Calverton Aviation Technologies Innovation Hub

ECONOMIC BENEFITS ANALYSIS 2018

jamesLIMA
Planning + Development

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ECONOMIC BENEFITS ANALYSIS

ECONOMIC IMPACTS OVERVIEW

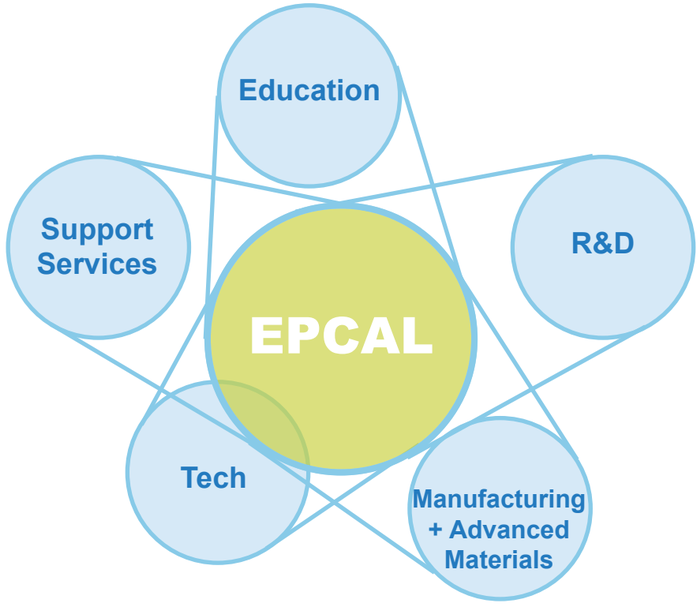

Figure 1: Cluster Activities Profile.

A buildout of the Calverton Innovation Hub is envisioned as a high technology cluster specializing in advanced manufacturing and technology, including aeronautics-aerospace manufacturing and renewable energy, and a mix of supportive activities.

The economic benefits associated with the proposed Calverton Innovation Hub are estimated for two scenarios – **Scenario 1 (Optimal)** and **Scenario 2 (Baseline)** - each over four phases of development. The development schedule under the two scenarios provide a range of potential that considers market absorption rates from previous studies and the novelty factor of the project, in terms of the proposed technology activities. The two scenarios on which the economic benefits analysis was conducted were prepared in collaboration with Triple Five, sponsor of this report, and presented to the Town of Riverhead in the first quarter of 2018.

The Calverton Innovation Hub seeks to launch a unique set of cutting-edge high technology manufacturing and service activities in the aerospace, aeronautics, renewable energy, and related industries not seen before in the New York metro area. Other economic benefits to the Town and the wider region, include on-site and off-site jobs creation, average wage increase and payroll addition, and overall economic output. The project development schedule, and the associated economic benefits and methodology are explained in several steps below.

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SUPPORTING REGIONAL FACTORS

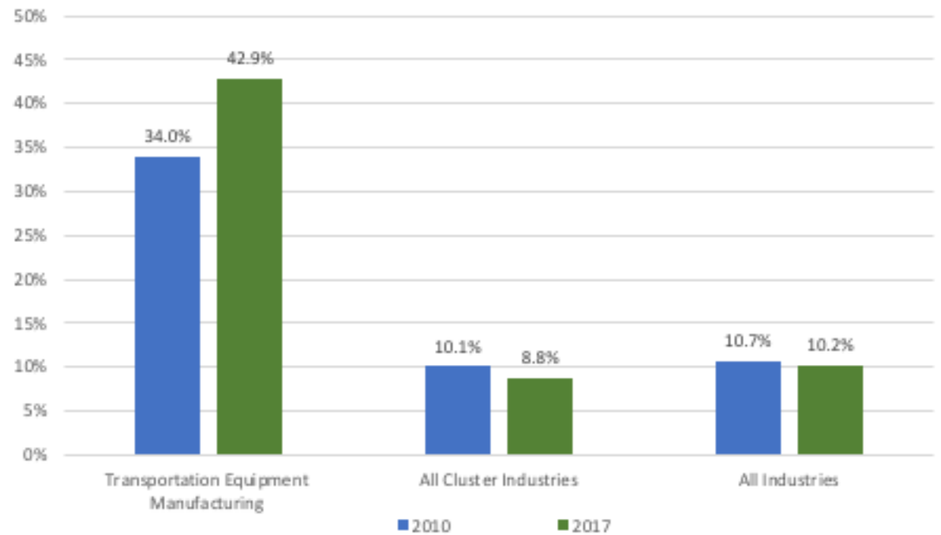

Figure 2: Suffolk County Share of Industry Grouping in New York Metro Region.
Source: James Lima Planning + Development, Based on New York State Dept. of Labor Industry Data.

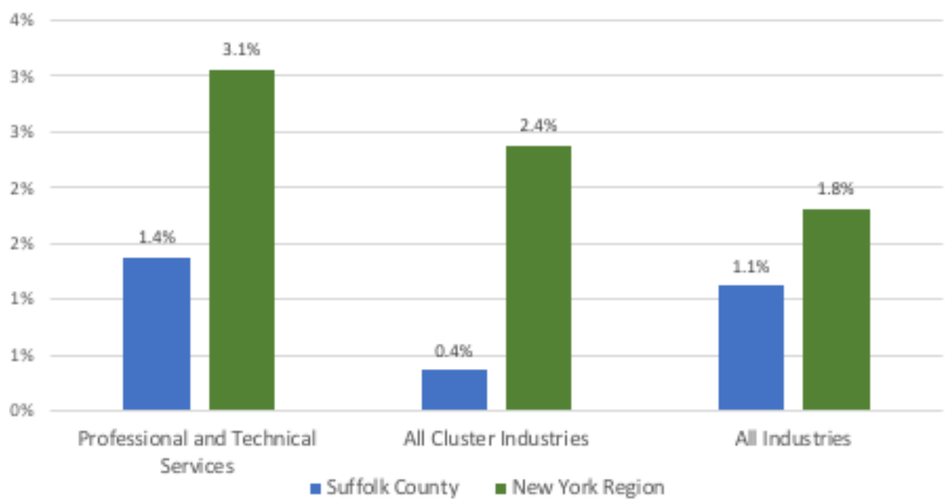

Figure 3: Industry Grouping Average Annual Growth Rates: 2010-2017.
Source: James Lima Planning + Development, Based on New York State Dept. of Labor Industry Data.

