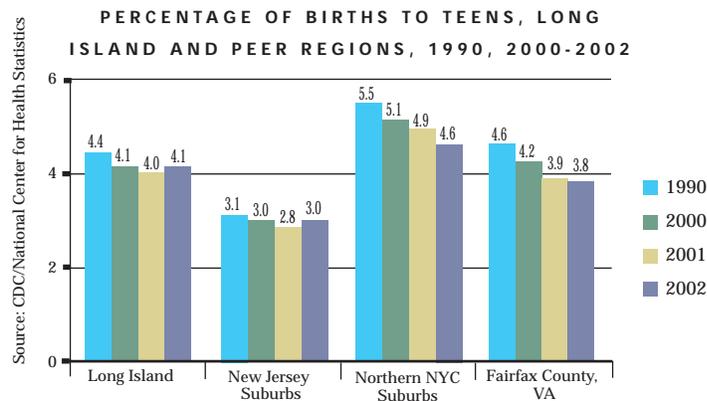
The rate of hospital discharges with ACS conditions on Long Island has increased by almost 13% since 1997. A persistently high rate of ACS discharges has been observed in several Nassau/Suffolk communities, potentially indicating a lack of access to primary care by residents in these communities. These differences tend to be associated with socioeconomic status.

NASSAU-SUFFOLK COUNTY 2003 TOTAL AMBULATORY CARE SENSITIVE
CONDITION INPATIENT DISCHARGES BY ZIP CODE



Sources: North Shore-LIJ Health System Planning Office Analysis, New York State Department of Health Office of Statewide Planning and Research Cooperative System

Stability in Overall Percentage of Births to Teens Masks Progress Among African-American Teens



Why is this important?

There is well-documented evidence that teen mothers face a future of limited educational and economic opportunities compared to other teens. Children of teen mothers are more likely to have behavioral problems and poor academic outcomes and they are more likely to engage in sex at an early age and become teen parents themselves. The estimated annual cost to U.S. taxpayers of births for 15 to 17 year olds is close to \$7 billion in lost tax revenues and increased government spending.

How are we doing?

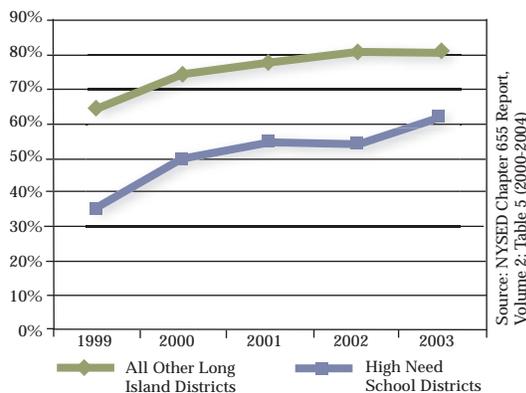
The percentage of births to teens on Long Island has remained steady at about 4 percent since 1990, while a significant decline in teen births occurred across the U.S. over the 1990s. The percentages of births to teens for Long Island and peer suburban areas of New Jersey, Northern NYC, and Fairfax County, Virginia, are in the lowest 10% of all counties nationally. In 2002, of the peer counties compared to Long Island, only the Northern NYC suburbs (4.6%) had a higher overall percentage of births to teens than Long Island (4.1%). Like its suburban peers and the nation as whole, Long Island's percentage of teen births among African-Americans declined significantly, dropping by more than 33% from 1990 to 2002. The disparity between the percentages of births to African-American teens compared to that of white teens is greater for Long Island than its suburban peers. Within Long Island, Suffolk County's percentage of births to teens was consistently higher than that of Nassau County for each year examined.

All Students Are Improving on State Tests But Disparity Remains*

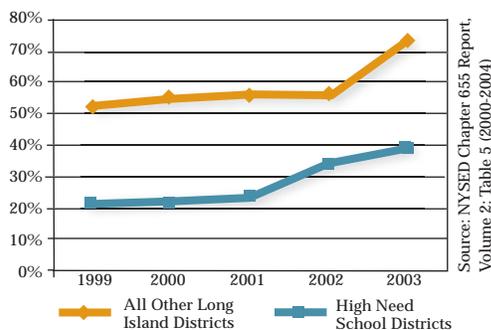
GOAL 8: EDUCATIONAL READINESS

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

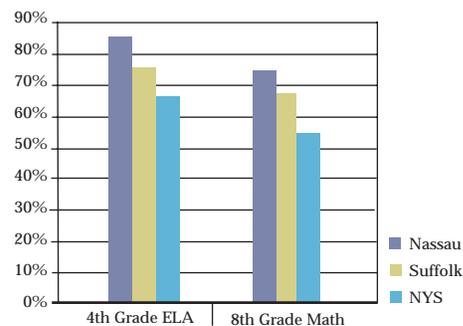
PERCENT OF LONG ISLAND STUDENTS PERFORMING AT OR ABOVE STATE STANDARDS, 4TH GRADE ENGLISH LANGUAGE ARTS 1999-2003



PERCENT OF LONG ISLAND STUDENTS PERFORMING AT OR ABOVE STATE STANDARDS, 8TH GRADE MATHEMATICS 1999-2003



PERCENT OF L. I. AND NYS STUDENTS PERFORMING AT OR ABOVE STATE STANDARDS, 4TH GRADE ENGLISH LANGUAGE ARTS AND 8TH GRADE MATHEMATICS, 2003



Source: NYSED Chapter 655 Report, Volume 2 (2000-2004)

Why is this important?

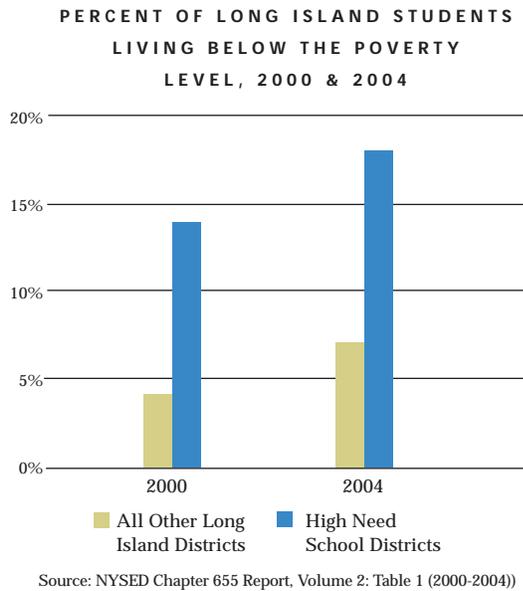
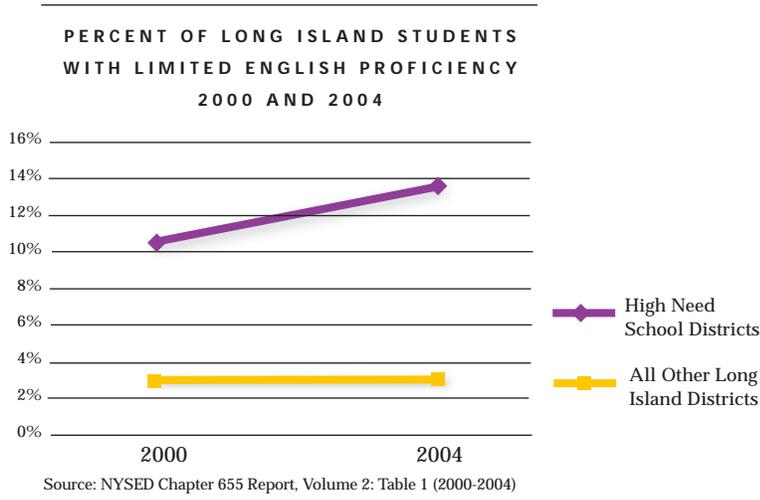
According to the NYS Education Department, the Grade 4 English Language Arts (ELA) and Grade 8 Mathematics exams reflect benchmarks that identify those students who should pass, and those who may have difficulty passing the Regents Exams, now a requirement for high school graduation.

How are we doing?

