

Appendix C491

Analysis of Retail Activity in Communities Surrounding the Proposed Lighthouse
Development

An Analysis of Retail Activity in Communities Surrounding the Proposed Lighthouse Development

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Concern has been expressed that the proposed 500,000 square feet of retail-related space proposed for the Lighthouse development will have adverse consequences for retailers in surrounding and neighboring downtowns.

Sandra G. Johnson, Co-President, Chamber of Commerce of the Bellmores: “We are concerned that the amount of retail space [at the Lighthouse] will adversely affect our local businesses.”

Nicholas P. Episcopia, Garden City Trustee: “Charles Wang definitely stated that the project would contain some housing, retail to support the housing, and cafes and pubs to make attending the coliseum more attractive. Exactly the opposite has happened...500,000 square feet of retail is the size of a mall...”

Incorporated Village of Garden City: “Many of the surrounding downtowns are experiencing economic hardships and a substantial increase in storefront vacancies. The proposed construction of...one half million square feet of commercial space under these circumstances is not smart growth. This new space will directly and unfairly compete with the existing surrounding downtown centers, including Garden City’s, which will seriously exacerbate the existing problems currently being experienced.”

Village of Hempstead: “Due to the magnitude of the proposed project, and its potential significant adverse effects on the Village’s ongoing downtown redevelopment efforts, including as projected in the Village’s Plan, 2,500 new housing units, 283,600 square feet of retail space and 382,100 square feet of office space, we strongly urge that a full commercial character assessment be prepared as part of the socio-economic impact analysis...For this analysis, it is urged that the trade area generally correspond to a least a five-mile radius around the project site, which would include the Hempstead CBD.”

This study addresses these concerns. To determine the likelihood that the proposed retail space at the Lighthouse will compete with existing retailing in surrounding downtowns, to the detriment of merchants in these downtowns, a field survey of retail activity in surrounding downtowns was conducted between August 22nd and August 28th, 2009. The communities surveyed were Hempstead Village, Uniondale, East Meadow, Carle Place, Mineola, Garden City, Bellmore and Westbury. With the exception of Uniondale, East Meadow and Bellmore, each of these communities has a well-defined downtown shopping district. The goal of the field survey was to determine the mix of retail activity in each community and ascertain the prevalence of vacant or underutilized retail space.

The Retail Centers Studied

The retail centers studied ranged in distance from the Lighthouse of between 2.7 miles and 11.5 miles as shown in the following table. As the following table also shows, there are numerous retailers, primarily in strip commercial retail centers, between the retail downtown of each community and the Lighthouse.

Community Surveyed	Approximate Distance From Lighthouse in Miles	Amount of Retail Between Downtown Area Surveyed & Lighthouse
Hempstead Village	3.5	There are numerous neighborhood stores along Fulton Avenue and Hempstead Turnpike between Main St. in downtown Hempstead & Earl Ovington Blvd. Many of these stores cater to the needs of students at nearby Hofstra University. There are also numerous student-oriented bars and fast food establishments.
Uniondale	2.7	There are neighborhood stores along Uniondale Avenue between Jerusalem Ave and Hempstead Turnpike. This is the most direct path to the Lighthouse. There are also some fast food stores and hair salons along Front Street between Uniondale Avenue and the Meadowbrook Parkway.
East Meadow	3.7	There is a Home Depot as well as fast food restaurants and other neighborhood stores going west along Hempstead Turnpike between Front Street and James Doolittle Blvd.
Carle Place	5.5	There is an enormous amount of regional retailing just south of the Glen Cove shopping corridor surveyed. This includes the Source Mall in Westbury and the Roosevelt Field Shopping Center just north of the Lighthouse property
Mineola	5.9	Both the Garden City downtown shopping center and the Roosevelt Field Shopping Center lie between the Mineola downtown shopping area and the Lighthouse. Both centers are regional shopping centers containing national market retailers.
Garden City	4.2	The Roosevelt Field Shopping Center is located just east of the Garden City downtown area and northwest of the Lighthouse. Roosevelt Field is a regional shopping center containing national market retailers.
Bellmore	11.5	There are numerous neighborhood-type retailers along Merrick Road going west to the Meadowbrook Parkway. These are at a substantial distance from the Lighthouse.
Westbury	4.2	There are numerous neighborhood-type restaurants, supermarkets, hair salons and similar retailers along Merrick Avenue between Old Country Rd. and Hempstead

		Turnpike going south toward the Lighthouse.
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Summary of Findings

Of the eight downtown shopping centers surveyed, all but Carle Place and the Franklin Avenue Corridor within Garden City contain retailers that predominantly serve the needs of their resident populations. Such neighborhood-type retailers generally understand the needs of their customers and presumably stock merchandise and maintain store hours that meet those needs. In Hempstead Village, Uniondale and Westbury Village, retailing is geared to the needs of their large Hispanic population.

Given the results of the field survey, it is unlikely that the predominantly entertainment-related and neighborhood-type retailing proposed for the Lighthouse will compete with most existing retail businesses in surrounding downtowns. Rather, the purchasing power (\$250M annually) that potential Lighthouse residents will bring to the community is likely to have a positive impact on the retail community.

Proposed Retailing at the Lighthouse

The proposed retail space at the Lighthouse development will not be a shopping mall as critics contend. Approximately 65,000 square feet will be a cinema and the remaining 435,000 square feet will consist of entertainment-oriented lifestyle retail development and neighborhood-type shops designed to serve the needs of Lighthouse residents. About 82,000 of the 435,000 square feet will be restaurants and there will be a 50,000 square foot grocery store. This means that the **net** retail area planned for the Lighthouse will be approximately 303,000 square feet.

The Mix of Retail Development Planned for the Lighthouse

Type of Retailing	Estimated Square Feet
Total	500,000
Cinema	65,000
Remainder	435,000
Restaurants	82,000
Grocery Store	50,000
Remainder	303,000

Source: Lighthouse Development Group

Existing Retailing in the Town of Hempstead

A **net** addition of 303,000 square feet of retail space at the Lighthouse, even a **gross** addition of 500,000 square feet, is actually a small fraction of the retail space that already exists within the Town of Hempstead. For example, there is at least 7.1 million square feet of retail space within communities surrounding the proposed Lighthouse development. The nearby Roosevelt Field Mall alone contains approximately 2.4 million square feet of retail space. Its 345 stores include not only restaurants but also offer virtually every conceivable line of retailing.