Several regional factors support the case for the Innovation Hub in Suffolk County, and by extension the Town of Riverhead. These include the county's rising share of the Transportation Equipment manufacturing industry in the New York region, the strong presence of specialized occupations that support the proposed cluster activities, and the commute patterns of the Suffolk county resident labor force.

Regional Employment Growth in Technology Industries

Suffolk County has experienced stable growth over the past decade. As shown in Figure 2, the county has maintained its share of overall jobs in the New York metro region in the 10% to 11% range over 2010 to 2017. At the same time, the county's share of jobs in the Transportation Equipment industry – the main driver of the Calverton cluster – in the New York region has increased significantly over this time from 34 percent to 43 percent. These activities comprise the predominant portion of the Calverton cluster, as discussed later. The county share of all cluster Industries stands at around 9 percent.

Further, as shown in Figure 3, the Professional and Technical Services industries, which is a measure of the available technology talent pool in the economy, and that can be attracted to technology-intensive advanced manufacturing activities in the future, has grown at an average annual rate of 1.4 percent over 2010-17 in the county, which was higher compared to the overall employment growth in the county. The rapid expansion of technology service activities in the broader region, at 3.1 percent over this time-period, augurs well for the proposed Aerospace cluster that seeks to draw technical talent.

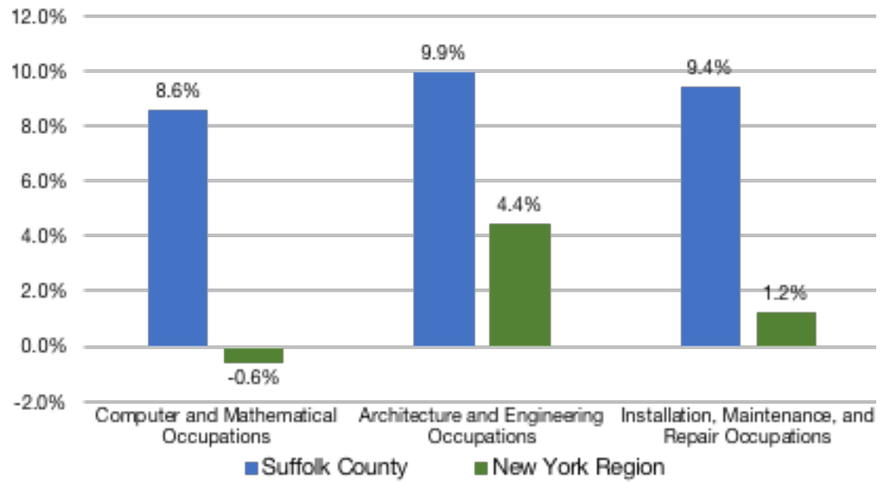

Figure 4: Average Annual Growth of Workers in Main Cluster Occupations: 2014-16.
Source: James Lima Planning + Development, American Community Survey 2014 and 2016.

Local and Regional Occupational Profile

On the workforce front, the occupational profile of workers living in Suffolk County is complementary to the proposed activities in the Calverton cluster. As shown in Figure 4, workers in STEM occupations has grown faster compared to the New York region. Computer and Mathematical occupations have grown at an annual rate of 8.6 percent compared to a decline of 0.6 percent in wider region, while workers in Architecture and Engineering Occupations have grown at an annual rate of 9.9 percent compared to 4.4 percent in the New York region. Installation, Maintenance and Repair occupations, of interest to Aircraft Maintenance, Repair & Overhaul (MRO) operations, have grown at an annual rate of 9.4 percent over 2014-16 compared to only 1.2 percent in the wider region. County resident worker wages in these occupations are comparable to the wider region. The average wages for technology intensive occupations are nearly 50 percent higher compared to the overall average wages in the county and the region.

