GROWTH PROJECTIONS

This chapter is a portion of the Inventory and Analysis section of the York Comprehensive Plan. Its purpose is to provide information about the local economy and labor force. This information is essential to inform decisions in several sections of the Comprehensive Plan, including economic development, fiscal policy, land use and transportation.

The text of this Chapter is organized into two sections: Residential Growth Projections and Commercial and Industrial Growth Projections.

It is important to preface this Chapter with a warning about projections. Projections, by their very nature, are simply educated guesses about what the future holds. There is no crystal ball. There is no certainty. It is a matter of making assumptions based on what is known at this point in time, and extrapolating trends into the future. As new information becomes available and circumstances change (for example if the federal government decides to close the Portsmouth Naval Shipyard) the projections in this chapter will become outdated, and therefore will be less relevant and useful. It will not be feasible to incorporate all projections made in the future into this Chapter. It is hereby established that projections contained in this Chapter should not be used to the exclusion of all others. It will be the responsibility of the data user to determine which projections and information are most suitable.

Comprehensive Plans in Maine must comply with the legal requirements of state law, specifically Title 30-A §4326. The law establishes that land use policy must be based on information and analysis, and accordingly the law establishes that comprehensive plans must contain an Inventory and Analysis section. This Chapter is one part of the Inventory and Analysis section of the York Comprehensive Plan. This Chapter, and others being prepared at this time, marks a change in format for the Plan. The Inventory and Analysis section is being converted to a series of technical reports on individual subjects (population, housing, land use, natural resources, etc.). Each is complete as a stand-alone report on its specific subject, but taken as a set they comprise the complete Inventory and Analysis section. This new format should encourage the Town to keep the Plan up to date, and should increase public access to information contained in the Inventory and Analysis. During the transition from a single Inventory and Analysis section to a series of single-subject reports, some degree of overlap of content and information is expected. For purposes of interpretation, the most current document shall supersede any earlier version or chapter of the Inventory and Analysis section. When the entire set of Inventory and Analysis chapters is adopted, the 1999 Inventory and Analysis section of the York Comprehensive Plan can be repealed.

Summary

York is growing. Population, housing and non-residential uses are each experiencing growth at a significant rate. Projecting population by a variety of techniques shows growth ranging between 3,500 and 8,800 additional year-round residents in the coming 20 years. In terms of housing

units, this is between 2,100 and 4,800 new units. Based on an earlier build-out analysis, York would be completely built out some time between 2025 and 2050. Land needed for projected commercial and industrial growth would barely reduce the maximum potential residential growth projection. If these projections are correct, timely action to conserve critical resources while fostering appropriate patterns and designs of development is essential as build-out approaches.

Residential Growth Projections

This section examines expected future population growth in the Town of York and how it will affect planning issues such as housing and public facilities. There are three types of projections covered in this section: population, housing and school enrollment.

1. Population Projections

Population projections for the Town of York have been completed by age group for each five-year interval from 2000 through 2025. In order to examine different scenarios of future population growth, three different sets of population projections were done.

- **Survival and Net Migration Method** – This method uses subregional annual birth, death and net migration rates from the years 1990-2003 to project population through 2025.

- **Historic Growth Rate Method** – This method takes the Town's compound annual growth rate (CAGR) for the years 1980-2000 to estimate future population if the Town continues to grow at the same rate into the future.

- **Capped Growth Method** – This method examines the effect of allowing the Town's residential growth limitation of 84 units per year on future population growth. It assumes that exactly 84 units will be built each year through 2025.

A. UNIVERSAL ASSUMPTIONS

Each of the three methods of projecting future population growth has many of its own unique assumptions, which are discussed in greater detail below. However, there are several assumptions that are consistent for all three methods. These universal assumptions are listed below.

Average Household Size

Average household size has been on the decline locally, regionally and nationally for several decades. In the Town of York, the average household size has dropped from 2.65 persons in the 1980 Census to 2.42 in the 2000 Census. This represents a decline of more than two percent for each five-year period between 1980 and 2000.

For these projections, it is assumed that the rate of decline in average household size will slow in the future to one percent per five-year period, as extending the historic rate would result in a 2025 average household size of 2.16—this much of a drop is unlikely to occur. Given the aging population in the State of Maine and in York, and recent research into the number of school-age children living in newer homes, it may be appropriate to conduct sensitivity analysis on this variable for average household sizes as low as 2.0 people per household.