If it is argued that the entertainment-related and neighborhood-type retailing planned for the Lighthouse competes directly with retailers in surrounding downtowns, it could certainly be argued that the abundance and diversity of retailing at the Roosevelt Field Mall poses a much greater competitive threat to these downtown shopping districts.

**Estimated Retail Square Footage in
Communities Surrounding the Proposed Lighthouse Development**

Community	Street Location	Sq. Ft.	No. of Stores
East Garden City			
Roosevelt Field Mall	Old Country Rd/Meadowbrook	2,375,000	257
The Source Mall	Old Country Rd/Ellison Av.	826,000	86
Roosevelt Raceway Ctr.	Ellison Av/Corporate Dr.	421,000	6
Westbury Plaza	Old Country Rd/Zeckendorf	402,000	8
Stewart Plaza	Stewart Av/Quentin Blvd.	194,000	22
	Total	4,218,000	379
Garden City CBD			
	Franklin Av/Stewart Av	745,000	141
	Total	745,000	
East Meadow			
East Meadow Plaza	Hempstead Tpke/E Meadow Av	259,000	31
Clearmeadow Plaza	Hempstead Tpke/Newbridge Rd.	210,000	25
East Meadow Mall	Front St./E. Meadow Av.	143,000	31
Meadow Plaza	Front St./Newbridge Av.	63,000	14
Mitchel Manor SC	Front St./Merrick Av.	63,000	22
Meadowbrook SC	Hempstead Tpke/Prospect Av.	43,000	19
Meadowbrook Square	Hempstead Tpke/Conti Sq. Blvd.	23,000	17
Meadow Plaza	Newbridge Rd./Falcon St.	17,000	16
	Total	821,000	175
Hempstead			
Hempstead CBD	Main St./Front St.	840,000	500
Hempstead Hub	Fulton St./Cathedral Av.	248,000	10
Hempstead SC	Greenwich St./Henry St.	28,000	10
Island Plaza	Hempstead Tpke/St. Paul's Rd.	19,000	15
	Total	1,135,000	535
Uniondale			
Nassau Rd. SC	Nassau Rd/Southern Pkwy	20,000	11
Uniondale Plaza	Nassau Blvd/Uniondale Av.	8,000	8
Meadowbrook Pkwy Plaza	Jerusalem Av/Winthrop Dr.	134,000	3
Emerson Plaza	Merrick Rd/Spruce St.	19,000	11
	Total	181,000	33
	Grand Total	7,100,000	

Source: Nassau-Suffolk Regional Planning Council

The Mix of Retail Activity at the Roosevelt Field Shopping Mall

Retail Category	Categories*	Percent of Total
Accessories	32	9
Cards / Books / Gifts / Stationery	5	1
Children's Fashions	9	3
Department Stores	6	2
Entertainment	4	1
Health and Beauty	24	7
Home Furnishings	10	3
Jewelry	16	5
Luggage	6	2
Men's & Women's Fashions	30	9
Men's and Women's Fashions / Modas de Caballeros y Damas	1	Less than 1%
Men's Fashions	10	3
Men's Specialty Fashions	1	Less than 1%
Music / Electronics / Video	12	3
Optical / Eyewear	4	1
Photography	4	1
Restaurants (order at the counter)	16	5
Restaurants (order via wait staff)	4	1
Services	22	6
Shoes	31	9
Specialty Food	11	3
Specialty Shops	32	9
Sporting Goods / Active wear	14	4
Toys and Games	3	1
Women's Fashions	33	10
Women's Specialty Fashions	5	1
Total	345	100

*Some retailers are classified in more than one category. Therefore the number of categories exceeds the number of stores.

Source: Roosevelt Field Website

The Field Survey: General Findings.

A total of 763 street level businesses were surveyed in Hempstead Village, Uniondale, East Meadow, Carle Place, Mineola, Garden City, Bellmore and Westbury.

- Approximately half of them consisted of restaurants, food service establishments and health and beauty retailers.
- Some 13% provided legal, travel or financial services.
- Another 12% provided various household services.
- Only 9% were clothing or department stores.
- The vacancy rate for the shopping districts studied was 7%.

In all of the downtown shopping districts surveyed, the types of retailers present closely reflected the unique demography, culture, financial status and needs of the immediate community.

**Mix of Street Level Businesses, by Category
Hempstead Village, Uniondale, East Meadow, Carle Place,
Mineola, Garden City, Bellmore, and Westbury**

Category	Number	Percent of Total
Financial Services	48	6
Food/Restaurants	211	28
Health & Beauty	183	24
Clothing/Department Stores	69	9
Home Décor	41	5
Legal Services / Travel	50	7
Household Services	91	12
Clubs & Lounges	8	1
Jewelry	10	1
Vacant	52	7
Total	763	100

Source: Field Survey

The Field Survey: Specific Shopping Districts

Hempstead Village. Retail activity in Hempstead Village is concentrated on Main Street north and south of Fulton Avenue, along Fulton Avenue between Main and Front Streets and between Fronts Street and Hilton Avenue. Hispanic restaurants, deli's, groceries, multi-service businesses and travel agencies are prominently represented in the retail community. The western end of Fulton Street is anchored by a modern Home Depot shopping mall. Approximately half of all street level businesses in the downtown shopping center were restaurants, fast food establishments and health and beauty establishments, 15% were clothing or department stores, and 11% provided legal, tax, and travel services, including money grams to foreign destinations. Specific retailers by street are listed in the tables below.