On the whole, Long Island students are performing well on the Grade 4 ELA and Grade 8 Mathematics exams, with both Nassau and Suffolk Counties scoring well above the state averages. Indicators suggest Long Island school districts have displayed consistent growth in helping 4th and 8th graders reach proficiency and mastery levels on required exams; however, a significant disparity between high need school districts and all other school districts remains. While high need districts have experienced a significant improvement in the number of children meeting or exceeding state standards on these exams in the past five years, they still fall 19% (ELA) and 34% (Math) behind those of all other Long Island districts, and do not reach the statewide averages. This “achievement gap” remains closely tied to the areas of Long Island that have been racially and ethnically segregated and economically disadvantaged.

*See page 39 of *Long Island Index 2004* for previous indicator

Number of At Risk Students Continues to Grow*



Why is this important?

Not all children experience economic and social conditions that allow them to perform their best in our public school system. Limited English proficiency and living under the poverty level are indicators of students at risk of performing poorly in school. They also reflect Long Island's changing population and the resulting increase in disparity across school districts.

How are we doing?

Long Island's high need school districts continue to experience a dramatic increase in students with limited English proficiency, while all other

school districts are seeing a less dramatic increase. Between 2000 and 2004 there was a 28% increase in the percentage of limited English proficient students in high need districts compared to a 6.5% increase for all other districts. In that same period, the percentage of Long Island students living below the poverty level increased 29% for high need districts, with close to 1 in 5 children in those districts living in poverty. While in all other districts there are fewer children that meet this criteria (1 in 14), the overall percentage of children living in poverty in these districts increased from 4% to 7% in just four years. It appears that children with the greatest needs are most often concentrated in school districts that are already resource starved.

*See pages 40-42 of Long Island Index 2004 for previous indicator

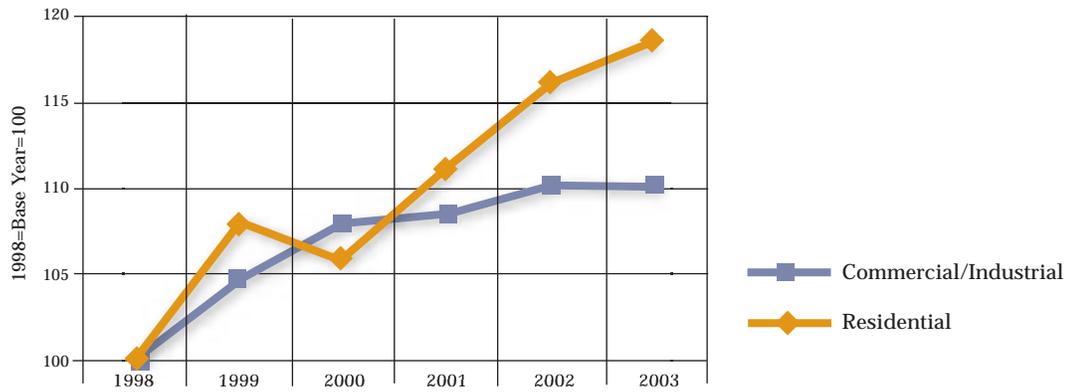


**GOAL 9:
NATURAL RESOURCE
CONSERVATION:**

*We promote the conservation
and efficient use of the region's
natural resources.*

Electricity Consumption Continues to Increase*

RESIDENTIAL AND COMMERCIAL/INDUSTRIAL
ELECTRICITY CONSUMPTION ON LONG ISLAND,
1998-2003 INDEXED TO 100



Source: Long Island Power Authority

Why is this important?

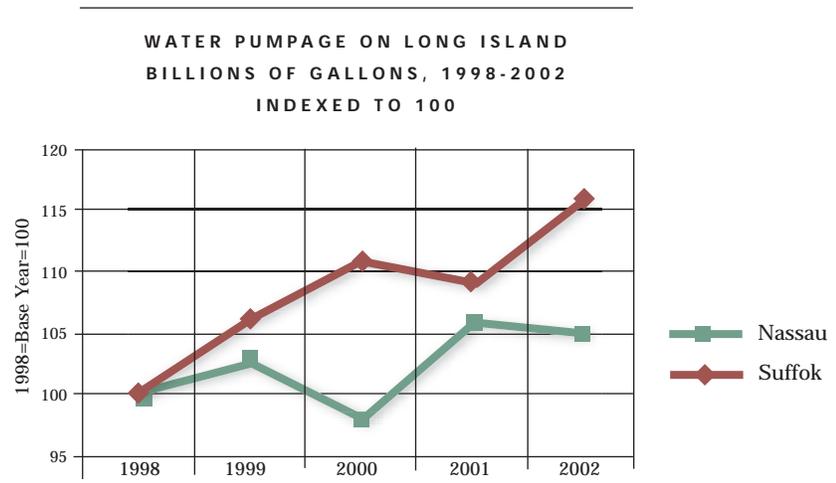
High energy consumption has large economic and environmental costs. Long Islanders pay some of the highest electric rates in the country, and we are increasingly dependent on off-island power sources to meet our electricity demands. Responsible energy use will be a key factor in building a sustainable future for Long Island.

How are we doing?

Long Islanders consume a considerable amount of electricity and recent figures show no signs of a potential decline. Between 1998 and 2003, residential electricity consumption increased by almost 20%. Commercial and industrial electricity consumption increased by 10%.

*See page 43 of *Long Island Index 2004* for previous indicator

Water Consumption Increases*



Source: Data compiled by the Nassau County Planning Federation

Why is this Important?

There is a finite amount of high quality groundwater available to meet human needs and those of the Island's ecosystems. Increasing demand for water hastens the loss of the high quality water stored in the aquifers. Increased water use accelerates the spread of contamination into the deeper portions of the aquifer system and increases the risk of saltwater intrusion affecting coastal communities.

How are we doing?

Water use in both counties continues to climb. Between 1998 and 2002, water consumption in Nassau County increased 5% while water consumption in Suffolk County increased 17%. Population increases in Nassau and Suffolk Counties during this same time period were much smaller: 1.2% in Nassau County and 4.7% in Suffolk County.

Water use is influenced by season, temperature and population. Water use within the Suffolk County Water Authority area rose due to seasonal temperature variations, increased development and a moderate growth in population. By comparison, in Nassau County, most of the water use fluctuations have resulted from economic expansion and seasonal climate variation.

Per person water use in Nassau County was 140 gallons per person day in the year 2000. In the same year, the per person water use in the Suffolk County Water Authority service was 168 gallons per person per day. Comparatively, the national average for per person water use in 2000 was 120 gallons per person per day.

*See page 45 of *Long Island Index 2004* for previous indicator. NB: Nassau County's pumpage has been added this year.

More Garbage, Less Recycling

TOTAL RESIDENTIAL WASTE & RECYCLING ON LONG ISLAND, 2002 - 2003

	2002	2003
Total Residential Waste	4.92 lbs/person/day	5.23 lbs/person/day
Total Residential Recycling	0.85 lbs/person/day	0.81 lbs/person/day

Source: Waste Reduction and Management Institute, Stony Brook University

Why is this important?

Waste generation and recycling are good indicators of how well the region is managing its natural resources. Less waste generation and more recycling means less garbage filling up our landfills, less potential for air and water contamination, and less need for exporting our excess waste off-island. It also means that we won't have to use up valuable remaining open space to build new landfills and waste incineration facilities. As an island, how we manage our solid waste is of much greater importance than mainland regions since the total amount of space we have available to us to "store" that waste is physically, geographically limited.

How are we doing?

From 2002-2003, Long Island residents increased their daily per capita residential waste generation by 6.3%, from 4.92 pounds per person per day to 5.23 pounds per person per day. At the same time, the amount they recycled decreased by 4.7%, from 0.85 pounds per person per day to 0.81 pounds per person per day. If this trend continues, the region could be facing a garbage crisis in the near future. We currently export 30% of our waste stream to places in Pennsylvania, Ohio and Virginia. With existing on-Island landfills and waste incineration facilities at or near capacity, we will be forced to export more and more of our waste stream off-island, at an increasing cost to both our economy and our environment.