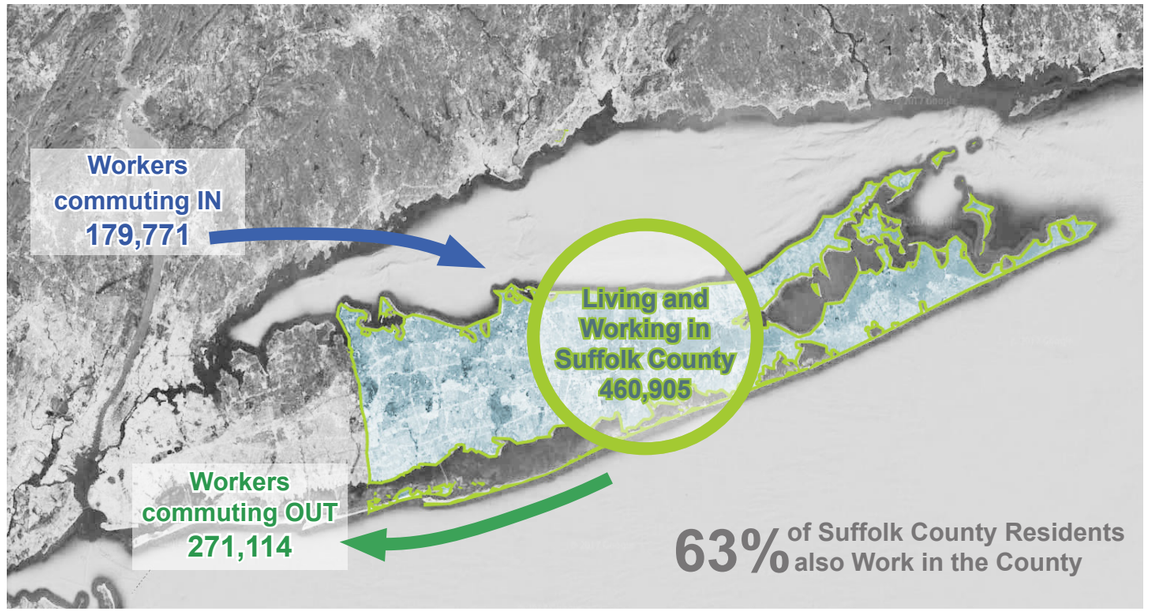

Figure 5: Inflow-Outflow Commute Patterns, Suffolk County, 2015.
Source: James Lima Planning + Development, Census Longitudinal Employer Household Dynamics, 2016.

Regional Commute Patterns

In addition to the expansion of residents in STEM occupations, the county's workforce formation for future industries finds support in regional commute patterns. Most of the county residents also worked in the county. As shown in Figure 5, of the approximately 732,000 resident workers about 461,000 or a 63 percent share of the resident labor force also worked in the county. On the flip side, when looking at the approximately 641,000 individuals employed in the county, nearly 72 percent also lived there. These trends allude to positive quality of life factors that could establish strong linkages between future industry growth and local labor formation that could translate to spillover effects in terms of support export and local activities.

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SUMMARY OF DEVELOPMENT AND ECONOMIC BENEFITS

ECONOMIC BENEFITS ANALYSIS

SUMMARY OF DEVELOPMENT AND ECONOMIC BENEFITS

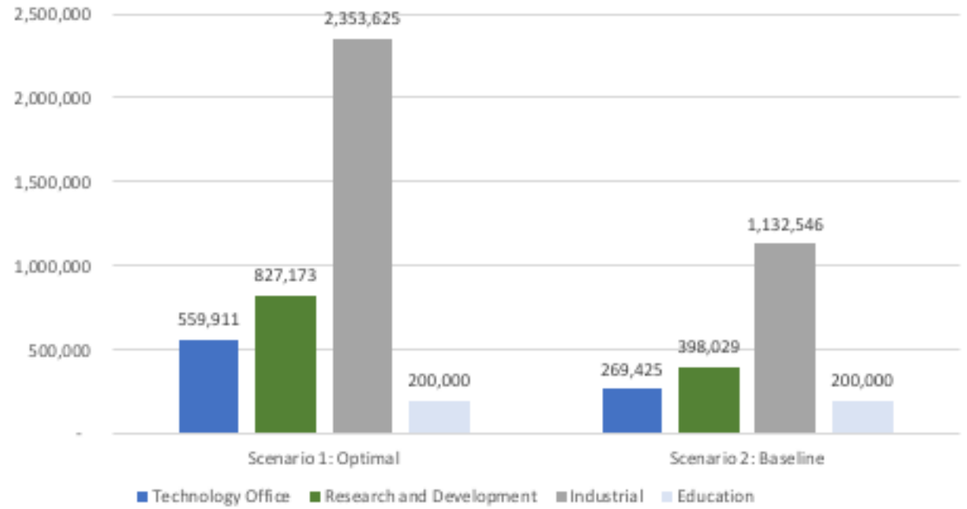

Figure 6: On-Site Development by Space Utilization.
Source: James Lima Planning + Development.

The real estate use profile and regional economic impacts of the project are summarized in this sections for Scenario 1 (Optimal) and Scenario 2 (Baseline). Presented below are the On-Site Development profile by space utilization square feet for Technology Office, Research and Development, Industrial and Education uses, and the associated levels of employment for both scenarios at build-out.

On-Site Development:

Under Scenario 1, as shown in Figure 6, a total of 3.9 million square feet (sf) of real estate space is estimated for the Innovation Hub at buildout. This includes 560,000 sf of Technology Office, 827,000 sf of Research and Development, 2.4 million sf of Industrial, and 200,00 sf for Education uses. Under Scenario 2, a total of 2.0 million sf of real estate space are estimated at buildout for the Innovation Hub. This includes 269,000 sf of Technology Office, 398,000 sf of Research and Development, 1.1 million sf of Industrial, and 200,00 sf of Education.

On-Site Employment:

Under Scenario 1 at buildout, as shown in Figure 7, a total of 5,530 On-Site jobs are estimated for the Innovation Hub. This includes 1,866 Technology Office jobs, 1,103 Research and Development jobs, 2,140 Industrial jobs, and 421 Education jobs. Under the Baseline Scenario 2, a total of 2,879 On-Site jobs are estimated for the project at buildout. This includes 898 Technology Office jobs, 531 Research and Development jobs, 1,030 Industrial jobs, and 421 Education jobs.