**Number of Street Level Businesses, by Category
Village of Hempstead**

Category	Number	Percent of Total
Financial Services	3	2
Food/Restaurants	31	25
Health & Beauty	28	23
Clothing/Department Stores	18	15
Home Décor	4	3
Legal Services / Travel	14	11
Household Services	11	9
Clubs & Lounges	4	3
Jewelry	3	2
Vacant	6	5
Total	122	100

Survey Results: Main Street From Fulton to Centre Streets

Retail Store	Retail Store
Around the lock Deli/Grocery	Star Nails
Cabana Fast Food Restaurant & Pizza	Herbert's Country Meat Market
Hempstead Liquor	Shoe Repair
Costamar Travel	Golden House Chinese Food
Milly's Beauty Salon	Passion Bar - VACANT
Hempstead Central Shoe Repair	T-Mobile - VACANT
Main Street Photo Center	Discount Variety Store
K & M Electronics	Village Goldmine Jewelry
Linda's Hispanic Restaurant	One Lister Beauty Supply
Wig World	Sweats & Jeans Clothing
Main Street Fish & Chips	Rina's Restaurant
Gold Town New York Jewelry	Main Street Realty
News Alley Convenience Store	Spring Store
Tres Sabores Restaurant	

Survey Results: Main Street From Centre to Jackson Streets

Retail Store	Retail Store
McDonald's	Guy Allen, Attorney at Law
City National Bank	Cards, Gifts & Stationary
Genesis Barber Shop	Delgado Travel
Patrick's Beauty Salon	China Gardens Restaurant
Jeans & Shoes Land	

Survey Results: Centre Street East of Main Street

Retail Store	Retail Store
Black Butterfly Hair Salon	Marla Beauty Salon
Koinonia Hair Designs	La Frontera Deli/Grocery
Bitas Thrift Shop - VACANT	Gorgeous Nails
Cousin's Clothing	Lee's Fish Market - VACANT
	All County Bail Bonds

Survey Results: Main Street South of Fulton Avenue

Retail Store	Retail Store
Antojitos Family Restaurant	Mor Fashion -VACANT
Pawn Broker	Labor Ready Temporary Employment
VIM Variety Store	Be-Bop Bagel
Medical Center	Discount Variety & Clothing
Sharifov & Russell Lawyers	Animal Hospital
Bicycle Shop	Main Street Mini Mart
Pitit – Petion Hair Salon	DCAP Insurance & Income Tax
Best Seller Book Store	Linda's Travel Agency
Tienda Naturista Botanica	El Golazo Jewelry Repair
Main Discount	Caridad Restaurant
Best Buy Furniture	State-wide Insurance
	Hall of Fame Cutz Hair Salon

Survey Results: Fulton Avenue, Main Street to Front Street

Retail Store	Retail Store
Caribbean Pizzeria	New Fashion Expo
Angel's Nail	Calvary Tabernacle
Marise Hair Design & African Hair Braiding	Taste of Honey Nightclub
R&G Brenner Income Tax Consultants	Essence Beauty Supply
Saw Mill Nails	Street Gear Sneakers
El Mariaci Restaurant	Coco II, Inc. Bar
El Dorado Cafe	Bancomerico
Panda Nails	A&A Kaila Boutique
Servitax Travel & Insurance	Cellular Message Center
Children's Clothing Store	Daisy L. Beauty Salon
Laptop & Computer Repair	El Mango Deli & Grocery
Customized Clothing	Noches Lounge
Art, Frames & Sculptures	Weichert Realtors
Jamaican & Chinese Restaurant	Amerifirst Mortgage - VACANT
Payless Shoe Store	

Survey Results: Fulton Avenue, Front Street to Terrace Avenue

Retail Store	Retail Store
Rainbow Shops	Miranda River Café
Nassau Downs OTB	Metro Vision Optical
Unique Furniture	El Nuevo Arco & Iris Bar - VACANT
Multi Services Express	Stella's Cafe
Irving Singer, Attorney at Law	Bachata - VACANT
	Star 99 Cent Store

Survey Results: Fulton Avenue, Terrace Avenue to Hilton Avenue

Retail Store	Retail Store
Preferred Pharmacy	Home Depot Shopping Center
Verizon Wireless	Chuck E. Cheese
Allen Health Care Services	OLD NAVY
Maxim Health Care	Home Depot
Cleaners	Subway
Nail Smart	Game Stop
James Cafe	Petland
Long Island Beauty School	Super Stop & Shop
USA SCRUBS	GNC Vitamins

Source: Field Survey

Uniondale. Retail activity in Uniondale is concentrated in the corridor along Uniondale Avenue north of Jerusalem Avenue. Almost 70% of all retailers in this area are restaurants, fast food establishments and health and beauty establishments; 16% of all businesses provide various household or personal services, including plumbing, check cashing, day care, and laundry services. Hispanic and Caribbean retailers are well represented within the community. Multiservice firms provide legal, tax and immigration help and arrange travel and money grams to Latin American destinations. **There were no vacant stores in the retail corridor surveyed.**

Number of Street Level Businesses, by Category, Uniondale

Category	Number	Percent of Total
Financial Services	3	4
Food/Restaurants	27	40
Health & Beauty	19	28
Clothing/Department Stores	2	3
Home Décor	1	1
Legal Services / Travel	5	7
Household Services	11	16
Vacant	0	0
Total	68	100

Survey Results: Uniondale Avenue Between Jerusalem Avenue & Henry Streets

Retail Store	Retail Store
C Town Supermarket	Uniondale Chemists
State Farm Insurance	Uniondale Surgical Supply
Check Cashing	Baskin Robbins
Subway Restaurant	Diaf Lawrence Clothing Boutique
Exit Realty	J&C Deli & Grocery
Ting Ho Kitchen	Scholastic Promotions – Plaques & Trophies
Liquor Store	Shiny Nail Salon II
Fine Nails	Mei Ho Kitchen
Dominican Hair Salon	MGL Beauty Salon
Pupuseria Carmelina Restaurant	Celebrity Kutz Hair Salon
La Belle Dominique Beauty Salon	Creole Buffet
Claudy’s Beauty Supply	Blue Banner Real Estate
	Wise Plumbing

Survey Results: Uniondale Avenue Between Webster Ave. & Midwood Street

Retail Store	Retail Store
D&D Day Care	Majestic Hair Design Inc.
Kermit’s Driving School	Classico Bar
Carmitas Restaurante	Check Cashing
Los Muchachos Barber Shop	Greggs Distinguished Kuttz Barber
Supreme Cultural Center & Internet Cafe	Long Island Glass & Door
Ray Anthony Electric, Inc.	Viper Collision
	Unisex Barber Shop

Survey Results: Front Street Between Uniondale Ave. & New Jersey Ave.