GOAL 10: PROTECT NATURE

Long Island's Pesticide Use is More Than Double The Per Capita Statewide Level, and is On The Rise*

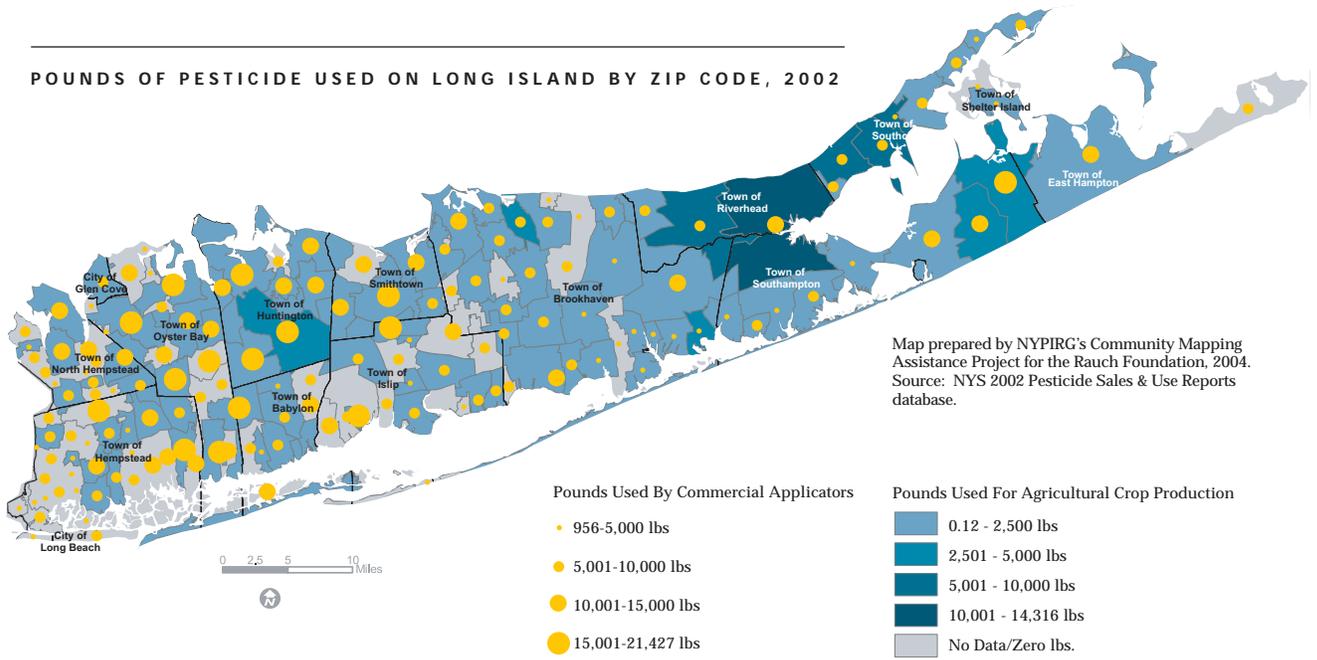
We meet high standards for improving our air and water quality and protecting and maintaining our open spaces.

Why is this important?

In a 2000 report by the New York State Attorney General's office, several key findings drew a grim picture of Long Island's green spaces. Researchers found that golf courses and public schools on Long Island were the greenest parts of the region, primarily due to the overt use of pesticides. Pesticides pose health risks such as nervous system toxicity, carcinogenicity and damage to the endocrine, immune and reproductive systems. They pose environmental risks to the air, water and soil.

*See page 46 of *Long Island Index 2004* for previous indicator

POUNDS OF PESTICIDE USED ON LONG ISLAND BY ZIP CODE, 2002



How are we doing?

Long Island's use of pesticides per person remains substantial and – for non-agricultural uses – is rising.

According to pesticide data collected by the New York State Department of Environmental Conservation (DEC) for 2002 (the most recent year available), Suffolk and Nassau counties, respectively, are the first and second highest counties in the state for the amount of pesticides reported by pounds, and Suffolk County is the highest in the state for the amount of pesticides reported by gallons. Nassau ranked 10th for pesticides by gallons in 2002 and third for pesticides by gallons in 2001.

Pesticide use on Long Island is also substantial on a per capita basis, and it is increasing compared with the rest of the state. In 2002 New Yorkers statewide used less than a pound of pesticides (0.84 lbs) per person, a decrease from 0.89 pounds per person in 2001. On Long Island, the per capita pesticide usage for these applications in 2002 was more than double the statewide average, at almost 1.8 pounds per person, an increase from 1.6 pounds per person in 2001.

In contrast, despite the agricultural activity in Suffolk County, a smaller amount of pesticides per person was involved in agricultural purposes on Long Island compared to New York State overall. This amount is also decreasing in the rest of the state. On Long Island, the per capita amount of agricultural pesticides in 2002 was 0.13 pounds; a decrease from 0.16 pounds per person in 2001. The statewide per capita amount was 0.28 pounds in 2002, a drop from 0.29 pounds per person in 2001.

When agricultural and commercial applications are combined, Long Island accounted for almost one quarter of all pesticides reported in the state in 2002 by pounds (the amount of gallons reported island wide is just over 15% of the statewide total). Yet Long Island only accounts for 15% of the state's population. Its pesticide use is disproportionately high, and is consistent with the overall urban and suburban patterns of extensive pesticide use for lawn care, golf courses, and other residential and institutional purposes.



**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.*

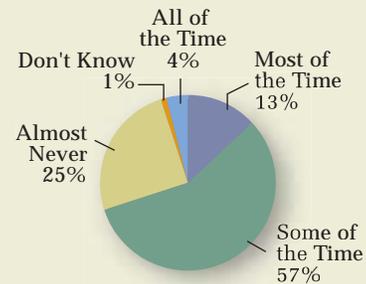
Bond Ratings Continue to Rise in Both Counties*

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 government entity is a critical building block in its fiscal structure. Poor ratings have a direct effect on the cost of doing business, be it for capital projects or refinancing existing debt, and are one of the key factors in how much interest the Counties must pay to borrow money.

WHAT PEOPLE IN THE REGION ARE SAYING

How much of the time do you think you can trust Long Island's government to do what's right?



BOND RATINGS FOR NASSAU AND SUFFOLK COUNTIES BY STANDARD & POOR'S AND MOODY'S, 1991-2004

Standard & Poor's					
NASSAU			SUFFOLK		
Date	Rating	Change	Date	Rating	Change
Sept. 04	A-	↑	May 00	A	↑
Nov. 03	BBB+	↑	Apr. 96	BBB+	↑
Mar. 03	BBB	↑	Oct. 91	BBB	↓
June 99	BBB-	↓	Feb. 91	BBB+	
July 93	A-				

Moody's					
NASSAU			SUFFOLK		
Date	Rating	Change	Date	Rating	Change
Sept. 04	A	↑	Dec. 03	A2	↑
Nov. 03	BAA1	↑	June 99	A3	↑
Feb. 03	BAA2	↑	Jan. 94	BAA1	
Feb. 00	BAA3	↓			
Jan. 99	BAA2	↓			
July 94	BAA1				

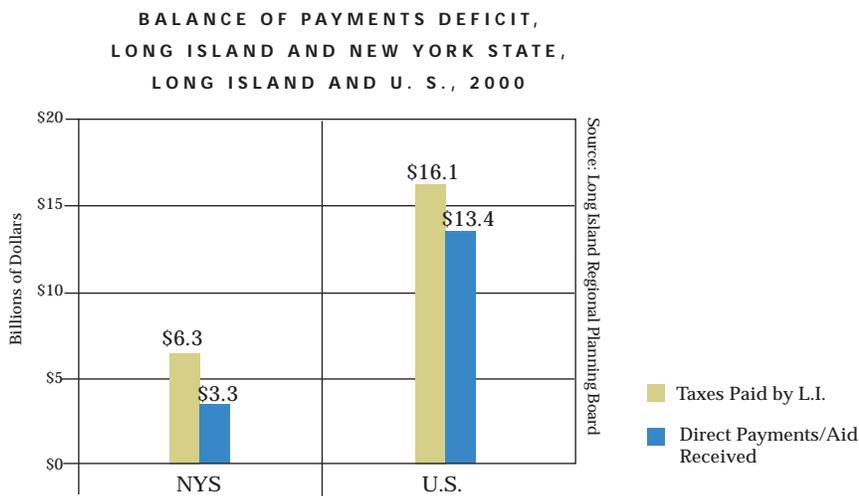
Sources: Standard & Poor's and Moody's

*See page 48 of Long Island Index 2004 for previous indicator

How are we doing?