The assumed average household sizes are as follows:

Table 1
Average Household Size Assumptions

2000	2005	2010	2015	2020	2025
2.42	2.40	2.37	2.35	2.32	2.30

Source: Southern Maine Regional Planning Commission

Age Profile

Age profile assumptions are based on Maine State Planning Office projections of age shifts for the Town of York through 2015. These projections foresee a continued shift towards an older population in York. The shift in age profile has been flattened out somewhat, as these projections take the state's expected 2015 age profile and apply it to 2025. For each five-year interval between 2000 and 2025, the shift is projected to occur at a uniform rate. As with household size assumptions, sensitivity analysis on this variable may also be warranted because it may be unrealistic to assume the aging trends will stop after 2015.

For example, the 45-49 age group represented 9.3% of the Town's population in 2000 and the state's 2015 projections show it growing to 11.5% of the population. In these projections, the 11.5% share for this age group is not achieved until 2025. In the interim, the shift occurs as follows:

Table 2
Age Profile Shift Example

Age Group	2000	2005	2010	2015	2020	2025
45-49	9.3%	9.8%	10.2%	10.6%	11.1%	11.5%

Source: Southern Maine Regional Planning Commission

To simplify age projections, the five-year groups were combined into six categories that more accurately reflect housing markets:

1. Pre-School (Age 0-4)
2. School Age (Age 5-19)
3. Household Formation (Age 20-34)
4. Move-Up (Age 35-54)

5. Empty Nester (Age 55-64)
6. Retiree (Age 65+)

The projected age profile follows.

Table 3
Age Profile Assumptions
(Age Group as Percent of Total Population)

Age Group	2000	2005	2010	2015	2020	2025
Pre-School (0-4)	4.9%	4.9%	4.8%	4.7%	4.6%	4.6%
School Age (5-19)	19.5%	18.8%	18.1%	17.4%	16.7%	16.0%
HH Formation (20-34)	11.3%	10.8%	10.3%	9.8%	9.4%	8.9%
Move-Up (35-54)	35.0%	34.9%	34.9%	34.9%	34.9%	34.8%
Empty Nester (55-64)	12.3%	12.9%	13.4%	14.0%	14.6%	15.2%
Retiree (65+)	17.0%	17.7%	18.4%	19.1%	19.8%	20.5%

Source: Southern Maine Regional Planning Commission

Seasonal Housing as Share of Total Housing

York has a substantial seasonal population. According to 2000 Census data, about 33 percent of the Town's existing housing stock is comprised of units that are only "for seasonal, recreational and occasional use." Thus, future projections of population and housing will need to account for some amount of seasonal occupations.

Throughout Maine, most of the growth in historically tourist-oriented communities such as York is from new year-round residents, and not from vacationers. Thus, the assumption is that 85 percent of future housing units in York will be for year-round use and just 15 percent will be for seasonal use. This assumption does not take into account the potential for existing seasonal units to be converted into year-round units. While seasonal conversions will undoubtedly occur in York, there will be new seasonal units built to replace them. The 85/15 split therefore takes into account the potential for some losses in the seasonal supply due to conversions to year-round use. (Note: cursory research on newly constructed homes shows that only about 30% have registered voters—which could be an indication of a much higher rate of seasonal use.)

Compared to historical data from 1970 to 2000, 85% of new construction being year-round is high. In this period actual figures show year-round construction closer to 75% of the total. However, the introduction of the Growth Management Ordinance in 2000 is reasonably expected to cause current conditions to differ from prior periods. For this reason, the 85% assumption is reasonable. Anichdotal information from Tim DeCoteau, a Code Enforcement Officer in York for almost 2 decades, also lends credibility to this assumption. He indicated there are a few new seasonal homes built each year, and of the couple dozen tear-downs

York experiences annually, a significant portion are new seasonal units replacing older seasonal units.

Population in Group Quarters
Though most of York's population lives in households, a small share of the Town's residents is housed in group quarters. Data from the 2000 Census show that 1.44 percent of York residents live in group quarters. It is assumed that this share will continue through 2025.

B. SURVIVAL AND NET MIGRATION METHOD

The Survival and Net Migration Method of projecting population growth is based on three rates: birth, death and net migration. Data were assembled on annual births, deaths and in and out-migration for the years 1990 through 2003 for York and its surrounding communities (Eliot, Kittery, Ogunquit, South Berwick and Wells). The sub-region was used as the measuring stick in order to get a better sense of these rates beyond the Town of York.

Table 4 below displays birth, death and migration rates for the subregion for the 1990-2003 period. The calculation of these rates is shown in Appendix A

Table 4
Birth, Death and Migration Rates, 1990-2003
(Rates are Annual Averages Per 1,000 Population)

Item	YORK	Eliot	Kittery	Ogunquit	South Berwick	Wells	TOTAL
Birth Rate	10.94	10.71	13.05	6.75	14.08	10.11	11.58
Death Rate	9.29	6.90	8.49	13.48	6.19	8.11	8.18
Net Migration Rate	25.46	8.86	-0.22	37.18	6.65	21.32	13.68

Source: Southern Maine Regional Planning Commission

The above annual rates of change were applied to York's 2000 Census population to project total population for each five-year interval through 2025. The universal age profile assumptions were then applied to these totals to produce population projections, as shown in Table 5.