Retail Store	Retail Store
Dominican Restaurant	Razor Sharp Barber Shop
Convenience & Smoke Shop	Strong Arm Contracting
Insurance	Absolute Hair Success, Inc.
Tobacco Express	Cleopatra Middle Eastern Food
McDonald’s	Vista Allegra Deli & Grocery
El Nuevo Globito Bakery & Restaurant	Roti King Caribbean Cruise Specialists
Pene & Son Variety Store	Laundry City
Okinawaken Karate	Rivera Multiservice Center
Malibu Cafe	Martin Furniture
Uniondale Beverage Center	Savante’s Food Market

Pickliz Restaurant & Bar	Presto Pizza
	Front Street Liquors

Survey Results: Front Street Between New Jersey Ave. & Chester Street

Retail Store	Retail Store
El Sapon Convenience Deli	AK Nails & Spa
Wing Hing Kitchen	Byron's Barber Shop
Island Legacy Restaurant	La Beaute Hair Care
Express Mortgage & Funding	

Source: Field Survey

East Meadow. East Meadow does not have a geographically concentrated downtown shopping district. Rather, retail activity is dispersed along Hempstead Turnpike between Bly Road and Carmen Avenue/Third Street. Retailers in this corridor are generally located in major shopping malls that are anchored by national market retailers such as Marshall's clothing or Home Depot. Two large shopping centers are also located at the intersection of Front Street and East Meadow Avenue. Smaller neighborhood shopping centers are found along Merrick Road between Front Street and Warren Street.

Almost 60% of the retailers surveyed in this community were restaurants, fast food establishments or health and beauty stores. Approximately 14% provided household or personal services and 7% were vacant. The types of retailers present in East Meadow generally service the population of the immediate community.

Number of Street Level Businesses, by Category, East Meadow

Category	Number	Percent of Total
Financial Services	6	6
Food/Restaurants	30	30
Health & Beauty	27	27
Clothing/Department Stores	9	9
Home Décor	4	4
Household Services	14	14
Legal Services / Travel	1	1
Clubs & Lounges	2	2
Vacant	7	7
Total	100	100

Survey Results: Southwest Corner of Front Street & East Meadow Avenue

Retail Store	Retail Store
Uncle Louie's - VACANT	Wing Zone Fast Food
Heidi Karen Hair Salon	Golden Garden Sushi
Crown Royal Laundromat	Bella Nails
Margarita's Cafe	Prescription Headquarters Drugstore
Bagelicious Catering & Restaurant	AMF East Meadow Bowl
Iannuzzi Fine Food & Catering - VACANT	

Survey Results: Northeast Corner of Front Street & East Meadow Avenue

Retail Store	Retail Store
Marshall's Shopping Center	24-Hour Laundromat
Pathmark Supermarket	Happy Wok Restaurant
Blockbuster Video	Chiropractor
One Hour Photo	Athlete's Shop
Marshall's Clothing Store	Ange Nails
Bagel Biz Deli	

Survey Results: Hempstead Turnpike, Bly Road To Carmen Ave./Third Street

Retail Store	Retail Store
Home Depot Shopping Center	Friendly's Restaurant
Home Depot	Colony Diner
Mandee's Clothing Store	Advance Auto Parts
Modell's Sporting Goods	Preferred Dental Care
Chase Bank	Potter's Pub
Plaza French Cleaners	Kasbah Hookah Lounge
Radio Shack Electronic Store	Subway Sandwich Shop
Payless Shoe Store	Gotta Getta Haircut Hair Salon
The UPS Store	Jackson Hewitt Tax Service
Star Wok Chinese	Verizon Wireless
Pearl's Art & Craft Store - VACANT	Alberto's Pizzeria
99 Cent Zone	Gyrolicious
Camp Nails	Vacant Store
Frantori's Italian Restaurant & Pizzeria	Sign-A-Rama
Beach Bum Tanning	Miami Car Wash
Pita Lovers	Sleepy's Mattress Store
Aquarius Card Store	East Garden Chinese Restaurant
Kielbasa Foods	My Nail & Spa
Zachary's Clothing	Foot Haven Spa - VACANT
Rite Aid Pharmacy	Empire Baking - VACANT
Roslyn Savings Bank	RE Bath Fixtures
Lemon Tree Hair Salon	Yoga Tai Chi
Yogurt & Such	Beverage Barn
Avenue Clothing	Complete Orthopedic Services
Vacant Store	COSI Physical Medicine
North Shore Fitness	New York Physical Therapy & Wellness
	Baskin Robbins
	Masters Auto Collision
	Kitchens & Baths
	Seven Eleven Convenience Store
	Allure Kitchens & Baths
	Zorn's Poultry

Survey Results: Merrick Road Between Hempstead Turnpike & Warren Street

Retail Store	Retail Store
TD Bank	Laundromat
Merchants Credit Union	Paris Drive In Cleaners & Tailors
Seven Eleven Convenience Store	Anginellas's Pizza
Waldbaum's Supermarket	MAB Wines & Spirits
Bank of America	Complete Care Physical Therapy
Capital One Bank	Immediate Care Medical
Benchwarmers Sports Bar & Grill	Jasmin's Dry Cleaners
Moon & Stars Nail & Spa	New Flamingo Nail & Spa
Mirror Image Hair Designs	Venturi Hair Salon
East Meadow Bicycles	The New York Dancers Studio
China Buffet Restaurant	Family Chiropractic

Source: Field Survey

Carle Place. Retail activity within Carle Place is concentrated along Glen Cove Road between Old Country Road and Jericho Turnpike. Unlike the other shopping centers surveyed, the Carle Place shopping center contains the types of retailers that draw customers from outside the immediate community. Several large furniture retailers, including Macy's, Raymour & Flanigan, Ashley Furniture and La-Z-Boy are present. Other specialty retailers like Bridal Reflections, Elements Lighting, Innovation Luggage and the Corningware Factory Store also attract patrons from relatively long distances. This shopping corridor is just north of the Roosevelt Field Shopping Mall, which positions it to attract patrons of Roosevelt Field. Most retailing in the Carle Place shopping corridor is concentrated in large shopping malls.

The mix of retailers in the Carle Place shopping corridor is different from that of the neighborhood shopping centers studied. Only about one-third of the retailers present are restaurants, fast food establishments or health and beauty stores; 21% are clothing or department stores; 18% are furniture or home décor retailers. Six percent of the stores surveyed were vacant.