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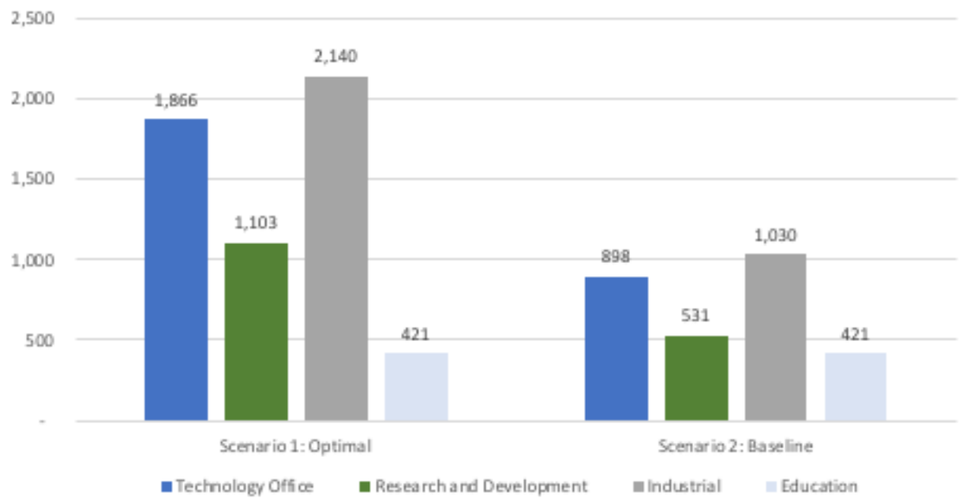

Figure 7: On-Site Employment Profile.
Source: James Lima Planning + Development.

Also discussed are the regional impacts of the project, including employment, labor income, value added and economic output indicators, for on-site (direct) and off-site (indirect and induced) at project buildout using the IMPLAN regional Impacts estimation software.

The IMPLAN software estimates the impact of direct economic change (employment change) in terms of the resulting indirect and induced changes to the regional economy. While indirect effects are the regional supply chain (business to business) changes associated with additional on-site direct jobs, induced effects are associated with the spending increases on goods and services by employees (households) from the direct and indirect jobs. The indirect and induced effects are taken together in this current analysis as combined Off-Site regional changes.

Regional Employment Impact:

Under Scenario 1, as shown in Figure 8, a total of 5,530 On-Site (direct jobs) are added for the Innovation Hub, which results in a regional change of 7,880 Off-Site jobs for a total regional impact of 13,410 jobs. Scenario 2 generates lower employment levels of 2,879 On-Site (direct jobs) and a regional change of 3,892 Off-Site jobs for a total regional impact of 6,771 jobs.

Regional Labor Income Impact:

Under Scenario 1, as shown in Figure 9, labor income associated with the On-Site jobs amounts to nearly $666 million, with another $571 million for Off-Site jobs for a total regional change of $1,237 million. Labor income associated with the baseline employment change under Scenario 2 results in $335 million for the On-Site jobs, with another $281 million for Off-Site jobs for a total regional change of $615 million.

SUMMARY OF DEVELOPMENT AND ECONOMIC BENEFITS

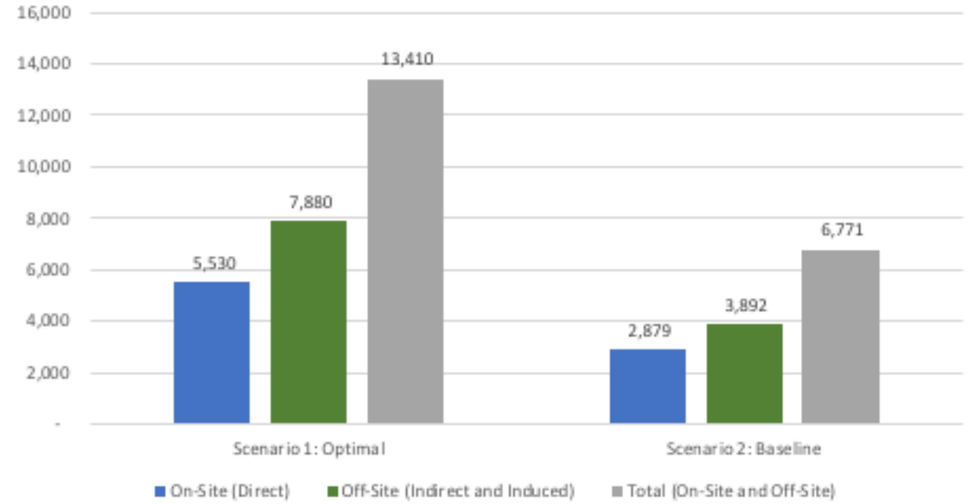

Figure 8: Regional Employment Impacts.
Source: James Lima Planning + Development; IMPLAN Regional Model.