Table 5
Projected Population Change, 2000-2025
Survival and Net Migration Method

Age Group	2000	2005	2010	2015	2020	2025	Num Chg	% Chg
Pre-School (0-4)	636	680	730	780	830	880	244	38%
School Age (5-19)	2,506	2,620	2,730	2,850	2,970	3,090	584	23%
HH Formation (20-34)	1,449	1,510	1,550	1,610	1,670	1,720	271	19%
Move-Up (35-54)	4,494	4,870	5,290	5,740	6,210	6,750	2,256	50%
Empty Nester (55-64)	1,582	1,790	2,030	2,310	2,600	2,940	1,358	86%
Retiree (65+)	2,187	2,480	2,780	3,150	3,520	3,960	1,773	81%
Total	**12,854**	**13,950**	**15,110**	**16,440**	**17,800**	**19,340**	**6,486**	**51%**

Source: Southern Maine Regional Planning Commission

C. HISTORIC GROWTH RATE METHOD

The Historic Growth Rate Method is the most basic of the three—it simply takes the Town of York's compound annual population growth rate from 1980-2000 of 2.11 percent and extends it into the future. This method is a good way of understanding the question of "what happens if we continue to grow at the same rate?"

Table 6 below shows total projected population and population by age group for by five-year interval from 2000 through 2025.

Table 6
Projected Population Change, 2000-2025
Historic Growth Rate Method

Age Group	2000	2005	2010	2015	2020	2025	Num Chg	% Chg
Pre-School (0-4)	636	700	760	830	910	990	354	56%
School Age (5-19)	2,506	2,680	2,870	3,060	3,250	3,460	954	38%
HH Formation (20-34)	1,449	1,540	1,640	1,730	1,820	1,920	471	33%
Move-Up (35-54)	4,494	4,980	5,530	6,130	6,800	7,540	3,046	68%
Empty Nester (55-64)	1,582	1,830	2,130	2,460	2,850	3,290	1,708	108%
Retiree (65+)	2,187	2,510	2,920	3,350	3,860	4,430	2,243	103%
Total	**12,854**	**14,240**	**15,850**	**17,560**	**19,490**	**21,630**	**8,776**	**68%**

Source: Southern Maine Regional Planning Commission

D. CAPPED GROWTH METHOD

The Capped Growth Method depends on three variables:

- New year-round units built annually;
- Average household size; and
- Group quarters population

These assumptions are all taken from the Universal Assumptions section above. Applying the year-round assumption of 85 percent to the existing maximum rate of growth of 84 units per year, it is assumed that 71 new year-round units will be added each year during the projection period. As shown in Table 1, the average household size is assumed decline from 2.42 persons in 2000 to 2.30 persons in 2025. Finally, group quarters population is estimated to continue at 1.44 percent of total population.

Based on these assumptions, as well as the age profile assumptions from above, the Capped Growth population projections were calculated. Table 7 displays total projected population and population by five-year interval from 2000 through 2025.

Table 7
Projected Population Change, 2000-2025
Capped Growth Method

Age Group	2000	2005	2010	2015	2020	2025	Num Chg	% Chg
Pre-School (0-4)	636	660	690	710	730	750	114	18%
School Age (5-19)	2,506	2,550	2,580	2,610	2,620	2,610	104	4%
HH Formation (20-34)	1,449	1,470	1,480	1,470	1,470	1,460	11	1%
Move-Up (35-54)	4,494	4,750	5,000	5,240	5,470	5,710	1,216	27%
Empty Nester (55-64)	1,582	1,750	1,920	2,110	2,290	2,480	898	57%
Retiree (65+)	2,187	2,410	2,640	2,860	3,100	3,350	1,163	53%
Total	**12,854**	**13,590**	**14,310**	**15,000**	**15,680**	**16,360**	**3,506**	**27%**

Source: Southern Maine Regional Planning Commission

E. COMPARISON OF THREE METHODS

The expected change in population in the Town of York from 2000 through 2025 ranges from about 3,500 persons (Capped Growth) to 8,800 persons (Historic Growth Rate). The middle scenario (Survival and Migration) envisions about 6,500 new residents over the 25-year period.