Number of Street Level Businesses, by Category, Carle Place

Category	Number	Percent of Total
Financial Services	2	3
Food/Restaurants	12	15
Health & Beauty	17	21
Clothing/Department Stores	17	21
Home Décor	14	18
Household Services	11	14
Clubs & Lounges	2	3
Vacant	5	6
Total	80	100

**Survey Results: Carle Place Commons at the
Northeast Corner of Glen Cove & Old Country Roads**

Retail Store	Retail Store
Toys R Us Toy Store	Apple Bank
Panera Bread	Door Store Furniture - VACANT
Petco Pet Supplies	Carle Place Diner
Vincent's Restaurant	Red Lobster
	Vacant Store, 5,000 Sq. Ft.

Survey Results: TJ Maxx Shopping Center, Glen Cove Rd. & Voice Rd.

Retail Store	Retail Store
Play It Again Sports	Utrecht Art Supplies
Eastern Mountain Sports	J&J Hot Bagels & Deli
Minado Japanese Restaurant	Laundromat
Angelo's Pizza & Gyro	Salon La Moda Hair Salon
Happy Hair & Nails	Skye Sterling Silver - VACANT
Quality Cleaners	Weight Watchers
Liquor Store	Game Stop
Cash for Gold	Hale & Hearty
Mr. Chen's Chinese Restaurant	Capital One Bank
Perfumes Outlet	Metrovision Optical
One Hour Photo	Futons Furniture

Survey Results: Glen Cove Rd. & Westbury Ave.

Retail Store	Retail Store
Innovation Luggage	Bridal Reflections Bridal Shop
Calico Corners	Tuxedo Park formal wear
Lucille Roberts	McDonald's
Elements Distinctive Lighting & Furnishings	Huntington Learning Center
Oreck Vacuums	William Matt Salon & Spa
Harrow's Pools	Corning Ware Factory Store
Marburn Bed, Curtain & Bath	Dress Barn Clothing Store
The Bedroom Source	Pier One Imports
Carle Place Fabrics & Crafts	Carter's Children's Clothing
99 Cent Mall	Nail Club
Dinette's Plus	Party City
Perfume Factory Outlet	Staples
Kung Fu Center	Bass Shoes Outlet
Golfsmith Golf Shop	Big Lots Discount Store
Golftec Lessons	Ciao Baby
Luggage Store	Izod Men & Women Clothing
Love My Shoes	Ultra Cosmetics & Salon
Karaco Designed Suits	Subway Sandwich Shop
Furniture to Go	Nassau Off Track Betting
Vacant Store	Ashley Furniture
J&D Brauer Butcher Block	Jennifer Convertible Sofa's
Pearle Vision Eyeglasses	Golden Nail & Spa
Van Heusen Shirts	Sleepy's Mattress Store
The Place Furniture Galleries - CLOSING	

Survey Results: Glen Cove Rd. Between Westbury Ave. & Jericho Tpke

Retail Store	Retail Store
Macy's Discount Furniture	La-Z-Boy Furniture
Raymour & Flanigan Furniture	

Source: Field Survey

Mineola Village. The Village of Mineola has a compact shopping district that abuts the Mineola Station of the Long Island Rail Road and is adjacent to the Nassau County government center and Winthrop University Hospital. The numerous dining facilities, law offices, men's and women's clothiers and personal service businesses within the shopping district reflect the needs of the many workers in the area.

Almost 60% of the retailers in the downtown shopping area are restaurants, fast food establishments or health and beauty stores; 13% provide household or personal services and a relatively high percentage, 12%, are vacant.

Number of Street Level Businesses, by Category, Mineola Village

Category	Number	Percent of Total
Financial Services	5	5
Food/Restaurants	31	34
Health & Beauty	20	22
Clothing/Department Stores	4	4
Home Décor	1	1
Legal Services / Travel	5	5
Household Services	12	13
Jewelry	2	2
Vacant	11	12
Total	91	100

Survey Results: Station Plaza Between Third Ave. & Mineola Blvd. Extension

Retail Store	Retail Store
The Recovery Room Bar & Grill	Station Plaza Coffee Shop & Diner
Farrell, Farrell & Burke Legal Offices	Mineola Mini Market
Mineola Card & Convenience Store	

Survey Results: Mineola Blvd. Extension Between Station Plaza & 2nd St.

Retail Store	Retail Store
R&G Brenner, Income Tax Consultants	Britt Firearms
Shoe Repair	Double H Pub
Watch Doctor Jewelry	Nails World & Spa
Gourmet Grill 5	Mo Joe Coffee Restaurant
Marcelos Law Office	

Survey Results: Mineola Blvd. From 2nd St. to Main St.

Retail Store	Retail Store
Citibank	Mama Antonia's Deli & Cafe
Wong's Noodle House Chinese Takeout	John's Barber Shop
La Belle Gift Shop - VACANT	Rose Fine Jewelry
J Kevin Floral Designs	S.N.Z. Locksmith
Sung's Best Nails	Hair Care Place
The St. James Restaurant	Sophia's Nails II

Survey Results: Main St. From 2nd St. to Station Plaza

Retail Store	Retail Store
Te-Amo Smoke Shop	Buccelli Uomo Fine Men's Clothes
Creations De Belle Gift Shop	Clifford Michael Designed Outlet - VACANT
Café Jane Korean Restaurant	Fox's Women's Clothing Outlet
Long Island Cosmetic Treatment Center	Davenport Restaurant

Survey Results: Main St. From 2nd St. to 1st St.

Retail Store	Retail Store
Rachel's Women's Clothes	Café Rossini Italian Restaurant
Souperfry Gourmet - VACANT	Y&J Kitchen & Bath
Magical Nail & Spa	Main Street Hardware - VACANT
Antonio & Antoinette Beauty Salon	Dao's Hair Salon
On the Spot Tailoring	Vito's Bake Shop

Survey Results: 2nd St. East of Main St.

Retail Store	Retail Store
A&T Variety Store	Terra Latina Gifts

Survey Results: Mineola Blvd. From 2nd St. to 1st St.