Since 2003 Nassau County has seen several upgrades as a result of their cost cutting efforts, with one upgrade from each rating agency coming since last year's *Long Island Index* was published. Suffolk's ratings have been more stable in recent years. Concern over financial mismanagement is likely one reason why residents have such a low level of trust in Long Island's government, with 82% saying that they trust government only some of the time or almost never.

Long Island Comes Up Short in Balance of Payments Deficit with New York State and U.S.



Why is this important?

This indicator helps gauge whether Long Island is getting its fair share from state and federal governmental revenues.

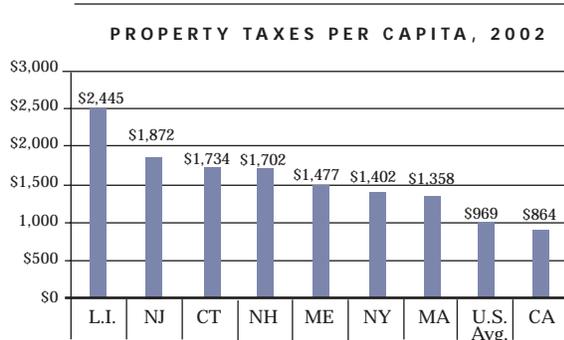
How are we doing?

In 2000 the residents of Long Island paid approximately \$6.3 billion in non-business taxes and fees to New York State, primarily from the personal income tax and the sales and use tax. In return Long Island received only \$3.3 billion from the state, including an estimated \$1 billion in operating costs. This means that the balance of payment gap that Long Island residents incur with the state of New York is approximately \$3 billion.

Long Island also incurs a balance of payment deficit with the federal government. According to the Consolidated Federal Funds Report put out by the U.S. Census Bureau, the Nassau-Suffolk region received approximately \$13.4 billion in direct federal expenditures or obligations in 2000. By contrast, in personal income and payroll taxes alone, Nassau and Suffolk residents paid approximately \$16.1 billion to the federal government that year. This leaves a balance of payments deficit for Nassau-Suffolk of approximately \$2.7 billion.

Presumably, these balance of payment figures are conservative estimates as business taxes are not included; however, determining the exact balance difference is an extremely complex task.

Long Islanders Shoulder Highest Property Tax Burden, with Majority of Taxes Funding Public Education



Sources: NYS Comptroller's Report on Municipal Affairs; NYS Statistical Yearbook; U.S. Bureau of Economic Analysis; Suffolk and Nassau County Property Tax Warrants; NYS Department of Taxation and Finance Taxable Sales and Purchases Reports; Massachusetts Taxpayers Foundation.

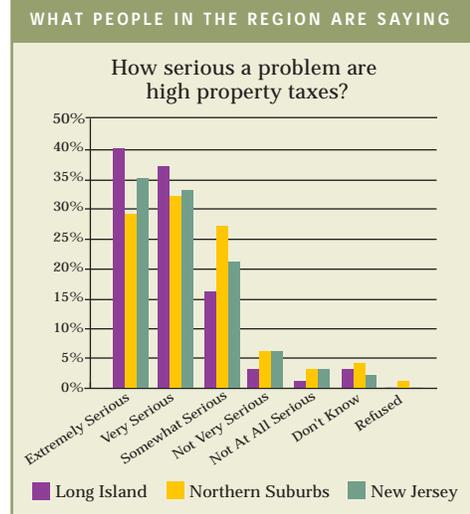
Why is this important?

Property taxes affect disposable income, cost of living and the overall affordability of a region. These indicators of tax burden are adjusted for population and differences in income across states and the Long Island region, giving a more accurate reflection of local tax burden.

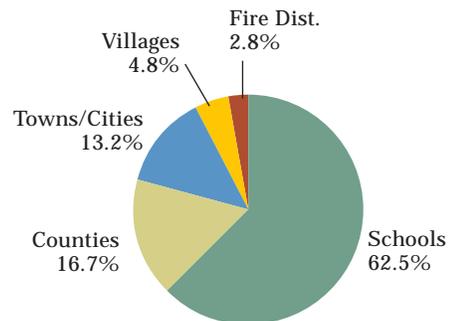
How are we doing?

Long Island has the highest tax burden among all the states compared, raising approximately \$2,445 per resident in property taxes in 2002. Neighboring New Jersey was next highest with a per capita levy of \$1,872, 23% lower than Long Island. The average for New York State is \$1,402 per capita, 43% lower than Long Island. Several high tax, high income states in the Northeast were lower than Long Island including Connecticut, Massachusetts, and Maine. If direct comparisons to peer regions were available, the results might place Long Island more on par with those regions in terms of property tax burden. However, when compared to peer regions in New York and New Jersey, a significantly higher percentage of Long Island residents see property taxes as an extremely or very serious problem.

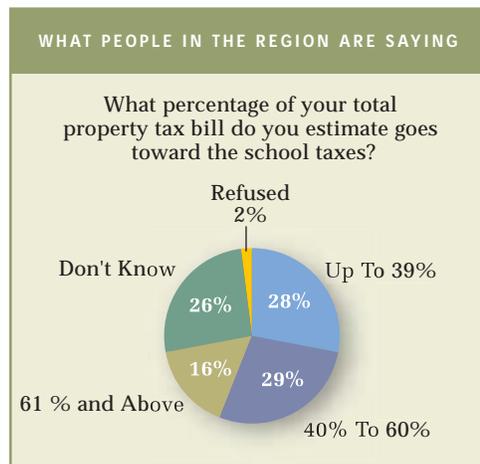
The majority of our property tax dollars on Long Island fund our public education system which provides an excellent education for most students. On average, 62.5% of property taxes on Long Island support the local school districts, with the other 37.5% covering the county, town, village and fire district functions. While Long Island residents identify property taxes as a problem, only 1 in 6 is aware that school taxes make up more than 60% of their property tax burden.



TOTAL PROPERTY TAX LEVY, LONG ISLAND, 2004



Source: New York State Comptroller's Office; Suffolk and Nassau County Tax Warrants

