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Data Highlights Workshop: What We've Learned Summary Report

The Data Highlights: What We've Learned Public Workshop for Plan Yarmouth took place on June 12, 2023, from 6PM to 8PM at the American Legion Log Cabin in Yarmouth, ME.

More than 33 attendees (+10 CPSC Members + Town staff, & project team) participated in the presentation and activities.

This is a summary report of the feedback received at the workshop (in-person on June 12). The comments from the Idea Boards are summarized below and the mentimeter results are attached.

Attachments

1. Idea Boards (scanned) & Mentimeter results
-

Summary of Input

Population & Demographics

Desire to foster inclusivity and a more racially and economically diverse population. Interest in attracting immigrants and supporting their integration into the community. Concerns about slow growth and school capacity.

History and Archaeological Resources

Desire to raise awareness of Wabanaki History through signage, and educational programs, and to include a land acknowledgment in the plan. Protect the historic character of the village.

Housing

Evaluate zoning to allow for more multifamily housing and affordable housing options. Support for multi-family housing, apartments, ADUs, and adopting sustainable building practices. Explore & discuss demand and actual housing needs. New housing should be located along Route 1.

Transportation

Importance of public transportation options, such as the Breez bus service, with potential for EV shuttles and commuter rail. Desire for expansion of bike/ped trails and open space connections, EV parking stations, and collaboration with Greater Portland for improved transportation.

Recreation

Desire for increased public access to the ocean and river (Madeline Point opportunities) and development of small neighborhood parks. Underutilized resources include the community garden and Frank Knight Forest.

6/12 Data Highlights Workshop

Public Facilities and Services

Concerns about drinking water quality and contamination. Support for youth programs, public safety training, and Interest in assessing Pay as you throw and promoting recycling and waste reduction efforts.

Economy

Focus on attracting businesses to expand the tax base. Interest in family entertainment businesses, attracting small businesses and shops, restaurants & cafes. Explain employment figures relative to county population.

Natural & Water Resources

Concerns about water quality and the need for the protection of rivers and oceans. Potential for job creation or funding for water management. Desire to remove dams and protect Casco Bay. Underprotected resources include the Royal River and wildlife habitats.

Marine Resources

Advocacy for dam removal. Concerns about Historic Society and pollution of Royal River.

Existing Land Use

Focus on growth within the designated growth areas and discourage sprawl. Consideration of densification and infill development while preserving open space. Support for mixed-use development and allowing ADUs to minimize impacts on conservation areas.

Fiscal Capacity

Interest in expanding the commercial tax base. Recognition of efficient budget management.

All Input per Category

Population

- “Hoping for a more racially & economically diverse population - so that Yarmouth is recognized as welcoming & inclusive in its diversity” (+1)
- “Emphasize slow growth so far, and slow increase in school children; therefore no need for alarm bells”
- “Want to ensure our schools can handle the growth being discussed”
- “Town is old and rich & # of people 30-49 has dropped 2011-2021”
- “How can we encourage immigrants to move + work + start businesses in Yarmouth?”

Historic & Archeological Resources

- “Yarmouth residents become aware of Wabanaki history thru signage, community programs, and Wabanaki studies adopted in school curriculum, and there is African American History here too.” (+1)
- “Yarmouth residents become aware of the contributions enslaved people made to its development. Same for the BIPOC people who have lived and worked here overtime.”
- “Reword the value statement mentioning “settlers” to something that begins with the first settlers”
- “Would be good to have a land acknowledgment statement” (+3)
- “Increase signage + acknowledgments”
- “Protect the village, don’t have infill everywhere”

Housing

- “Would like to see more land use zones that allow multi-family housing.” (+4)
- “If we want to have a town population which allows variety in income, we must have some housing which is affordable if one is in a lower income bracket.” (+2)
- “Support multifamily housing and apartments that are affordable for new mainers & young families” (+2)
- “Think its important to preserve owner-occupied ADUs”
 - “Allow non-owner occupied ADUs!”
- “Need all types of multi-unit, including below market, multi-generational, and ADUs” (+1)
- “Would be great to see Yarmouth adopt the stretch code & move towards Net Zero new building.”
- “What is the actual housing need? Do we want to build apartments just to fill the category of real estate offerings or does the right single-family development solve the problem? Apartments don't seem in keeping with Yarmouth”

- “Allow ancillary dwellings (1,2, or even 3 per lot)”

Transportation

- “Great that Breez exists - important to provide public transportation option”
- “Although I am now retired, I used the Breez bus to commute to Portland for 2 years, because my company lost all of its parking. I found it very convenient.”
- “More trails for bike community to Portland + other nearby towns”
- “More EV parking stations” (+1)
- “Transporation will be key link to Portland + other towns -> maybe EV shuttles?” (+1)
 - “Would love a train to Portland, commuter rail”
- “w/ 28 of the town commuting to Portland, increasing Breez ridership seems worthwhile”
 - “Probably needs to be combined with more EV incentives”
 - “Could work with Greater Portland to help create more transportation throughout southern Maine”

Recreation

- “More public access to the ocean”
 - “Yes! This one needs to be discussed as part of the Madeline Point project.”
- “Encourage multiple neighborhood small parks. We need a dog park such as was once considered in the fenced site along the Royal River (earlier coated electrical line poles)”
- “Research the town of Salida, Colorado. They have developed their river brilliantly and made it the draw for the town.”
- “I live next to the Community Garden & Frank Knight Forest - I believe this is underutilized”
- “Include outdoor showers @ river access + at ocean”
- “Improve launch + entry access to river + oceanfront”
- “Yarmouth has great ped/bike trails through town - build on this network!”

Public Facilities & Services

- “Is the drinking water source for Yarmouth protected from contamination?”
- “I would love to know the impact of the Pay-as-You-Throw. I am hoping that more people are recycling.”
- “Start youth programs to encourage training + volunteer for public safety”
- “How can we increase use of municipal space?” /create more

Economy

- “Businesses for family entertainment and jobs for young & old”
- “We need to move businesses to offset residential taxes”
- “3% of all jobs in the county, what % in our population of county?”

Natural & Water Resources

- “What do we need to do to keep Yarmouth’s water quality at class B?”
- “How can water quality + protection be a source of jobs ? /source of funding for those jobs?”
- “Really hoping to get rid of the dams! Free the Royal!”

Marine Resources

- “Take down the dams!”
 - “At least the Historical Society which directly contributed to the high e-coli a couple years ago.”
- “The water of Casco Bay! We have a significant % of Casco Bay Shoreline, & we have a responsibility - the Bay is under stress - sprayed on insecticides + fertilizers - & grow to water’s edge - are not good!”

Existing Land Use

- “Re-emphasize (focus) growth in designated growth area and disincant sprawling pattern into the RR - look at Hinesburg, VT code!”
- “It seems that the designated growth area is already pretty densely built up.”
- “The village still has space for densification while keeping open space”
- “Allow more ancillary dwellings as a way to expand without major impact to conservation regions / current woodlands”
- “More mixed-use development - housing with commercial/ retail”

Fiscal Capacity

- “How can we increase commercial tax base?”
- “I feel the town manages its budget quite efficiently.”

PLAN → YARMOUTH



Summer Public Engagement Results & Analysis November 2023

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Overview

The Yarmouth Comprehensive Plan team connected with the community during summer 2023 in two main ways: through a survey and through pop-up events at various locations in Yarmouth. Understanding that engagement during the summer months can be difficult, we chose to offer a survey as well as go to where the Yarmouth community may be during the summer.

Summer Survey

The Comprehensive Plan team administered the topic-based survey to gauge community responses to questions based on data highlights from the inventory chapters, as well as reaction to the vision statement drafted in 2022.

The survey was open from June to September 2023, available online and in paper format, and received 123 responses. The survey asked 17 questions on the following topics: vision statement, housing, economy, recreation & open space, transportation, and demographics, along with general open-ended questions about the future of Yarmouth.

The survey was advertised on the Town's website, and through the Town's newsletter and social media channels. In addition, paper copies of the survey were made available at all of the summer pop-up events, at Town Hall, and at the Library.

Community Values and Draft Vision Statement

Before beginning the comprehensive plan update, in 2022 the Town of Yarmouth completed a visioning and engagement initiative called *Imagine Yarmouth* with the support of consulting firm Berry Dunn. The purpose of the initiative was to identify common values and priorities for the future through community input in a fair and representative engagement process. To guide the development of a vision for the Town, a robust public engagement effort was conducted to obtain input from as many Town residents and stakeholders as possible. The feedback gathered as part of the *Imagine Yarmouth* initiative, such as community values, priorities, and goals, informed the creation of a vision statement.

The following values were expressed by residents and stakeholders throughout the visioning process. While not all participants agreed on how the Town should move forward, there was consensus on the community values that are fundamental to the Town's identity:

*We value the **natural environment**, including the numerous parks, open space preserves, rivers, and Casco Bay, and prioritize preserving and protecting these areas for enjoyment by all and as critical ecosystems.*

*We value a **connected community** where residents have strong social bonds through a shared commitment to civic engagement, and where community members can safely and easily access services, amenities, recreation, jobs, and social opportunities within the Town.*

*We value the **history and culture** of the people and land that is now the Town of Yarmouth and the physical environment that embodies that history, from the natural land and water features to the built environment.*

*We value a **welcoming and inclusive environment** where neighbors help one another and a strong sense of community brings all people together, regardless of background.*

The draft vision statement was developed based upon the themes and values that were expressed by community members throughout the visioning process:

The Town of Yarmouth is a small coastal community with a vibrant and picturesque village center. Yarmouth's identity is deeply rooted in the Town's history, beauty, and commitment to community. The walkability of the Town's historic Main Street, abundant open space areas, and active community groups all contribute to community members' sense of connectedness to the Town.

The Town is dedicated to protecting and preserving what makes Yarmouth a great place to live. At the same time, residents recognize the significant local, regional, and global challenges that the Town faces, and are committed to addressing these issues with careful consideration for the Town's history and culture and with creativity to leverage opportunities to enhance the Town's defining characteristics – beauty, history, inclusivity, abundant open spaces and recreation opportunities, and commitment to volunteerism – to build an even stronger community.

To meet the needs of residents and community members, the Town will plan and make decisions through a lens of equity, sustainability, and fiscal responsibility to ensure that the community's values and critical assets are sustained for future generations.

This statement is intended to be a clear but broad aspiration for the future of Yarmouth and is meant to guide the development of the Town's next Comprehensive Plan, but to also be adaptable as the planning process moves forward and additional research, discussions, and engagement exposes new aspects and nuances of the Town's future goals.

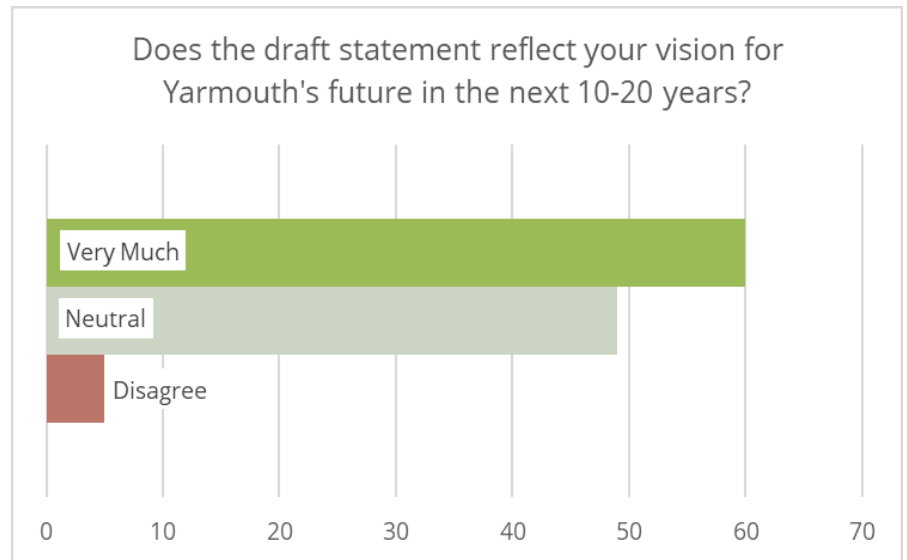
Analysis

This analysis was completed by the Yarmouth Comprehensive Plan Team to understand what respondents' thoughts were on the draft vision statement and community values, as well as comprehensive plan topics housing, economy, recreation, and transportation. A qualitative analysis of the open-ended questions about the future of Yarmouth is also included.

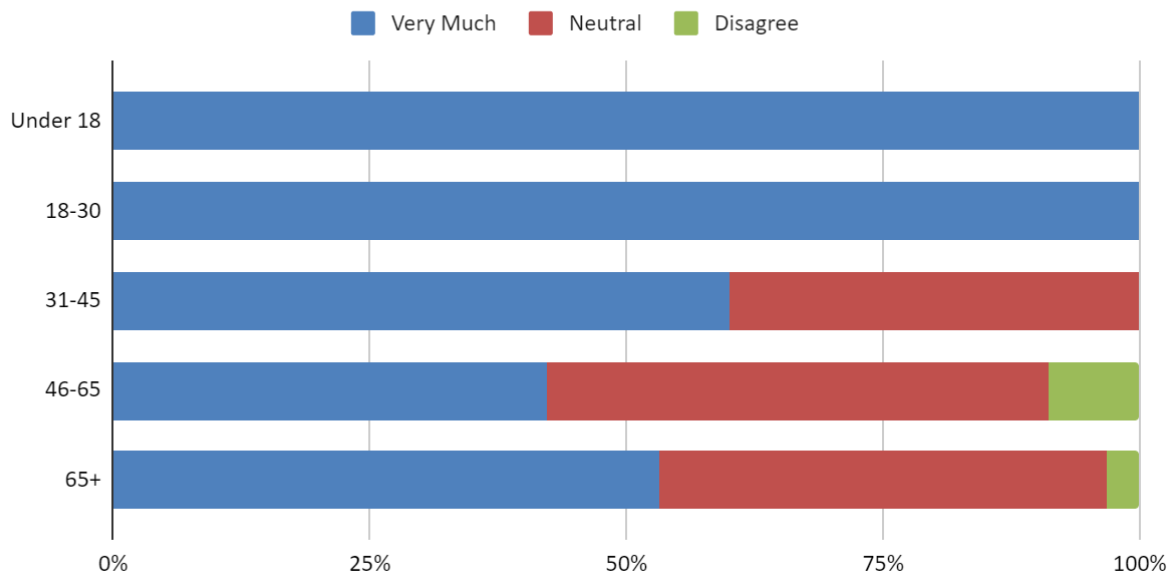
Draft Vision Statement

Most respondents agreed the draft vision statement “very much” reflected their vision of Yarmouth’s future for the next 10–20 years, or were neutral.

The survey asked for the respondent’s age, so the Comprehensive Plan team is able to review more closely how the draft vision statement reflects the values of different age groups. 114 respondents out of the 123 respondents completed both these questions.



How well does the draft statement reflect your vision for Yarmouth by Age?



As can be seen in the chart above, no one under the age of 30 disagreed or had a neutral opinion of the draft vision statement. No one under the age of 45 disagreed with the draft vision statement. In the age demographic of 46 to 65 years old, the

Respondents to the survey were asked to rank the themes in the draft vision statement in order of importance. A walkable and bikeable community, vibrant and picturesque village center, and abundant open space and natural resources were the most highly ranked themes.



The high priority themes were also broken out by age cohort:

Highest Ranked Themes by Age Cohort

Ranking	Under 18	Ages 18-30	Ages 31-45	Ages 46-65	Ages 65+
#1	Sustainability	Sustainability	Walkable/ Bikeable Community	Walkable/ Bikeable Community	Vibrant and picturesque village center
#2	Equity	Walkable/ Bikeable Community	Abundant open space and recreational opportunities	Fiscal Responsibilit y	Inclusivity
#3	Walkable/ Bikeable Community	Abundant open space and recreational opportunities	Vibrant and picturesque village center	Vibrant and picturesque village center	Fiscal Responsibilit y
#4	Inclusivity	Inclusivity	Natural Beauty	Abundant open space and recreational opportunities	Equity
#5	Commitment to Volunteerism	Equity	Sustainability	Natural Beauty	Sustainability

When comparing the highly ranked themes across the different age cohorts, there are some themes that appear across the age spectrum including sustainability and a walkable and bikeable community. Those respondents under the age of 30 indicated that sustainability, equity, a walkable and bikeable community, and inclusivity are highly ranked themes. Those respondents in the older age groups noted fiscal responsibility, abundant open space and recreational opportunity, and a vibrant and picturesque village center as highly ranked themes.

Overall, the highly ranked themes are generally consistent with the community values identified as part of the *Imagine Yarmouth* initiative. They focus on the health and resilience of the community (sustainability, walkable and bikeable community, and fiscal responsibility), a welcoming and diverse community (commitment to volunteerism, equity, and inclusivity), the natural environment (abundant open space and recreational opportunities and natural beauty), and history and culture (vibrant and picturesque village center).

The survey provided space for respondents to let the Comprehensive Plan team know what was missing in the draft vision statement. There were a significant number of comments about balancing priorities over the next several years, such the two comments below:

"Everything on the list above is relevant. There is something needed about balancing population growth with changing demographics of the area along with the desire to have a minimalist ecological footprint. Maintaining affordability for all age groups, exploring ways the community can grow and manage the pressures of growth. I hope the Town will continue to be a leader in education, seeking alternatives to cars and exploring ways to be inclusive to new residents while welcoming long-time families. Let this be a community where new ways of living can be tried."

"I believe that the statement should acknowledge the intense period of growth that the town has experienced in the past ten years and the importance of assessing the feasibility of maintaining this vision in the face of rapid building and population growth."

Adapting to and mitigating the impacts of climate change and protecting our natural resources was also a focus of the open-ended responses:

"I think Yarmouth should be leading the environmental responsibility charge (among other communities) in Maine, as the broader impacts of climate change are becoming impossible to ignore/deny."

Many comments also focused on the need to support the whole community. The comment below highlights the struggle to select one theme that addresses all of these concerns, such as affordability, diversity, safety and accessibility, supporting Yarmouth's small business community, and the working waterfront.

"Not sure how to phrase it, but Yarmouth needs to be a place where people of all ages and income levels can live and enjoy all the town has to offer. Perhaps inclusivity covers that, but increasingly Yarmouth has become a wealthy suburb of Portland, and it is difficult for young and old residents to be able to afford to continue to live here."

Finally, the open-ended comments highlighted the fact that many of words used in the community values and draft vision statement can mean different things to different people, and the updated Comprehensive Plan should highlight simple calls to action needed to spur implementation:

"Yarmouth's vision is about concrete qualities of the Town, not trendy buzzwords that mean different things to different people."

Housing

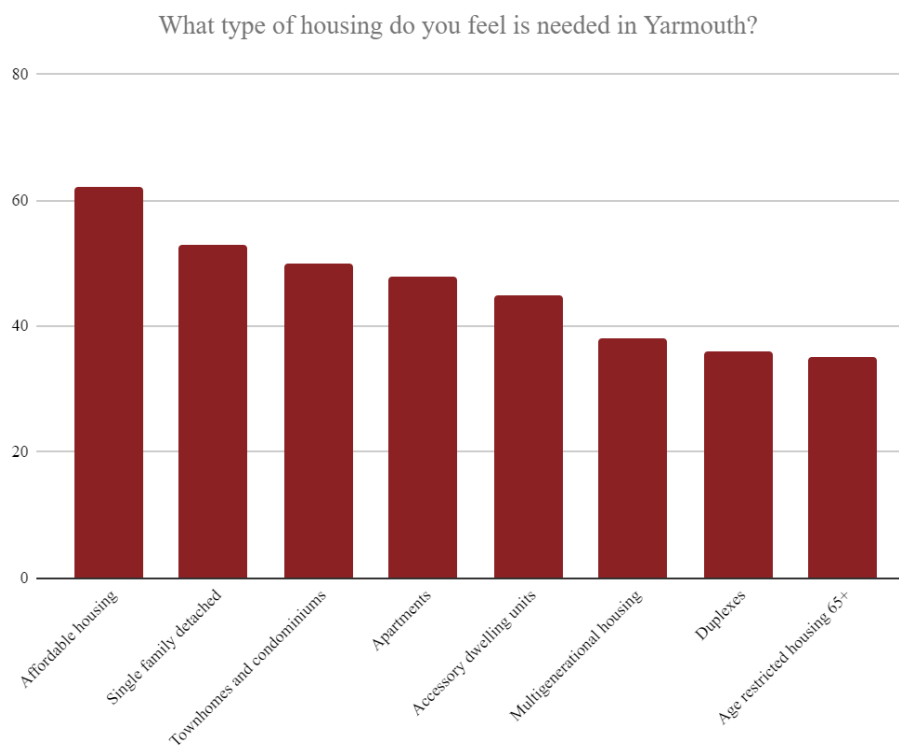
The survey asked two questions about housing in Yarmouth: what type of housing is needed in Yarmouth, and where should new housing be located in Yarmouth. In both questions, respondents were given a number of responses and could select as many responses as desired. For both questions, "other" was an allowed response with space for additional thoughts.

The question "what type of housing is needed in Yarmouth" gave respondents the option of selecting any of the following responses: single-family detached, duplexes, townhomes and condominiums, apartments, accessory dwelling units, multigenerational housing, affordable housing, and age restricted housing for those

aged 65 and older. Of the 123 responses received, 109 respondents completed this question.

Survey respondents believe that a wide range of housing types are needed in Yarmouth, as shown in the chart below. No responses were received in the “other” category, suggesting that the list provided respondents with all housing types that might be considered in Yarmouth.

“Affordable housing restricted to people earning below median income” was the most frequently selected type of housing needed in Yarmouth. The open-ended responses provided throughout the survey suggest that both deed-restricted housing as well as housing that is affordable to a spectrum of households is needed in the community.



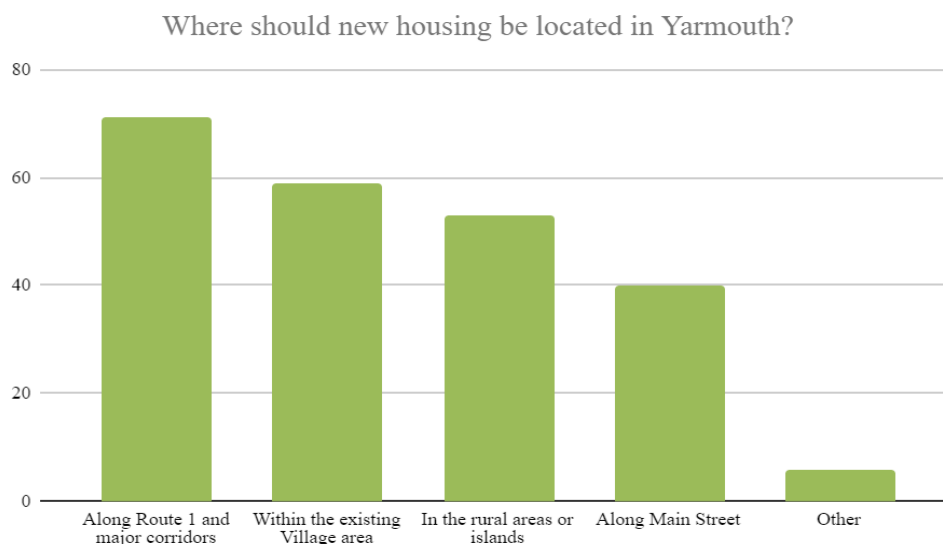
Housing, and the related affordability of Yarmouth, were also themes in responses about the draft vision statement, with comments generally supporting the results of the housing survey questions:

"We are experiencing a severe housing shortage. There is no mention of housing at all in the vision statement or list of priorities."

"There should be a recognition that historically Yarmouth was a mix of blue collar workers, middle class folks and some wealthy people. There is a shift underway toward wealthy people, leaving blue collar people and even lower middle class people out of the town's future... an ominous trend for our town's future as a healthy, vibrant and resilient place to live."

The second housing question asked respondents where new housing should be located in Yarmouth from a number of options: along Route 1 and major corridors; within the existing Village area; in the rural areas and islands; and along Main Street. An "other" open-ended response was also allowed. Of the 123 responses received, 110 respondents completed this question.

"Along Route 1 and major corridors" was the top selected response followed by "within the existing Village". Interestingly, along Main Street was selected less often, perhaps due to the perception that Main Street is the center of Yarmouth's small business community and people would not want to replace businesses with housing.