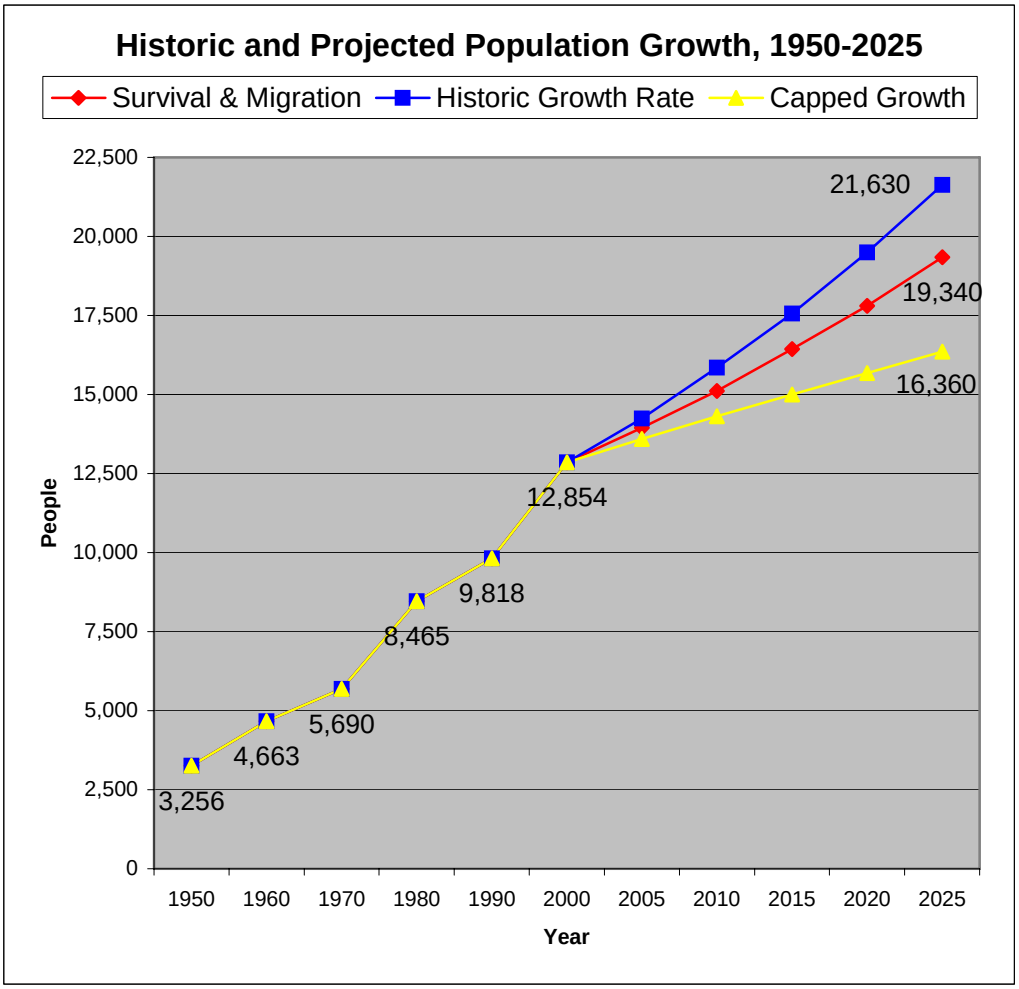
The Survival and Migration Method presents the most likely outcome, as it uses actual historic data on birth, death and migration rates in the region. The other two methods each stem from artificial assumptions:

- The Historic Growth Rate Method is based on a smaller population base (just 8,465 people in 1980)—as the population base increases, sustaining this rapid growth rate is unlikely.
- The Capped Growth Method places a limit on the number of housing units that can be built each year. As the population base grows, this assumption by its very definition must slow down the percentage rate of growth.

The most likely scenario to occur is growth that is somewhere higher than the Capped Growth Method and between the Survival and Migration method. The Survival and Migration method probably presents the most realistic picture of the future population growth in York, but there is strong public pressure to maintain some level of residential growth control. Based on this understanding, the Town must be prepared to absorb about 4,000 to 5,000 new residents in the coming 20 years.

Figure 1 below shows historic population growth from 1950 to 2000 and the projected growth for each of the three scenarios.

Figure 1



F. COMPARISON WITH REGIONAL AND STATE PROJECTIONS

The Maine State Planning Office (SPO) projects population through the year 2015 for each municipality in the state. SPO projections for York predict a 2015 population level of 16,594. This is a very similar projection to the 2015 projection from the Survival and Net Migration method of 16,400. Projections for 2015 for the other scenarios are 17,560 for Historic Growth Rate and 15,000 for Capped Growth.

SPO's projections envision York continuing to grow at a much faster rate than York County as a whole and the State of Maine. The overall 2000-2015 growth rates projected by SPO are: Town of York: 29%; York County: 15%; and State of Maine: 8%.

2. Housing Projections

Housing projections are based on the three different methods of population projections from the preceding section. The translation of population projections to housing projections was done in a three-step process:

1. Calculate new household population by netting out group quarters population growth from total population growth
2. Calculate total number of new year-round housing units (i.e., households) by dividing total household population by average household size
3. Calculate total number of new housing units by adding seasonal units to year-round units

The assumptions for all of these calculations are the same as for the population projections (see Universal Assumptions section above).