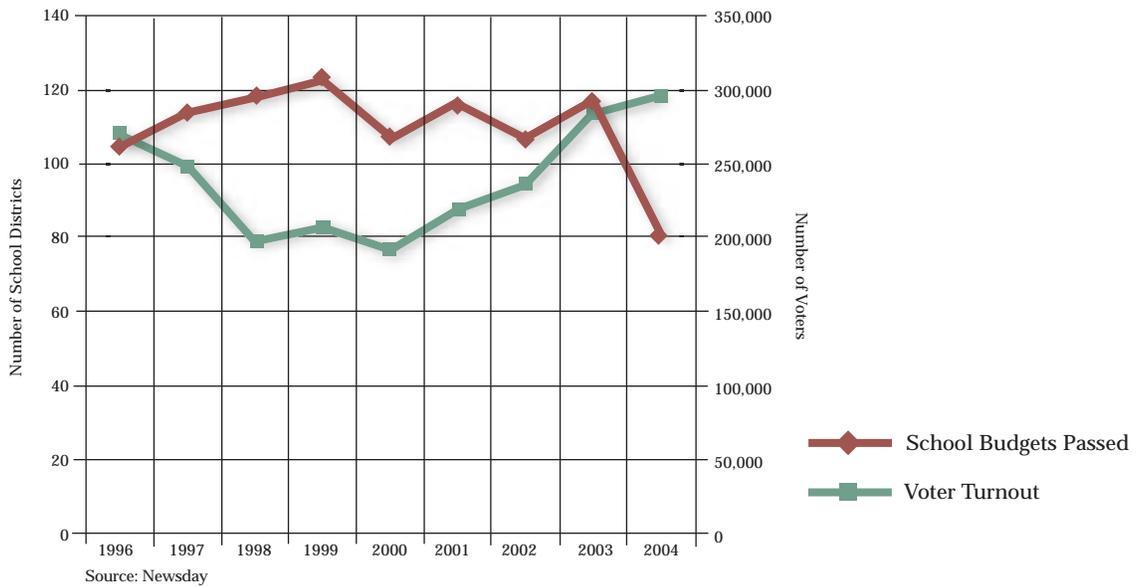


A Record Number of School Budgets Fail in 2004

**GOAL 12:
CIVIC ENGAGEMENT**

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

**NASSAU/SUFFOLK SCHOOL DISTRICT ELECTIONS
TURNOUT VS. BUDGETS PASSED FIRST TIME,
1996 - 2004**



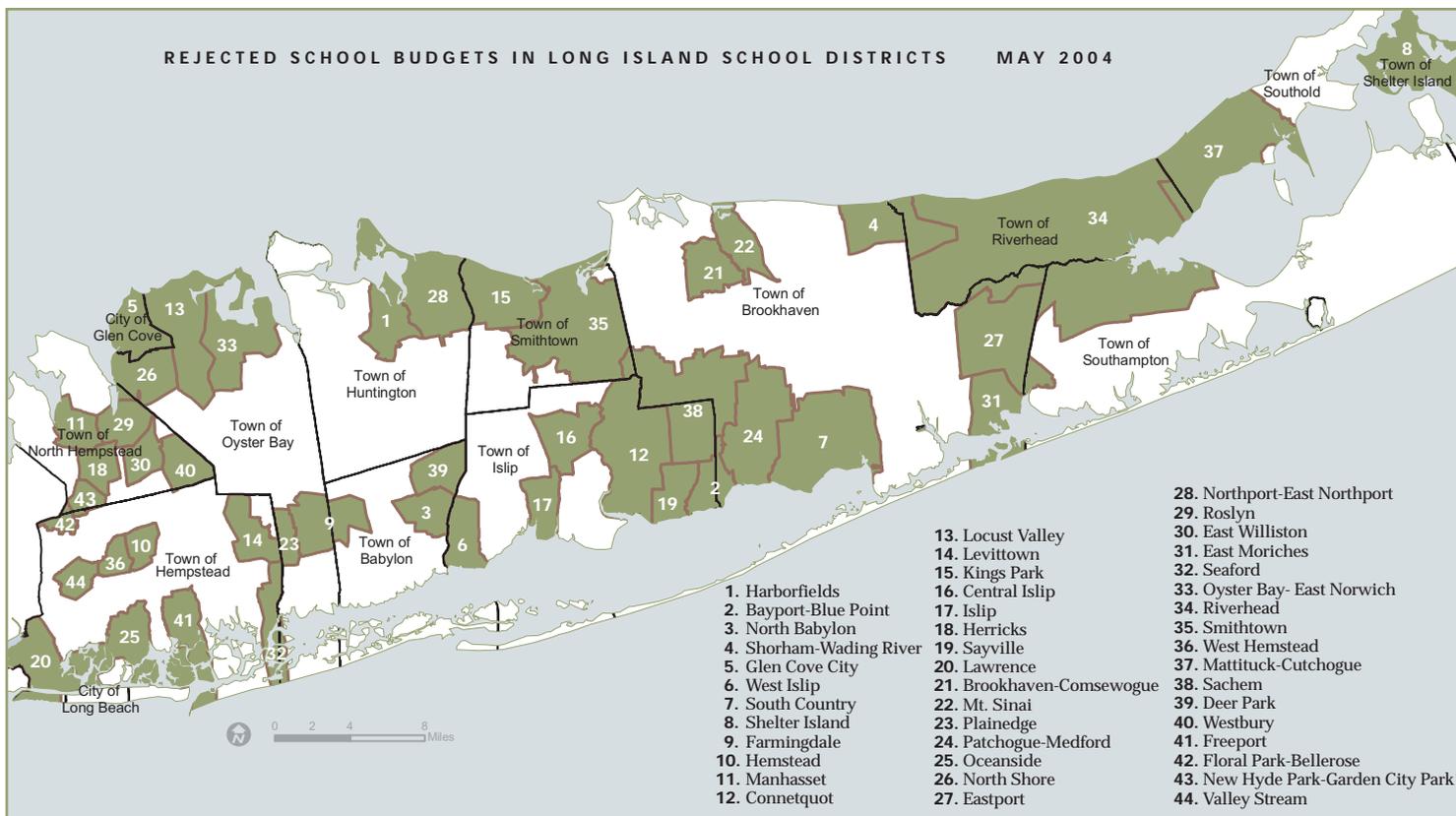
Why is this important?

On Long Island, an average of 62.5% of our property taxes goes toward funding our local school districts, and property values are most often tied to the reputation of the local school district. Voting on school budgets increases civic participation, gets parents and families involved in their community’s future and sends a signal to local politicians, school boards and state officials as to the importance of educational funding.

How are we doing?

In the most recent 2004 school budget votes, Nassau voters rejected 22 out of 57 first time budget proposals (39%) and Suffolk voters rejected 24 out of 69 first time budget proposals (35%), the most rejected in the last 8 years of available data. This more than doubled the average failure rate of first time school budgets since 1996. Budgets were defeated in high need districts, average and wealthier districts.

As voter participation in school budget votes decreased in the late 1990s, more first time school budgets were passed. From 1996 to 2000, voter turnout declined by more than 26%, but school budgets continued to pass more than 80% of the time. In contrast, from 2000 to 2004 voter turnout increased dramatically from nearly 200,000 voters in 2000 to nearly 300,000 in 2004. Voters approved 85% of first time school budgets in 2000, but in 2004 first time school budgets were rejected at the highest rate of the past eight years, with only 63% passing. This appears to indicate the struggle that Long Island residents are experiencing with the property tax burden they carry.



Sources: NYS Education Dept. (www.emsc.nysed.gov/mgtserv/BudgetVotes/2004finalvotes.htm) U.S. Census Bureau TIGER/Line Files, 2001
 Map by NYPIRG CMAP

A P P E N D I X A : D A T A S O U R C E S

All public opinion data in this report are from *Where do we Grow from Here? Land Use on Long Island: Regional Attitudes Toward Housing, Land Use and Open Space*, December 2004, a regional public opinion poll conducted by Stony Brook University's Center for Survey Research for the Rauch Foundation in July and August of 2004. A full copy of the poll report is available at www.longislandindex.org.

■ 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 geographic and government information are from Nassau and Suffolk County Government official websites and Advantage Long Island.

Executive Summary of Long Island Index 2004

The estimate of the number of local planning and zoning boards comes from the Long Island Regional Planning Board.

Long Islanders: Who Are We?

All demographic and household data are based on US Census 2003 County Estimates, 2003 American Community Survey Data Profiles and the March 2004 Supplement of the Census Bureau's Current Population Survey (CPS). Job data and unemployment rate are from the Bureau of Labor Statistics. Gross Metropolitan Product data are from the United States Conference of Mayors, 2003. 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*, April 2003. A full copy of this poll report is available at www.longislandindex.org.

■ SPECIAL ANALYSIS

Unsustainable

The estimates for cost reductions due to school consolidation and the total number of taxing jurisdictions on Long Island were supplied by the Long Island Regional Planning Board.

Property tax burden data were compiled by the Long Island Regional Planning Board from the NYS Comptroller's Report on Municipal Affairs; NYS Statistical Yearbook; U.S. Bureau of Economic Analysis; NYS Department of Taxation and Finance Taxable Sales and Purchases Reports; and the Massachusetts Taxpayers Foundation.

Balance of Payments Deficit analyses conducted by the Long Island Regional Planning Board from data provided by the New York State Department of Finance: 2002 New York State Statistical Yearbook and the U.S. Census Bureau's Consolidated Federal Funds Report. The analysis does not include business taxes. For NYS, personal income tax, sales tax, estate tax, real estate transfer tax, mortgage recording tax are included. For U.S., personal income and payroll taxes are calculated. Taxes paid were calculated for year 2000 using 2000 Taxable Adjusted Gross Income for both counties. New York State payments to Long Island include all state aid payments to local governments calculated by the New York State Comptroller and reported in the Special Report on Municipal Affairs series for the

latest available year when research was conducted. Operating costs of state offices and agencies on Long Island are calculated from the budgets of the State University of New York at Stony Brook, the State University of New York at Farmingdale, the State University of New York at Old Westbury, and estimates for other state offices. Federal government expenditures or obligations to Long Island are contained in the U.S. Census Bureau's Consolidated Federal Funds Reports, an annual series. Direct Expenditures as provided in this report include: retirement/disability payments for individuals; other direct payments for individuals, direct payments other than for individuals; grants; procurement contracts; and salaries and wages of federal employees. The federal government also provides loans, loan guarantees, and insurance which are not included as payments in this analysis. For purposes of estimating tax payments to the federal government, an 18 percent effective tax rate is applied to the total adjusted gross income for the region as provided in the New York State Department of Taxation and Finance New York Adjusted Gross Income and Tax Liability. The 18 percent effective tax rate includes payroll taxes and was estimated with the help of the accountants at Trachtenberg and Pauker LLP in Woodbury, New York.