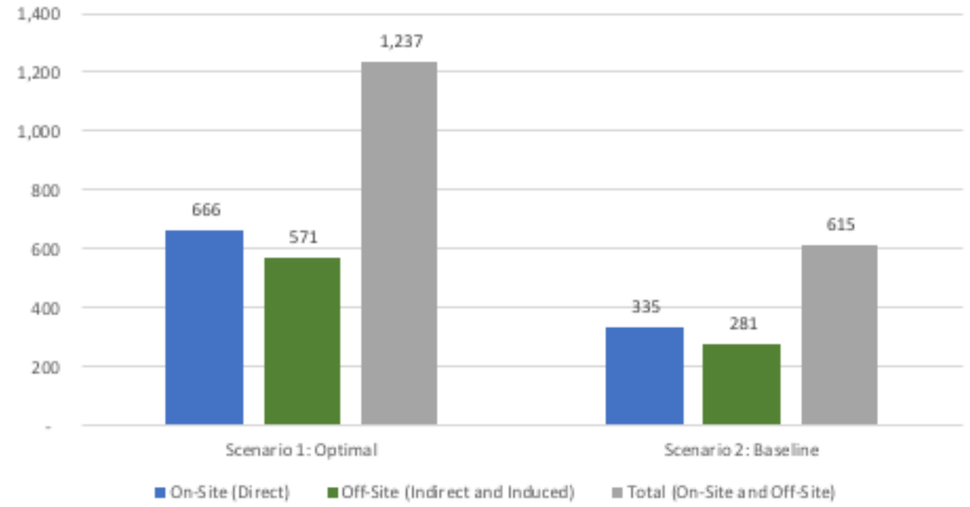

Figure 9: Regional Labor Income Impacts (Millions of Dollars).
Source: James Lima Planning + Development; IMPLAN Regional Model.

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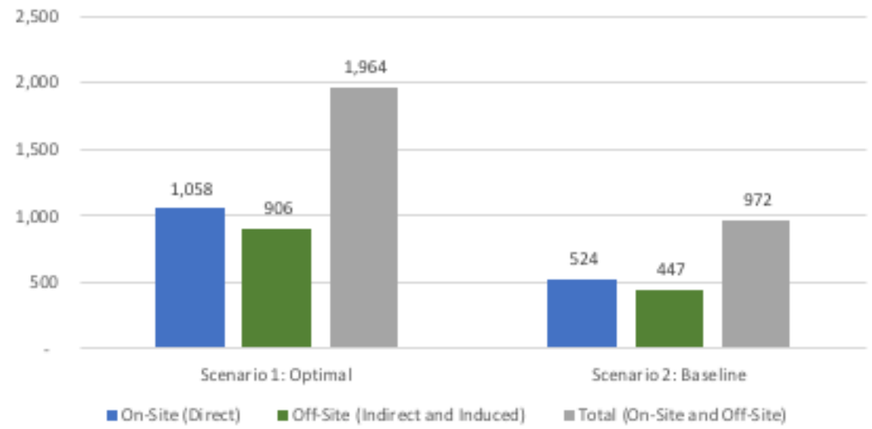

Figure 10: Regional Value Added Impacts (Millions of Dollars).
Source: James Lima Planning + Development; IMPLAN Regional Model.

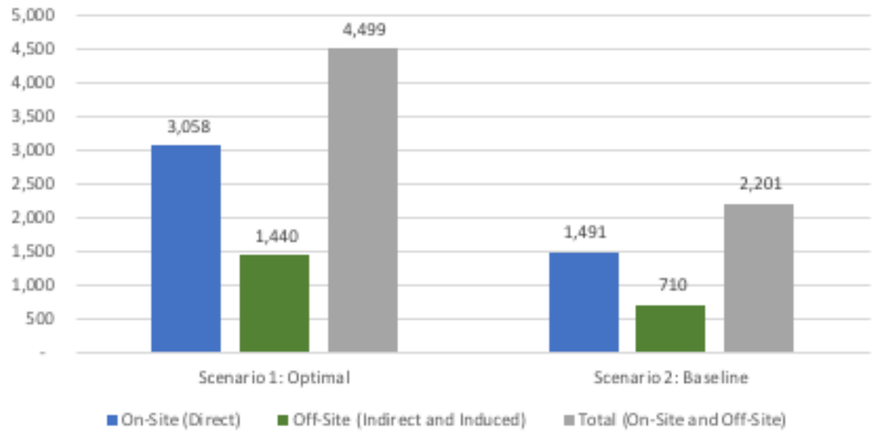

Figure 11: Regional Output Impacts (Millions of Dollars).
Source: James Lima Planning + Development; IMPLAN Regional Model.

Regional Value Added:

Under Scenario 1, as shown in Figure 10, value added associated with the On-Site jobs amounts to nearly $1,100 million, with another $942 million for Off-Site jobs for a total regional change of $2,042 million. Value added associated with the conservative employment change under Scenario 2 results in $567 million for the On-Site jobs, with another $484 million for Off-Site jobs for a total regional change of $1,051 million.

Regional Output:

Under Scenario 1, as shown in Figure 11, the On-Site jobs amount to nearly $3,182 million in output, with another $1,498 million for Off-Site jobs for a total regional change of $4,679 million. Output associated with the conservative employment change under Scenario 2 results in $1,616 million for the On-Site jobs, with another $769 million for Off-Site jobs for a total regional output change of $2,384 million.

SUMMARY OF DEVELOPMENT AND ECONOMIC BENEFITS

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IMPACT ESTIMATION METHODOLOGY

Site Development Analysis

The site is proposed for development over four phases with specific acreage breakdowns, as shown in Figure 12 and Figure 13, and identical for both scenarios. The land development schedule includes 113 acres under Phase 1, 159 acres under Phase 2, 73 acres under Phase 3 and 89 acres under Phase 4. At the same time, the proposed building square feet associated with each phase differs under the two scenarios.

Scenario 1 (Optimal) assumes that the novelty of the technology uses being proposed for the Innovation Hub do not have past comparisons and that the technology cluster would be a purpose-built brokered development for high-value anchors. Under this scenario, land acres are developed at the conventional floor area ratio (F.A.R.) factor of 0.20 for industrial uses. This results in a total of 3.84 million square feet at build-out, with 1.0 million square feet in Phase 1, 1.4 million square feet in Phase 2, 646,018 square feet in Phase 3, and 787,611 square feet in Phase 1.