Table 8 below shows the projected need for new housing for each of the three growth scenarios.

Table 8
Projected New Housing Need, 2000-2025
(Includes both Year-Round and Seasonal Units)

Method	2000-2005	2005-2010	2010-2015	2015-2020	2020-2025	Total Need
Survival & Migration	585	650	740	740	870	**3,585**
Historic Growth Rate	725	870	920	1,050	1,190	**4,755**
Capped Growth	415	420	420	400	410	**2,065**

Source: Southern Maine Regional Planning Commission

The expected amount of new housing units needed in York between 2000 and 2025 is therefore between 2,100 and 4,800, with a moderate estimate of 3,600. This averages out

to between 84 and 190 units per year, with the middle estimate being 144 per year. Actual town permit data from 2000 through 2003 show that 353 units were added through 2004. Accounting for this real change, the amount of new units needed between 2005 and 2025 ranges from 1,700 to 4,400.

In 2001 the York Open Space Committee commissioned a build-out study. This study condluced in a document, "Final Report: Build-Out Analysis for the Town of York," dated September 4, 2001. This was prepared by RKG Associates of Durham, NH, and Lobdell Associates, Inc., of Landaff, NH. This report is hereby incorporated by reference into this Chapter.

The build-out analysis sought to define the maximum number of housing units that could be developed in York given zoning density limits, soils constraints, and availability of municipal sewer service. Assuming all available land develops as residential, somewhere in the order of 4,000 additional residential units could be built in York. The highest projection of growth (historic growth rate method) shows York reaching its buildout around 2025—just 2 decades from now. The lowest projection (capped growth method), if extrapolated, puts York at its maximum residential build-out by about 2050.

To gain a more thorough understanding of the types of housing that will be needed in the future in the Town of York, these total housing projections were then broken out by household type. The six age group categories from the population projections were combined into four different housing markets:

1. Young Families – includes ages 0-4 and 20-34
2. Older Families – includes ages 5-19 and 35-54
3. Empty Nesters – Ages 55-64
4. Retirees – Ages 65+

These categories are merely meant to illustrate the types of housing that will be demanded and are not all-inclusive. For example, the 20-34 age group will likely include many single people and non-family households, as well as young families with children. Also, a fifth category of housing is seasonal housing units.

Table 9 shows total 2000-2025 housing projections for each scenario by housing market grouping.

Table 9
Projected New Housing Need by Market Grouping, 2000-2025

Method	Young Families	Older Families	Empty Nester	Retiree	Seasonal	Total Need
Survival & Migration	261	1,369	616	799	540	**3,585**
Historic Growth Rate	401	1,859	766	1,009	720	**4,755**
Capped Growth	101	709	416	539	300	**2,065**

Source: Southern Maine Regional Planning Commission

3. School Enrollment Projections

The York School Department produces ten-year projections of school enrollment each year. As a check on these projections, school-age population statistics from the above population projections are compared with them in this section.

The most recent projections of school enrollment were completed by Planning Decisions, Inc., in November 2004. These projections put forth two alternative growth scenarios for enrollment through the 2014-2015 school year. The first, the Best Fit Model, was calculated based on recent birth and migration rates. The second, the Recent Development Model, assumes that the Town's building cap will slow the rate of in-migration of families with children entering school.

Table 10 compares the two sets of enrollment projections.

Table 10
York School Department Enrollment Projections, 2004-2015

	Actual	Projected		Change	
	2004-2005	2009-2010	2014-2015	Number	Percent
Elementary (K-4)					
Best Fit	737	777	757	20	2.7%
Recent Development	737	752	731	-6	-0.1%
Middle (5-8)					
Best Fit	669	641	674	5	0.1%
Recent Development	669	637	651	-18	-2.6%
High (9-12)					
Best Fit	703	686	676	-27	-3.8%
Recent Development	703	686	665	-38	-5.4%
Total Enrollment					
Best Fit	2,109	2,104	2,107	-2	-0.0%
Recent Development	2,109	2,075	2,047	-62	-2.9%

Source: Planning Decisions, Inc., November 2004

Despite continued growth in the Town of York (more than 1,000 new housing units), Planning Decisions' projections foresee no gain in the overall school enrollment over the next ten years. This is due partly to low birth rates in York and partly to the fact that most in-migration is from empty-nesters and retirees who do not have school-age children.

Looking at grade level enrollment, elementary and middle school enrollments are expected to grow slightly in the Best Fit Model and to decline slightly in the Recent Development Model. High School Enrollment is expected to decline in both scenarios.