Number of Housing Units map was prepared by the New York Public Interest Research Group's Community Mapping Assistance Project with data from the U.S. Census Bureau Summary File 3, 2000; Zip Code Business Patterns, 2001; TIGER/Line Files 2001; and MTA Long Island Rail Road, 2001.

Nassau Suffolk Land Use 1980 and 2000 data come from a land use analysis conducted by the Long Island Regional Planning Board in 2004. The land use data was compiled using the 1981 field verified base data from the Long Island Regional Planning Board, along with 2005 assessment roll data for Nassau County and the five west end towns in Suffolk County. East End Suffolk County land use data were compiled by the Suffolk County Planning Department in June 2001. Open space and agricultural land use data were updated to reflect the most recent acquisitions in various reports from the Long Island Regional Planning Board, Suffolk County Planning Department and Nassau County Planning Department.

Developed Land Maps, 2000-2050 were prepared by the Regional Plan Association (RPA) as part of a larger Build Out Analysis conducted for the region. Projected developed lands data are from Hunter College, Department of Geography and RPA. Existing developed lands data are from RPA, Cornell, and USGS's Urban Growth Series. Land that is not suitable for development includes floodplains, water, wetlands, protected open space and slopes greater than 15%. Land not suitable for development data were compiled from several sources: USFWS, USGS NED, FEMA Q3 flood maps, NYSDOT, NYSDEC, NYS Parks, TNC- Long Island and NPS.

Clear and Present Crisis: Lack of Housing

The median price of a house on Long Island was provided by the Long Island Regional Planning Board, as of July 2004.

Data for the ratio of median family income to median home price were calculated by the Long Island Regional Planning Board.

Data on the exodus of young people come from the U.S. Census of Population, 2000.

GROWING INCLUSIVE ECONOMY

Growth in Long Island Wages (8%) Lags National Wage Growth (12%) Over Past 15 Years

Regional average pay for the U.S. and Long Island was provided by Economy.com; the data were analyzed by Collaborative Economics. Average pay per employee was calculated by dividing total annual payroll by total private non-farm (TPNF) employment. All values reported are adjusted for inflation. All wages were adjusted using the U.S. city average Consumer Price Index (CPI) as reported by the Bureau of Labor Statistics in August of 2004.

Health is Our Largest Industry Cluster; Government and Military is the Largest Segment of Our Economy; and Finance and Insurance Cluster Has the Greatest Economic Impact.

Data were provided by Economy.com and analyzed by Collaborative Economics. Employment figures given are total employment, total private employment non-farm, and government & military on an annual basis from 1990 – 2004. Federal, state and local government includes all civilian employees of government, including teachers and other employees of public schools, public junior colleges and state run colleges and universities. It also includes employees of local special districts. Military employment includes uniformed members of the military; related employment, such as non-uniformed workers for the Defense Department, are classified as federal government. Note: Appendix B identifies the specific subsectors that comprise each cluster.

Productivity is Higher Than the U.S. Average But Rises at the Same Pace

Value-added data were provided by Economy.com and analyzed by Collaborative Economics. Value added is the sum of compensation paid to labor within a sector and profits accrued by firms. Regional 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.

Long Island's Job Growth Continues

Data were provided by Economy.com and analyzed by Collaborative Economics. Employment figures given are total private employment non-farm from 1990 – 2004.

Long Island Maintains Low Unemployment Rate

Data were compiled by Collaborative Economics from the US Bureau of Labor Statistics. The Long Island unemployment rate is the average unemployment rate for Nassau and Suffolk Counties. Data are not seasonally adjusted and are reported on an annual average basis. The unemployment rate is calculated by dividing the number of unemployed persons by the civilian labor force. According to the BLS, unemployed persons are persons 16 years and over who had no employment during the reference week, were available for work, except for temporary illness, and had made specific efforts to find employment sometime during the 4-week period ending with the reference week. Persons who were waiting to be recalled to a job from which they had been laid off need not have been looking for work to be classified as unemployed.

Region Receives Less Than 1% of Federal Research & Development Dollars

Data were compiled by Collaborative Economics from the RAND Corporation. Figures are inflation-adjusted and represent the total amount of Federal R&D dollars that went to Long Island research universities, labs and corporations on an annual basis. Annual data is reported in fiscal years.

Region Lags Nation in Number of Patents Generated

Data were compiled by Collaborative Economics from the US Patent and Trademark Office and reflect the number of patents generated by city on Long Island. Geographic origin is attributed to the first inventor listed on the patent form. This methodology avoids double-counting patents, but most likely undercounts the number of inventors participating in patent-creation in the region. Population data are from the U.S. Census Bureau, as configured by the Real Estate Center at Texas A&M University.

VIBRANT LIVABLE COMMUNITIES

Disparities in Household Incomes Persist

Data were compiled by Collaborative Economics from the March 2004 Supplement of the Census Bureau's Current Population Survey (CPS). Household income includes both earned and unearned income for all persons living in the same household. Household income is adjusted for household size by doubling household income and dividing it by the square root of the number of household residents. All reported incomes are inflation-adjusted using the New York-Northern New Jersey-Long Island, NY-NJ-CT-PA area Consumer Price Index published by the US Bureau of Labor Statistics. Though the data presented are the best available at the regional level, data are derived from an annual sample of as few as 500 households. Household incomes are averaged over a three-year period to increase the reliability of reported income estimates. Data are more useful for tracking long-term trends than for noting specific year-to-year movements. Over time, specific households move up and down the distribution. Data on this "mobility" are not available at the regional level.

Demographic Profile: Population Diversifies and is Aging Faster Than the Nation

Data were compiled by the Regional Plan Association and Long Island Regional Planning Board from the 1990 and 2000 U.S. Census of Population and 2003 U.S. Census County Estimates.

Long Island Arts Organizations Increase and Offer a Variety of Cultural Activities

Data on the number of arts organizations are from the Urban Institute's National Center for Charitable Statistics, <http://nccsdataweb.urban.org>. Data on the variety of cultural offerings and level of participation are from a mail survey conducted by the Rauch Foundation from August 15, 2004 through September 15, 2004 of 186 arts organizations on Long Island.

Significant Drop in Juvenile Arrests

Data on juvenile population are from the U.S. Census of Population estimates archives for 1992, 1997 and 2002. Juvenile arrest rates by county are from the FBI Arrest Statistics <http://ljjdp.ncjrs.org>. Note: A juvenile as defined by the FBI Unified Crime Report as juvenile is any person under the age of 18.

Housing Affordability Declines Further

Data were compiled by the Long Island Regional Planning Board from the Long Island Board of Realtors, Multiple Listing Service of Long Island, and the U.S. Census Bureau, American Community Survey.

New Homeowners Face Housing Burden, Spending Over 40% of Monthly Household Income on Homeownership Costs

Data were compiled by the Long Island Regional Planning Board. Median Household Income for 2003 in Nassau was \$80,647 and in Suffolk \$70,281. This analysis assumes a 6 percent, 30 year mortgage and a ten percent down payment. It assumes median annual property taxes for Nassau County for 2003-04 of \$7,128 and for Suffolk County \$5,500. Homeowner's insurance is estimated at \$1,000 per year in each county, or \$250 for every \$100,000 of appraised value. Median price of a home in Nassau for 2003 is \$437,300 and for Suffolk \$352,500.

Transit Ridership Down Again

Data were compiled by the Regional Plan Association from the American Public Transportation Association/FTA Database.

A Change in Patterns: Fewer Cars Since 2000

Data were compiled by the Regional Plan Association from the U.S. Census of Population and New York State Department of Motor Vehicles.

HEALTHY, EDUCATED POPULATIONS

Long Island is Average Among Suburban Peers on Child Well Being Index

Data were compiled by the State University of New York Downstate Medical Center as part of a larger analysis of Child Well-Being for the region. Family and poverty indicators data are from the 1990 and 2000 U.S. Census; health indicators data are from the CDC/National Center for Health Statistics, 1990 and 2000. Indicators included in index are the percent of families headed by single mothers; the child poverty rate; the percent of births to mothers under age 20; the percent of low birth weight babies; and the infant mortality rate.