Retail Store	Retail Store
Summers Cleaners	Souvlaki Gyro Stop Restaurant
Four Seasons Uniform - VACANT	Subway Restaurant
Winthrop Community Outreach	Bagel Café & Deli
Massaro's Restaurant & Catering	Vacant Store
La Cisterna Restaurant	Jani Oriental Restaurant

Survey Results: Mineola Blvd. From 1st St. to Harrison Avenue

Retail Store	Retail Store
Franwin Pharmacy	Kuck's Deli & Yogurt
Perfect Touch Men's Hair Styling	Mineola Florist
Eleanor Rigby's Restaurant	Caliber Printing
Collins, McDonald & Gann, PC, Lawyers	Pasto Vino Italian Kitchen
Long Island Women's Health Care Group	Mi Ranchito Mexican Grill
Family & Cosmetic Dentistry	Barbara Grocki, Dentist
Mineola Dental Care PC	The Valentine Real Estate & Insurance Agency
	Vivi Nail, Inc.

Survey Results: Old Country Road Between 3rd Ave. & Mineola Blvd.

Retail Store	Retail Store
Murphy's Bar & Grill	Plum Tomatoes Restaurant & Pizzeria
Chris's Deli	Chase Bank

Survey Results: Mineola Blvd., Old Country Road to Station Plaza

Retail Store	Retail Store
HSBC Bank	Verizon Wireless - VACANT
Office Building - VACANT	Blimpie - VACANT
Slates Restaurant - VACANT	1,200 Sq. Ft. for Rent

Survey Results: Old Country Road, Mineola Blvd. To Roslyn Rd.

Retail Store	Retail Store
Action Sports Medicine & Rehabilitation	Panda House Chinese Restaurant
Bank of America	Dunkin' Donuts
The Benchmark Cafe	Citibank
B Well Chiropractic Care	Zutton Hair Styling Barber
Giaccone's Pizzeria	Premier Gourmet Deli

Source: Field Survey

Garden City. Garden City's shopping district actually encompasses two shopping corridors: The Seventh Street corridor and the Franklin Avenue business corridor. The Seventh Street shopping district includes businesses along Seventh Street west of Franklin Avenue, along Franklin Avenue South of Seventh Street, and along Franklin Avenue between Seventh Street and Stewart Avenue. This corridor includes retailers that primarily serve the needs of the local population. Supermarkets, savings banks, cleaners, beauty salons, shoe repair shops and florists are well represented in this shopping area. By contrast, medical offices, banks, brokers and other financial service firms predominate along the Franklin Avenue between Stewart Avenue and Twelfth Street. These businesses tend to draw patrons from a broader geographic area.

The mix of businesses in the Garden City shopping district is considerably different from the mix of business in the other retail centers studied in that financial service firms account for 18% of all businesses. Restaurants and health and beauty establishments account for about 42% of the total. However, the types of restaurants, food stores and spas present in Garden City reflect the relative affluence of the Garden City population. Cases in point include Edible Arrangements, La Nonna Bella Restaurant, Salon Imperiale, and Garden City Skin Care Center. Upscale jewelry, fur, antique stores and art galleries are also present.

Number of Street Level Businesses, by Category, Garden City

Category	Number	Percent of Total
Financial Services	24	18
Food/Restaurants	36	27
Health & Beauty	20	15
Clothing/Department Stores	11	8
Home Décor	9	7
Legal Services / Travel	12	9
Household Services	12	9
Jewelry	3	2
Vacant	7	5
Total	134	100

Source: Field Survey

Survey Results: The Franklin Avenue Business Corridor

Retail Store	Retail Store
Stewart Avenue to Ninth Street	Ninth Street to Tenth Street
CVS Pharmacy	TDK Financial Services
H.L. Gross & Brothers Jewelry	PayHalf Clothing
Asian Moon	Calageros Italian Cuisine
Salon Beyond Home Decor	Garden City Galleries
Wild Fig Mediterranean Grill	Mahalo Health Spa & Tea House - VACANT
New York Sports Clubs	Upper Crust Café
DiSalvo Galleries LTD - VACANT	TD Ameritrade
Novita Wine Bar & Trattoria	Arista Furs
Waterzooi Belgian Bistro	NY Soup Exchange
TD Bank	Sushi YA Japanese Restaurant
M & T Bank	J.E. Lund Jewelers
Smith Barney	Dulci Cafe
Kings Supermarket	Village Pediatrics
	960 Franklin - VACANT
Tenth Street to Eleventh Street	Spa's & Nail
E.Trade Financial	Quiznos Subs - VACANT
Wachovia Bank	Grimaldi's Pizza
Wachovia Securities	Cold Stone Creamery
Community National Bank	Long Island Plastic Surgery Group
TD Ameritrade – COMING SOON	Sovereign Bank
Jenny Craig	J. Barbera Tobacco
Barbatsuly Brothers Furrier	Jin East Japanese Restaurant
Countrywide Bank	
The First National Bank of Long Island	Eleventh to Twelfth Streets
Citibank	Sears Department Store
Garden City Medical Plaza	T. Rowe Price
	Charles Schwab
	Fidelity Investments
	Flushing Bank
	Talbot's Outlet Store
	Astoria Federal Savings Bank
	Lord & Taylor

Source: Field Survey

Survey Results: The Seventh Street Neighborhood Shopping Corridor

Retail Store	Retail Store
Seventh Street West of Franklin Avenue	Seventh Street West of Franklin Avenue
Chase Bank	Personal Training Institute
Riesterer's Cards & Bakery	Garden City Shoe Shop
Seventh Street Gourmet	Hoffmann's Delicatessen
Dougall C. Fraser Real Estate	Starbucks Coffee
Daniel Gale Sotheby's Real Estate	Leo's Restaurant
Farrell Design Associates	Antiques
Roslyn Savings Bank	Things & Stuff
Bank of Smithtown	
Edible Arrangements	Franklin Avenue South of Seventh Street
Wayne's Pharmacy	Garden City Pizza
Taylor Warner Realty	Figaro's Hair Studio
Salon Imperiale	Bagel Man
Clancy & Clancy Insurance	Garden City Bistro
Capital One Bank	Madison Taylor Salon
Neptune Camera	Village Valet Cleaners & Shoe Repair-VACANT
Seventh Street Café	Travel Gallery
Southampton Blazer & Button Company	Garden City Coffee Shop
Coach Realtors	Joinus Nails
Joseph & Joseph Men's Clothing	Once Upon a Dish Pottery Studio
HSBC Bank	Bette La Bru Dressmaker Tailoring
Paninoteca Italian Restaurant	West & Stannish Opticians
Natural Food Market	Exclusive Barber Shop
Key Food Fresh Market	La Nonna Bella Restaurant
Atlantis Chemists -VACANT	Haggens Homes
Food for Thought	Cecilia's Salon
Town Meat Market	June Nail
TCBY Treats	McMahon Realty, Inc.
Dunkin Donuts, Baskin Robbins	
Feldis Florists	Franklin Avenue Between Seventh St. & Stewart Ave.
Rotico Rotisserie Cafe	Garden City Stitches, Needlework
The Pear Tree Gift Shop	Nail Boutique
Garden City Properties	Miniature Manor
Coquette Women's Clothing	Hengstenberg Florists
Garden City Skin Care Center	The Wardrobing Room, Women's Clothier
Seventh Street Travel	Optometrists Office
Garden City Wines & Spirits	Le Joaillier Fine Jewelry
Seventh Street Stationary	Andron Realty Group
Chicos	Prilik Galleries - VACANT
Walk Street Restaurant	Andrew Roberts Hair Salon
Adelphi Cleaners	Anastasia's Hair Care
Sunflower Fine Art & Framing	The UPS Store
Culinary Heights, Inc.	Liberty Travel