Six respondents filled in the "other" response regarding location of new housing. Two locational responses were provided:

- Backyards: when you talk about accessory dwellings, they just kind of "fit snugly in" to everything else.
- Portland Street and/or areas that are not quite rural but also not in the village.

One respondent noted that new housing needs an area that is properly zoned and available, connecting housing with land use. Similarly, a respondent noted that new housing should be "carefully located to preserve the values of Yarmouth's vision" consistent with other open-ended responses that balancing all of the priorities of Yarmouth must be a cornerstone of an updated Comprehensive Plan.

Finally, "no new construction" was mentioned in two different ways. One respondent wrote "No new construction. Repurpose existing structures in town. Ensure that all existing buildings are fully utilized." Another respondent wrote "I would say NO to all of it! No more apartments, no duplexes, no affordable housing. Just stop cramming in more homes/apartments/banks into our community." While the second comment suggests an outright moratorium of housing in Yarmouth, the first comment as well as the comment about accessory dwellings in backyards noted above, suggest that there are ways that Yarmouth can be innovative in developing new housing.

Economy

Two questions about Yarmouth's economy were asked in the survey: one about business growth in Yarmouth, and the other about the respondent's work arrangement and commute. In both questions, respondents were given a number of responses and could select as many responses as desired. For the first questions, "other" was an allowed response with an open response for additional thoughts.

The first question "What kind of business growth would you like to see in Yarmouth?" gave respondents the option of selecting any of the following that applies to their preferences:

- Small businesses and shops;
- Restaurants and cafes;
- Entertainment activities (theater, bowling alley, etc);

- Large employers and national brands;
- Industrial and manufacturing facilities;
- Coworking spaces;
- Art studios and maker spaces;
- Business and technology incubator;
- New business park;
- More tourism-based businesses;
- Working waterfront and ocean-based businesses.

117 of the 123 survey respondents answered this question. Restaurants and cafes and small businesses were the top selections for business growth for Yarmouth, as shown in the chart below. The working waterfront and ocean-based businesses and art studios and maker spaces were the next highest rated business growth for Yarmouth. Entertainment activities, business and technology incubator, and coworking facility were clustered together, as were a new business park, tourism-based businesses, large employers and national brands, and industrial and manufacturing facilities.

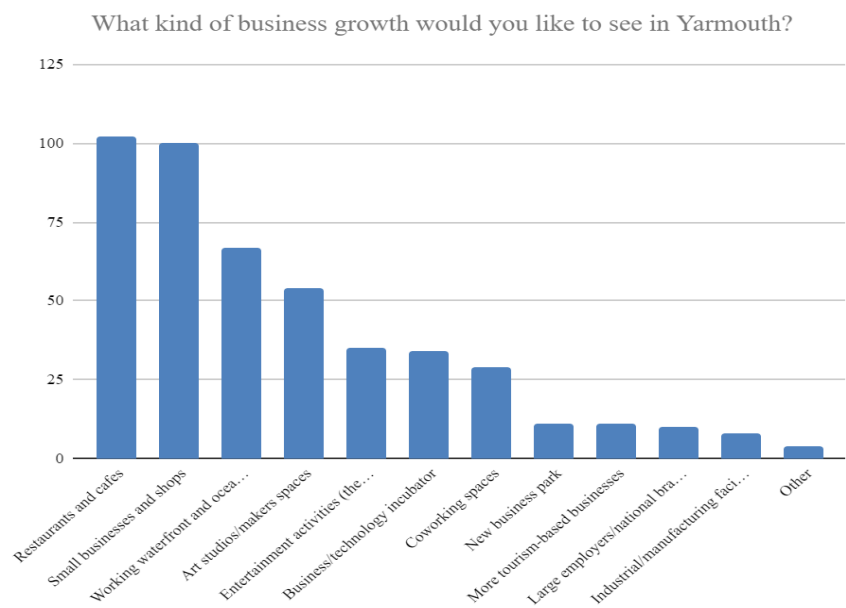
Respondents provided more detailed information about types of businesses needed in Yarmouth in the open-ended question on the draft vision statement such as the following comments:

"Yarmouth could use a retro arcade or maybe a cool ping pong lounge like you'd find in bigger cities -- it's a perfect place for kids to hang out). We need more indoor places for our kids to burn off energy or relax with friends during the cold or wet months. Also, a cafe that also serves kid-friendly drinks - hot milk steamers, cocoa, Boba tea drinks, with comfy sofas and lots of board games would be great."

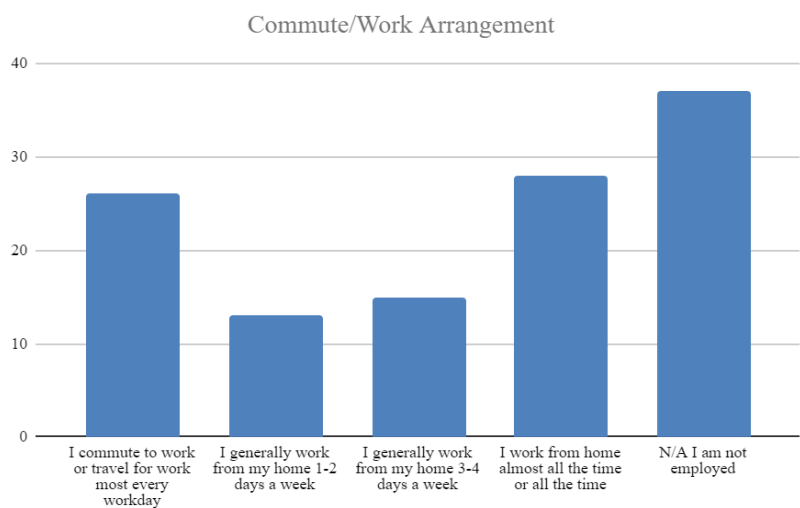
"Support small businesses and local businesses over national chains."

In the open-ended responses, three respondents provided more detail on recreational desires, such as a skate park and splash pad, a fitness center with swimming pool, and outdoor activities companies. These responses overlapped with

the responses in the next section on public recreation facilities or activities missing in Yarmouth.



The second question in this section asked respondents to describe their work arrangement. Of the 123 survey responses, 118 respondents answered this question. The most respondents selected that they are not employed, although this question did not allow respondents to expand on this response (i.e., retired, high school or college student, stay at home parent or guardian). Overall, most respondents either exclusively commute or travel for work on workdays, or are exclusively working from home, as shown in the chart below.



Recreation

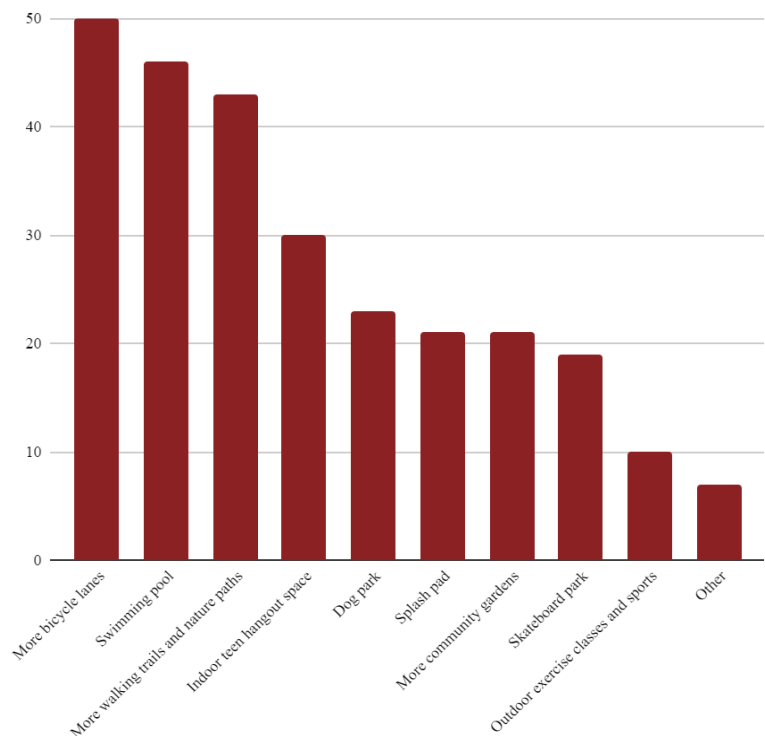
The survey asked respondents what types of public recreation facilities or activities are missing from Yarmouth. In response to this question, 114 respondents selected from the following options:

- Swimming pool;
- Splash pad;
- Skateboard park;
- Indoor teen hangout space;
- Dog park;
- Outdoor exercise classes and sports;
- More bicycle lanes;
- More walking trails and nature paths;
- More community gardens;
- More places to access the river or ocean.

The question also allowed an open-ended “other” response.

The top three most selected responses were more places to access the river or ocean; more bicycle lanes; and a swimming pool, as shown in the chart below. Behind those were more walking trails and nature paths; indoor teen hangout space; a dog park; splash pad; community gardens; and a skateboard park. The desire for a swimming pool currently being pursued by a separate interest group in Yarmouth, which

What types of public recreation facilities or activities are missing from the Town of Yarmouth?



collected over 400 signatures in support of a public pool during 2023.

The “other” responses provide some clarity on the responses given to the previous question, such as:

- Access to water (like Sandy Point) that is handicapped accessible; handicapped accessible fishing platforms.
- Recreational activities for the elder community.
- Connecting all the open spaces in town and surrounding community through walk/bike paths.

Other specific suggestions included a community center, dedicated tennis courts and pickleball courts for public use, and a performing arts amphitheater. One respondent suggested that the multiple-choice options offered in the question were inappropriate for and unneeded in Yarmouth.

Transportation

Survey respondents were asked two questions about transportation around Town:

- What actions could the town take to encourage forms of transportation besides single-occupancy vehicle travel?
- What places in Yarmouth do you regularly walk or bike to?

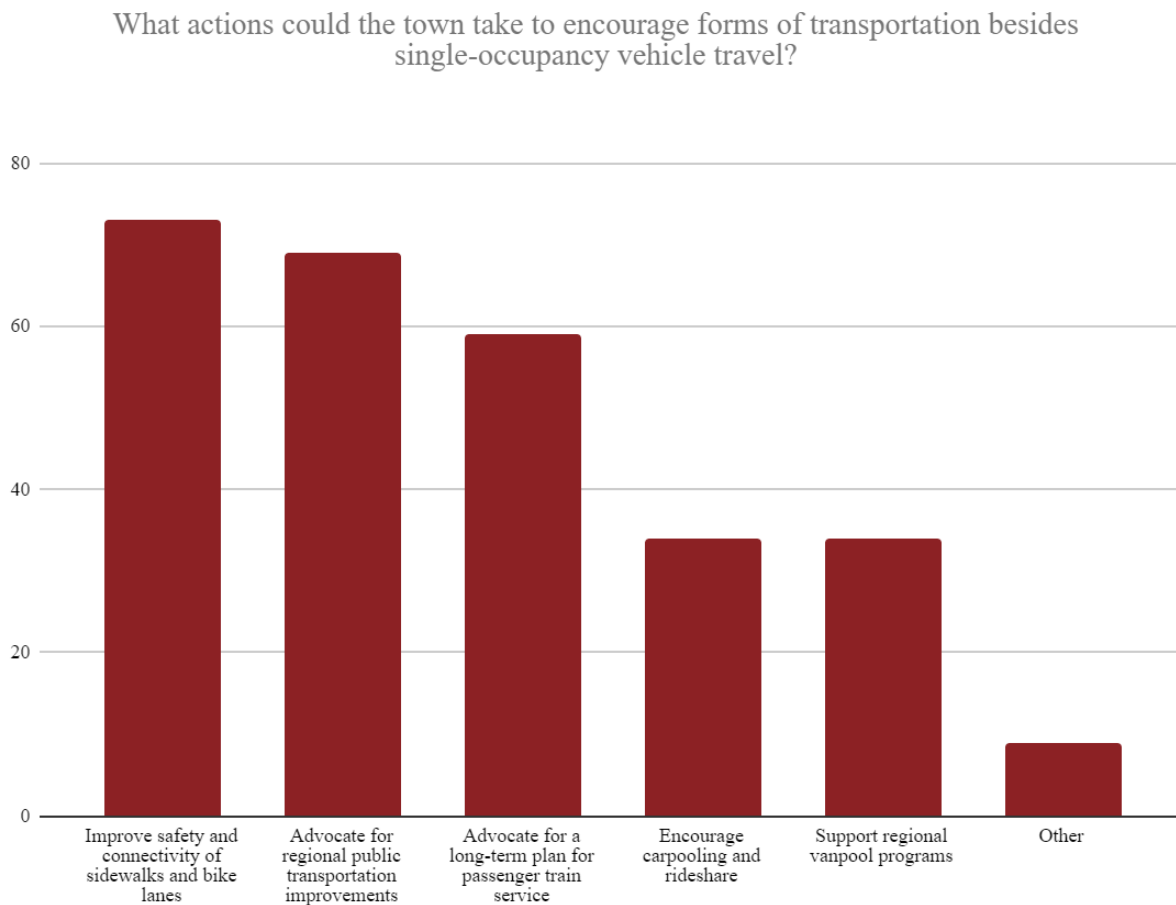
In response to both questions, respondents could select from multiple options.

In response to the first question, 111 respondents answered this question, selecting from the following responses:

- Improve safety and connectivity of sidewalks and bike lanes;
- Encourage carpooling and rideshare;
- Support regional vanpool programs;
- Advocate for regional public transportation improvements;
- Advocate for a long-term plan for passenger train service.

An open-ended “other” response was also provided.

The top ranked response suggested that the town should improve the safety and connectivity of sidewalks and bike lanes. The second and third ranked responses were related to alternative modes of transportation, including advocating for regional public transportation improvement and advocating for a long-term plan for passenger rail service. Behind those responses, was support for carpooling, ridesharing, and vanpooling.



Respondents that selected the “other” response provided the following additional feedback in three general categories about actions the Town can take around transportation:

- Local and regional shuttle service: “Town shuttle to locations in Yarmouth and maybe Falmouth center”

- Support of regional trails: “Create a bike/pedestrian path where the railroad currently sits. This will connect Yarmouth to other communities including Portland.”
- Breez bus service: “Support Breez ridership- it’s an amazing service that is not well-used”

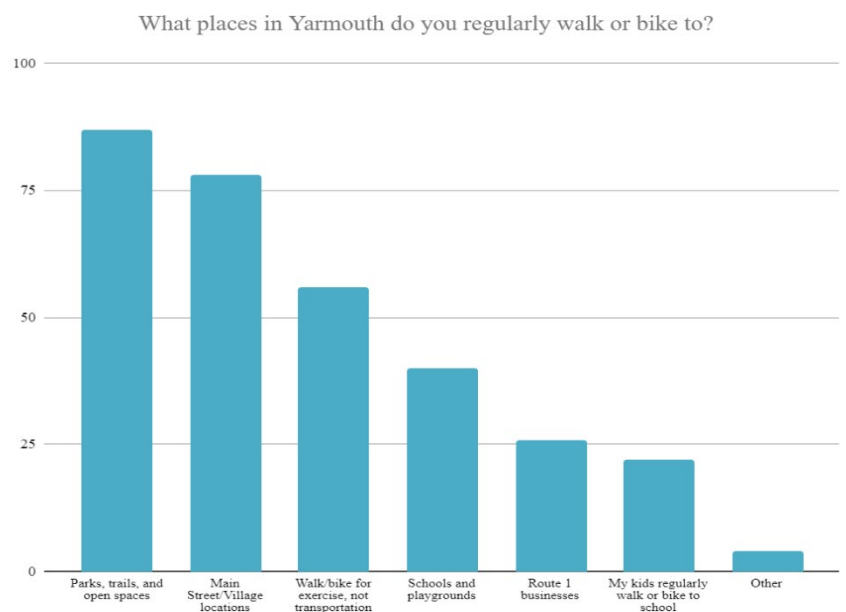
The second question received 116 responses out of the 123 survey respondents on where the respondent regularly walks or bikes to within Yarmouth. The respondents selected from the following options:

- Route 1 businesses;
- Main Street/Village locations;
- Parks, trails, and open spaces;
- Schools and playgrounds;
- My kids regularly walk or bike to school;
- Walk/bike for exercise, not transportation;

Respondents had the option of providing an “other” response.

The top two responses included parks, trails and open spaces, and Main Street or Village locations. Respondents selected schools and playgrounds and Route 1 businesses less often. Many respondents also indicated that they do not walk or bike for transportation, only for exercise. Very few respondents indicated that their kids regularly walk or bike to school.

Three respondents provided specific locations such as Intermed and the Library, and to points on Cousins Island in the “other” response.



Open Ended

The survey concluded with two open-ended questions for respondents to provide additional comments to the Comprehensive Plan team:

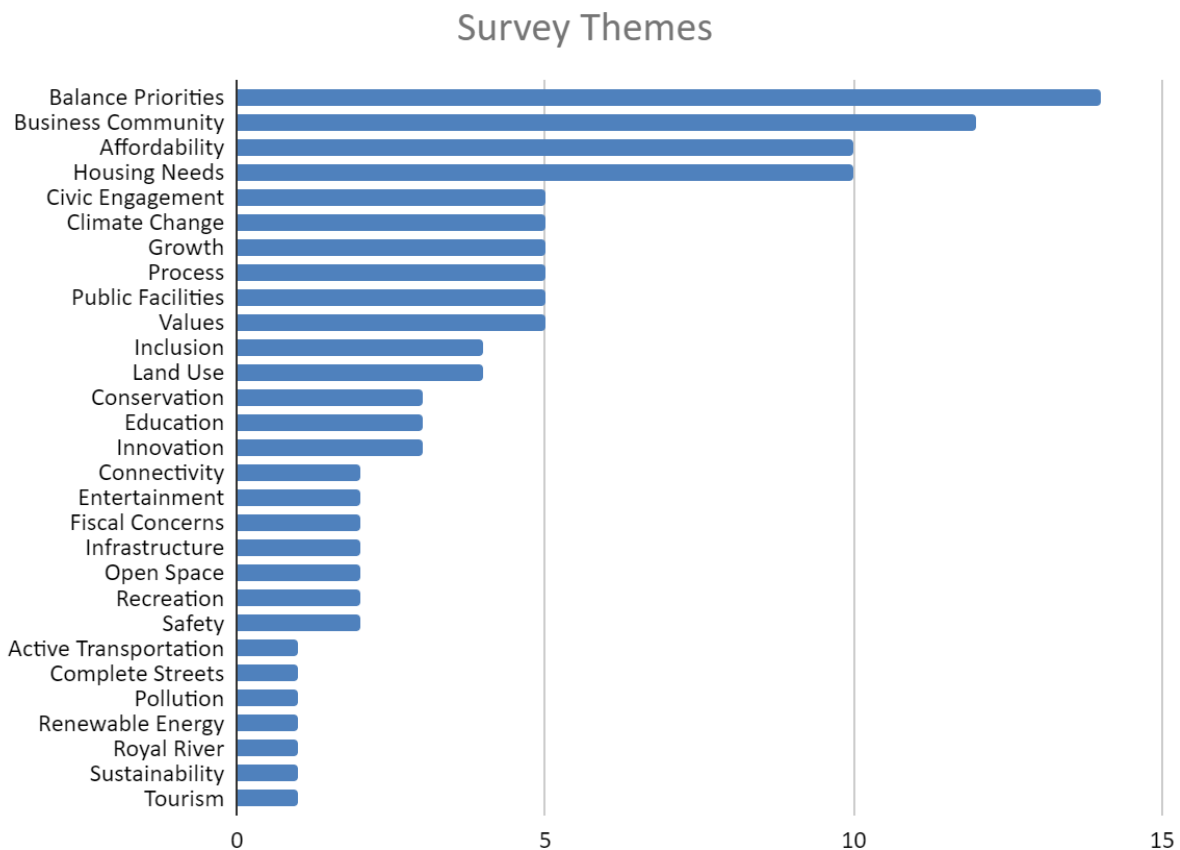
- What is one thing that would make Yarmouth a better place?
- Is there anything else you want us to know as we move forward with the comprehensive plan update?

The Comprehensive Plan team reviewed the responses and identified the themes in each response for analysis. Four themes appearing in the most comments rose to the top: Balance Priorities, Business Community, Affordability, and Housing Needs. Overall, the respondents to the survey made it clear that Yarmouth is special and how important it is to remember the important qualities that make Yarmouth a desirable community.

The people. A wonderful community. Been here 22 years.

Yarmouth is a special community that is in high demand. It is in high demand for a certain set of reasons. We must not lose sight of why their community is so desirable and we must not fundamentally change it into something different.

Strengthening an already strong sense of community. We must not dilute that feeling and work to make it stronger.



The top four themes and representative comments are described below.

Balance Priorities

The following comments that were categorized as “Balance Priorities” are representative of open-ended survey responses. Respondents consistently acknowledged that there is a desire to have the best of everything, but little discussion on how those desires relate to each other. In addition, respondents note that Yarmouth is already a great Town, and express concern that too much growth or development will change what makes the town great already. There is a delicate balance to ensure that Yarmouth continues to be a community that is desirable.

My concern is that we have the potential to "Love Yarmouth to Death".

Creative planning and budgeting. Lower expectations from 'always wanting to be the best' to setting goals to improve (we are already

doing most things better than others). Slow the growth of people and improve the resources that are already here.

I was hoping to read more about how many of these values and how to sustain them, are interconnected. Walkability, village, open spaces, environment, fiscal responsibility & housing for instance are inextricably linked. We need to start talking about them together and their relationships to each other instead of as separate issues.

I would love to see more about preserving the land and the small town feel, and keep growth to a sustainable levels. Expansion and growth at too accelerated a pace would cause both environmental as well as infrastructure issues (schools, roads, land) that I don't think the town is ready for.

Business Community

The small business community in Yarmouth was repeatedly identified as something that makes Yarmouth great and should be supported, consistent with the responses on the economy above. Although there were strong opinions expressed that Yarmouth did not need any more pizza places or banks, there is some desire for access to general merchandise stores.

The thoughtful development of Main Street with small boutique retail businesses. Maples really proved a point, that we are all looking for informal places to gather and be together. I think Handy's also proved the same point. We want those central places to take walks and see one another.

Opening up Main Street on a summer night for walking with some signs of life with music from local restaurants

Closer/easier access to a general-merchandise store like Target.

Anchor more into Main Street on a community-basis (ie: Second Saturday type encouragement to get out similar to First Fridays in other places) - not necessarily to draw other towns in, but to encourage those who live in Yarmouth to come out more through organized events. Similarly, more summer park movies!

Affordability

Respondents noted that Yarmouth is becoming less affordable for residents new and old. There is concern that if Yarmouth is no longer affordable, community members will have to leave the town, including seniors, teachers, police, and service workers.

We just finished digesting significant budget increases. It's a good time to manage the day to day and let people's finances catch up. We'll run fixed income people right out of town if we aren't careful.

A return to the traditional mix of occupations, income and housing to include blue collar, lower income brackets and multi family housing.

Housing Needs

As discussed above in the targeted questions on housing, affordable housing is a concern of survey respondents. Innovation is needed to create new housing options in Yarmouth. Density is one means to an end, but being creative in allowing new housing options should be balanced alongside calls for increased density.

Making an absolute commitment to affordable housing rather than lip service that has been the case over several cycles of comp plan. Continue to encourage all types of diversity.

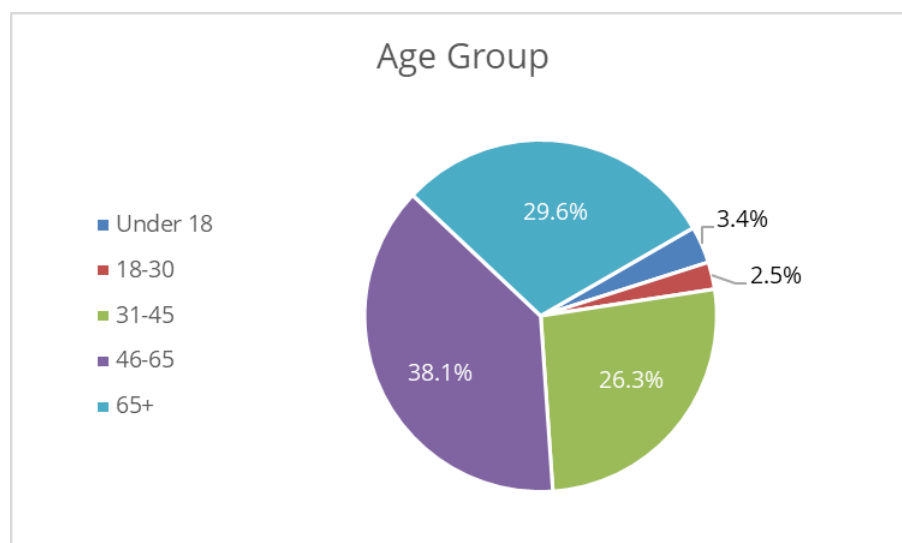
Continued development of the village/main street area, especially multi-unit, energy efficient and affordable housing.