Preventable Emergency Room Visits That Result in Hospitalization Remain High

Data were compiled by North Shore-LIJ Health System Planning Office Analysis from the New York State Department of Health Office of Statewide Planning and Research Cooperative System (SPARCS) inpatient data 1997-2003.

The following ACS conditions are included: otitis media & uri age >17 w/cc, otitis media & uri age >17 w/o cc, otitis media & uri age <18, respiratory infects & inflammations age >17 w/cc, respiratory infects & inflammations age >17 w/o cc, chronic obstructive pulmonary disease, simple pneumonia & pleurisy age >17 w/cc, bronchitis & asthma age >17 w/cc, bronchitis & asthma age >17 w/o cc, heart failure & shock, cardiac arrest, unexplained hypertension, angina pectoris, chest pain, cellulites age >17 w/cc, cellulites age >17 w/o cc, cellulites age <18, diabetes age >35, diabetes age <35, respiratory infections & inflammations w/mcc, bronchitis & asthma w major cc, respire infections & inflammations age <18 w/cc, respir infections & inflammation age <18 w/o cc, simple pneumonia & pleurisy age <18 w/cc, simple pneumonia & pneumonia & pleurisy age <18 w/o cc, bronchitis & asthma age <18 w/cc, bronchitis & asthma age <18 w/o cc.

Stability In Overall Percentage of Births to Teens Masks Progress Among African-American Teens

Data were compiled by the State University of New York Downstate Medical Center as part of a larger analysis of child well being for the region. Data are from the CDC/National Center for Health Statistics. Data on the cost to U.S. taxpayers for births to 15-17 years olds come from the National Campaign to Prevent Teen Pregnancy, www.teenpregnancy.org

All Students Are Improving on State Tests But Disparity Remains

Data are from the NYSED Chapter 655 Volume 2 Report, (2000-2004). 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; Roosevelt; 7. Westbury; 8. William Floyd; 9. Wyandanch.

Number of At Risk Students Continues To Grow

Data are from the New York State Chapter 655 Report, Volume 2 Report, Table 1 (2000-2004). 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 2000-2004.

Poverty Index is defined as the number of children aged 5 to 17 years 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.

ENVIRONMENTAL STEWARDSHIP

Electricity Consumption Continues to Increase

Data are from the Long Island Power Authority.

Water Pumpage Increases in Nassau and Suffolk Counties

Water pumpage data come from several sources. A letter from Mr. William H. Spitz, Regional Water Manager of the New York State Department of Environmental Conservation, Region One, dated July 9, 2004 provided data covering the years 1998 - 2002 for Nassau County water pumpage. It was augmented with information from the Nassau County Department of Health for two water districts, Bayville and Locust Valley, for the year 2001 pumpage, personal communication, September 10, 2004. The DEC information applies to water pumped by public water suppliers and does not include all other activities occurring in the county. Water pumpage data for the Suffolk County Water Authority depict water pumpage based on a fiscal year that runs from June 1 to May 31 over each year. Population data for Nassau County and Suffolk County is from the U.S. Census Bureau. Population served within the Suffolk County Water Authority (SCWA) is calculated from information from the SCWA Annual Reports, years 1997 through 2003. The service connection figure is multiplied by the household average size of 3 persons. This is a rough estimate given that service connection figures also include commercial service customers. This calculated population size was then used to calculate per person water use. For Nassau County, US Census Bureau figures are used to calculate per person water use.

More Garbage, Less Recycling

Data are from the Waste Reduction and Management Institute, Stony Brook University as part of a larger analysis of a Long Island Garbage Index. Municipal Solid Waste (MSW) and recycling data were collected from seven towns on Long Island, one in Nassau County (Hempstead) and six in Suffolk County (Babylon, Brookhaven, Easthampton, Huntington, Islip and Smithtown). Specifically, the Town of Hempstead represents 57% of the population of Nassau County, while Babylon, Brookhaven, Easthampton, Huntington, Islip and Smithtown together represent 92% of Suffolk County's population. These towns represent the face of Long Island and include rural, suburban and urban areas. Waste statistics from these towns are a good indicator for Long Island as a whole. Pounds/person/day of MSW and recyclables was calculated by dividing the amount of MSW or recyclables produced (in pounds) by the estimated 2003 population for each town, based on LIPA's 2003 annual population survey. Easthampton's population was adjusted to account for the large seasonal population.

Long Island's Pesticide Use is More Than Double the Per Capita Statewide Level, and is On the Rise

Analysis prepared by NYPIRG's Community Mapping Assistance Project with data from the NYS Pesticide Sales and Use Reports Database. Pesticide use is recorded under the Pesticide Reporting Law of 1996, which mandates reporting of pesticides used by the state's commercial pesticide applicators and information on sales to farmers. Note: commercial applicators include anyone who applies pesticides for hires, 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 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

Bond Ratings Continue To Rise in Both Counties

Data are from Standard & Poor's and Moody's Investor's Service.

Long Island Comes Up Short in Balance Of Payments Deficit With New York State and U.S.

Analysis was conducted by the Long Island Regional Planning Board from data provided by the New York State Department of Finance: 2002 New York State Statistical Yearbook and the U.S. Census Bureau's Consolidated Federal Funds Report. The analysis does not include business taxes. For NYS, personal income tax, sales tax, estate tax, real estate transfer tax, mortgage recording tax are included. For U.S., personal income and payroll taxes are calculated. Taxes paid were calculated for year 2000 using 2000 Taxable Adjusted Gross Income for both counties. New York State payments to Long Island include all state aid payments to local governments calculated by the New York State Comptroller and reported in the Special Report on Municipal Affairs series for the latest available year when research was conducted. Operating costs of state offices and agencies on Long Island are calculated from the budgets of the State University of New York at Stony Brook, the State University of New York at Farmingdale, the State University of New York at Old Westbury, and estimates for other state offices. Federal government expenditures or obligations to Long Island are contained in the U.S. Census Bureau's Consolidated Federal Funds Reports, an annual series. Direct Expenditures as provided in this report include: retirement/disability payments for individuals; other direct payments for individuals, direct payments other than for individuals; grants; procurement contracts; and salaries and wages of federal employees. The federal government also provides loans, loan guarantees, and insurance which are not included as payments in this analysis. For purposes of estimating tax payments to the federal government, an 18 percent effective tax rate is applied to the total adjusted gross income for the region as provided in the New York State Department of Taxation and Finance New York Adjusted Gross Income and Tax Liability. The 18 percent effective tax rate includes payroll taxes and was estimated with the help of the accountants at Trachtenberg and Pauker LLP in Woodbury, New York.

Long Islanders Shoulder Highest Tax Burden

Analysis was prepared by the Long Island Regional Planning Board from data provided by the NYS Comptroller's Report on Municipal Affairs; NYS Statistical Yearbook; U.S. Bureau of Economic Analysis; NYS Department of Taxation and Finance Taxable Sales and Purchases Reports; and the Massachusetts Taxpayers Foundation.

A Record Number of School Budgets Fail in 2004

Data were compiled from Newsday. Map prepared by NYPRIG's Community Mapping Assistance Project with the data from the NYS Department of Education.

APPENDIX B :

INDUSTRY CLUSTER DEFINITIONS

Cluster definitions were provided by Collaborative Economics for the *Long Island Index 2005*.