Recent research into school enrollment and new home construction has called some attention to assumptions about the number of children per household. As this research is formalized, it is likely to be reflected in future school enrollment projections.

The population projection scenarios from earlier in this chapter do show some growth in the school-age population. Depending on the scenario, the population between ages 5-19 is expected to grow by between 100 and 950 persons. However, there are other variables to consider in estimated actual public school enrollment: private schools, dropout rates, home schooling and enrollment in other districts.

The general conclusion from this comparison is that, though historic information suggests that school enrollment will remain flat over the next ten years, the Town of York should plan for some level of enrollment increase beyond the year 2015.

Commercial and Industrial Growth Projections

This section examines expected future employment growth in the Town of York and how it will affect the need for land for commercial and industrial development. There are two types of projections covered in this section: Employment; and Commercial and Industrial Land Needs.

1. Employment Projections

Projections of future employment in the Town of York are derived from employment forecasts for York County as completed by the Center for Employment and Business Research (CBER) at the University of Southern Maine. CBER's projections look at future employment through the year 2025 by major industry group for the whole county.

Two sets of employment projections were completed:

- **County Growth Rate Method** – This method takes CBER's annual average growth rates for each industry group and five-year interval from 2000 through 2025 and applies them to the 2003 employment level in the Town of York (take from the Economic Base chapter).

- **Adjusted Growth Rate Method** – This method takes into account the fact that, over the past 15 years, York's employment level has grown much faster than has York County's. The CBER growth rates from the county growth rate method have been doubled in this scenario. For negative growth rates, the rate of loss was halved.

In both scenarios, employment categories in the baseline data from the Maine Department of Labor differ somewhat from CBER's categories. The CBER growth rates have been applied to the appropriate corresponding employment categories from the Department of Labor data.

A. COUNTY GROWTH RATE METHOD

The County Growth Rate Method makes the assumption that the Town of York's employment base will grow at the same pace as York County's over the period from 2003 to 2025. Table 11 below displays the expected annual growth rates by employment category and five-year interval for this method.

Table 11
Projected Annual Rates of Employment Change by Five-Year Interval
County Growth Rate Method

Employment Category	2003-2005	2005-2010	2010-2015	2015-2020	2020-2025
Construction	1.1%	-0.3%	-0.3%	-0.3%	-0.1%
Manufacturing	-3.8%	-0.5%	0.1%	0.3%	-0.1%
Trade, Transportation & Utilities	-0.1%	0.3%	0.2%	0.1%	0.0%
Information	1.8%	2.1%	1.5%	1.3%	1.2%
Financial Activities	2.8%	1.2%	0.7%	0.4%	0.3%
Professional & Business Services	1.8%	2.1%	1.5%	1.3%	1.2%
Education & Health Services	1.8%	2.1%	1.5%	1.3%	1.2%
Leisure & Hospitality	1.8%	2.1%	1.5%	1.3%	1.2%
Other Services	1.8%	2.1%	1.5%	1.3%	1.2%
Other Categories	0.4%	0.9%	0.8%	0.6%	0.6%

Source: USM Center for Business & Economic Research; Southern Maine Regional Planning Commission

Table 12 applies these growth rates to the 2003 employment totals for each industry category to display future projections of employment for each one.

Table 12
Projected Annual Employment in York by Five-Year Interval
County Growth Rate Method

Employment Category	2003 Base	2005	2010	2015	2020	2025	Change
Construction	206	210	210	210	210	210	4
Manufacturing	330	310	300	300	300	300	-30
Trade, Transport. & Utilities	819	820	830	840	840	840	21
Information	50	50	60	60	60	60	10
Financial Activities	171	180	190	200	200	200	29
Prof. & Business Services	246	260	290	310	330	350	104
Education & Health Services	1,677	1,740	1,930	2,080	2,220	2,350	673
Leisure & Hospitality	1,288	1,340	1,490	1,600	1,700	1,800	512
Other Services	135	140	160	170	180	190	55
Other Categories	96	100	100	100	100	100	4
Total	**5,018**	**5,150**	**5,560**	**5,870**	**6,140**	**6,400**	**1,382**

Source: USM Center for Business & Economic Research; Southern Maine Regional Planning Commission

B. ADJUSTED GROWTH RATE METHOD

The Adjusted Growth Rate Method makes the assumption that the Town of York's employment base will grow at twice the rate as York County's over the period from 2003 to 2025. For categories that are projected to lose jobs, the rate of decline has been halved.

In actuality, York's employment base has grown more than ten times faster than York County's since 1990. However, this rate of growth is not likely to be sustainable.

Table 13 below displays the expected annual growth rates by employment category and five-year interval for this method.