Consider that increasing density is not the only answer to providing more diversity in housing.

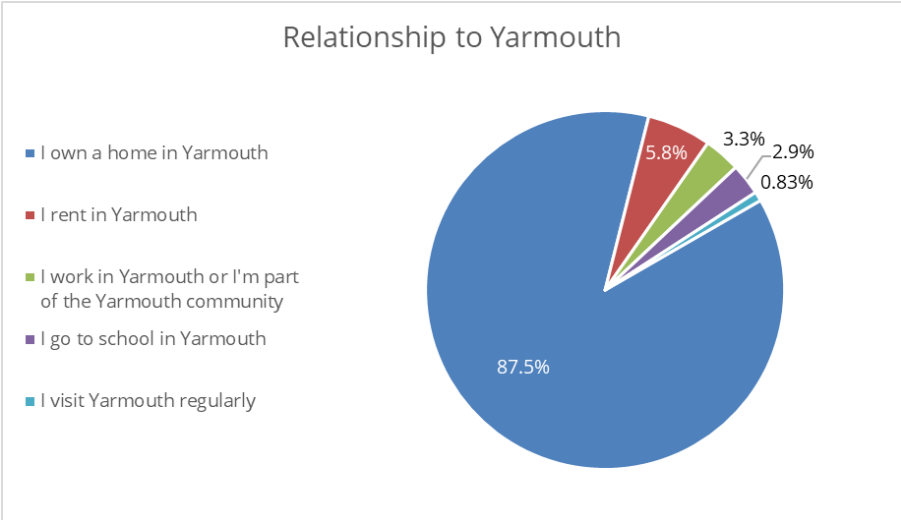
Demographics

The survey asked three demographic questions to understand who responded to the survey. Those demographic questions include age group, relationship to Yarmouth, and length of time associated with Yarmouth. These questions were optional for respondents.

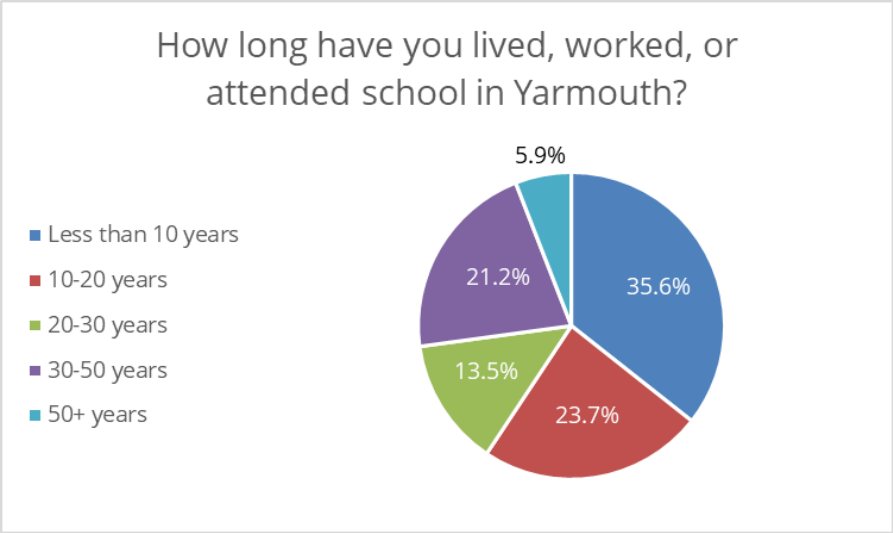
The survey respondents were primarily over the age of 31, with about 26% of respondents aged 31 to 45, about 38% aged 46-65, and about 30% over the age of 65. About 6% of respondents were under the age of 30.



The large majority of the respondents (87.5%) own a home in Yarmouth defining their relationship to Yarmouth. Just under 6% of respondents rent a home in Yarmouth. About 3% work in Yarmouth, define themselves as part of the Yarmouth community, or go to school in Yarmouth. Less than 1 percent of respondents were people who don't live in Yarmouth but visit regularly.



The largest share of respondents (35.6%) have lived in Yarmouth for less than 10 years, followed by 23.7% of respondents living in Yarmouth for 10 to 20 years. 21.2% of respondents have lived in Yarmouth for 30 to 50 years. The smallest shares of respondents have lived in Yarmouth for 20 to 30 years (13.5%) and more than 50 years (5.9%).



Summer Pop-Ups

The pop-up events were designed by the Comprehensive Plan team to provide informal and fun ways to let the community know about the Comprehensive Plan update, how to get involved, and solicit input. As noted, the primary goal of the summer pop-up events was to introduce to the community to the Comprehensive Plan Update through methods other than email, website postings, and mailings. Instead of asking the community to come to us, the Comprehensive Plan team went to the community. Nineteen events were held in Yarmouth during June, July, and August, including having a presence at the Yarmouth Clam Festival.

The following pop-ups were held:

- June 15: Coffee with Community hosted by Yarmouth Community Services
- June 22: Yarmouth Farmers' Market
- June 24: Brickyard Hollow
- June 30: Storytime hosted by the Merrill Memorial Library
- July 12: Royal River Park Daytime Concert
- July 14: Yarmouth Food Pantry
- July 17: Merrill Memorial Library
- July 20: Yarmouth Farmers' Market
- July 21: Yarmouth Clam Festival
- July 24: Clayton's Cafe and Bakery
- July 28: 317 Main Community Music Center
- July 30: Cousins Island & Littlejohn Island Improvement Association Summer Social
- August 2: Royal River Park Concert Series
- August 9: Royal River Park Concert and Movie Night
- August 15: Merrill Memorial Library
- August 17: Chebeague Transportation Company Ferry Dock on Cousins Island
- August 19: Artascope Plein Air Festival
- August 22: Merrill Memorial Library
- August 24: Yarmouth Farmers' Market

Wrapping up the summer engagement pop-ups, the Comprehensive Plan team hosted a Trivia Night in conjunction with the Yarmouth History Center and the Yarmouth Historic Preservation Committee on August 31. Beyond the summer months, the Comprehensive Plan team was present at the Yarmouth Public Schools

back to school nights and the weather-delayed Bartlett Woods barbeque in September.

In addition to an introduction to the Comprehensive Plan update, two simple questions were posed to those who chose to engage with the Comprehensive Plan team:

- Where are the places to protect and preserve?
- Where are the places that should have new investment, growth, and change?

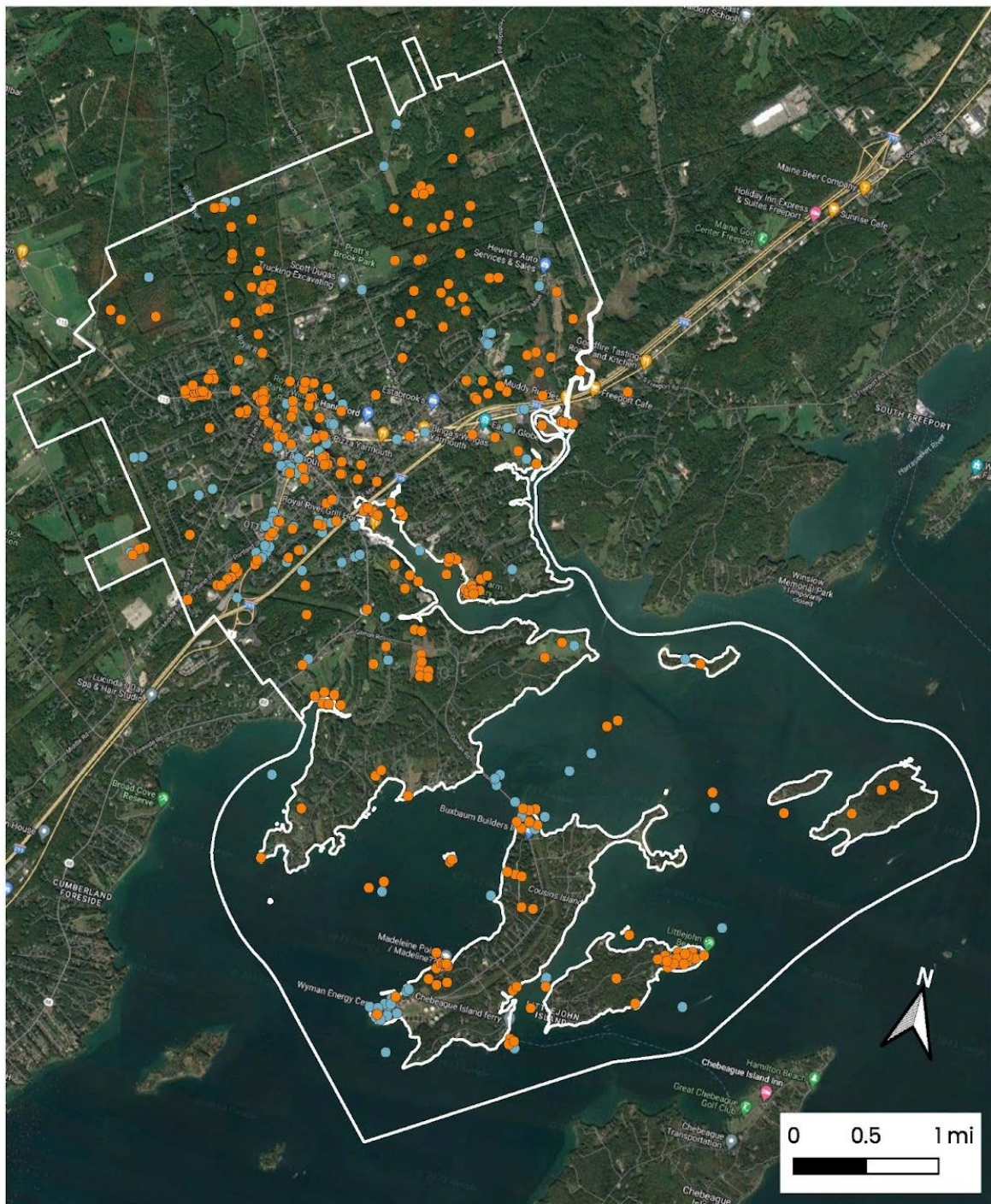
A large poster of Yarmouth was presented and those who chose to engage could add different colored dots to the map to indicate their preferences. In addition, participants could add other notes to the poster to provide any clarifying comments or to share any additional information. This activity was also duplicated on the project website.

The aggregated results of the exercise are presented in the map on the following page. The results of the mapping exercise are not unsurprising when taken in conjunction with the results of other engagement, such as the summer survey and the Community Conversations.

The places to protect and preserve are along the Royal River, large open spaces adjacent to existing open space such as Frank Knight Forest, coastal and estuarine areas along Casco Bay, the islands, and areas along the Cousins River.

Wyman Station and areas along Route 1 were identified as places where new investment, growth, and change should be focused. In addition, the Cousins Island Bridge and other critical infrastructure have been designated for investment, growth, and change.

Summer Pop-Ups and Online Survey: Map Results



- Places that should be preserved and protected
- Places that should have new investment, growth, and change

Regarding the comments received during the pop-up events and online were categorized into five categories: safe streets, connectivity and open space, public access, Town amenities and facilities, and islands.

Safe Streets	More bike paths and sidewalks that connect to places where people want to go like the YMCA and into Portland Vehicular speeds are problematic in some areas in town
Connectivity and Open Space	Wayfinding is important for locals and visitors alike Wildlife corridors should be established through open space preservation Preserve farmland and existing open space
Public Access	Water access points need investment Parking is limited at Royal River Park and other loved open spaces and parks Accessibility to and within town-owned access points is needed
Town Amenities and Facilities	Desire to see more restaurant options Affordable housing is needed Recreation opportunities like a pool
Islands	Island neighborhoods are unique Wyman Station presents opportunities

Other comments included some thoughts on flooding and resilience within Yarmouth. In general, the responses are consistent with the results of the summer survey described in this report and the other engagement efforts that continued into the fall of 2023.

PLAN YARMOUTH



Community Conversations Results & Analysis November 2023

Erin Zwirko, Director of Planning & Development, Town of Yarmouth



Overview

The Yarmouth Comprehensive Plan team held three topic-based Community Conversations events in Fall 2023 to support the development of the Comprehensive Plan Update. The topics selected were **Housing, Economy, and Environment & Natural Resources**. The topics were chosen by the Comprehensive Plan team as they encompass both the built environment and the natural environment of Yarmouth, and relate to the major themes we heard in the summer survey. Each session provided an opportunity for the community to have deeper discussions on these topics and get more nuanced feedback than the high-level questions in the summer survey.

Each event was held in-person in the same location on a Monday evening on September 18, September 25, and October 2. Events began with a brief presentation by the project team's subject matter experts. Following the presentation, attendees worked in groups to discuss targeted questions on each subject. Groups were led by table facilitators consisting of members of the Comprehensive Plan Steering Committee, the project team, and other community volunteers. Before the event ended, facilitators or other volunteers shared a brief report of what was discussed at each table. After the event, the presentations and video recordings of the events were made available on the Plan Yarmouth website, with online analogues of each activity.

During the same period of time, members of the Comprehensive Plan Steering Committee held a companion event about the needs of the growing number of Yarmouth residents who work from home. These results are also shared in this report.

In addition to the Comprehensive Plan Update, the Town of Yarmouth is concurrently working on developing its first Climate Action Plan. The Yarmouth Climate Action Task Force and the Yarmouth Sustainability Coordinator held a Community Action Workshop on October 10. Because of the interconnectedness of these two important planning processes, relevant results from the Community Action Workshop are referenced where there is overlap with the results from the Community Conversations.

Housing

Event Overview

Community Conversations: Housing was held on Monday, September 11, 2023 from 6 PM to 8 PM. 53 people attended the event, plus staff and facilitators. Jeff Levine of Levine Planning Strategies and a member of the Comprehensive Plan Team gave a presentation on the data incorporated in the Housing Inventory Chapter and the results of the Housing Affordability Market Study prepared by Levine Planning Strategies. The presentation shared important data points such as:

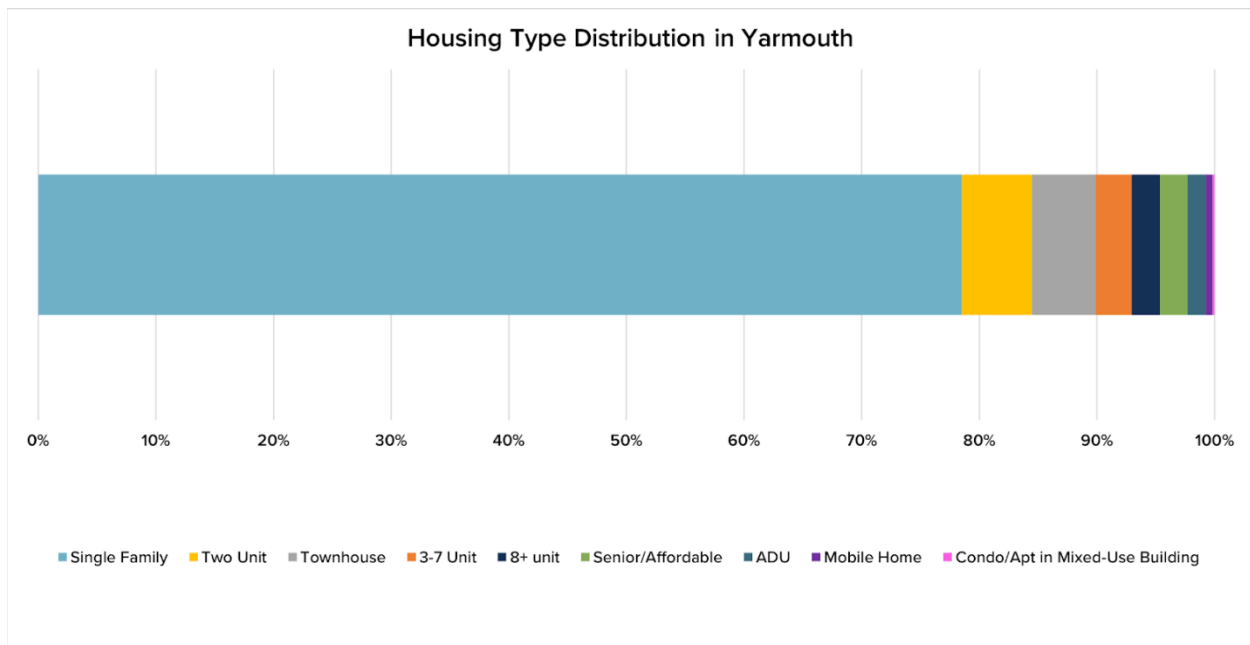
- Existing housing types in Yarmouth;
- Home construction over time in Yarmouth;
- Affordability data including the percent of households unable to afford the median-priced home and the resulting cost-burdened households in Yarmouth;
- Yarmouth's zoning limitations that affect the construction of new housing; and
- Number of homes needed to satisfy the current demand from renter and homeowner households based on income.

Armed with this information, small groups of attendees were asked to discuss what the mix of housing options should look like in Yarmouth in the future, where new housing should be located in Yarmouth, how new housing might relate to a variety of other topics, and strategies that Yarmouth can advance to create new housing. Attendees could also refer to Yarmouth's zoning map and land use map as well as the copies of the presentation.



Housing Mix

Attendees were provided with a graph showing the existing mix of housing types in Yarmouth, shown below.

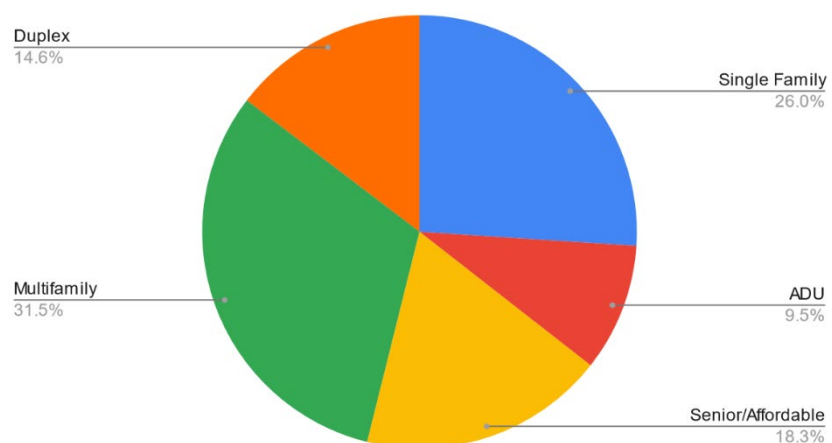


Based on this existing mix, each group was asked to consider what mix of housing types they would like to see be created in Yarmouth over the next 5 years. Groups were encouraged to discuss the housing types to gain a common understanding amongst group members as well as discuss other housing types that are missing. Each group developed their own categories for housing types and provided a distribution for what percentage of each type should be built.

Taking each group's housing mix and finding the average of each housing type, an average distribution was calculated.

Written comments on this activity and group comments at the end of the event illuminated that the participants did not recommend abandoning the single-family housing type in Yarmouth. However,

Average Housing Distribution



different types of single-family homes need to be available, such as cottages and smaller homes, and corresponding smaller lots, which in turn may be more affordable.

Many of the groups recommended that a baseline of affordable homes across all housing typologies be available in Yarmouth, with one group specifying 20 percent of all housing types be affordable.

Groups recommended, on average, that about one-third of new housing in Yarmouth should be multifamily. The summer survey yielded a similar result.

A version of this question was available online after the event. Respondents were asked to rank the housing types that should be built in Yarmouth over the next 5 years from a list of options:

- Single-family detached home
- Duplex (2-unit)
- 3-7 unit building
- 8+ unit building
- Age-restricted housing for people age 65+
- Affordable housing restricted to people earning below median income
- Accessory dwelling unit
- Mixed-use commercial/residential
- Mobile home

6 people responded.

Results reflected the Community

Conversations event

and the summer

survey in a desire for

more multifamily

housing, with duplex

and 3-7 unit

buildings ranked first.

There was a strong

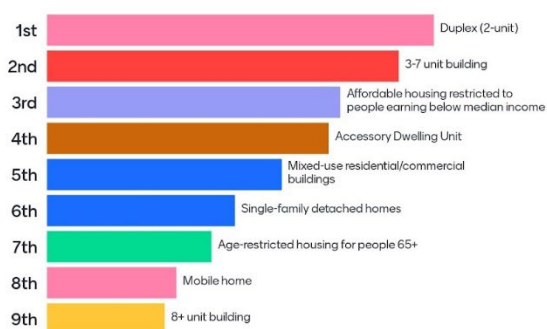
preference for

smaller multifamily

developments, with 8+ unit buildings ranked last. Affordable housing was ranked

third. Accessory dwelling units were fourth and single-family detached homes were

Housing Mix



Mentimeter



sixth, showing again that respondents want to keep building single-family homes in Yarmouth, but may be interested in different types of dwellings.

Housing Location

For the next exercise, each small group was given a handful of beans and asked to place the beans on a print out of Yarmouth in places where new housing should be located. Each bean was not assigned a value; rather the groups could use more beans to illustrate higher density and fewer or no beans to illustrate less density of housing.

Two examples of the bean maps that illustrate the range of responses to this question from the small groups are shown below:



The bean map on the left illustrates one group's interest in high housing density within the Village and along major corridors. The bean map on the right illustrates some increased density along Route 1 and some major corridors, but limited new housing elsewhere in town, which is more consistent with the other maps prepared by attendees. The Comprehensive Plan team reviewed each bean map for

commonalities and where there was divergence. Those common locations across the eight bean maps include:

- Village and Main Street;
- Route 1;
- Major corridors and intersections;
- Vacant land between the Garmin building and Bayview Street; and
- Creating more density around existing developments such as the Brookside Condominiums and the Taymil properties.

Where there was less agreement was along minor corridors such as Sligo Road, North Road, Granite Street, and Bayview Street. Only two maps put beans on any of the islands, the example above, and another map that placed beans at Wyman Station.

A version of this question was available online after the event. Respondents were asked where in Yarmouth new housing should be built over the next 5 years, and could drop a pin on a map to share. Only two answers were provided: one near the current Tyler Technologies property by Route 1 and the 295 ramp, and one on Blueberry Cove Road where there is currently an existing development of attached townhomes.

The results of the summer survey echoed the Community Conversations results, with the top response identified for new housing being located along Route 1 and major corridors. The attendees at the Community Action Workshop also supported prioritizing density and mixed-use buildings in areas close to transit and economic centers.