Scenario 2 (Baseline) draws upon previous market studies that have shown an estimated absorption rate of around a million square feet of commercial space over the next couple of decades for the proposed site. Under this scenario, a total of 2.0 million square feet have been proposed at total build-out distributed equally at 500,000 sf per phase over the four phases of site development.

		Scenario 1		Scenario 2	
	Acres	**Bldg. Sf.**	**FAR**	**Bldg. Sf.**	**FAR**
Phase I	113	1,000,000	0.20	500,000	0.10
Phase II	159	1,407,080	0.20	500,000	0.07
Phase III	73	646,018	0.20	500,000	0.16
Phase IV	89	787,611	0.20	500,000	0.13
Total	**434**	**3,840,708**	**0.20**	**2,000,000**	**0.11**

Figure 12: Development Analysis by Scenario and Phase. Source: James Lima Planning + Development; IMPLAN Regional Model.

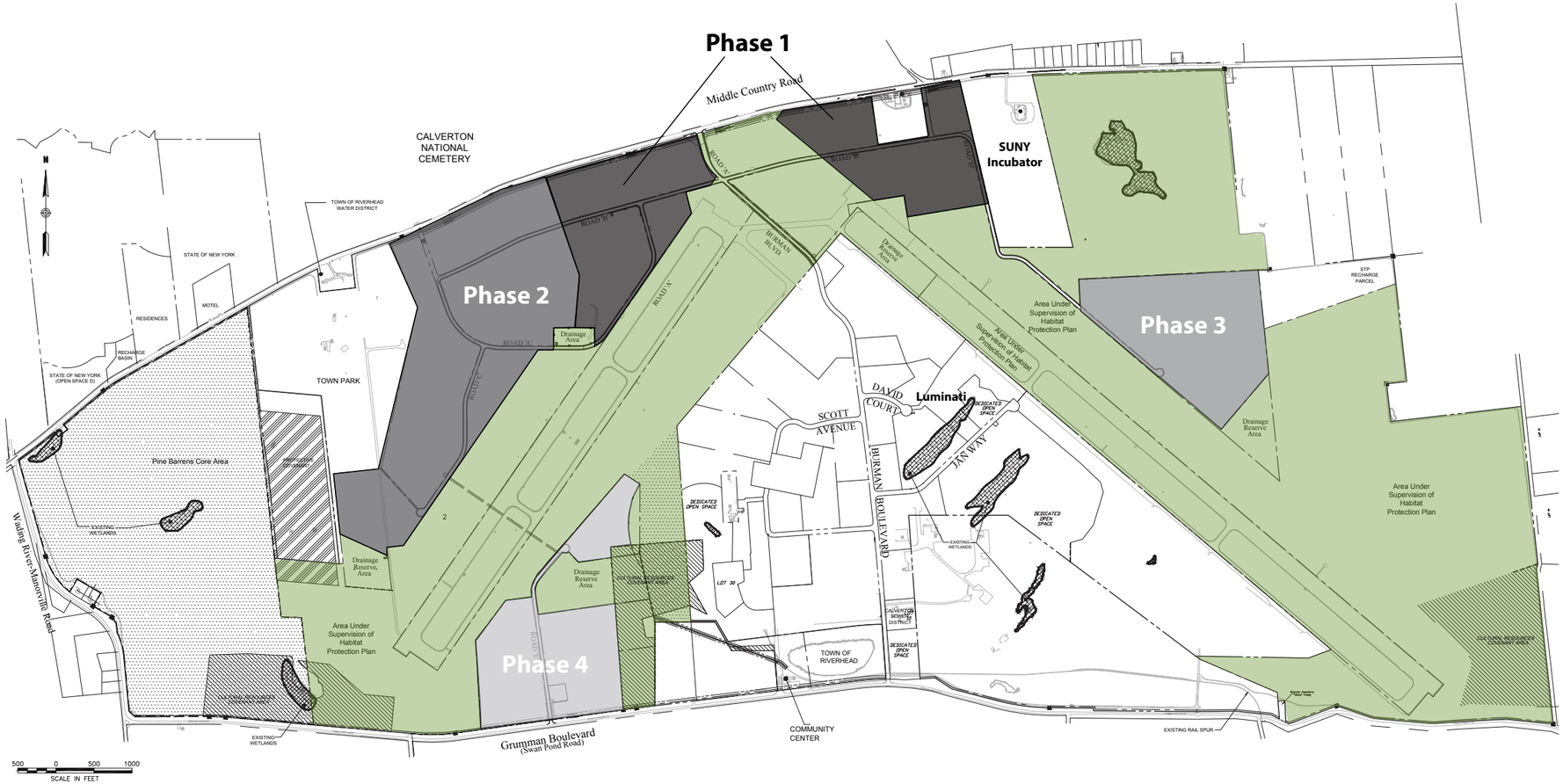

Figure 13: Phasing Plan.

Defining the Aerospace-Aeronautics Cluster

Complementing the site-development potential for the Innovation Hub, the next step in the economic benefits analysis involves estimating a mix of industry activities for the overall Innovation Hub cluster, driven primarily by Aerospace-Aeronautics manufacturing and related high-technology activities. The primary industries assumed in this cluster by detailed NAICS categories include Aircraft Manufacturing (NAICS 336411), Airport Engine and Engine Parts Manufacturing (336412) and Other Aircraft Parts and Auxiliary Manufacturing (336413). Further, assuming a three-way distributional split over each of the above output industries, a mix of related input activities are calculated from the IMPLAN Input-Output relationship matrix for the New York MSA to estimate a 100 percent mix of all technology jobs. Related three-digit technology industries that are assumed to provide production inputs to the primary activities include the manufacturing of Computer and Electronic Products (334), Fabricated Metal Products (332), Plastics and Rubber Products (326), Electrical Equipment (335) and Chemical Products (325). Other input-related jobs comprising technology services include Professional, Scientific and Technical Services (541), ISPs, Search Portals and Data Processing (518), Publishing Industries (511) and Other Information Services (511). When the above cluster-level activities are combined, Aerospace-Aeronautics manufacturing constitutes an overall share of 87 percent, followed by related technology services at 11 percent, and the remainder 3 percent is composed of related technology manufacturing (numbers are rounded), as shown in Appendix Table 1.