Source: Field Survey

The Bellmores. Merrick Road is the dominant shopping street within the Bellmores. Much of the retail activity along Merrick Road takes place between Winthrop Avenue and Newbridge Road. Although the Bellmores do not have a compact downtown shopping district as in Mineola or Hempstead or Garden City Villages, the types of stores represented along Merrick Road generally serve neighborhood populations. Almost 60% of the retailers surveyed were restaurants, fast food establishments or health and beauty stores; 12% provided various household or personal services. A relatively high percentage, 10%, was vacant.

Number of Street Level Businesses, by Category, The Bellmores

Category	Number	Percent of Total
Financial Services	3	3
Food/Restaurants	21	23
Health & Beauty	30	33
Clothing/Department Stores	5	6
Home Décor	7	8
Legal Services / Travel	2	2
Household Services	11	12
Jewelry	2	2
Vacant	9	10
Total	90	100

Source: Field Survey

Survey Results: Merrick Road From Winthrop Avenue to Newbridge Road

Retail Store	Retail Store
Christopher Salon & Spa	Quiznos Subs
Fresh Break Deli/Grocery	Oz General Contracting
Ultra Cleaners - VACANT	Shapers Fitness - VACANT
Goodwill Donation Center	Island South Physical Medicine & Rehabilitation
Town Bagel of Bellmore	Dun Rite Auto Parts
Shang Hai Pavilion Restaurant II	Blue Nails
J & H Jewelry	Signature Florist - VACANT
Celebrity Cutz Hair Salon	Bellmore Kickboxing Academy
Bellamore Pizzeria	DJ's, Video, Photographer
Laser Plus Spa	The Battery Terminal
Mirrabel Liquors	Have You Heard Invitations & Gifts
Texicana Grill	Seven Eleven
Precision Pharmacy	Olga Hair Stylist - VACANT
Bellmore Drive In Cleaners	No Name Store - VACANT
Antoinette's Ristorante	Sign Up Now Sign Store
B-Art Cleaners	Jim Cuccias & Sons, General Contractor
Kai Ying Chinese Restaurant	Gem Doors & Windows
Red Dragon Karate	Turnbury Lady Outlet
John Moore's Deli/Caterers	Personal Touch Cosmetics & Fragrances
Spiga Bakery/Espresso Bar	Bella Notte Italian Restaurant
Pearsall Dance Center	China Unicorn Takeout Restaurant
Crystal Water Collections Clothing	Convenience Store
Hair is Us Hair Salon	Paramount Personal Staffing
Sharon Nails	Michele's Nail Salon
Diversified Financial Consultants	Total Healthcare Staffing
Ace Home Centers	Frills & Things, Fabric & Craft Supplies
Olga's Hair Design	Nicola Kitchen & Bath Design Studio

**Survey Results: Merrick Road From Winthrop Avenue to Newbridge Road
(Continued)**

Medical Center	South Bellmore Veterinary Group
Roslyn Savings Bank	Spiro's Famous Pizza
Chase Bank	Zorn's Poultry
Friendly's Restaurant	D&G Equipment Rentals
Nail C.C.	Tire World
Sage Bistro French Cuisine	De La Mer Jewelry/Salon
Onzon Thai House	Melexis Fitness Studio
Xtreme Gym	Living Legends Memorabilia
Nails and Skin Care	United Mortgage Brokerage - VACANT
Michael Riccio Salon	Optical Concepts
Sunset Travel	Century 21 Real Estate
Women's Clothing Factory Outlet - VACANT	2464 Merrick Rd. - VACANT
Pedal Car Guy – Children's Toys	No Name Store - VACANT
Silverman & Gott LLP, Dentists	George Tung, MD Ophthalmology
Atlantic Dermatology Associates	Merrick Auto Center
Greek Delight Restaurant	Long Island Women's Health Care
Salon Scarpetto	Payless Shoe Source
Eternal Lites Candle Emporium	Rite Aid Pharmacy
	One-on-One Exercise and Chiropractic

Source: Field Survey

Westbury Village. Westbury Village has a compact downtown shopping district along Post Avenue just north of the Westbury Long Island Rail Road station. A local business improvement district (BID) has been working to beautify the downtown and make it attractive to shoppers. Hispanic shops predominate in this downtown, a reflection of the unique demography of the local population. Almost 60% of the shops surveyed were restaurants, fast food establishment or health and beauty stores; 14% provided tax, legal, immigration and travel services, including money grams to Latin American destinations; 12% provided various household services and 9% were vacant.

Number of Street Level Businesses, by Category, Westbury Village

Category	Number	Percent of Total
Financial Services	2	3
Food/Restaurants	23	29
Health & Beauty	22	28
Clothing/Department Stores	3	4
Home Décor	1	1
Legal Services / Travel	11	14
Household Services	9	12
Vacant	7	9
Total	78	100

Source: Field Survey

Survey Results: Post Avenue From Winthrop Street/Drexel Avenue to Union Ave.