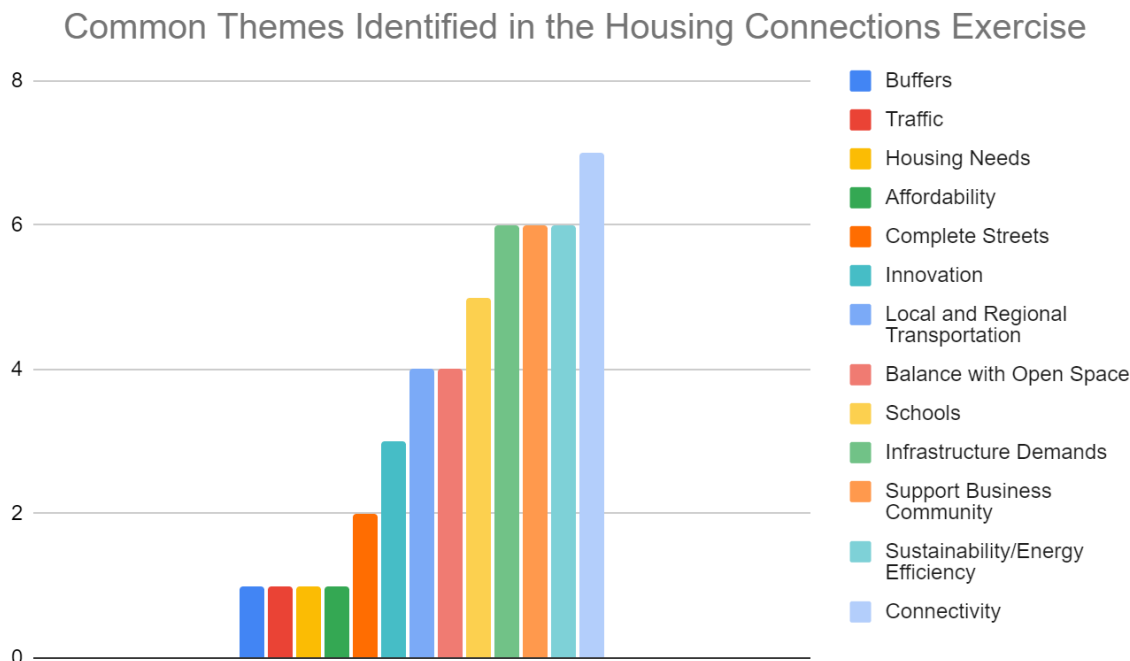
Housing Connections

Attendees were given the opportunity to think about what impacts the housing mix and locations they just developed would have on other aspects of life in Yarmouth: transportation, community amenities & infrastructure, open space & recreation, public schools, facilities, & services, energy efficiency & greenhouse gas emissions, and economy.

The Comprehensive Plan team reviewed the responses and assigned themes to the various connections identified by each small group. The most often cited item was connectivity – not only references to infrastructure to support walking and biking, but also local and regional transportation. Not unsurprisingly, there were many

references to the schools and infrastructure demands and striving to protect valuable open spaces. Other common themes cited include: sustainability and energy efficiency, housing supporting the business community.

The chart below illustrates how often various themes came up across the various small groups:



The same question was posed to respondents online. Only one person answered, citing the need for affordable workforce housing.

The respondents to the summer survey also expressed strong support for public transit improvements and supporting a community that is walkable and bikeable. Attendees at the Climate Action Plan Community Action Workshop provided input on high priorities consistent with the themes found in this exercise including preserving open space with a focus on wildlife corridors, aligning future development and building construction with climate goals, and supporting public transit and connectivity within Yarmouth.

Housing Strategies

Optionally, attendees could identify actions they would like to see the town of Yarmouth take to encourage this new housing. Not every group was able to complete this exercise, but the variety of responses suggested that the current zoning needs to be updated to support housing needs, there should be density bonuses for transit-oriented development, and affordable housing development needs to be incentivized.

The same question was posed to respondents online. Two respondents answered. One person listed affordability strategies: inclusionary zoning, support ADUs, create a housing trust, and commit town-owned land to affordable housing. Another person suggested that vacant buildings in town could be converted to affordable housing, and all housing should be surrounded by green space.

The variety of strategies provided suggests the desire by many members of the community to support and incentivize affordable housing. At the same time, others want to focus on balancing priorities and preserving Yarmouth's built environment and open space when addressing housing issues.

Economy

Event Overview

Community Conversations: Economy was held on Monday, September 18, 2023 from 6 PM to 8 PM. 23 people attended the event, plus staff and facilitators. Tom Dworetsky, of Camoin Associates, and a member of the Comprehensive Plan Team gave a presentation on the data incorporated in the Economy Inventory Chapter and the results of the Real Estate Market Analysis prepared by Camoin Associates. The presentation shared important data points such as:

- Key demographic trends on population and age, commuting, job growth, and growing industries;
- Yarmouth's key assets and strengths within in the region;
- Residential, retail, industrial, and general office market opportunities; and
- Key economic issues and needs in Yarmouth.



Following the presentation, attendees divided into small groups for discussion. Each small group was asked to complete four exercises: what businesses are missing in Yarmouth and where they should be located, what municipal actions to take to strengthen the local economy, what municipal actions to take on the creative economy, and what municipal actions to take on the working waterfront. Attendees could also refer to Yarmouth's zoning map and land use map as well as a map of Yarmouth's retail trade area and copies of the presentation.

New Business Growth: Missing Businesses and Appropriate Locations

Each small group was given a poster-size chart of business types for consideration. Each poster also provided space for groups to fill in any other business types that the group identified as missing in Yarmouth. Each attendee voted for five preferred businesses as part of the small group discussions. The photo on the following page is an example of one of the complete charts, illustrating how each small group rated each business category and added other ideas based on the group conversation.

When aggregating the responses from each table, the following top businesses were identified as missing in Yarmouth:

- Restaurants (full service, quick service, cafes, and diners);
- Outdoor recreation and agri-tourism;
- Boutique retailers;
- Daycare and childcare; and
- Urgent care.

This list diverges somewhat from the top five businesses identified for growth in Yarmouth in the summer survey. The top business type identified in the summer survey was restaurants and cafes, consistent with the results from the Community Conversation. Summer survey respondents identified the next four needed business types as small businesses and shops, working waterfront and ocean-based businesses, art studios and maker spaces, and entertainment activities. There is likely overlap between small businesses and shops and boutique retailers when comparing the Community Conversation results and the summer survey results, suggesting that the small business community is important to Yarmouth residents.

There are connections between the open-ended comments in the summer survey and the highly ranked missing businesses. A number of survey responses focused on family-oriented businesses, and both indoor and outdoor recreation were highly ranked in this event. Further, in the photo example above, this small group suggested that small department stores, such as a Reny's, are missing from Yarmouth, but the summer survey responses were clear that large box stores are not appropriate for Yarmouth.

The second part of this exercise asked attendees where they would locate their top new businesses in Yarmouth. Each small group was asked to identify where in Yarmouth new business growth would be appropriately located. Each table was given a second poster-sized chart as seen in the photo below and the options for

Community Conversation Economy
YARMOUTH

What business types are missing from Yarmouth?
Review the list below.
Place a blue dot next to the top 5 business you wish you had in Yarmouth.

Full service restaurants	• •
Quick service restaurants	
Supermarkets/grocery stores	
Specialty food stores	
Pharmacies	
Clothing stores	
Bookstores	
Furniture stores	
Large department stores	Small department stores • • • Reny's
Boutique retailers	
Barber shops and hair/nail salons	
Pet stores	•
Drycleaners	
Movie theaters	
Health/fitness centers	
Indoor recreation	• • •
Outdoor recreation	•
Urgent Care	
Outpatient medical services	
After-school tutoring	•
Day care/child care	
Music/Arts Education	
Museums	
Live Entertainment venues	•
Other: Energy Generator	• •
Other: Agri Tourism	Apple Orchard, Corn Maze, Pumpkin Picking, Maple Syrup • • •
Other:	•

locations for new business growth included along Route 1, in the village, in neighborhoods, and elsewhere in town.

Fill in the chart with your table's top 5 missing businesses. If you had these businesses in Yarmouth, where should they be located?

Business Type	Along Route 1 (high visibility, car access)	In the village (smaller, walkable, downtown)	In neighborhoods (local amenities)	Elsewhere in town (new development areas)
Full Service Restaurants - Destination Restaurants - Medium Price	Yes	Yes		
Quick Service Restaurants Cafes open on weekends Breakfast Spots	Yes	Yes		
Boutique Retailers	Yes	Yes		
Clothing Stores	Yes	Yes		
Urgent Care (for pets as well -- Vets)	Yes	Maybe?		

Wyman
Day care

Recreation uses

Across the small groups, most new business growth was recommended to be located along Route 1 and in the village, especially for all types of restaurants. Urgent care for people and pets and outpatient medical services were also recommended for Route 1. Boutique retailers and other small businesses were recommended primarily in the Village. One group identified high-end hospitality and accommodations as a new business type for Yarmouth, and recommended it to be located along Route 1 and in the Village.

Turning to new business growth in neighborhoods, the groups recommended daycares, full-service restaurants, boutique inns, and indoor recreation be available.

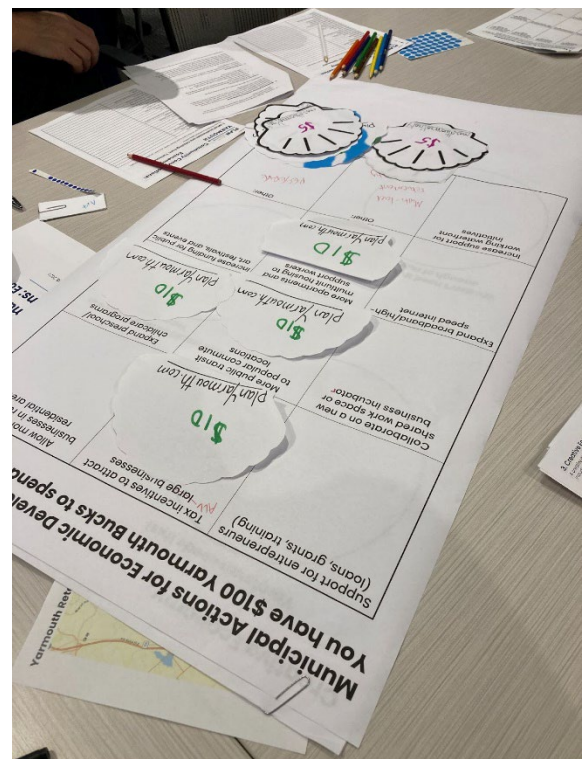
Specifically on Cousins Island, one group recommended new retail options. Groups specifically identified Wyman Station on Cousins Island as a good location for recreation, waterfront services, and aquaculture support. Further, another group identified East Elm Street at Depot Road as a good location for new light manufacturing. Finally, agritourism and outdoor recreation was identified for areas beyond Route 1 and the Village and not necessarily as a neighborhood amenity.

Following the event, a similar prompt was posed online. Respondents were asked what businesses are missing in Yarmouth and where they should be. Three people replied, requesting: restaurant with breakfast/moderately priced dinner, tech firms or incubators with mid to high paying jobs, and an inn/bed and breakfast.

Municipal Actions for Economic Development

For this exercise, the small groups were given \$100 Yarmouth Bucks to allocate to different municipal actions to support economic development. Each small group was directed to divvy up their \$100 toward a variety of actions Yarmouth could take including:

- Support for entrepreneurs (loans, grants, training);
- Tax incentives to attract large businesses;
- Allow more small businesses in rural and residential areas;
- Collaborate on a new shared work space or business incubator;
- More public transit to popular locations;
- Expand preschool/childcare programs;
- Expand broadband/high speed internet;
- More apartments and multiunit housing to support workers;
- Increase funding for public art, festivals, and events; and
- Increase support for working waterfront initiatives.

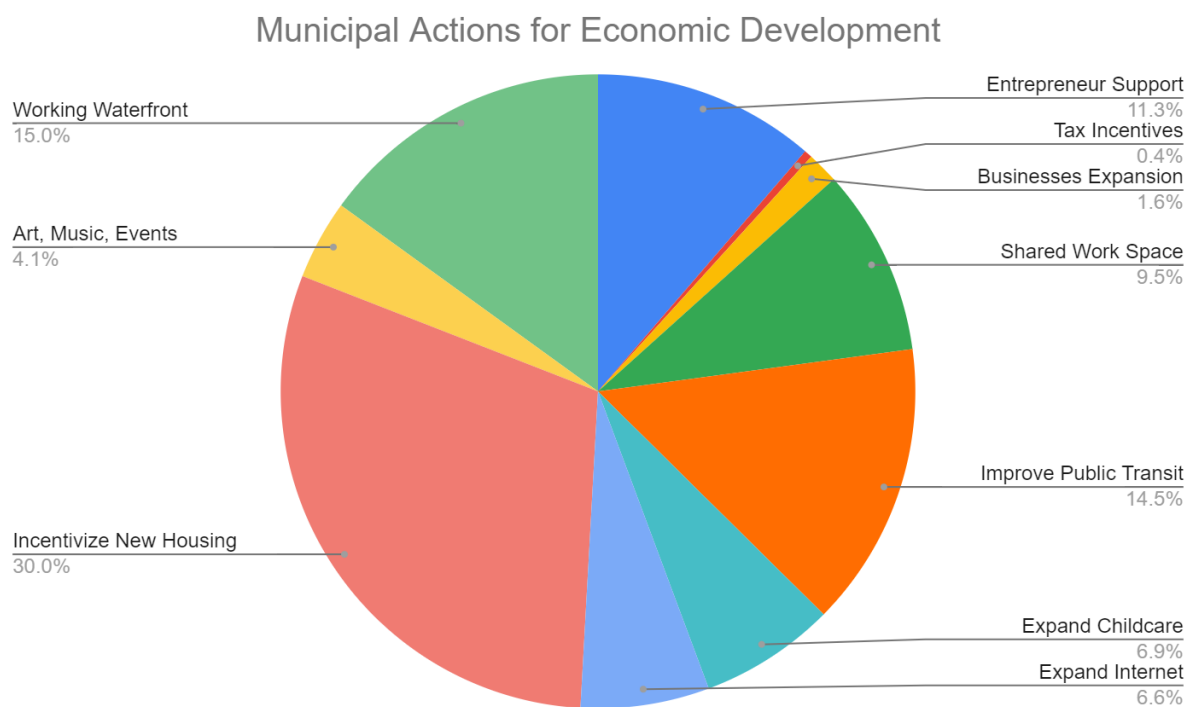


As with other activities, the small groups could add their own suggested municipal actions.

By aggregating the data across the small groups, the categories that received the highest amount of Yarmouth Bucks are:

- Incentivize new housing options;
- Increase support for working waterfront initiatives;
- Improved public transit to popular locations;
- Collaborative on a new shared work space or business incubator; and
- Support for entrepreneurs.

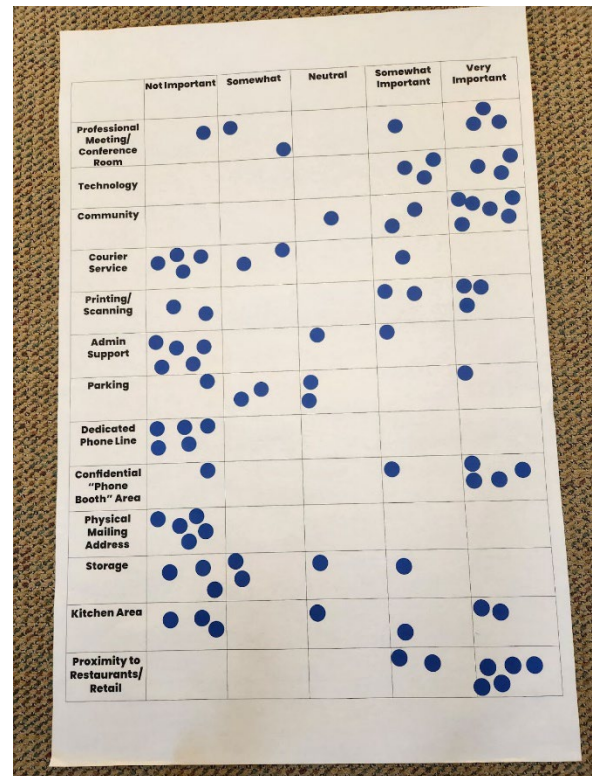
The following chart illustrates how the small groups in the aggregate distributed Yarmouth bucks across the topics.



“Other” responses included tax incentives for small businesses, outdoor recreation, entertainment, satellite parking in the Village, and trail connections. The results suggested that the small groups found consensus on supporting the small businesses in Yarmouth and expanding those opportunities for small businesses. These results are consistent with the feedback received through the summer survey.

The focus on collaborating on a shared work space or business incubator is consistent with the Town's Economic Development Advisory Board's current plan to focus on workforce development, business resources through shared work space, and business attraction.

At a companion event focused on remote work, the Comprehensive Plan Steering Committee learned that remote workers desire better internet infrastructure in the community. Although it was rated lower priority at the Community Conversation, the discussion at the remote work event illustrated that internet infrastructure in Yarmouth is still lacking. At the same event, attendees were asked about features of a



shared work space that would be considered important. Attendees indicated that the sense of a community would be the most important aspect of a shared work space, whereas features such as a dedicated phone line, administrative support, and a physical mailing address were not as important to attendees. (Results of community preferences for a shared workspace are in the photo above.) Although most of the attendees indicated that the firms they work for provide significant support for remote work, those who do not have that support system would benefit from growth strategy, graphic design and marketing, and technical support services.

Online, respondents were asked to share on a scale of 1-5 how much they agree (5) or disagree (1) with the following municipal actions. Two people responded.

- Support for entrepreneurs: average rank 2
- Tax incentives for large businesses: average rank 1
- More small businesses in rural/residential areas: 3
- Support public transit to popular commute locations: 5
- Expand preschool/childcare programs: 3
- More workforce housing: 3
- New coworking space or business incubator: 1.5
- Expand high-speed internet: 5

The small number of respondents means these rankings are not representative, but the two respondents did also highly value public transit and workforce housing, which were some of the top-ranked municipal actions in the in-person activities.

Creative Economy and Working Waterfront

The final two activities required the small groups to consider two niches of Yarmouth's economy, the creative economy and the working waterfront. For the two exercises, the small groups were provided with a list of elements that support these economies and were asked to determine whether Yarmouth needs that element, would be nice to have, or has enough of that element or it is not needed.

For the creative economy, the pre-selected elements included:

- "Percent for art" tax fund for arts and culture;
- Event space;
- Studio space;
- Visual/performing arts classes for kids;
- Visual/performing arts classes for adults;
- Public art installations;
- Sidewalk vendors;
- Music festivals; or
- Art fairs.

Each small group could also identify other elements that were important to the attendees.

Overall, the exercise illustrated that there are strong organizations in Yarmouth that already offer many of the items on the list, such as youth and adult classes and studio space. The "need to have" items included event space, sidewalk vendors (but not blocking the sidewalk), and music festivals. The "nice to have" items included studio space and public art installations. The items identified as not needed included the percent for art tax fund, youth and adult classes, and art fairs. An additional item identified included marketing to showcase Yarmouth's local creative economy to Yarmouth and the region.

Online, respondents were asked to rank the same list of creative economy elements in order of preference. Only one person answered. They ranked visual and performing arts classes for kids and adults highest, differing from the in-person results. Similar to

the in-person results, they also highly valued public art, art fairs, and studio space. "Percent for art" tax fund was ranked lowest.

For the working waterfront, the pre-selected elements included:

- Public wharves, piers, and boat ramps;
- Dedicated moorings for commercial use;
- Waterfront parking for commercial use;
- Boat and gear storage;
- Waterfront processing facilities;
- Education and job training;
- Increased shoreline and beach access;
- Public facilities (changing rooms, bathrooms, etc);
- Recreational boat tours;
- Waterfront dining;
- Address vulnerability to sea level rise; and
- Water-dependent energy generation (i.e., offshore wind).

As above, the small groups could also provide other responses.

Although not all of the groups completed this exercise, the responses that were received illustrate the tension between providing access to the waterfront for commercial users and for recreational uses when most of the shoreline in Yarmouth is privately owned. Additionally, more education may be needed in the community to understand what is needed to support a working waterfront today. There was strong interest in increased public access, boat ramps, public facilities, and energy generation. There was moderate support for dedicated commercial moorings, storage, and education. The responses were divided on recreational boat tours, waterfront dining, and other "touristy" activities.

Online, respondents were asked to rank the same list of working waterfront elements in order of preference. Only one person answered. They ranked "address sea level rise" highest, followed by public facilities and public wharves, piers, and boat ramps. Commercial activities were ranked lower.

Open-Ended Questions

The event also featured two open questions which attendees could respond to any time during the event. The two questions asked were:

- What are the biggest obstacles to starting or running a business in Yarmouth?
- If you could give input on the redevelopment of Wyman Power Station, what public benefits would you like to see?

The responses received to the first question included parking, staffing, and access for deliveries. These responses (parking and access for deliveries) suggest that Yarmouth's commercial districts do not provide space for indirect support for businesses, and this may be truer for the Village and Main Street.

The responses received to the second questions included providing a commercial tax base, establishing an environmentally sound business, and that appropriate future uses may be a park, a new mixed-use space open to the public, or a modern power plant. The commonality between these responses is that it should be put into productive use that could have public benefits for Yarmouth and the region.

Environment & Natural Resources

Event Overview

Community Conversations: Environment & Natural Resources was held on Monday, October 2, 2023, from 6 PM to 8 PM. 29 people attended the event, plus staff and facilitators. Bina Skordas of FB Environmental, and a member of the Comprehensive Plan Team gave a presentation on the data incorporated in the Natural Resources, Marine Resources, Agriculture and Forestry, and Recreation Inventory Chapters. The presentation shared important data points such as:

- Highlights on invasive plant species, groundwater water quality, stormwater management, and fish passage on the Royal River;
- Coastal bluff stability;
- Land conservation;
- Threats to water quality;
- Highlights on marine resources including important habitats, threats to marine resources, water-dependent commercial activities, and access; and
- Impacts of climate change on recreation and agriculture and forestry.

This presentation was more substantial than at the previous Community Conversation events, so the attendees were asked to complete fewer exercises in small groups. The first exercise was a mapping exercise where attendees used

different colored dots to identify locations in Yarmouth that should be prioritized for ecological value and resiliency, and locations that should be preserved for recreation uses.

For the second exercise, the small groups reviewed various municipal priorities to protect environmental quality, increase access to open space, and prepare for the impacts of climate change. Attendees could also refer to Yarmouth's zoning map and land use map and copies of the presentation.



Places to Protect

In the mapping exercise, attendees used different colored dots to designate areas in Yarmouth for ecological value and resiliency, or for recreation. Identified locations could be designated for both priorities. Attendees could also provide comments by

adding sticky notes to the map. The photo to the right of one group's map is representative of the feedback received through this exercise.

The Comprehensive Plan team reviewed each map and cataloged where attendees placed the different colored dots. The most common responses are provided below. Many of the groups designated the same locations as needing to be preserved for ecological value and resiliency, as well as for recreational opportunities.

The following locations in Yarmouth were most commonly recommended to be preserved for ecological value and resiliency:

- Land adjacent to the Royal River;
- The Garmin/DeLorme property;
- Sandy Point Beach and Camp SOCI on Cousins Island;
- Wyman Station;
- Archdiocese land on either side of Whitcomb's Way near the Yarmouth Water Treatment Plant;
- Large vacant privately-owned land near existing important resources and open spaces.

The large vacant parcels consisted of parcels around the Frank Knight Forest and Pratt's Brook Park; at the mouth of the Royal River; along Cousins River; and off of Sligo Road. Although not necessarily vacant, the land around the estuary that intersects with Princes Point Road was also identified as an important area for ecological value and resiliency.

The following locations in Yarmouth were most commonly designated as recommended to be preserved for recreation:

- The Saint Lawrence and Atlantic railroad corridor;
- Sandy Point Beach;



- Wyman Station;
- Maine Coast Heritage Trust property at corner of Granite Street and Old County Road;
- The Garmin/DeLorme property;
- Privately-owned land at the end of Bucknam Point Road;
- Town-owned land adjacent to the Yarmouth Water District;
- Large vacant privately-owned land around Frank Knight Forest and Pratt's Brook Park;
- Archdiocese land on either side of Whitcomb's Way near the Yarmouth Water Treatment Plant.

These two lists have many overlapping locations, illustrating how land preservation could serve both ecological and recreation purposes in Yarmouth, and accommodate other priorities such as access to the waterfront, accessible trails, and wildlife corridors and connectivity.

As noted above, each small group could also provide additional information through written notes on the maps. Those comments were categorized into different themes as outlined in the chart below with examples:

Theme	Examples
Accessibility	"Accessibility for all users"
Buffers	"Buffers along Royal River are critical" "Wider buffers along waterways"
Connectivity	"Protect wildlife corridors and ensure there is connectivity even under roads" "Wayfinding and connections"
Preservation	"Permanent protections for town owned property"
Process	"Implement/build on Open Space Plan" "Prioritize high value ecological sites"
Regulations	"Steep slopes protection and ordinance" "Assess coastal bluffs for updated maps and regulations"
Water Quality	"Water quality is important for aquaculture industry" "Look at septic systems along Casco Bay"

Following the in-person workshop, a similar mapping activity was placed online. Participants could drop a blue pin on a map in places that should be protected for environmental value, and an orange pin in places that should be protected from recreation. Only two pins were dropped, both on the Cousins Island power line corridor. The respondent added a note that habitat on Cousins Island has been damaged by CMP.