Cluster Staffing Patterns and Space Requirements

The industry profile for the Innovation Hub cluster is next converted to space utilization rates based on an analysis of occupational staffing patterns by industry. The basic premise behind this analysis is that industries are composed of workers across different occupations with varying space requirements in terms of real estate use types. The typical composition of industries by different occupations is obtained for 2016 as a two-way cross-tabulation from the American Community Survey (ACS) Public Use Microdata (PUMS) for the New York metro area. The industry-level composition obtained at the metro-level is weighted by the industry distribution for the Innovation Hub cluster, as shown earlier, to obtain a total weighted occupational profile for the project, as shown in Appendix Table A-2. Each of the occupations are then assigned to three basic categories of real estate space use with related square foot per employee factors – Tech-Office (300 sf per employee), Research and Development (R+D) (750 sf per employee) and Industrial (1,100 sf per employee). This profile is same for both Scenario 1 and Scenario 2, but different on the levels and phasing of the overall development square feet and employment.

	Phase 1	Phase 2	Phase 3	Phase 4	TOTAL
Scenario 1: Optimal					
Square Feet					
Technology Office	134,712	210,612	96,696	117,890	559,911
Research and Development	199,015	311,144	142,852	174,162	827,173
Industrial	566,273	885,324	406,470	495,559	2,353,625
Education	100,000	0	100,000	0	200,000
Total	**1,000,000**	**1,407,080**	**746,018**	**787,611**	**3,940,709**
Employment					
Technology Office	449	702	322	393	1,866
Research and Development	265	415	190	232	1,103
Industrial	515	805	370	451	2,140
Education	211	0	211	0	421
Total	**1,440**	**1,922**	**1,093**	**1,076**	**5,530**
Scenario 2: Baseline					
Square Feet					
Technology Office	59,872	74,840	59,872	74,840	269,425
Research and Development	88,451	110,564	88,451	110,564	398,029
Industrial	251,677	314,596	251,677	314,596	1,132,546
Education	100,000	0	100,000	0	200,000
Total	**500,000**	**500,000**	**500,000**	**500,000**	**2,000,000**
Employment					
Technology Office	200	249	200	249	898
Research and Development	118	147	118	147	531
Industrial	229	286	229	286	1,030
Education	211	0	211	0	421
Total	**757**	**683**	**757**	**683**	**2,879**

Figure 14: Cluster Employment by Scenario and Phases.
Source: James Lima Planning + Development.

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	Employment	Labor Income ($)	Value Added ($)	Output ($)
Scenario 1: Optimal				
On-Site (Direct)	5,530	$665,784,995	$1,057,788,272	$3,058,498,303
Off-Site (Indirect and Induced)	7,880	$570,968,514	$906,348,568	$1,440,288,830
Total (On-Site and Off-Site)	13,410	$1,236,753,509	$1,964,136,840	$4,498,787,133
Multiplier	2.4	1.9	1.9	1.5
Scenario 2: Baseline				
On-Site (Direct)	2,879	$334,738,496	$524,430,227	$1,490,861,776
Off-Site (Indirect and Induced)	3,892	$280,504,350	$447,238,534	$710,294,966
Total (On-Site and Off-Site)	6,771	$615,242,846	$971,668,761	$2,201,156,742
Multiplier	2.4	1.8	1.9	1.5

Figure 15: Regional Impact Analysis.
Source: James Lima Planning + Development; IMPLAN Regional Model.

Total Cluster Employment by Scenario and Phases

Next, total cluster employment by scenario and phases is estimated by calibrating the staffing patterns profile, as discussed above, to the total square feet obtained from the site development analysis. Essentially, the mix of occupation weighted by real estate utilization levels results in a total of 5,530 jobs corresponding to 3.9 million square feet under Scenario 1 (Optimal) and 2,879 jobs corresponding to 2.2 million square feet under Scenario 2 (Baseline), as shown in Table 2. This includes employment associated with the education use for a total of 200,000 square feet at buildout in both scenarios. The estimated employment levels for each scenario by phase and their corresponding square feet of uses are also shown in Figure 14.

Regional Impacts of the Aerospace Cluster

The final step in the economic benefits analysis involves modelling the regional employment, payroll and output impacts from the total onsite jobs (direct jobs) for the Innovation Hub cluster by phase for each scenario. The regional modelling is done on the IMPLAN economic impact assessment software using the input-output multipliers for the New York MSA. The IMPLAN software estimates the impact of direct economic change (employment change) in terms of the resulting indirect and induced changes to the economy. While indirect effects are the regional supply chain changes (business to business) associated with additional on-site direct jobs, induced effects are associated with the spending increases on goods and services by employees (households)

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from the direct and indirect jobs. The indirect and induced effects are taken together in this current analysis as Off-Site changes, as described below for each scenario.