Retail Store	Retail Store
Bank of America	State Farm Insurance
Westbury Pharmacy	Fidelis Health Care
ESP Realty	St. Brigid's Attic – Vintage Clothing
Village Chiropractic	Nationwide Insurance
Esposito's Meat & Pork Market	Elegante Hair Fashions
Century 21 Real Estate	Minuteman Press
Signature Salon	Wheatley Hills Discount Wine & Spirits
On A Roll Deli	Revitalaser – Printers, Computers FAX
Galleria Restaurante	GHE Employment Agency
Funari Insurance Agency	Roman's Barber Shop
Café Gino's	Renata's Deli - VACANT
Reflections Hair Salon - VACANT	Mirella's Continental Restaurant
Westbury Art, Frame and 1 Hour Photo	Dr. Louis Milhim, Dentist
Pierre Beauty Supply & Cosmetics	Latino Video Music - VACANT
Friar's Tavern	Dawn Nails
Creмоса Food Market	ABC Business Services Corp., Accounting, Tax
Unisex Haircutters - VACANT	Charles W. Beers, Inc.
Post Bagels & Restaurant	Post Avenue Cafe
Rite Aid Pharmacy	Dominic Shoe Repair
Westbury Dental	Maria's Pastry Shop
Burglar Busters Security - VACANT	The Wigbox Hair Boutique
Advantage Tennis	Trophy Realty & Construction
Chinatown Kitchen	Family Foot Care
John's Custom Tailors	Aquaquality Pools & Spas
Biscocho Dominicano Restaurant	A&B Grocery
El Pueblito Meat Market	The Language Center
Jin's Apple Farm, Inc. Grocery	Nicole & Alexandra Unisex Salon
Queen's Nails	Alfredo Restaurant
Subway Subs	J. Carle Locksmith
Dr. Jerome Kramer - Optometrist	No Name Store - VACANT
Multi Services Express – Money Grams, Income Tax	Kim's Nail
Chase Bank	Blue Skyline – Income Tax
Benny's Ristorante	Hair Unlimited Unisex Salon
Mediterranean Kebab House	Zapateria Mexico – Mexican Hats & Boots
Jackson Hewitt Tax Service	Rosita's Deli & Grocery
Beauty Nails	Julio's Barber Shop
El Usuluteco Restaurant	Esparanta Hair Salon
Mexican Western Attire	Azteca Deli & Grocery
Laundromat	No Name Store - VACANT

Summary of Findings

Of the eight downtown shopping centers surveyed, all but Carle Place and the Franklin Avenue Corridor within Garden City contain retailers that predominantly serve the needs of their resident populations. Such neighborhood-type retailers generally understand the needs of their customers and presumably stock merchandise and maintain store hours that meet those needs. In Hempstead Village, Uniondale and Westbury Village, retailing is geared to the needs of their large Hispanic population.

Given the results of the field survey, it is unlikely that the predominantly entertainment-related and neighborhood-type retailing proposed for the Lighthouse will compete with most existing retail businesses in surrounding downtowns. Rather, the purchasing power (\$250M annually) that potential Lighthouse residents will bring to the community is likely to have a positive impact on the retail community.

The Lighthouse development is expected to house more than 4,800 residents in 2,300 residential units at full development and full occupancy. Given the anticipated sales prices of the residential units, Lighthouse residents inject as much as \$250 million annually in discretionary purchasing power into the community.

As the following table shows, Uniondale, East Meadow and Hempstead Village are characterized by incomes that are below the comparable Nassau County benchmark income. Presumably, the price points of retailers located within these communities are consistent with the income levels within these communities. Therefore, the purchasing power of each community may be sufficient to support its own retail activity. Clearly any additional purchasing power introduced by residents of the Lighthouse will be helpful to retailers in these communities. Only Garden City definitely has the resident purchasing power to support its local retailers. Even here, however, the additional purchasing power introduced by Lighthouse residents may be helpful to Garden City merchants.

Median & Mean Household Income, Selected Communities 2007

	Median Income	Mean Income
Nassau County	\$87,658	\$115,285
Levittown	85,479	94,124
Hicksville	76,110	92,699
Franklin Square	80,164	89,461
Uniondale	71,941	75,704
East Meadow	86,582	101,896
Garden City Village	142,788	203,329
Hempstead Village	50,347	62,006

Source: U.S. Census Bureau, 2005-2007 American Community Survey; Income in Past 12 Months (2007)

It is reasonable to conclude, therefore, that the additional purchasing power that potential Lighthouse residents will bring to the community will be a positive development for existing retailers.

Specific Concerns: Hempstead Village

Hempstead Village is in the process of implementing a development plan that includes an additional 283,600 square feet of retail space. They have performed a comprehensive analysis of the potential for future retail development and have concluded that there is a potential for additional clothing & accessory and furniture and home furnishing stores. Based on the field survey of retailing within the Hempstead Village CBD, this seems like a reasonable direction for future retail development especially when you consider the amount number of residential units they are planning which increase the local spending power

The retailing proposed for the Lighthouse development will in no way impede future retail development within Hempstead Village. Proposed Lighthouse retail development will include cafes and restaurants likely to be patronized by those who attend events at the transformed Coliseum or the proposed Cinema. It will include retailers specializing in sports-related merchandise. It will also include groceries and purveyors of various personal services, including cleaners, shoe repair shops, tailors and florists, which serve the needs of Lighthouse residents.

The trade area for some of this retailing will undoubtedly be greater than five miles, which will include Hempstead Village. Sports events can draw fans from fifty miles or more. *The important point is that the retail development proposed for the Lighthouse will complement not conflict with the retail development planned for Hempstead Village and will most likely increase revenues for the local merchants*

Specific Concerns: Garden City Village

The specific concerns expressed by Garden City Village are of a slightly different nature. Garden City is concerned about growing storefront vacancies associated with the recession and about whether the new retail space proposed for the Lighthouse will complete with existing retailers in the Village.

The field survey showed that only 5% of the 134 retail spaces surveyed in downtown Garden City were vacant and that these vacancies occurred primarily along Franklin Avenue and affected some its financial service firms. There were only two vacancies in the Seventh Avenue neighborhood-shopping corridor. Since the current recession started in the financial services sector, it is not surprising to find vacancies among financial service firms along Franklin Avenue. Presumably this situation will be resolved when the economy begins to recovery.

In the longer run, however, the relatively affluent residents that the Lighthouse development will bring to the community are likely to be potential customers for the many banks, investment houses and brokers along Franklin Avenue. In short, the Lighthouse development is likely to have a positive rather than a negative impact on the Franklin Avenue business corridor.