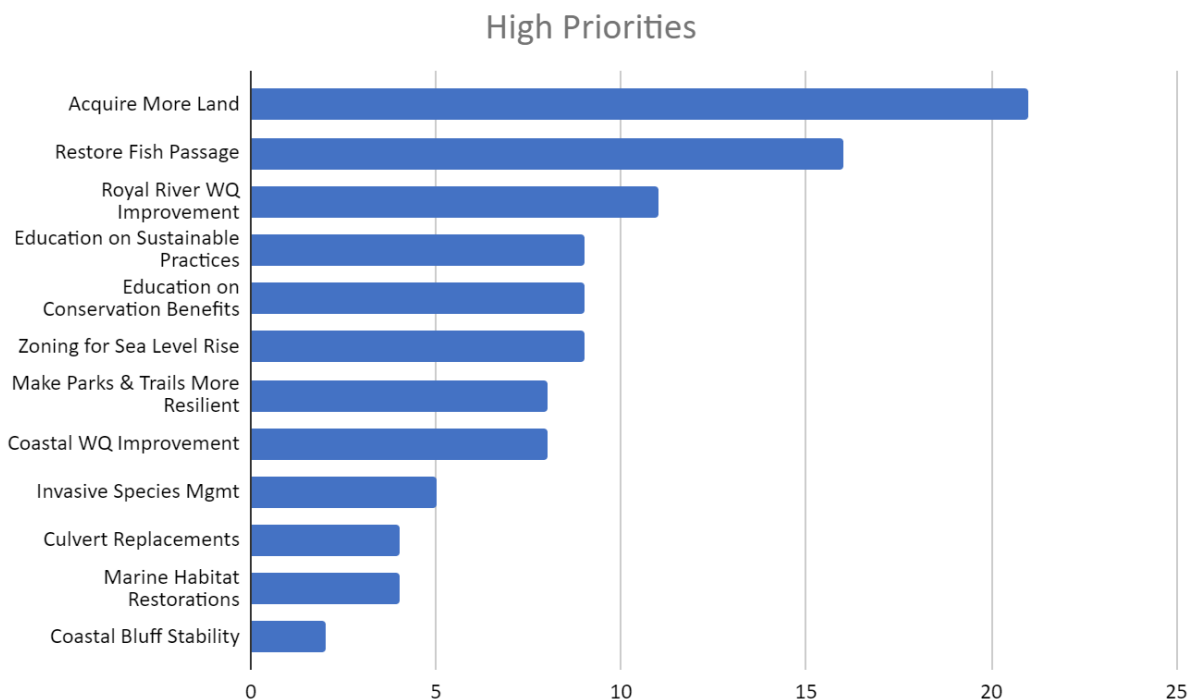
The results from the Climate Action Plan Community Action Workshop mirror the results recorded from this mapping exercise. One of the highest priorities for natural resources coming out of the Community Action Workshop was to protect 400 to 500 acres of land through focused acquisitions prior to 2050. In addition, the attendees at the Community Action Workshop recommended new regulatory and incentive strategies to protect trees within the community and to reduce clear cutting. There was also interest in conserving land with a focus on wildlife corridors and maximizing the tree canopy.

Municipal Priorities

The focus of the second exercise was for the small groups to identify high and medium priority municipal actions from a pre-selected list. Attendees also had the chance to add their own recommended priorities. Dots were used to differentiate between high and medium priorities. The pre-selected priorities included the following:

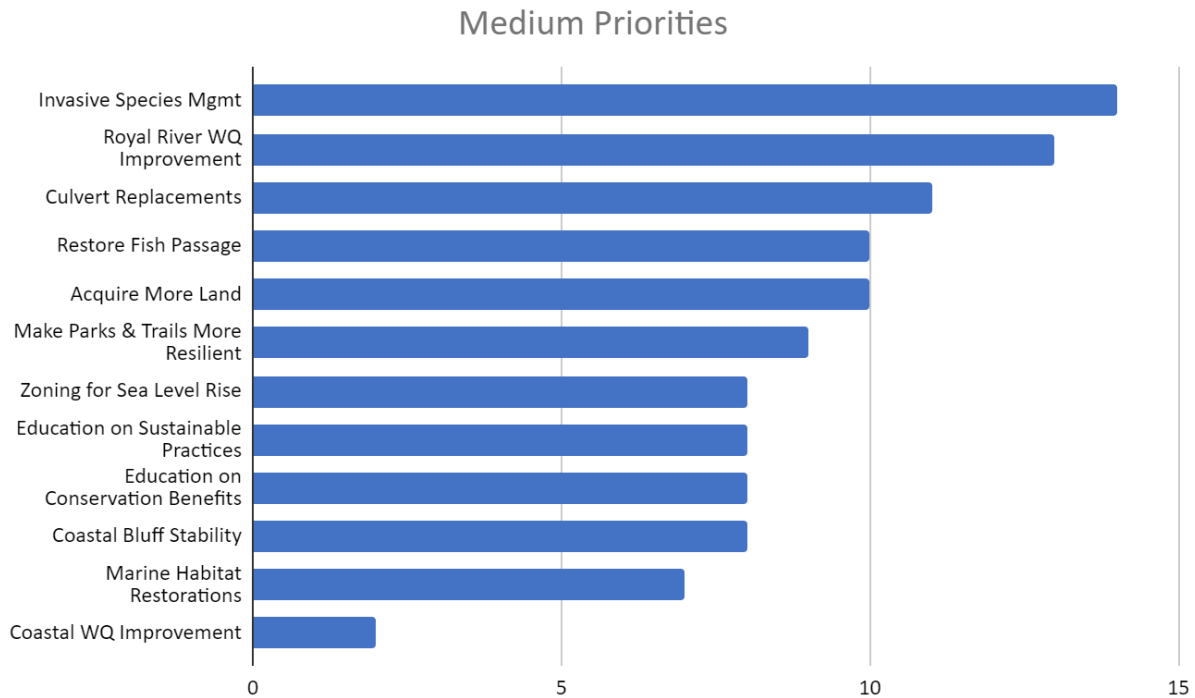
- Coastal water quality improvement;
- Marine habitat restoration;
- Royal River water quality improvement;
- River restoration for fish passage;
- Coastal bluff stability;
- Zoning for sea level rise;
- Make waterfront parks & recreation trails resilient to sea level rise;
- Invest in culvert replacement projects to reduce flood risk;
- Invasive species management;
- Invest in acquiring more conservation land;
- Educate large private landowners on the benefits of easements for conservation and recreation; and
- Educate homeowners on sustainable land care practices (native plants, pesticide and fertilizer use, etc).

The Comprehensive Plan team aggregated the results across the groups. The chart below illustrates the high priority ranking.



The top five high priorities were investing in acquiring more conservation land, restoring fish passage on the Royal River, Royal River water quality improvements, education for property owners, and zoning for sea level rise. These top three priorities have implications throughout Yarmouth and are big picture priorities for the community to address. These results are consistent with the results of the Climate Action Plan Community Action Workshop.

The next chart illustrates how the groups ranked the pre-selected priorities as medium priorities. If we took out the items ranked the highest of the high priorities, the top five medium priorities include invasive species management, culvert replacements to reduce flooding, making parks and trails more resilient, coastal bluff stability, and marine habitat restoration. In comparing these items to the high priority items, these actions are more targeted to specific areas in town, with the exception of marine habitat restoration.



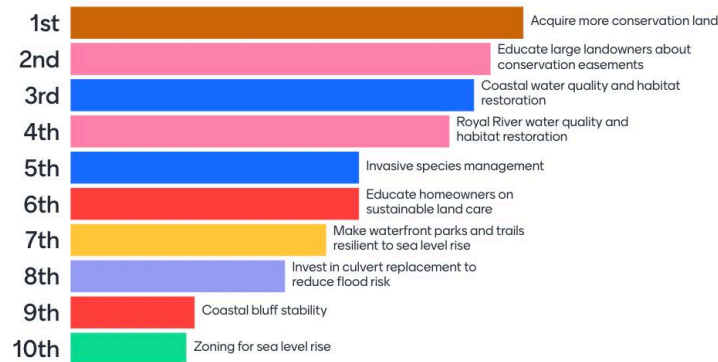
Other priorities that were identified by the small groups include the following items:

- Provide accessible trail systems;
- Protect the health of the tree canopy and increase the tree canopy each year;
- Eliminate point source pollution and other stormwater management improvements;
- Act regionally to address water quality improvements in Casco Bay;
- Educate the community on the threats of erosion from climate change;
- Provide multilingual outreach on these topics.

Respondents online were asked to rank the same municipal priorities. Seven people responded. Notably, acquiring more conservation land was also the top-ranked priority. The other high priorities were education for large landowners, coastal water quality, and Royal River water quality. Zoning for sea level rise and coastal bluff stability were the lowest-ranked priorities. (See chart on following page.)

Comparing these results to the feedback received in the summer survey about priorities for Yarmouth, there is clear consistency in the goal of preserving open space within the community, and a desire for Yarmouth to be a leader in addressing climate change and sea level rise. Access to and connectivity around open spaces for wildlife as well as people were also referenced often in the summer survey.

Rank these municipal priorities.



Open-Ended Question

The event also featured an open question which attendees could respond to throughout the evening: what factors are most important when considering the future of the Royal River dams?

The responses received to the question were mixed, but one response noted that whatever is done, it must be done correctly after the completion of the analysis currently underway by the Army Corps of Engineers. Other responses noted that there is the opportunity to reverse the impacts to biodiversity and the natural riverine ecology resulting from the dams. Still others noted that the fish ladders can work properly even if the dams remain. Finally, another response noted that the removal of the dams could help mitigate global warming and sea level rise projections.

PLAN YARMOUTH



Future Land Use Workshop & Survey Results & Analysis December 2023



Overview

On November 13, 2023, North Star Planning, assisted by Yarmouth town staff and the Comprehensive Plan Steering Committee, held a Future Land Use Workshop at Patriot Insurance from 6–8 PM.

48 people attended the event, which began with a 30-minute presentation from North Star Planning. The presentation started with an overview of data analysis and trends from the summer survey and Community Conversations events. Next, the presenters explained the process of future land use planning, including state requirements and Yarmouth's 2010 rural and growth areas, as well as key areas of town that came up often in public participation so far: Main Street and the Village, Route 1, residential neighborhoods, and the rural/coastal/island areas.

Attendees were then prompted to visit stations around the room open-house style, at their own pace. Stations included prompts about each key area of town, as well as a selection of conceptual renderings for people to react to.

An optional 6-question survey provided the opportunity to give more feedback on these issues, as well as to share additional ideas. Following the workshop, the 6-question survey was made available online to allow additional community members to participate. The survey was shared via the Plan Yarmouth email list and through the Town's channels. 72 people responded to the survey in total. Not all respondents answered every question.

Future Land Use Workshop Results

Main Street and the Village

Yarmouth's Main Street and Village are highly valued parts of town that help create a sense of community and identity. Along Main Street, the Town's Character Based Development Code works to guide new development in a compatible style with the historic New England village center. Previous public engagement suggested these areas should be preserved, but could also be enhanced.

Attendees were presented with different strategies to make Main Street and the Village more active and vibrant. The most selected strategies were outdoor dining, more small businesses, and public transit. The least selected were closing streets to cars, and sidewalk vending.

What strategies would make Main Street and the Village more active & vibrant?

Outdoor Dining	25
More small businesses	22
Public transit	15
Public art/murals	10
More residential development	9
Food trucks	7
Close streets to cars (temporarily or seasonally)	6
Sidewalk vending	1

These results indicate that people largely enjoy the way Main Street and the Village are now, but are interested in a greater variety of businesses and restaurants, and

more things to do downtown. Preferences correspond with the results from the Community Conversation event on Yarmouth's economy, where people indicated restaurants, recreation, and boutique retailers were the most desired businesses in Yarmouth. Restaurants, cafes, and small businesses were also the most commonly selected types of businesses in the summer survey.

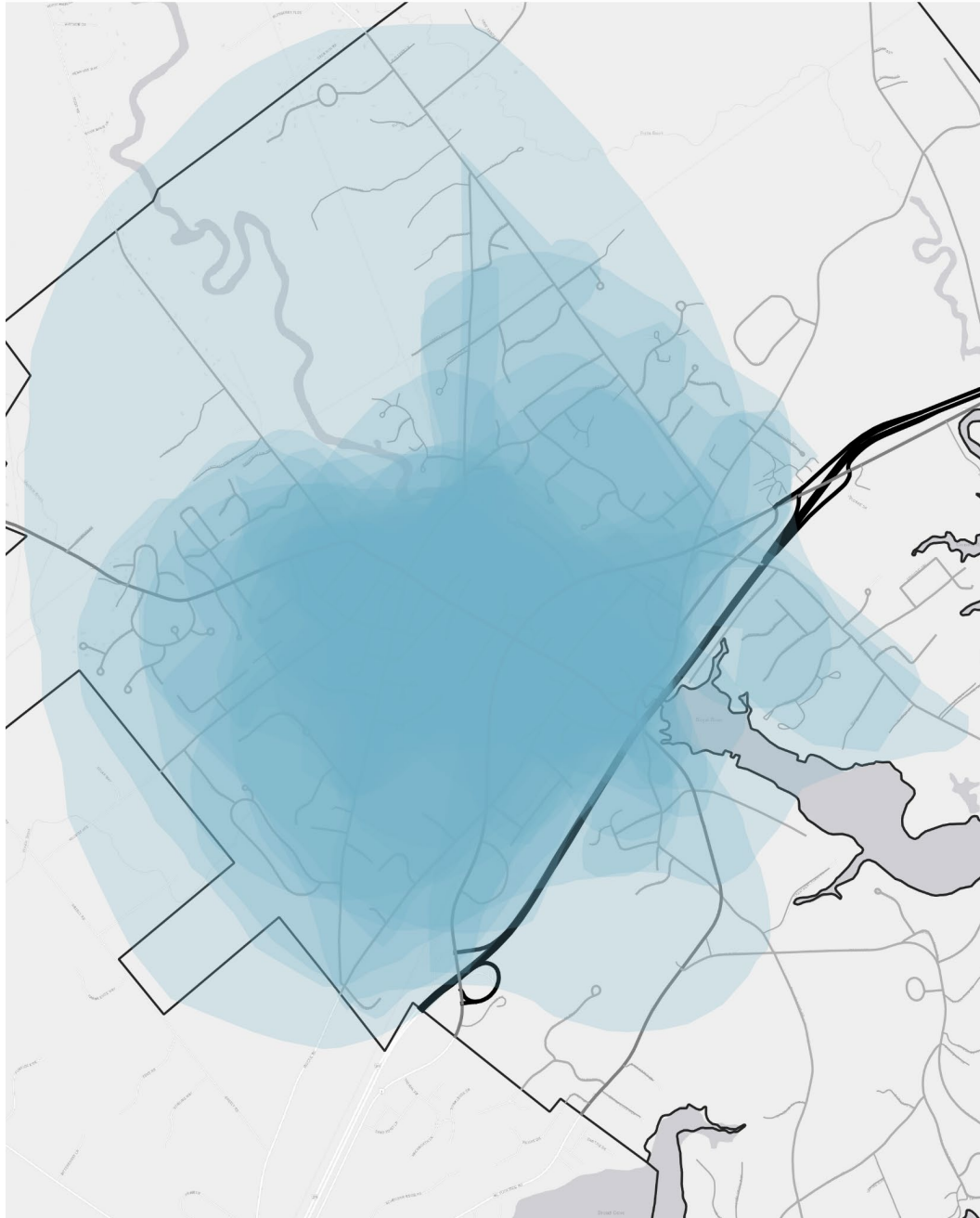
Attendees added their own suggestions to this question on post-it notes. Some attendees expressed their agreement with what was written on the post-it notes with dot stickers. The most popular suggestion was more bike lanes/sidewalks/walking paths: 11 people suggested and agreed with this idea. Other popular suggestions were: move utilities underground (8 people suggested and agreed), and to preserve existing and add more open space in the village (5 people.)

Other comments and suggestions include:

- *"Parking so people can walk to the village"*
- *"Encourage mixed-use development in village - retail on ground floor, residential above, 4 story maximum"*
- *"Night market!"*
- *"Encourage more art/music/special events to attract visitors and hotels"*
- *"You cannot have a vibrant main street without the dense residential surrounding it. One can't survive without the other, both are vibrant."*
- *"Not more residences, but gathering places inside (restaurant) and outside (more parks and spots like sitting under the overpass)"*

Circle the Village

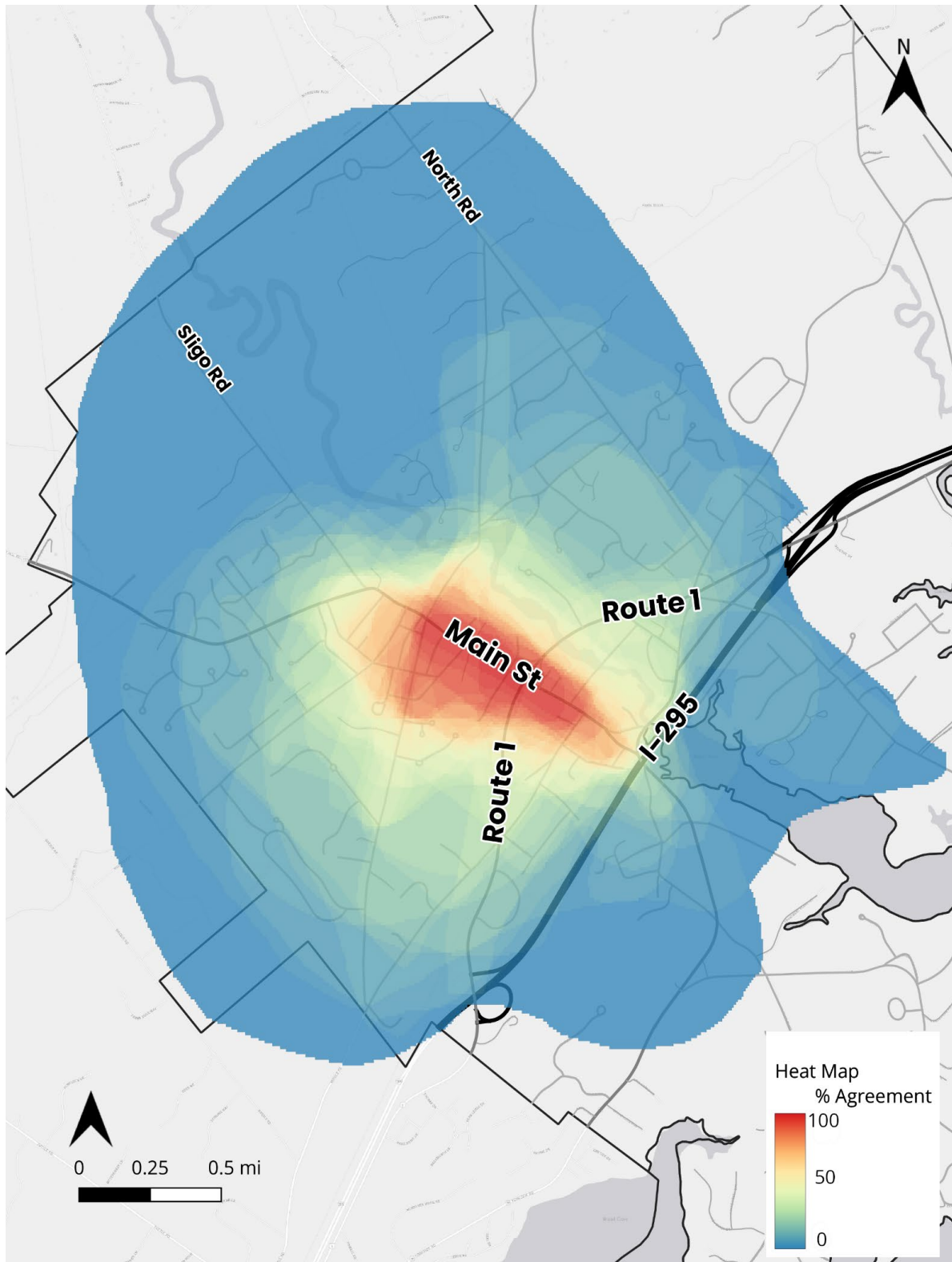
Attendees were provided with a blank map of Yarmouth and asked to circle what part of town they consider to be "The Village." 38 people participated in this exercise. Following the workshop, all maps were scanned and traced as polygons into a GIS layer. The result of all 38 maps as overlapping polygons is shown on the following page.



Circle the Village – 38 responses

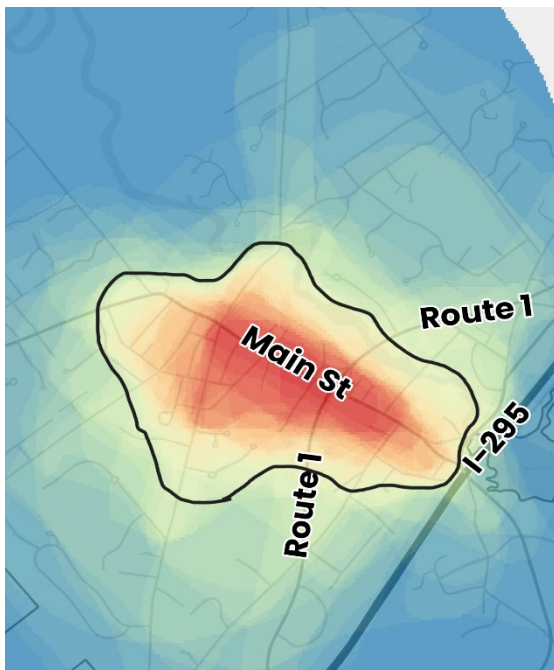
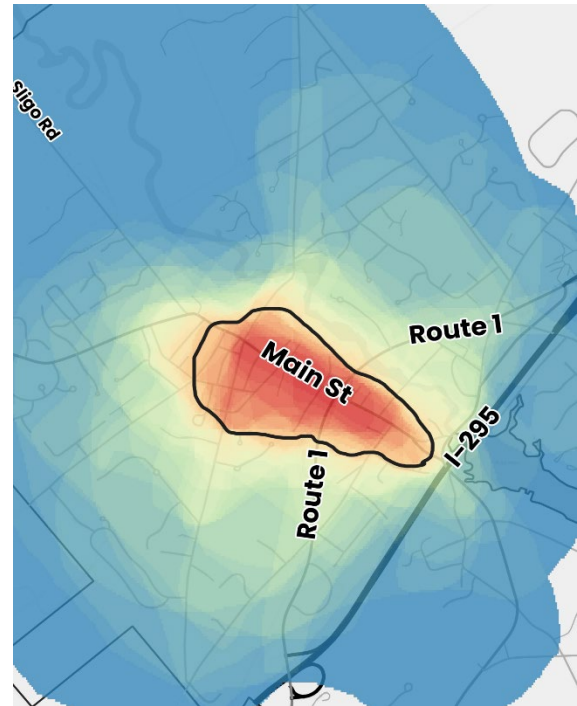
To identify the area of consensus for what people think of as the village, the polygon layer was analyzed using a density heatmap algorithm in QGIS. The resulting diagram is visualized using a spectral gradient to show highest (red) to lowest (blue) polygon density. The area of highest polygon density is where more polygons overlap - i.e., where more of the village “circles” drawn by participants overlap. This is

indicated by the red center of the heat map. As the spectrum moves from red to blue, there is less and less overlap between participants' village circles.



These results help demonstrate what parts of Yarmouth are popularly considered to be in the Village. There is unanimous consensus that Main Street between Elm Street and Portland Street is the Village.

75% of participants agree that the areas in red to orange are part of the Village. This includes the residential neighborhoods south of Main Street stretching from Hillside Street to South Street; Railroad Square; the full length of Cleaves Street; the section of Route 1 including Walgreens, Clayton's, and the North Yarmouth Academy fields; and the residential neighborhood along High Street and Rocky Hill Road. The eastern boundary is the area where Main Street and Marina Road split. North of Main Street, this area of 75% agreement stretches approximately to the area where the Grist Mill Park and Fields and Royal River Park begins.