Scenario 1 (Optimal): Under this scenario, the total estimated on-site employment of 5,530 jobs results in 7,880 off-site jobs for a total of 13,410 regional jobs with an employment multiplier of 2.4. Labor Income is estimated at $665 million for on-site activities and $1.2 billion for the total regional effect for a 1.9 income multiplier. Value Added is estimated at $1.1 billion for on-site activities and $2.0 billion for the total regional effect for a 1.9 value-added multiplier. Economic Output is estimated at $3.1 billion for on-site activities and $4.9 billion for the total regional effect for a 1.5 output multiplier.

Scenario 2 (Baseline): Under this scenario, the total estimated on-site employment of 2,879 jobs results in 3,892 off-site jobs for a total of 6,771 regional jobs with an employment multiplier of 2.4. Labor Income is estimated at $334 million for on-site activities and $615 million for the total regional effect for a 1.8 income multiplier. Value Added is estimated at $524 million for on-site activities and $972 million for the total regional effect for a 1.9 value-added multiplier. Economic Output is estimated at $1.5 billion for on-site activities and $2.2 billion for the total regional effect for a 1.5 output multiplier.

APPENDIX

APPENDIX TABLE 1
CALVERTON INNOVATION HUB
ESTIMATED CLUSTER INDUSTRY EMPLOYMENT MIX

NAICS Code	NAICS Industry Description	Percent Share
NAICS 336: Transportation Equipment Manufacturing		
336411	Aircraft Manufacturing	28.9%
336412	Aircraft Engine and Engine Parts Manufacturing	28.9%
336413	Other Aircraft Parts and Auxiliary Equipment	28.9%
		86.7%
Related Manufacturing		
325	Chemical Manufacturing	0.1%
326	Plastics & Rubber Products Manufacturing	0.2%
332	Fabricated Metal Product Manufacturing	0.9%
333	Machinery Manufacturing	0.1%
334	Computer and Electronic Product Manufacturing	1.2%
335	Electrical Equipment and Appliances	0.2%
		2.7%
Related Technology Services		
511	Publishing Industries	0.1%
518	ISPs, Search Portals, & Data Processing	0.7%
519	Other Information Services	0.2%
541	Professional and Technical Services	9.5%
		10.5%
TOTAL INNOVATION HUB CLUSTER		**100.0%**

Source: MIG, Inc. IMPLAN System, New York MSA Model.

APPENDIX TABLE 2
CALVERTON INNOVATION HUB
INDUSTRY-OCCUPATION MATRIX

	NAICS 3-DIGIT INDUSTRIES											OCCUPATION
	325	326	332	333	334	335	336	511	518	519	541	TOTAL
OCCUPATIONS												
Management Occupations	0%	0%	0%	0%	0%	0%	11%	0%	0%	0%	2%	**13%**
Business and Financial Operations Occupations	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	2%	**5%**
Computer and Mathematical Occupations	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	1%	**5%**
Architecture and Engineering Occupations	0%	0%	0%	0%	0%	0%	12%	0%	0%	0%	1%	**13%**
Life, Physical, and Social Science Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Community and Social Service Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Legal Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	**2%**
Education, Training, and Library Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Arts, Design, Entertainment, Sports, and Media Occupations	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	1%	**4%**
Healthcare Practitioners and Technical Occupations	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	**1%**
Healthcare Support Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Protective Service Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**

Food Preparation and Serving Related Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Building and Grounds Cleaning and Maintenance Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**1%**
Personal Care and Service Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sales and Related Occupations	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%	**4%**
Office and Administrative Support Occupations	0%	0%	0%	0%	0%	0%	10%	0%	0%	0%	1%	**12%**
Farming, Fishing, and Forestry Occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Construction and Extraction Occupations	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	**2%**
Installation, Maintenance, and Repair Occupations	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	**4%**
Production Occupations	0%	0%	0%	0%	0%	0%	27%	0%	0%	0%	0%	**28%**
Transportation and Material Moving Occupations	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	0%	**7%**
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
INDUSTRY TOTAL	**0%**	**0%**	**1%**	**0%**	**1%**	**0%**	**87%**	**0%**	**1%**	**0%**	**10%**	**100%**

Source: James Lima Planning + Development based on the American Community Survey (ACS) 2016

APPENDIX TABLE 3
CALVERTON INNOVATION HUB
STAFFING PATTERNS AND SPACE ALLOCATION BY PHASE

Occupations	Share of Cluster Jobs		Land Use Allocation	Square Foot per Employee
Management Occupations	13%		Tech Office	300
Business and Financial Operations Occupations	5%		Tech Office	300
Computer and Mathematical Occupations	5%		R+D	750
Architecture and Engineering Occupations	13%		R+D	750
Life, Physical, and Social Science Occupations	0%		R+D	750
Community and Social Service Occupations	0%			
Legal Occupations	2%		Tech Office	300
Education, Training, and Library Occupations	0%		Tech Office	300
Arts, Design, Entertainment, Sports, and Media Occupations	4%		R+D	750
Healthcare Practitioners and Technical Occupations	1%		Tech Office	300
Healthcare Support Occupations	0%			
Protective Service Occupations	0%			
Food Preparation and Serving Related Occupations	0%			
Building and Grounds Cleaning and Maintenance Occupations	1%			
Personal Care and Service Occupations	0%			
Sales and Related Occupations	4%		Tech Office	300

Office and Administrative Support Occupations	12%		Tech Office	300
Farming, Fishing, and Forestry Occupations	0%			
Construction and Extraction Occupations	2%		Industrial	1,100
Installation, Maintenance, and Repair Occupations	4%		Industrial	1,100
Production Occupations	28%		Industrial	1,100
Transportation and Material Moving Occupations	7%		Industrial	1,100
	0%			
TOTAL	**100%**			

Source: James Lima Planning + Development based on the American Community Survey (ACS) 2016

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