Table 13
Projected Annual Rates of Employment Change by Five-Year Interval
Adjusted Growth Rate Method

Employment Category	2003-2005	2005-2010	2010-2015	2015-2020	2020-2025
Construction	2.2%	-0.2%	-0.2%	-0.1%	-0.1%
Manufacturing	-1.9%	-0.2%	0.3%	0.6%	-0.1%
Trade, Transportation & Utilities	0.0%	0.6%	0.4%	0.1%	0.0%
Information	3.7%	4.2%	3.0%	2.5%	2.4%
Financial Activities	5.7%	2.3%	1.4%	0.8%	0.7%
Professional & Business Services	3.7%	4.2%	3.0%	2.5%	2.4%
Education & Health Services	3.7%	4.2%	3.0%	2.5%	2.4%
Leisure & Hospitality	3.7%	4.2%	3.0%	2.5%	2.4%
Other Services	3.7%	4.2%	3.0%	2.5%	2.4%
Other Categories	0.8%	1.8%	1.5%	1.3%	1.1%

Source: USM Center for Business & Economic Research; Southern Maine Regional Planning Commission

Table 14 applies these growth rates to the 2003 employment totals for each industry category to display future projections of employment for each one.

Table 14
Projected Annual Employment in York by Five-Year Interval
Adjusted Growth Rate Method

Employment Category	2003 Base	2005	2010	2015	2020	2025	Change
Construction	206	220	220	220	220	220	14
Manufacturing	330	320	320	320	330	330	0
Trade, Transport. & Utilities	819	820	840	860	860	860	41
Information	50	50	60	70	80	90	40
Financial Activities	171	190	210	220	230	240	69
Prof. & Business Services	246	260	320	370	420	470	224
Education & Health Services	1,677	1,800	2,210	2,560	2,900	3,260	1,583
Leisure & Hospitality	1,288	1,380	1,690	1,960	2,220	2,490	1,202
Other Services	135	150	180	210	240	270	135
Other Categories	96	100	110	120	130	140	44
Total	**5,018**	**5,290**	**6,160**	**6,910**	**7,630**	**8,370**	**3,352**

Source: USM Center for Business & Economic Research; Southern Maine Regional Planning Commission

C. COMPARISON OF TWO METHODS

The two projections of future employment predict a net increase of between 1,400 and 3,300 new jobs in York from 2003 through 2025. In both scenarios, job growth is expected to be heavily concentrated in the two areas that are already the largest employment sectors in York: Education & Health Services and Leisure & Hospitality.

These two categories encompass three particular subsectors that can be expected to drive the local economy: health care, dining and lodging. As the Town's population continues to age, the need for specialty medical care will continue to expand. As for dining and lodging, York's growing population base and attractiveness to visitors should continue to create opportunities for growth in these areas.

2. Commercial and Industrial Land Needs

Translating projections of employment into the need for commercial and industrial land requires three key assumptions:

1. The share of commercial and industrial space for each employment category;
2. The gross square footage of commercial/industrial space per job; and
3. The amount of land needed to accommodate the gross square footage of space

Table 15 below shows the assumptions for the share of each employment category that is expected to need commercial versus industrial space.

Table 15
Projected Employment Growth Allocation

Employment Category	Commercial	Industrial
Construction	0%	100%
Manufacturing	0%	100%
Trade, Transportation & Utilities	40%	60%
Information	80%	20%
Financial Activities	100%	0%
Professional & Business Services	80%	20%
Education & Health Services	80%	20%
Leisure & Hospitality	100%	0%
Other Services	80%	20%
Other Categories	50%	50%

Source: Southern Maine Regional Planning Commission

For the second variable, gross square footage of space per job, the assumptions are 250 square feet per commercial job and 400 square feet per industrial job. These figures reflect typical usage of commercial and industrial buildings.

The final variable, the land needed to accommodate the gross square footage of buildings, is based on reasonable estimates of land coverage and building height. For industrial space, it is assumed that 10,000 square feet of industrial floor space will be constructed for each acre of land developed. This represents a lot coverage of 23% for the buildings alone (not including roads and parking lots).

For commercial space, it is estimated that 15,000 square feet of commercial floor space will be developed per acre, a coverage of 34%. This higher ratio is based on the fact that commercial buildings are more likely to have multiple floors than are industrial buildings.

Tables 16 and 17 display the gross square footage and land area needed to accommodate the projected employment growth for each of the two methods.