The areas in orange to yellow are what 50% of participants agree is part of the Village. This expanded area is bounded by the Royal River to the north and I-295 to the east. The Village expands to the west to the intersection of Sligo Road and West Main Street, encompassing the historic Yarmouth One Room Schoolhouse, located next to the West Main Street Schools. To the south, more residential areas are included, down to Bowdoin Street, Tenney Street and Village Brook Road, Route 1 including the Romeo's Pizza strip mall, and residential streets Mayberry Lane and Sandy Brook Lane.

The Village border is just north of the Yarmouth High School and Elementary/Middle School campuses.

Route 1

Route 1 is a major commercial and transportation corridor in Yarmouth that primarily consists of auto-oriented development. The town's Character Based Development Code works to guide new development in a style compatible with Yarmouth's traditional New England village. In previous surveys and public engagement, the Route 1 corridor has been identified as a place that can accommodate additional development and infill, as well as an area that needs improvements to make it a better place to work, live, and travel as a pedestrian or cyclist.

Attendees were asked what strategies would make the Route 1 corridor more welcoming and accommodating. The most selected strategies were landscaping and street trees, more bike infrastructure, traffic calming, benches and small public spaces, and increased public transit. Less selected strategies were more residential development and public art and murals. These choices indicate that attendees want to see basic improvements for enjoyment, safety, and open space, but are lukewarm about more development and a complete transformation of the corridor.

What would make the Route 1 corridor more welcoming & accommodating?

Landscaping and Street Trees	19
More bike infrastructure	18
Traffic calming	17
Benches and small public spaces	17
Increased public transit	17
More infill development	13

More residential development	10
Public art and murals	4

Attendees added their own suggestions on post-it notes and noted their agreement with dot stickers. Most of these suggestions connected to the strategies provided, including:

- *"Safe walking, it is currently terrifying"*
- *"Bikes and walking paths"*
- *"Landscape medians rather than green asphalt (like Falmouth)"*
- *"Large enough areas of plantings for the plants to survive"*
- *"Add trees to the center of Route 1"*
- *"Mixed use office-retail plus residential"*
- *"Infill but that looks consistent with existing village"*

Other notes included air quality concerns for residents if housing is built near the highway, and an idea to redevelop the MDOT Exit 15 Park & Ride with affordable housing. These comments are at odds with each other, but represent the range of opinions of the attendees.

Residential Neighborhoods

Yarmouth residents have consistently described the town's existing residential neighborhoods as fantastic places to live. However, regional housing pressure along with this high quality of life has resulted in increasing demand for homes in Yarmouth, and housing prices that have increased faster than surrounding communities. There is a need to balance existing neighborhood strengths with the need for more housing.

Attendees were presented with an array of housing types and asked which might fit into Yarmouth's existing residential neighborhoods. Historic homes converted to multifamily, homes on smaller lots, and single-family homes with ADUs were the most selected options. New 8+ unit buildings and connected townhomes were the least selected.

What types of housing would enhance Yarmouth's residential neighborhoods?

Historic homes converted to multifamily	19
Homes on smaller lots	18
Single-family with ADU	16
Duplexes	11
New 3-7 unit building	9
Traditional single family	7
New 8+ unit building	5
Connected townhomes	4

These choices indicate that attendees recognize the need for more housing options but prefer the existing building types in Yarmouth. They are open to increasing housing options through compatible forms, like historic homes converted to apartments, and traditional homes on smaller lots, adding accessory dwelling units to existing homes. Attendees are less interested in introducing new forms like duplexes, townhomes, and apartment buildings.

Attendees added their own suggestions on post-it notes and noted their agreement with dot stickers. Some popular suggestions included maintaining a mix of open space and preserving existing trees, fields, and habitat in new development (12 suggestions and agreements), concern about AirBnBs (7 against short-term rentals, 1 pro), and a desire for more senior housing (6 suggestions and agreements.)

Other comments included:

- *"Small lots are an infrastructure burden!"*

- *“Need for larger developments with 30+ unit buildings and apartment complexes”*
- *“Limit ADUs in already-dense neighborhoods (e.g. village) and no air bnb-ing”*
- *“Many historic dwellings held multifamily but are now single family, encourage these structures to become multi again”*
- *“You could make large houses into apartments or subsidized condos”*

Rural, Coastal, and Islands

Yarmouth’s rural, coastal, and island areas were identified as places for limited development in the 2010 Comprehensive Plan. Previous public engagement demonstrated that Yarmouth’s natural resources, including open space, forested areas, and waterfront (both river and ocean) are highly valued by town residents.

Attendees were asked to identify what aspects of these areas are most important to preserve or protect, such as scenic views, habitat, access to nature, or historic buildings. Responses were written on post-it notes, and participants could indicate agreement using dot stickers.

Aspects identified for preservation aligned with themes of habitat, waterfront, outdoor space and outdoor recreation, historic New England character, and the rural feel of these areas.

What are the most important things to preserve in Yarmouth’s rural, coastal, and island areas?

Habitat	13
Waterfront	9
Open space/outdoor recreation	9
Historic/New England character	6
Rural feel	6

Individual responses within these themes included:

- *"Historic, classic New England rural charm"*
- *"Habitat and ecological integrity where it exists"*
- *"Open space: farms, fields, watersheds, wildlife (bobcats, deer, ermines, minks, fishers, raptors, coyotes, cool snakes, elvers, migratory birds - all this growth is going to mess it up)"*
- *"Water access (work, recreation)"*
- *"Public access to walking, biking, boating with parking"*

Other individuals talked about preventing overdevelopment, preserving the non-commercial zoning of these areas, and keeping large setbacks and large lots.

Some attendees used the space to suggest goals or improvements for Yarmouth's rural, coastal, and island areas. The most common suggestions were bicycle and pedestrian safety (5), more open space and trails (6), and climate resilience and carbon storage (3). Other individual suggestions included dog parks, increasing enforcement in these areas, invasive species control, more open space and trail connectivity, and adding density at rural crossroads.

Conceptual Renderings

Attendees were asked to share their reactions with face stickers (happy, sad, and neutral) to a series of conceptual renderings developed by Aceto Landscape Architects. Each rendering depicted a new type of development that doesn't currently exist in Yarmouth and would not be allowed by current zoning.

Next to each rendering, a map of Yarmouth allowed attendees to place a dot where they think this type of development might belong in town. This task was optional, depending on if attendees thought the pictured development could belong in Yarmouth.

During the workshop, comprehensive plan team members were available to explain that these images were concepts intended as examples or ideas, and not actual

planned development. The team also encouraged people to think broadly about where in town these developments might belong, and not only consider currently available parcels.

Rural Crossroads

Rural Crossroads

This is a conceptual sketch of mixed-use development located at a crossroads in a rural part of town. *This development would not be allowed under current zoning.*



1 Multifamily units in New England farmhouse style

2 First-floor retail providing neighborhood amenities, with housing upstairs

3 Public green space for gathering and events

This conceptual sketch showed a mixed-use development at a rural crossroads. The development includes multifamily units and first-floor retail providing neighborhood amenities in a traditional New England farmhouse style, with public green space for gathering and events.

Overall, 43 happy faces, 4 neutral faces, and 6 sad faces were placed on the image.

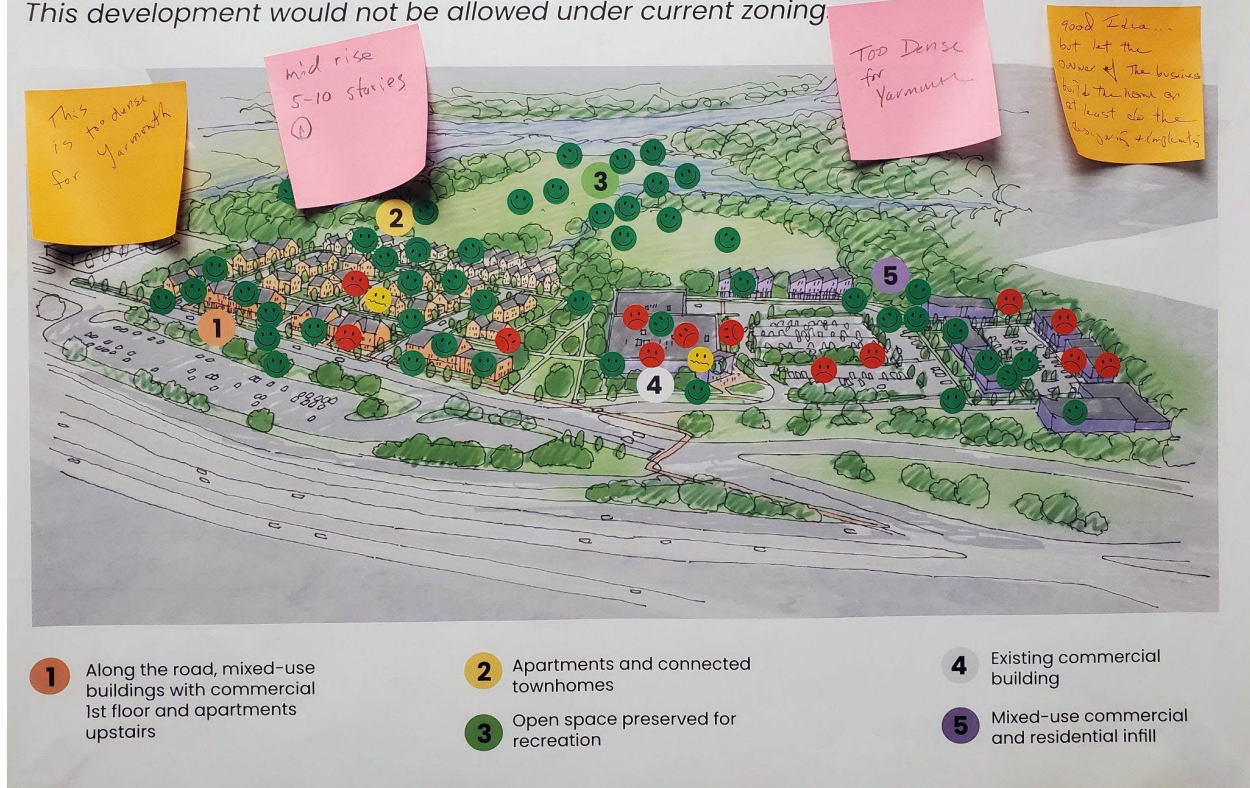
Several individuals added post-it notes with additional comments and suggestions on the map. They included:

- *"Build a big rec facility at Sligo (like Twin Brook w/ an aquatics facility)" – 3 people added dots of agreement*
- *"Beware – asthma rates go up when kids live too close to highways"*
- *"Where can you drive through and see rural in town? Not Sligo. Not North Rd."*
- *"Relocate Public Works from North Rd and redevelop as mixed-use and/or multifamily"*
- *"Beware – the old town dump is in the area under North Road... the town garage serves the community well here."*
- *"The rural area is landlocked – the wildlife has nowhere close to go"*

Live/Work Complex

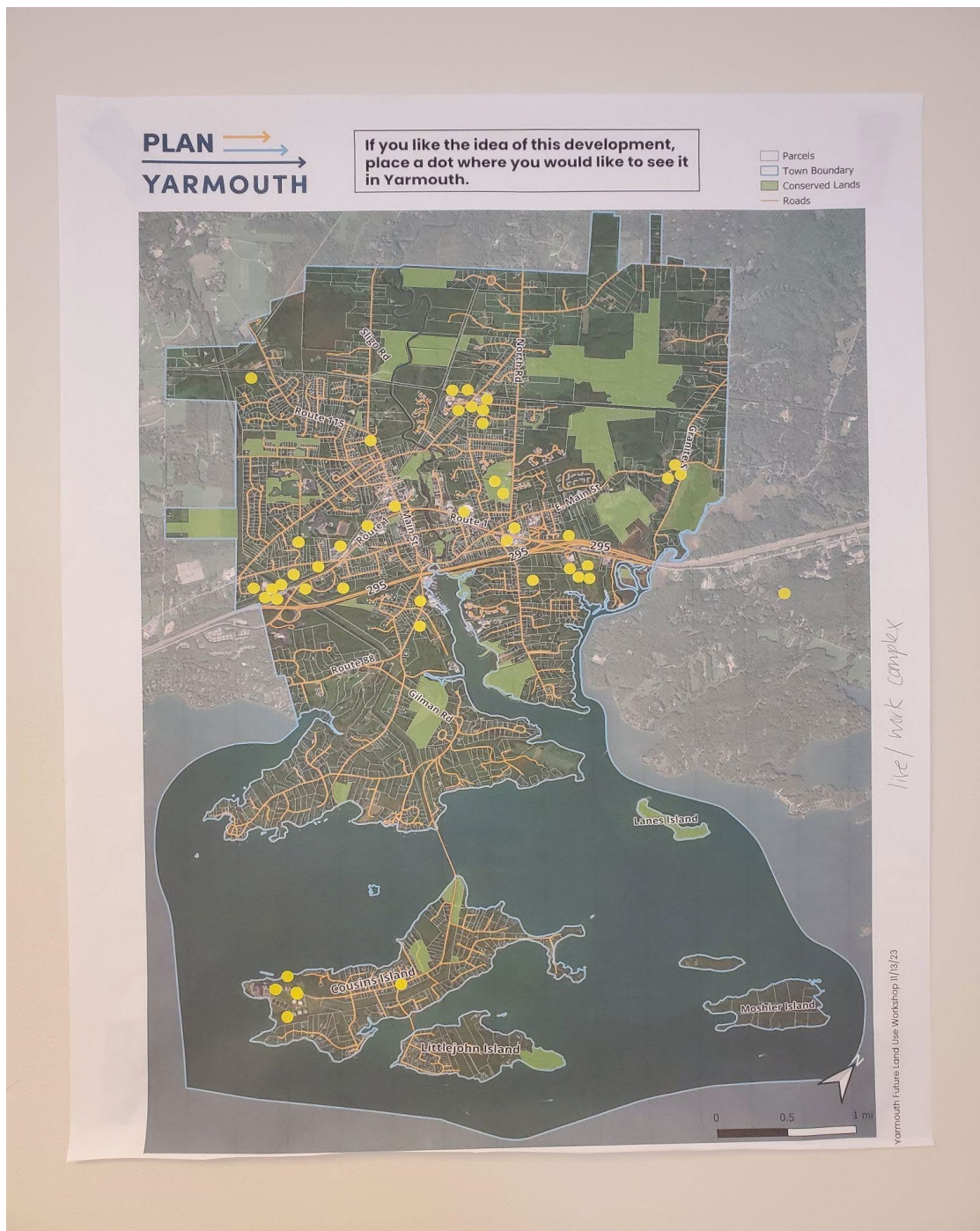
Live/Work Complex

This is a conceptual sketch of mixed-use development located at a busy road or highway. This development would not be allowed under current zoning.



This conceptual sketch showed a mixed-use development located on a busy road or highway. The development includes mixed-use buildings with commercial on the first floor and apartments upstairs along the road, with a dense area of apartments and connected townhomes behind it. Along the river, open space is preserved for recreational access. On the other side of the development, an existing commercial building and parking lot remains, with additional mixed-use commercial and residential infill added.

Overall, 48 happy faces, 2 neutral faces, and 13 sad faces were placed on the image. Happy faces were clustered on the open space and the housing development. Sad faces were clustered on the existing commercial building and parking lot, as well as on the new mixed-use development near the existing commercial.



The most commonly selected area for this type of development was locations along Route 1 (20 selections). Other popular locations were at the intersection of Leighton & East Elm streets (7) and Granite & East Main streets (3.)

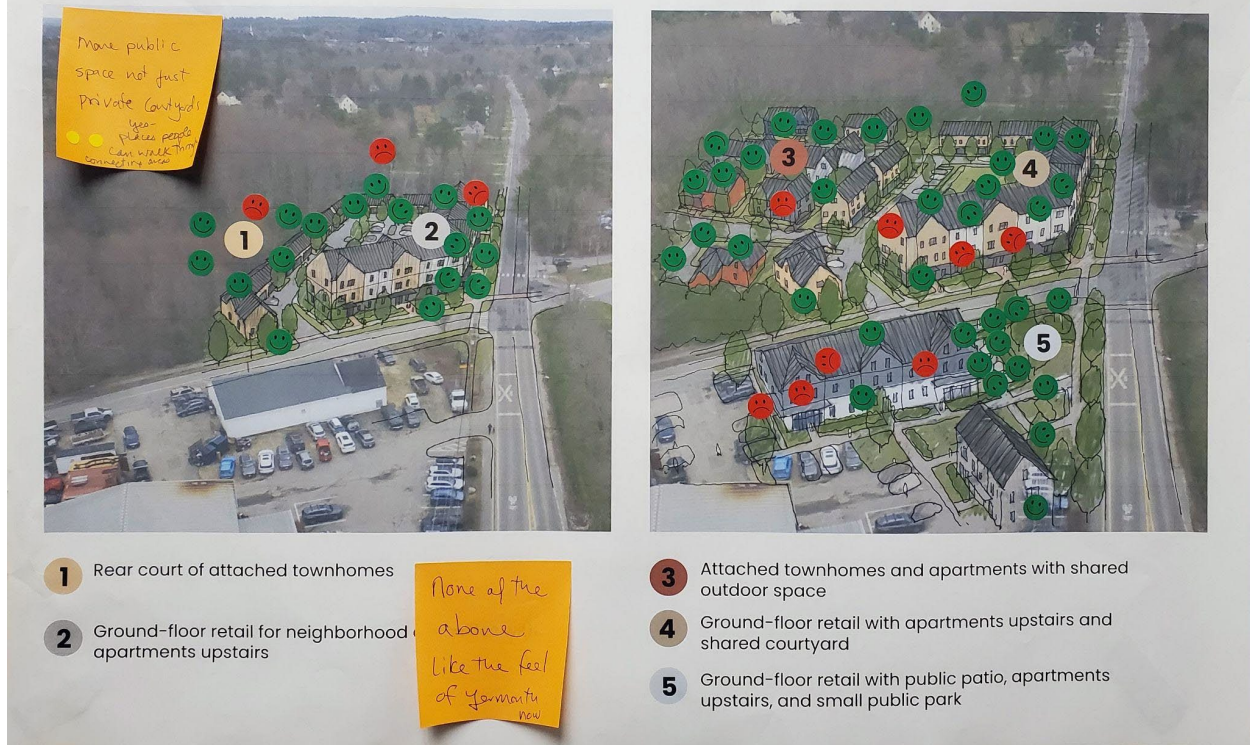
Several individuals added post-it notes with additional comments and suggestions on the rendering and the map. They included:

- *"Too dense for Yarmouth"* (2 comments)
- *"Mid-rise 5-10 stories"*
- *"Good idea, but let the property owner decide"*

Infill Neighborhood

Infill Neighborhood

These conceptual sketches show a development of diverse housing types within an existing neighborhood. *This development would not be allowed under current zoning.*



This conceptual sketch showed two options for diverse housing types within an existing neighborhood. The first option included a mixed-use building along the street with retail for neighborhood amenities on the first floor and apartments upstairs, and a rear court of attached townhomes. The second option included a mixed-use building along the street with retail for neighborhood amenities on the first floor and apartments upstairs, several rear courts of attached townhomes and apartments with shared outdoor space, and an additional mixed-use building across the street.

7 happy faces and 3 sad faces were placed on option 1. 36 happy faces and 8 sad faces were placed on option 2. On option 2, the happy faces were clustered around the rear courts of townhomes and the public open space. The sad faces were clustered on the larger mixed-use buildings.

Several individuals added post-it notes with additional comments and suggestions on the rendering and the map. They included:

- *"More public space and not just private courtyards" (3 people agreed)*
- *"None of the above feel like Yarmouth now"*
- *"Convert Public Works on North Road to multifamily development"*
- *"MDOT Exit 15 Park & Ride is always 90% empty" (3 people agreed)*
- *"Please note that none of these exercises capture the view of those who do not want the development concept pictured" (1 agreed)*

Analysis

Together, these results indicate general support for the new types of development in the renderings. People responded positively to the chosen designs, which were intended to echo traditional New England styles already present in Yarmouth and in the town's Character Based Development Code.

Responses were overwhelmingly positive to green space/open space/parks in the renderings, echoing other comments at this workshop and in previous public engagement that Yarmouth needs to preserve and increase open space throughout town.

Negative responses were most present on larger-scale development concepts and on commercial development. Some negative responses with reaction stickers and in post-it notes were a reminder that a significant group of attendees are hesitant about more development in Yarmouth and are worried about the impacts to the town's visual character, infrastructure, and natural environment with continued growth.

The map results indicate that attendees generally want to see development in areas that are already developed. The overwhelming choice for the location of all development concepts was along Route 1, an area that has been indicated from previous public engagement as a place that could be enhanced and improved, and a place that has potential space for new development and/or infill. These results

generally support feedback from previous public engagement events that expressed the desire for increased development in already-developed areas and along major corridors with access to amenities and transportation. The Climate Action Plan also discussed increasing density in these areas to support more sustainable, climate-friendly patterns of growth.

The Rural Crossroads development concept received a number of responses that would place it on streets or intersections in less developed areas of town. Previous public engagement results suggested support for some limited new development in these areas, particularly including neighborhood amenities such as daycare, restaurants/cafes, and recreation.

Locations for the Live/Work concept were largely focused on areas of town with notable open parcels or potential for infill. A balance between development and preserved open space is preferred on these open parcels.

The responses for the Infill Neighborhood included locations throughout Yarmouth's existing medium-density residential neighborhoods. There was a more positive reaction to the larger-scale apartments and townhomes in these renderings than there was in the Residential Neighborhoods question when attendees were asked to select the housing types they prefer. People may have responded more positively because they liked the look of this development more than the example photos in the other activity.

Public engagement has demonstrated an overall desire to increase housing options and allow new development concepts in Yarmouth both on major corridors and in existing neighborhoods, but there is a preference for development that fits in with Yarmouth's existing building types, and some general pushback against larger-scale development.

Future Land Use Survey Results

The Future Land Use Survey consisted of 6 open-ended questions. The survey was available in paper format and online. In total, 72 people responded to the survey. Not all respondents answered every question.

What's missing from Main Street and the Village?

The top 5 themes in response to this question were: coffee shop/cafe/restaurants; community center/gathering space; more small retail shops; trees/parks/green space; and bicycle and pedestrian infrastructure.

Coffee shop/cafe/restaurant	18
Community center/gathering space	13
Small retail	13
Trees/parks/green space	8
Bike/ped infrastructure	5

These results match up with the most popular strategies for Main Street enhancement selected during the workshop: outdoor dining and more small businesses. Some individual responses in these categories include:

"Great coffee shop (could also be work/meet spot). More diverse restaurants. More housing infill done tastefully."

"Cute shops or cafes that aren't super expensive and more green space (like gardens and trees not grass)"

"Bike trails, greenways, and a sidewalk that continues past the apartments on East Main."

Many respondents also suggested specific amenities and aesthetic improvements, including: attractive planters, nicer trash cans, benches, more attractive street lights, electric vehicle charging stations, water fountains, seasonal decorations, American flags, and educational signage about local history.

Some respondents also noted that they would not change anything about Main Street/the Village.

"I like it the way it is- walkable, bike-able, shade, green space, a nice mix of businesses and services and residential, access to park in a number of locations and parking is not a problem."

"Nothing. We don't want to change the small town feel"

What's missing from Route 1?

The top 5 themes in response to this question were: green space/parks; cafes and restaurants; bicycle and pedestrian infrastructure; traffic calming; and activity spaces or community facilities (such as kid's activities, an aquatics facility, and a community center.)

Green space/park	21
Cafe/restaurant	21
Bike/ped infrastructure	15
Traffic calming	9
Activities/community facilities	9

These results are consistent with those from the workshop, where landscaping/street trees and bicycle infrastructure were both highly-ranked enhancements for Route 1. The desire for more dining options in Yarmouth has been a consistent theme throughout the public engagement process. Some mentions of parks and green space noted the need to preserve trees and open space in this part of town in balance with new development.

"More landscaping, trees, high enough to screen parking, but not signage."

"Green space. I feel like we're trying to put too much into a small area."

"We need more crosswalks and narrower traffic lanes to make it more friendly for pedestrians and bicyclists, and to slow down drivers."

"Green space. Pedestrian comfort and safety. Compare Route 1 Falmouth to Yarmouth – Falmouth has: trees in median, underground utilities, well-planned traffic lights."

"a diner type establishment, offering breakfast and lunch, much like Benny's in Falmouth."

"We really need great international food options. For example: Indian, Thai, Chinese, Mexican etc."