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)

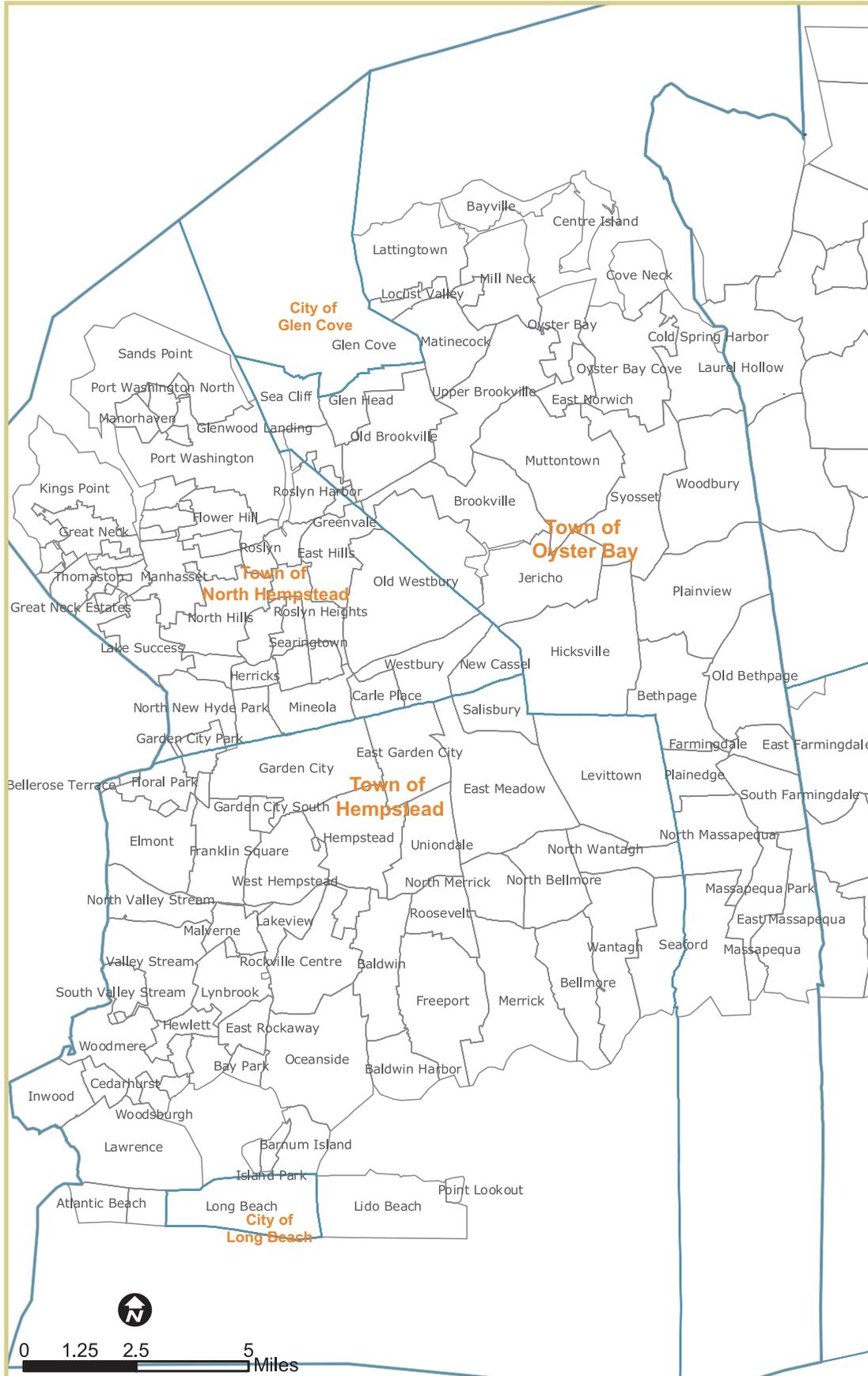
Business Services

- 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

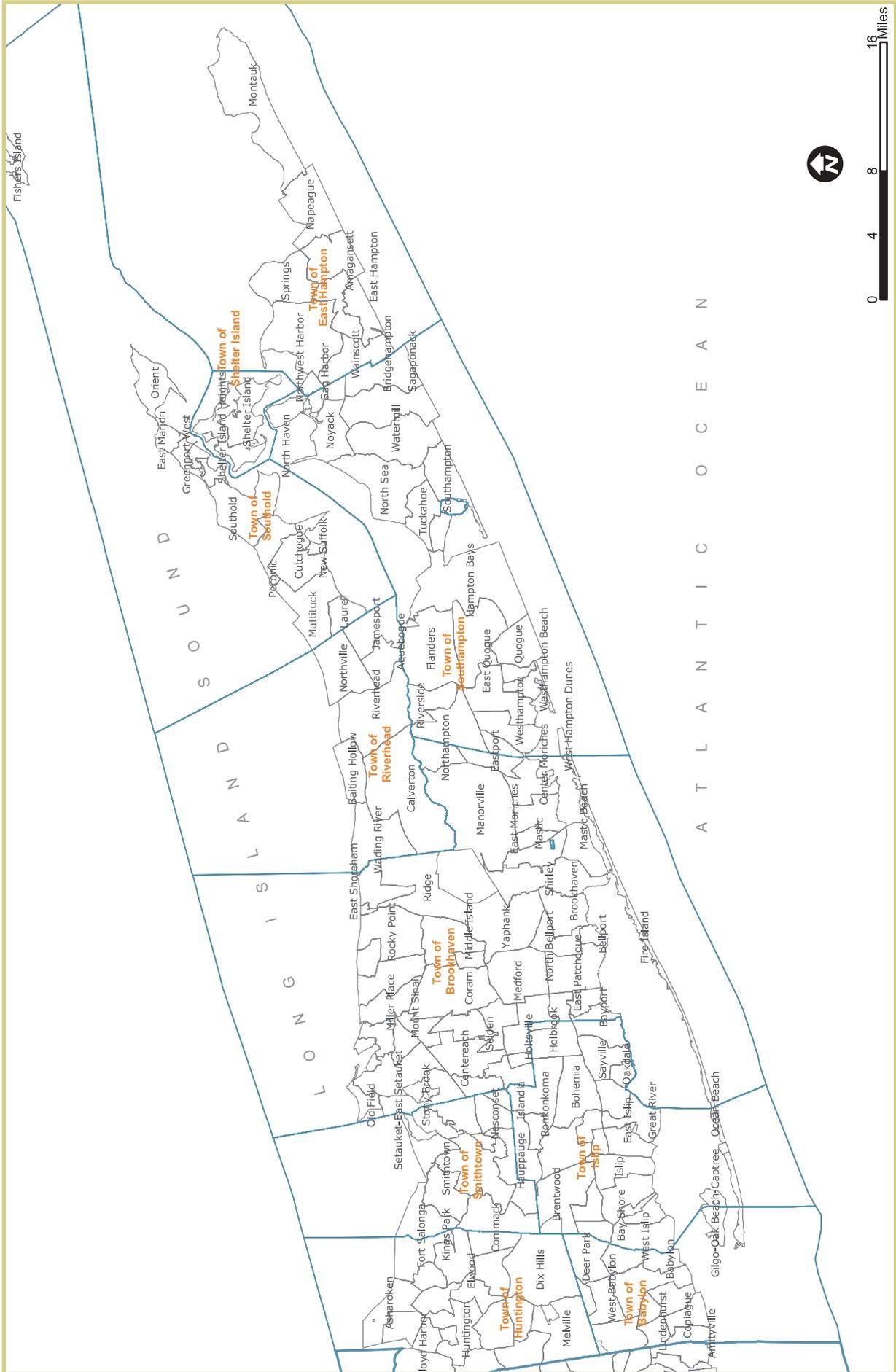
Technology Manufacturing

- 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

Nassau County Cities, Towns, Villages and Hamlets



Suffolk County Towns, Villages and Hamlets





HOW TO USE www.longislandindex.org



The *Long Island Index* Web site was developed to be your resource for accurate information about the Long Island region. The information is presented in a neutral manner, and the data, trends, surveys, polls, charts, graphs, analysis and reports about the Long Island region are what make up the *Long Island Index*.

You can access this information by logging on to www.longislandindex.org

All the details behind the report including the latest Poll reports and Special Research used in developing the special analysis are available to you. Download the whole report or just the charts and graphs you need. See and download the latest press releases about the index, or search for specific information. Do your own analysis and form your own conclusions using actual data from the index.



Learn about your community by using the detailed tables that show the demographic changes from 1990 to 2000, based on the most recent US Census data. View or copy the pie charts and bar graphs that are automatically displayed by clicking on categories such as Race/Ethnicity, Age or Income/Poverty.

It's where you can get the latest demographic information about any community in the region, and compare it with NY State or the metro region.

What else can you do? You can reference our complete list of news coverage of the Index sorted by topic, date and media. You can sign up to receive automatic updates about the Index and you can even participate in our online survey.

Don't wait for critical information to come to you. Get it online. Bookmark this valuable resource. It's just a mouse click away.



Working Together In New Ways For Long Island's Future

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