Table 16
Commercial and Industrial Space Needs in York to 2025
(In Square Feet)

Employment Category	*County Growth Rate*			*Adjusted Growth Rate*		
	Comm	**Ind**	**Total**	**Comm**	**Ind**	**Total**
Construction	0	1,600	1,600	0	5,600	5,600
Manufacturing	0	0	0	0	0	0
Trade, Transportation & Utilities	2,000	5,200	7,200	4,000	10,000	14,000
Information	2,000	800	2,800	8,000	3,200	11,200
Financial Activities	7,250	0	7,250	17,250	0	17,250
Professional & Business Services	20,750	8,400	29,150	44,750	18,000	62,750
Education & Health Services	134,500	54,000	188,500	316,500	126,800	443,300
Leisure & Hospitality	128,000	0	128,000	300,500	0	300,500
Other Services	11,000	4,400	15,400	27,000	10,800	37,800
Other Categories	500	800	1,300	5,500	8,800	14,300
Total	**306,000**	**75,200**	**381,200**	**723,500**	**183,200**	**906,700**

Source: Southern Maine Regional Planning Commission

Table 17
Commercial and Industrial Land Needs in York to 2025
(In Acres)

Employment Category	*County Growth Rate*			*Adjusted Growth Rate*		
	Comm	**Ind**	**Total**	**Comm**	**Ind**	**Total**
Construction	0.0	0.2	0.2	0.0	0.6	0.6
Manufacturing	0.0	0.0	0.0	0.0	0.0	0.0
Trade, Transportation & Utilities	0.1	0.5	0.6	0.3	1.0	1.3
Information	0.1	0.1	0.2	0.5	0.3	0.8
Financial Activities	0.5	0.0	0.5	1.2	0.0	1.2
Professional & Business Services	1.4	0.8	2.2	3.0	1.8	4.8
Education & Health Services	9.0	5.4	14.4	21.1	12.7	33.8
Leisure & Hospitality	8.5	0.0	8.5	20.0	0.0	20.0
Other Services	0.7	0.4	1.1	1.8	1.1	2.9
Other Categories	0.0	0.1	0.1	0.4	0.9	1.3
Total	**20.4**	**7.5**	**27.9**	**48.2**	**18.3**	**66.5**

Source: Southern Maine Regional Planning Commission

The total estimated need for commercial and industrial land in the Town of York through 2025 is between 28 and 67 acres. The majority of the land need will be for commercial development. These totals do not account for redevelopment of existing properties.

Appendix A
Calculation of Birth, Death and Migration Rates

Birth, death and migration rates are essential to the Survival and Migration population and housing scenarios in this chapter. This appendix shows how these rates were calculated. All three rate calculations are based on historic rates from 1990 to 2003 for the sub-region surrounding York, which includes Eliot, Kittery, Ogunquit, South Berwick, Wells and York itself.

1. Birth Rate

The historic birth rate was calculated from data on live births of babies born to mothers living in each of the six towns from the Maine Bureau of Health, Office of Data, Research and Vital Statistics. For each year from 1990-2003, the number of live births was compared with the estimated population to determine an annual birth rate. This set of annual birth rates was then averaged for the fourteen-year period to determine the overall average birth rate for the subregion.

Table A-1 below shows the calculation of the birth rate for the subregion.

Table A-1
Birth Rates in York Subregion, 1990-2003

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	Total/ Average
Births	574	512	542	474	462	447	446	452	461	463	509	487	451	474	**6,754**
Population	39,094	39,114	39,179	39,259	39,226	39,413	39,984	40,706	41,037	41,782	45,648	46,921	47,723	48,268	
Rate per 1,000	14.68	13.09	13.83	12.07	11.78	11.34	11.15	11.10	11.23	11.08	11.15	10.38	9.45	9.82	**11.58**

2. Death Rate

The historic birth rate was calculated from data on resident deaths from the Maine Bureau of Health, Office of Data, Research and Vital Statistics. For each year from 1990-2003, the number of deaths was compared with the estimated population to determine an annual birth rate. This set of annual birth rates was then averaged for the fourteen-year period to determine the overall average birth rate for the subregion.

Table A-2 below shows the calculation of the death rate for the subregion.

Table A-2
Death Rates in York Subregion, 1990-2003

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	Total/ Average
Deaths	325	311	296	300	315	310	353	356	351	372	404	372	368	372	**6,754**
Population	39,094	39,114	39,179	39,259	39,226	39,413	39,984	40,706	41,037	41,782	45,648	46,921	47,723	48,268	
Rate per 1,000	8.31	7.95	7.56	7.64	8.03	7.87	8.83	8.75	8.55	8.90	8.85	7.93	7.71	7.71	**8.18**

3. Net Migration Rate

The historic net migration rate was calculated by netting out the natural population change (births minus deaths) from the total population change from 1990 to 2003. Over the fourteen-year period, the total population change in the subregion was 9,436 people, as the region's population grew from 39,094 in 1990 to 48,530 in 2004. During this period, there were 1,949 more births than deaths reported. The total net migration into the subregion during the period was therefore 7,487 people.

Comparing the net migration of 7,487 with the 1990 population of 39,094 produces an annual average fourteen-year net migration rate of 13.68 per 1,000 population.