Other suggestions included retail (6 total; answers included small retail, large retail, discount stores, clothing stores, and convenience stores), more mixed-use or residential development and density (6), and design standards or aesthetic improvements (6.)

A few respondents also made suggestions to make it easier to take the bus that stops on Route 1, such as bus shelters, heated shelters, and parking for people who are taking the bus. Additionally, there were several mentions of the need for sound protection from highway noise if more development continues along Route 1.

What would make Yarmouth's rural, coastal, and island areas better?

The most common themes in response to this question were increased bicycle pedestrian infrastructure, more open space, and increased access to the water/public docks. Other common suggestions were to limit new building in this

area (two respondents suggested new construction should be directed to Yarmouth's medium-density residential zone instead), more trails, and more open space.

Bike/ped infrastructure	17
More open space	16
Water access/public docks	15
No more building/build in MDR instead	11
Trails	11

Some individual responses within these themes:

"Greenways and more bike friendly roads. North road, East Main, and Granite st are all too narrow with small shoulders and no sidewalks to allow bicycles"

"Access to the water with parking and carry-in boat access, longer open-space trails, for coastal areas, invest in waterside walk/bike trail that connects from the village."

"More water access, more open spaces open to the public"

"Keep open land open and use for recreation. No more building."

"Continue to protect public access to the coastal and island areas. And for rural, PROTECT IT."

Additional ideas included a beach for dogs or a dog park (3), dam removal (3), and indoor recreation facilities for youth (3).

During the workshop, attendees noted open space/habitat and water access as the most important things to preserve about these areas. Access to open space and the waterfront, and acquiring more open space, has come up as a theme throughout this public engagement process as well as a top priority in the Climate Action Plan.

How can we increase connectivity between different parts of Yarmouth?

Responses to this question primarily focused on bicycle and pedestrian infrastructure (39 respondents) and trails (22 respondents). Themes included increasing bike lanes and sidewalks, making sure sidewalks are accessible to people with disabilities, complete streets, and more multipurpose trails. 6 respondents suggested developing more signage and/or a map of all town sidewalks, bike lanes, and trails to make them more user-friendly.

Responses included specific locations:

- *Add sidewalks on East Main Street to reach Community Garden and Frank Knight Woods*
- *We should start by removing the gates placed between neighborhoods during recent development. Village Run to Newell Rd, McKearney Village to Applewood for example.*
- *Safe crossing from Princes Point to Pleasant Street*
- *Extended sidewalks (North Rd., East Main St.)*
- *Need a designated bike lane/ walk lane on Princes Point Road.*
- *North and Ledge road lack bike lanes or sidewalks*
- *Have a sidewalk/running & biking trail alongside 88 on the water side of the road, with crosswalk and/or pedestrian bridge that connects from the village to the water*
- *Build a trail from the east end of the Royal River Park (eg Bridge St) down to Grist Mill/Rte 88.*

Other suggestions touched on community connections and local businesses, including: more community events and gatherings, a community center, online groups for the town, high-speed internet, and a “buy local” guide. Three respondents also proposed a local shuttle service within Yarmouth.

Yarmouth has a small commercial working waterfront on the Royal and Cousins Rivers. What role should the working waterfront play in Yarmouth's future?

The most common response to this question was preservation of the existing working waterfront (21 replies) and support for local working waterfront businesses (13).

Suggestions to support the working front included both town assistance, and more dining and retail opportunities in Yarmouth for local fishermen to sell their catch.

"Consult local fishermen and address their needs."

"More dining and fresh seafood markets"

"Is there a place where they sell what they catch in yarmouth? That would be cool"

"Keep it a priority to support it as a WORKING waterfront. The various committees that address water issues have traditionally been heavily weighed in favor of recreational boaters."

7 responses mentioned recreation uses of the waterfront, including recreational boating, kayaking, and public access. 5 responses suggested additional waterfront uses that could support both the working waterfront and public access, such as a marina or waterfront seafood restaurant. The need for balance between recreational and working use of the waterfront also came up as a major theme in the Community Conversation event on Yarmouth's economy.

4 responses suggested more education, both for awareness of the working waterfront for the community at large, and for future generations of waterfront workers.

"Encourage hands-on education in school programming."

"I would love if there was a "working waterfront day" similar to "Maine Maple Sunday" where the sap houses open up and host visitors and show off their trades."

Two responses proposed the town look into boat wrap recycling so working waterfront businesses can expand in a sustainable way.

Tell us your other ideas.

The final survey question offered a space for respondents to share any other ideas they have for Yarmouth, future land use, and the comprehensive plan. Responses to these questions were varied.

The most common theme was community or recreation facilities, with 13 responses. Suggestions included an aquatics facility, a central outdoor recreation area like Twin Brook in Cumberland, a community center, a playground on North Road, a skateboard park, and community events.

"Having a robust community social and recreational center with courts, a weight room, pool (so Yarmouth kids don't have to go to the Freeport Y), event rooms, classrooms, dance studio (ie the Landing Y in Brunswick), etc. would be such a wonderful addition to Yarmouth. I imagine it would serve as a connector for the whole, multi-aged Yarmouth community!"

Ten responses discussed protecting more open space, increasing parks and trees, and preserving existing open space.

"ALL development, no matter where, should include mandated tree planting, LOTS of it, and way more stringent sanctions about tree removal."

"Yarmouth has relatively little open space left – let's keep it (for clean air, habitats, and recreation) and focus development on where neighborhoods and service centers already exist."

Ten responses centered on keeping Yarmouth the same as it is today. Responses included preserving town traditions, character, and density, and limiting the amount of future development.

"We do not need to increase residential development without careful consideration of the impacts on infrastructure and our schools."

"I believe this town is just expanding too much. People grew up in Yarmouth then returned to raise their families here. Families moved to Yarmouth (like mine) because we love the coastal village charm with a great school system. In the last 10 years, the mindset has changed from village preservation to expansion and growth."

5 responses discussed bicycle and pedestrian safety and traffic calming.

5 responses gave suggestions for more dense development in existing service centers and residential areas of Yarmouth, including mixed-use development on Route 1 and smaller lot sizes in the MDR zone.

Additional suggestions included:

- Implement an architecture and design review board
- Encourage re-use of existing buildings for housing
- Create a mobile home overlay for affordable housing options
- Join a regional school district
- Work regionally on affordable housing initiatives and subsidized senior housing
- Make development easier: relax the Character Based Development Code; get rid of the sprinkler ordinance
- Grow the commercial tax base
- Create a satellite parking lot for Main Street

Conclusions

The results of the Future Land Use Workshop and Survey echoed previous public engagement results regarding participants' values and vision for the future of Yarmouth. Preserving the town's strengths, especially Main Street, the historic village, and existing open space, is critically important, while enhancing existing infrastructure and allowing for more housing, businesses, and activities.

Public input on future land use also included people who want things to stay the same in Yarmouth, and some people who are cautious about new development generally. As heard at the prior Community Conversations, many participants' comments reflect the tension between development and preservation. Even though change is inevitable, change and development must be balanced with the desire for preservation.

In the Future Land Use Workshop and Survey, open space was a theme throughout all the questions. Participants want to see additional open space preserved, both inland and along the river and coast, with public and recreational access to these places. Green space is desired throughout town, including along Route 1 and Main Street. These spaces should not just be grass – gardens, trees, and recreation or gathering spaces should be part of preserving green space throughout town.

Another common theme was the desire for additional community amenities and facilities. There was a popular initiative in summer 2023 to get signatures in support of a Yarmouth town pool, which may have helped increase the number of people thinking about community facilities. In addition to aquatics, many others mentioned a community center, a place for teens to hang out, a skate park, or a senior center. Notably, support for a community center or other facility was not among any pre-selected options in this workshop; all responses on this theme came directly from community members. It is clear there is a widespread desire for more places for public recreation and connection in Yarmouth.

MEMORANDUM

To: Erin Zwirko, AICP, LEED AP, Planning & Development Director, Town of Yarmouth
From: Jeff Levine, AICP

Re: Affordable Housing Market Need Analysis

August 23, 2023

This memorandum outlines the market for residential property in Yarmouth with a focus on below-market affordable housing. We define the market demand for housing that is affordable at the various income levels of current Yarmouth residents. In all, there are currently 1,278 households in Yarmouth that are housing burdened – meaning they spent more than 30 percent of their income on housing expenses. Breaking that into sub-markets, there is demand for 835 ownership units at lower price points and 443 rental units at lower price points.

This does not mean there is a market for this many additional units in total. The Real Estate Market Analysis completed by Camoin Associates (May 2023) does an excellent job of outlining the demand for net new units and estimates that need at between 54 and 180 units between now and 2027. However, our analysis outlines the affordability gap in today's market and suggests that there would likely be a larger market for additional below-market affordable units. This demand could be met through a combination of providing additional resources to lower-income households, creation of new units to meet these specific sub-markets, or a combination of these two approaches.

Camoin's Market Analysis

The study completed by Camoin offers a good set of background data and market projections in multiple submarkets. It notes that 75% of the occupied housing units in Yarmouth are owner-occupied and that new residential development is currently focused on multifamily and mixed-use developments, with 103 units currently under development or recently completed.

While current trends project only a small increase in Yarmouth households (17 in total) the market overall could support a slightly larger number of units. Using a baseline as well as a high-growth scenario, Camoin estimates an annual demand of up to six rental units and between 24 and 50 for-sale units.

Projected Demand for Housing Units in Yarmouth

	Renter		For-Sale	
	Baseline	High Growth	Baseline	High Growth
Net 5-year Supportable Demand	0	32	122	248
Net Annual Supportable Demand	0	6	24	50

Source: Camoin Associates

Their study breaks out demand by income level, propensity to rent, and other factors that lead into demand figures. They note that “future growth in housing units is most constrained by the availability of adequately zoned buildable sites, rather than market demand for new units.” (p. 2)

Housing Affordability

In our work, we supplement this analysis with a look at the demand of current and future Yarmouth households based on incomes as related to housing costs. A general rule is that a household should not have to spend more than 30 percent of its income on housing costs – including rent or mortgage payment, taxes, utilities, insurance, condominium fees, and other related expenses.¹ Any household spending more than 30 percent of its income on housing costs is called “housing burdened” and is at risk of losing their housing, or having to unreasonably cut back on other core expenses, such as groceries, transportation, health care or education.

By looking at housing burden as a measure of affordability, we provide a perspective on quality of life and housing security, with a focus on current Yarmouth residents. In general, we find that Yarmouth residents are more housing burdened than those of Cumberland County as a whole. In the ownership market we find the highest need for units starting at sales prices of \$185,000 up to the current median of \$815,000². Focusing on the rental market specifically, we find that there is particular demand for units at rents of between \$1,251 and \$1,875 per month, as well as units at \$875 per month and below.

Housing Burden Analysis

Owner-Occupied Units

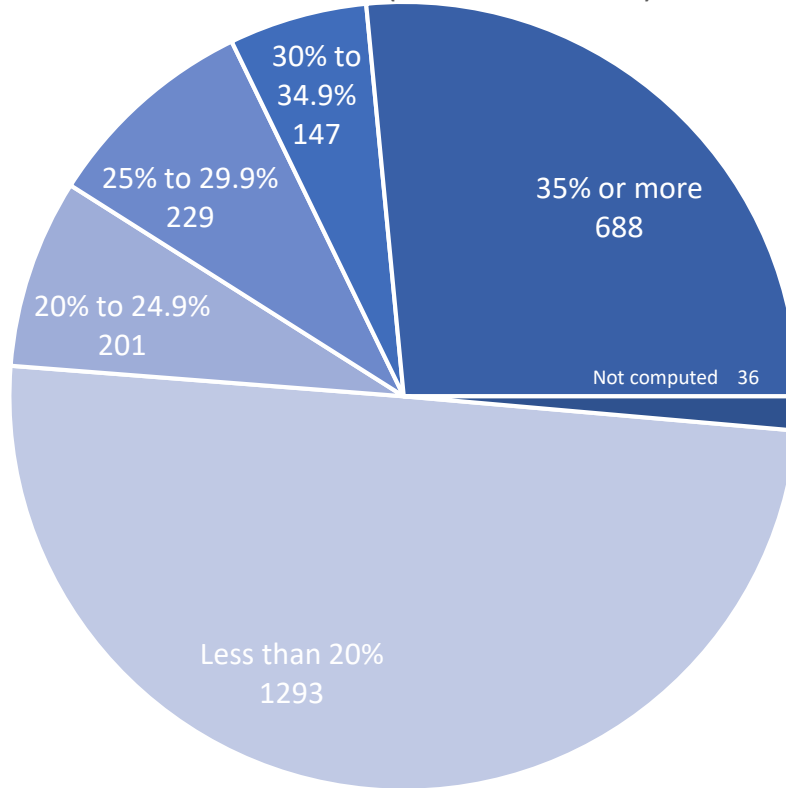
Using U.S. Census data from the five-year 2021 American Community Survey, we find that one-third of Yarmouth households who own their home are housing burdened. For comparison, 22.5% of households who own their homes in Cumberland County are housing burdened. While some of these households may have assets that allow them to make those housing payments, it’s also likely that asset-rich households would use those assets to lower their housing costs, for example by taking out a smaller mortgage.

In total, *835 owner-occupied households in Yarmouth are cost burdened*, with 688 of them paying 35 percent or more of their income on housing.

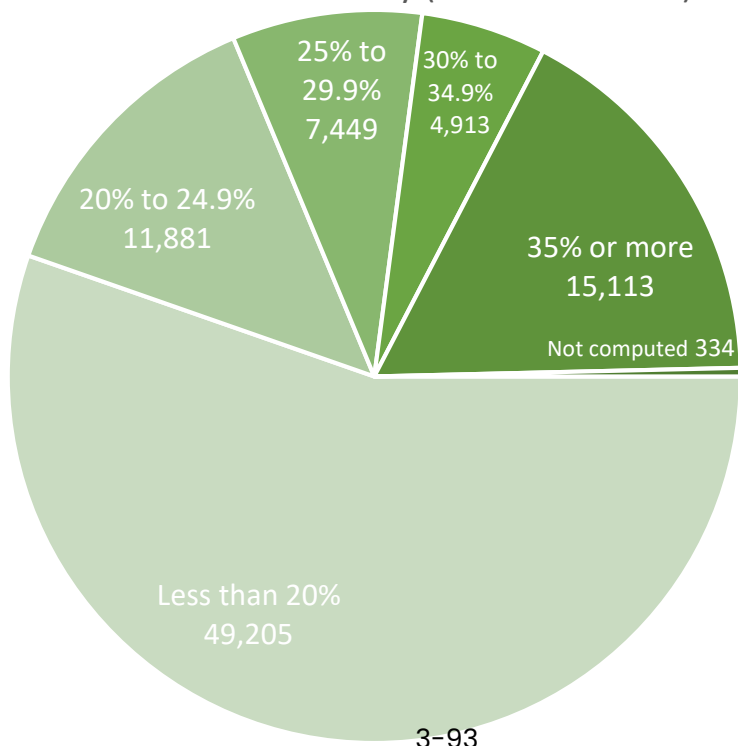
¹ An interesting new line of research seeks to add transportation-related expenses into those costs, though we don’t attempt to do so in this work.

² According to the MaineHousing homeownership index.

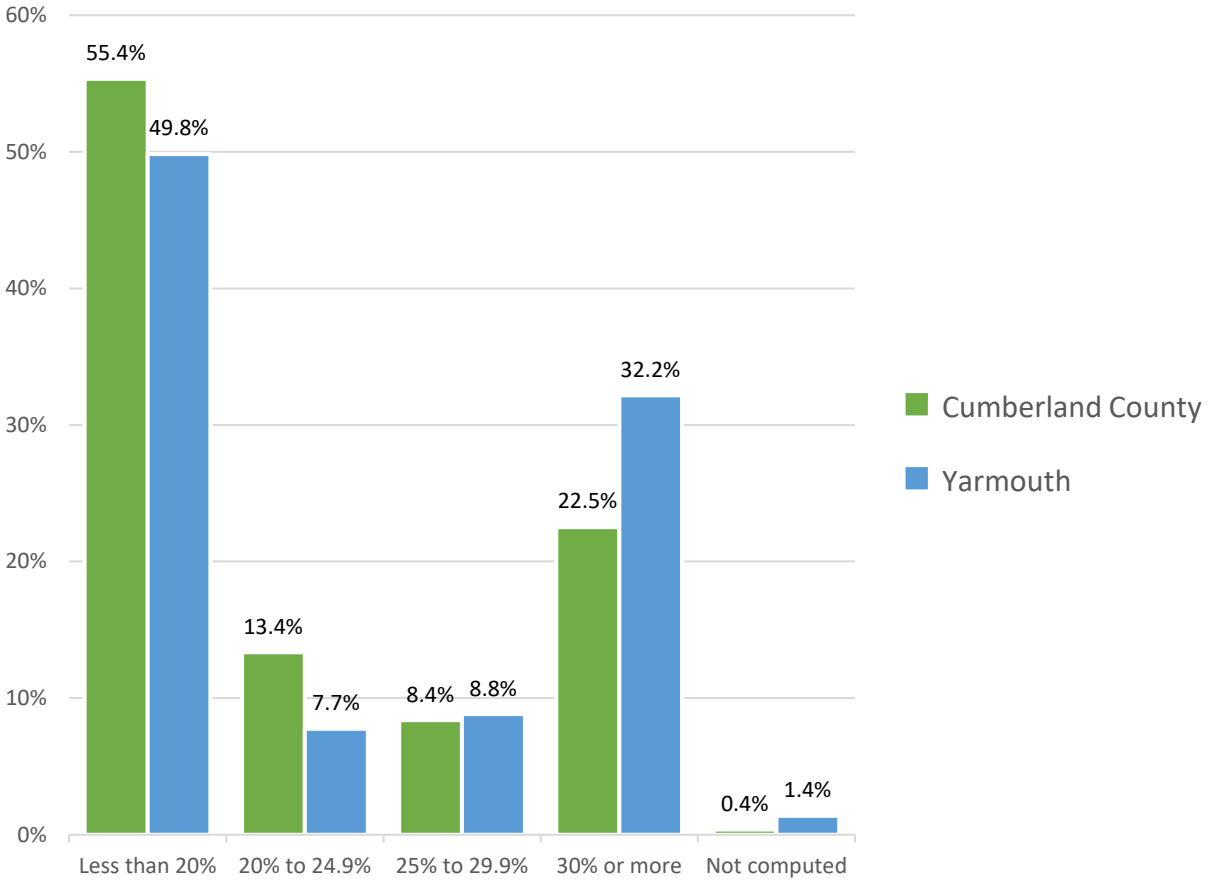
Owner Costs as a Percentage of Household Income
Yarmouth (2021 5-Year ACS)



Owner Costs as a Percentage of Household Income
Cumberland County (2021 5-Year ACS)



Owner Costs as a Percentage of Household Income Cumberland County and Yarmouth (2021 5-Year ACS)



Owner Housing Needs

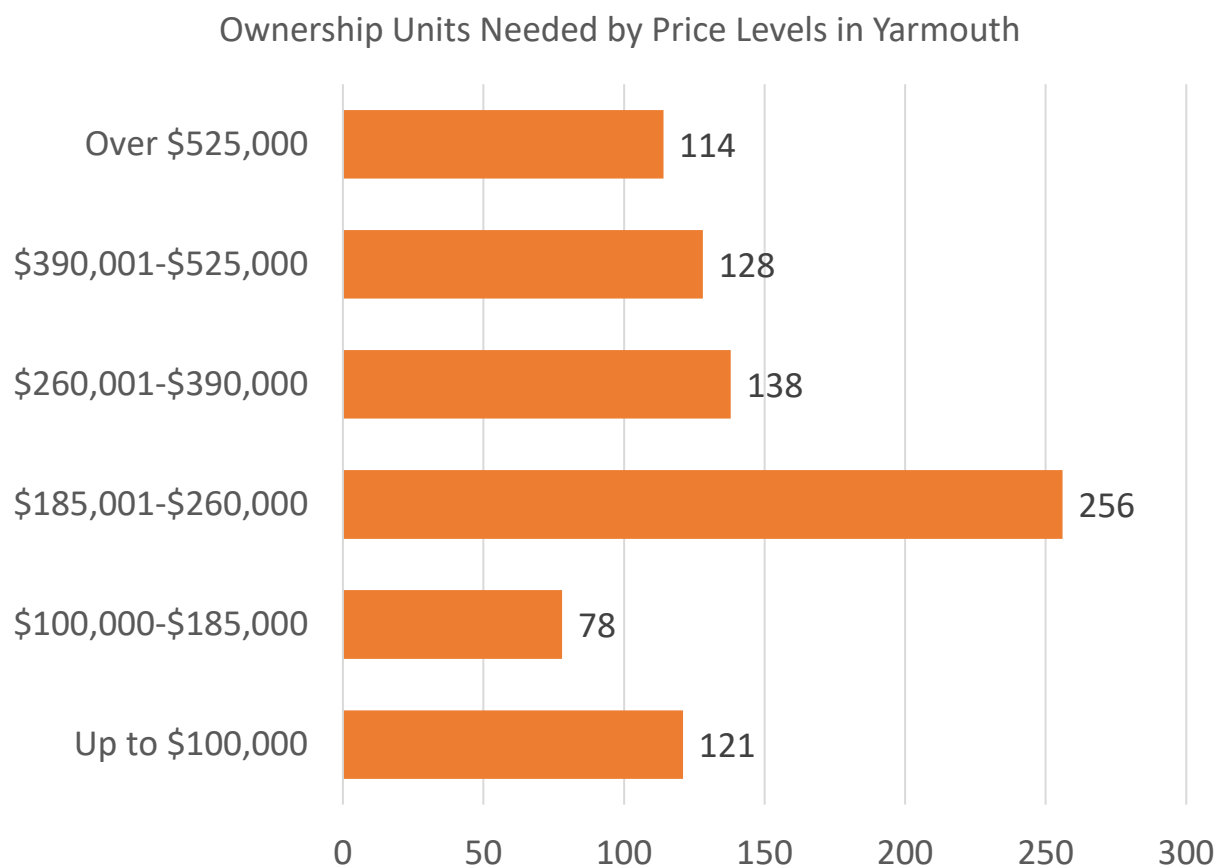
As mentioned above, there is a higher need for owner-occupied units that are affordable at various income levels in Yarmouth than in Cumberland County as a whole. Using some basic assumptions, we can break that overall need into general price points for the 835 households that are cost burdened. These assumptions include:

- Access to a fixed-rate mortgage product at 5.0% annually (or a mortgage lender that underwrites according to that assumption.) While current rates are somewhat higher, we expect that rates will decline again in the next year or two.
- An initial twenty percent down payment
- No mortgage insurance

These assumptions will be by household. For example, some households will have a higher down payment. Other households may choose to take out a variable-rate mortgage that might start in 2023 at seven percent but may go lower than five percent in future years. Other households may have to pay

mortgage insurance. However, the numbers will not change dramatically with changes in these assumptions.

The results of this analysis are shown below.



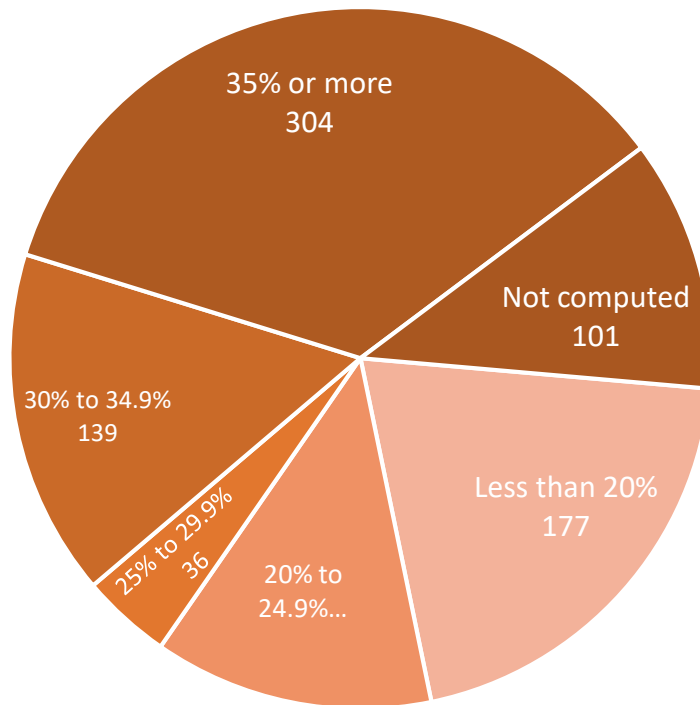
While this analysis shows a gap at many price points, the most significant need appears to be in the band between \$185,000 and \$260,000 per unit. With the median home price in Yarmouth currently estimated at \$815,000 by MaineHousing (and 720,000 by Zillow,) it's not surprising there is a gap at this lower price level. In fact, the gaps exist all the way up to that median home price, with just as many households that would ideally be paying between \$260,000 and \$525,000 as in the modal \$185,000 to \$260,000 range.

Rental Units

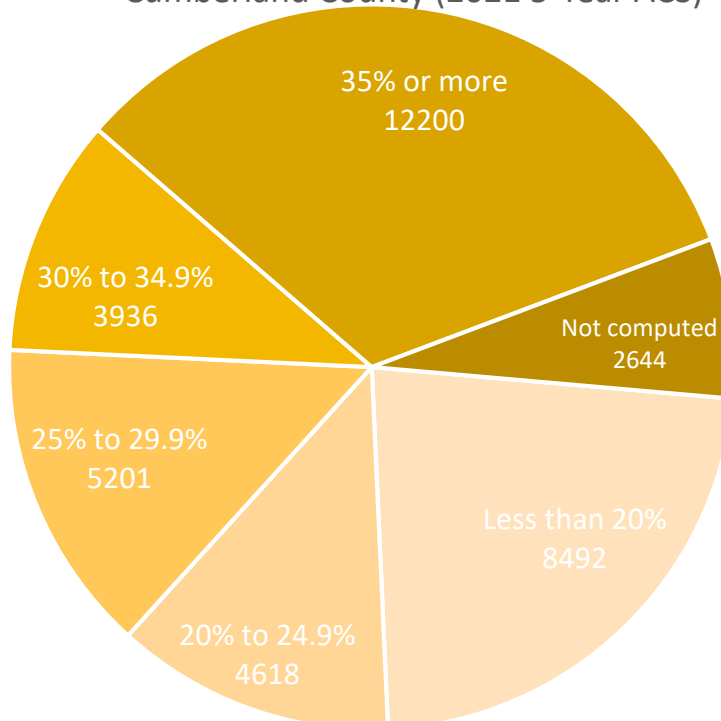
Rents in Yarmouth are Primarily in the \$1,000-\$2,000/Month Range. There is a lack of rental housing in both the higher end (luxury units typically renting for \$2,500 per month or more) and at levels affordable for households below 60% of Area Median Income (renting at below \$1,186 per month for a two-bedroom unit.)

As with the owner-occupied units above, we analyzed the housing burden of rental households in Yarmouth. This analysis reveals an even higher level of housing burden for renters than home owners. In

Renter Costs as a Percentage of Household Income
Yarmouth (2021 5-Year ACS)

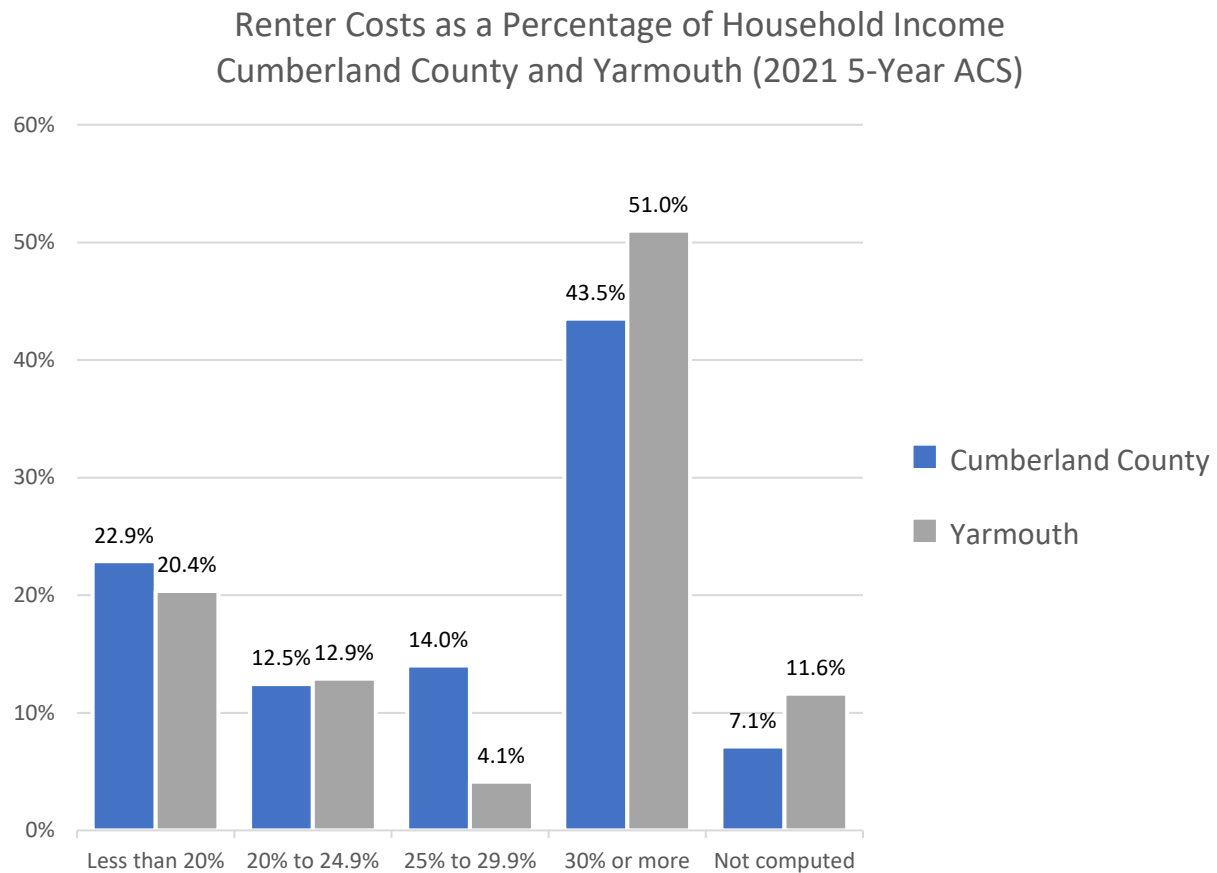


Renter Costs as a Percentage of Household Income
Cumberland County (2021 5-Year ACS)



total, just over half (51 percent) of Yarmouth households that rent are spending 30 percent or more of their incomes on housing costs, with 35 percent of all households spending 35 percent or more of their incomes on housing. The gap with Cumberland County rental households is somewhat smaller than it was with owner-occupied households, with 44 percent of County households considered housing burdened, and just under a third spending 35 percent or more of their income on housing expenses.

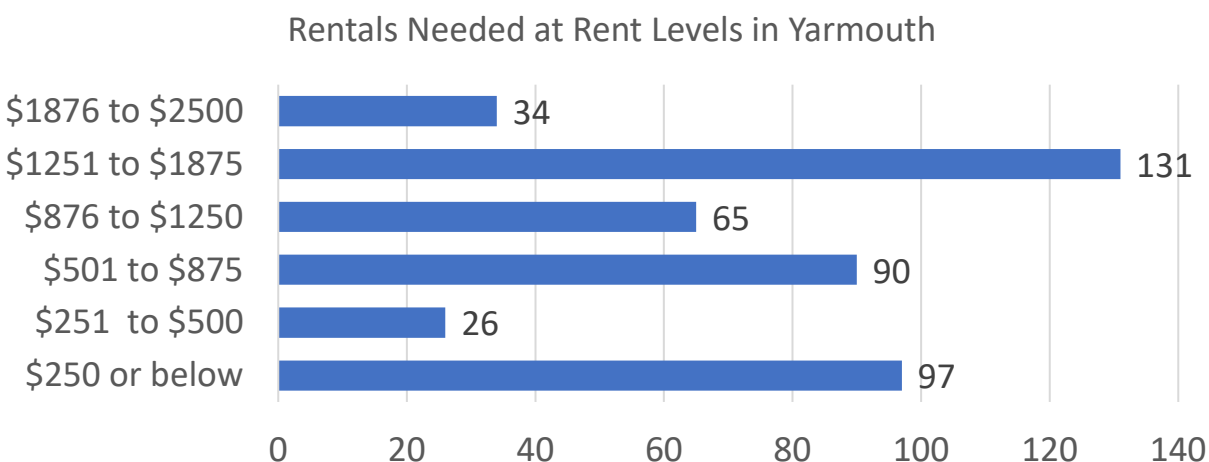
In all, *443 Yarmouth households are rent burdened*, out of 869 total households that rent.



Rental Housing Needs

The need for affordable rental housing is larger in Yarmouth than in Cumberland County as a whole. In addition, meeting the needs of current Yarmouth renters would require units at a range of rents. Based on the number of Yarmouth households that are rent burdened, and those households' income levels, the ideal maximum rents for the 443 rental units for those household can be estimated. This table shows the ideal maximum rents.

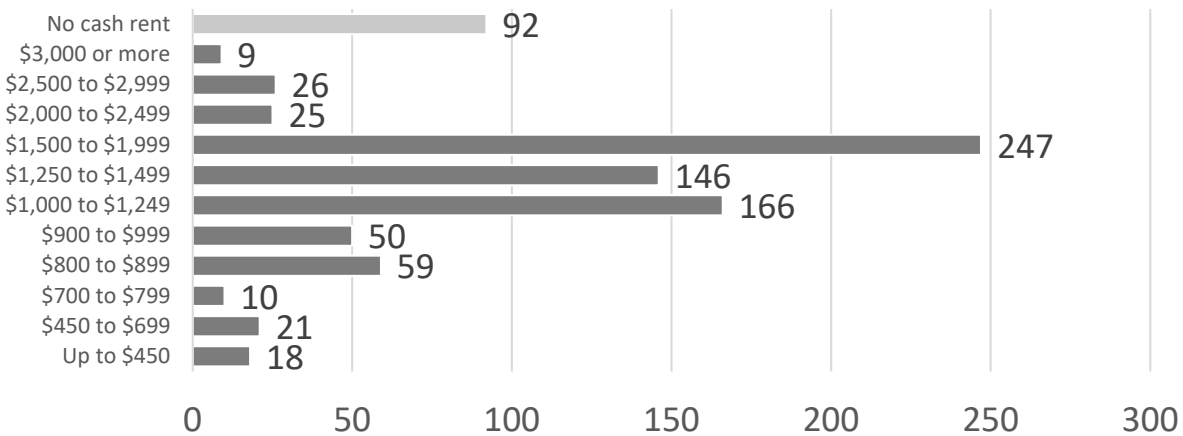
We analyzed the rents for currently housing-cost-burdened households in Yarmouth to better understand the rental housing needs at different price points. For this calculation, we took the income ranges of households that are currently housing burdened. We then determined what 30% of those income levels could pay in a year and divided that amount into monthly payments. The results are available in this chart. These are rents – including utilities, insurance, and other housing-related costs – that these households could reasonably pay. The ranges are based on the ranges of income levels available on the 5-Year American Community Survey.



The primary need for current residents is in the moderate-rent levels. 131 of the 443 units should be at rents between \$1,251 and \$1,875 per month (generally including utilities and insurance.) On the other hand, there is also a need for very-low rent units among current residents – of the 443 units, 97 would ideally be at rents of \$250 a month or below.

These rents can be achieved through project- or unit-based subsidies or through direct rent assistance to households. In addition, regulatory changes that reduce the costs of construction, by allowing more units on parcels, reducing parcel sizes, and streamlining uncertainty in development review, can also play an important role in meeting this need.

Monthly Rents Paid in Yarmouth (2021 5-Year ACS)



Conclusions

This analysis suggests that, while the overall five year need for housing units identified in the Camoin study is up to 248 for-sale units and up to 32 rental units, there is an existing and ongoing need for more units of both kinds at different cost levels. While the market is likely to supply many of the units needed, it is unlikely to provide the units needed at lower- and moderate-cost levels without a combination of public actions and public funding.

Specifically, we have identified an existing market gap of:

- 835 ownership (for-sale) units and
- 443 rental units

This means there is an overall existing need for 1278 units that are affordable at various income levels. We further identified the income ranges for which particular need exist, though it is fair to say there are needs at all levels of housing affordability below the current market.

This analysis is limited in some ways:

1. It quantifies *current* needs and does not carry those trends forward. It's likely that the number of units needed at low- and moderate-income levels will increase, but that is not certain. It's possible that some households will simply move to other communities if they are seeking lower housing burdens.
2. Similarly, it assumes there is no external interest in moving to Yarmouth that is not currently being met. In reality, Yarmouth is an attractive and popular community that many people would probably like to move to if they could find suitable and affordable housing.

3. It assumes that owners and renters are in two different markets, when there are times when a household will move from ownership to rental, or vice versa. However, the overall gap would remain generally the same, even if the number of for-sale and rental units shift.
4. Given that these 1278 households already live in Yarmouth, it does not analyze what might happen to the market if some or all these households moved to more affordable units, or if the units they already occupy became more affordable via direct subsidies or other methods.
5. Finally, this analysis does not factor in the reality that many households become housing burdened to accomplish other goals. For example, there are likely many households in Yarmouth that are paying more than 30% of their income on housing because they want their children to attend Yarmouth schools, or they simply enjoy the high quality of life and amenities offered in the community. Similarly, some households may remain housing-burdened because one or more workers in the household work nearby and are seeking a shorter and less expensive commute.

There are also some limitations of the data. The American Community Survey data has some margin of error, as does all sampling data. It is also aggregated in ranges that may not always be ideal for this sort of analysis. Overall, however, this analysis suggests an affordability challenge for a significant percentage of Yarmouth households.

Real Estate Market Analysis

TOWN OF YARMOUTH

AUGUST 2023

PREPARED FOR:

Town of Yarmouth
North Star Planning
49 Pineland Dr.
Suite 102
New Gloucester, ME 04260

3-101

PREPARED BY:



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1. EXECUTIVE SUMMARY

This Real Estate Market Analysis is intended to inform the Town of Yarmouth's Comprehensive Plan. This analysis provides insight into the Town's ongoing economic development efforts and provides a robust understanding of the types of market-supported development that could occur in the Town of Yarmouth.

The Town of Yarmouth is a coastal town approximately 12 miles north of Portland, Maine. Boasting coastal access to the ocean and outdoor recreation, along with its close proximity to Maine's largest city (Portland), Yarmouth is considered a highly desirable community to live in, as evidenced by high home prices. With comparatively large shares of household incomes making over \$100,000, the town drives popularity amongst families due to the high quality of life, safety, and strong school district. The Town of Yarmouth has a walkable downtown with local service amenities and restaurants. Yarmouth has direct access to I-295 and Route 1, creating access to the skilled workforce living throughout Southern Maine. In addition, direct highway access leads to short commutes to job centers in both Portland and Brunswick.

While the Town of Yarmouth is highly competitive within the region due to its strengths, there are constraints that restrict development opportunities. Yarmouth has limited availability of large developable sites for commercial and industrial use. Even fewer developable sites exist with direct access to I-295, a requirement for many commercial and industrial users. Furthermore, larger-scale retail centers in Freeport to the north and Falmouth to the south limit potential for more regional-serving retail developments. Housing costs that are among the highest in the state significantly limit the diversity people who can afford to live in town and restricts the potential workforce population for many local businesses, including retail, restaurants, services, etc.

Key findings to Yarmouth's demographic and socioeconomic profile and four use types examined in the study (residential, retail, industrial, and office) are presented as follows.

Yarmouth Net Supportable Demand for Real Estate Through 2027

Net Supportable Demand	
Residential - Rental	Up to 32 Units
Residential - For-Sale	122-248 Units
Retail	33,000 SF
Industrial/Flex	Up to 10,000 SF
General Office	Minimal Demand
Medical Office	4,300 SF

Source: Camoin Associates

Note: Reflects additional supportable demand for space beyond what is currently vacant or in the Town's development pipeline

DEMOGRAPHIC & SOCIOECONOMIC

Population Growth | Yarmouth's population is growing at a faster pace than the surrounding county, region, and state, though its growth rate is projected to slow in the next five years assuming status quo development trends.

Population Characteristics | Yarmouth has a significantly older population than the surrounding geographies, with a median age of 49.4. It has a comparatively high share of the population aged 50+, and lower shares of young children and early-career aged individuals. The median household income in Yarmouth is higher than the surrounding region, with almost a quarter of its population living in households with income of \$200,000 or more.

Commuter Characteristics | 85% of Yarmouth residents commute outside of Yarmouth for work, and Yarmouth imports about 85% of its

workforce from outside communities. According to the most recent available data available (sampled between 2017-2021), 14.9% of employed Yarmouth residents worked from home, though the current share of those working from home is likely considerably higher.

RESIDENTIAL

Historically, the Greater Portland Market has not been known to have a significant multifamily market, with single-family homeownership dominating. However, the rental market has strengthened in recent years, with minimal vacancies and strong rent growth prompting developers to respond to the improved market demand.

Approximately 75% of Yarmouth’s occupied housing units are owner-occupied. This is lower than the percentage of owner-occupied units in the surrounding towns, but similar to the Portland Metro Area and the State. New residential development in the town is focused on multifamily and mixed-use units, with approximately 100 units under development.

Projecting forward past trends in household growth, over the next five years (2022-2027) the number of households in Yarmouth is projected to increase by 17. Age cohorts driving growth will be those aged 65+ and 25–34-year-olds. Growth will be concentrated in higher-income households. Households with incomes greater than \$100,000 will increase most, while households with incomes of \$100,000 or less will decrease.

Projected Demand for Housing Units in Yarmouth

	Renter		For-Sale	
	Baseline	High Growth	Baseline	High Growth
Net 5-year Supportable Demand	0	32	122	248
Net Annual Supportable Demand	0	6	24	50

Source: Camoin Associates

Given the robustness of the Yarmouth housing market and high desirability of the community as a place to live, future growth in

housing units is most constrained by the availability of adequately zoned buildable sites, rather than market demand for new units.

Considering market potential alone, it is estimated that over the next five years up to 32 new rental housing units could be absorbed from demand within Yarmouth and the surrounding market. This is equal to up to about 6 units per year for the next five years, beyond units that are already in the pipeline.

It is also projected that over the next five years between 122-248 newly constructed for-sale housing units could be supported from demand within Yarmouth and the surrounding market, beyond what is already in the pipeline. This is equal to about 24-50 units per year for the next five years.

RETAIL & RESTAURANT

Within the Portland market retail vacancy rates (except for malls and other retail) are trending downward. While the overall outlook is positive, challenges such as inflation, online retail, and labor shortages will continue to put a strain on the market.

The pipeline of new retail space in the market is limited, with most new retail space being constructed in Portland and Topsham. Yarmouth has a modest retail market that draws customers from a smaller geographic area compared to larger neighboring retail centers in Freeport, Topsham, Brunswick, Falmouth, and Portland.

Based on the data that is available for current retail demand, retail industries with the largest gap (demand exceeds sales) represent retail categories for which residents leave the trade area to meet a portion of their needs. Most retail categories exhibit some level of spending leakage (meaning that local resident spending is greater than sales at local businesses, or that residents leave the local area to meet their demand), which is expected given the relatively small-scale retail offerings within Yarmouth and the high spending power of its residents.

Up to about 32,700 SF of net new retail space could be supported as a result of leakage recapture of local trade area residents and household growth. Local small-scale food stores, restaurants and cafes, and boutique clothing and household goods stores are examples of retail categories that could be an appropriate fit for Yarmouth.

Local Trade Area Supportable Demand for New Retail Space

Demand From	SF
Demand from Existing Residents	32,262
Demand from New Residents	1,766
Total Supportable Demand	34,029
Currently Vacant	1,300
Net Supportable Demand	32,729

Source: CoStar, Camoin Associates

INDUSTRIAL

The Portland industrial market has approximately 33.2 million SF of space, over half of which is categorized as logistics space, with the rest being split between specialized industrial and flex space.

In general, the Portland industrial market is somewhat tight, with low vacancy. Recent demographic trends in and around the Portland market have made it an increasingly attractive location for final-mile distribution centers and warehouse space. The Portland market could serve as a key location in helping to address national supply chain and bottleneck issues due to an overall lack of supply of industrial space to warehouse products and distribute to consumers.

In the NE Cumberland County submarket, the overwhelming majority of stock is occupied, with vacancy of 1.1%. Currently, no industrial construction is underway.

Yarmouth Net Supportable Industrial Demand

	Baseline	High Growth
Supportable SF	16,542	33,084
Current Vacant SF	23,000	
Net Supportable Industrial Demand	-6,458	10,084

Source: CoStar, Camoin Associates

The submarket has remained active for industrial transactions in the past few years, but momentum has more recently slowed. Vacancy is expected to remain low due to the prolonged period of minimal development.

Regional demand could support approximately 262,000 SF of new industrial space, of which Yarmouth could capture up to 33,000 SF by prioritizing attraction of industrial businesses. After accounting for 23,000 SF that is currently vacant in Yarmouth, about 10,100 SF of new industrial space could be supported in Yarmouth.

OFFICE

With the shift to remote and hybrid working in an already sluggish office market, commercial office space has been one of the hardest hit markets of the pandemic. With many employers offering opportunities to continue working from home fully or partially, it is anticipated that overall office demand will not return to pre-pandemic levels. The most competitive office space will be high-quality space in amenity-rich environments that give workers a reason to go into the office.

Portland is a midsize secondary market with roughly 26 million SF of office space. Relatively little supply has kept vacancies low in the market. Vacancy rates in both downtown and suburban areas are expected to tick up slightly and plateau in mid-2023.

In the NE Cumberland County submarket, no new construction of office buildings is currently underway, although inventory has expanded by 1.2% over the last three years.

Supportable Demand for New General Office Space, 5-Year

Demand From	Low Office Intensity	Medium Office Intensity	High Office Intensity
Demand (SF)			
Yarmouth	600	900	1,200
Portland-South Portland MSA	224,100	336,150	448,200
Net Demand (Minus Current Vacancy)			
Yarmouth	-13,403	-13,103	-12,803
Portland-South Portland MSA	-897,662	-785,612	-673,562

Source: Camoin Associates

In both Yarmouth and the MSA, net demand for new General Office space is minimal. However, locally the net demand for Medical Office space could support over 4,000 SF of new space over the next 5 years. Within the MSA, it is estimated that an additional nearly 150,000 SF could be supported.

Supportable Demand for New Medical Office Space, 5-Year Estimates (SF)

Demand From	Yarmouth	Portland-South Portland MSA
New Demand (SF)	4,260	227,657
Currently Vacant (SF)	0	78161
Net New Demand (SF)	4,260	149,496

Source: CoStar, Camoin Associates

Note: Vacancy for YTD 2023

Major office users in Yarmouth include Tyler Technologies and Garmin. Garmin is currently anticipating expansion that could support up to 300 employees at their Yarmouth site in the long-term.

DEVELOPMENT OPPORTUNITIES

This market analysis should be used to inform Town decision-making around encouraging or discouraging certain types of development in

light of market trends and pressures. Overall, the analysis points to several findings:

- Strong residential demand for both rental and owner-occupied housing units provides opportunities for development. Growth is projected in higher-income and older households. Given escalating home prices and construction costs, it will be a challenge for the Town to diversify the housing stock and attract younger professionals that are looking for starter homes and affordable housing options.
- Opportunity exists for additional small-scale retail space in town that recaptures resident spending and/or attracts visitors. The unique mixed-use and walkable environment in Yarmouth's downtown area has the potential for more destination specialty shops that draw people from beyond the local trade area.
- Beyond the planned Garmin expansion, there is minimal need for office development of any sizable scale. Yarmouth's greatest opportunity in this area is expanded small-scale workspace for town residents who work from home at least some of the time and want options to work in a different environment. Locations with walkable access to dining, shopping, entertainment, and recreation amenities are best positioned to capture this demand.
- Demand for both distribution and other specialized industrial space is strong regionally, though the lack of large shovel-ready sites with direct highway access in Yarmouth is a significant barrier for attracting such uses.
- The Wyman Energy Center site on Cousins Island is a 100-acre site that offers unique potential development opportunities. Due to the distance from the highway, any industrial reuse of the site will most likely be by a user that would take advantage of its direct water access.

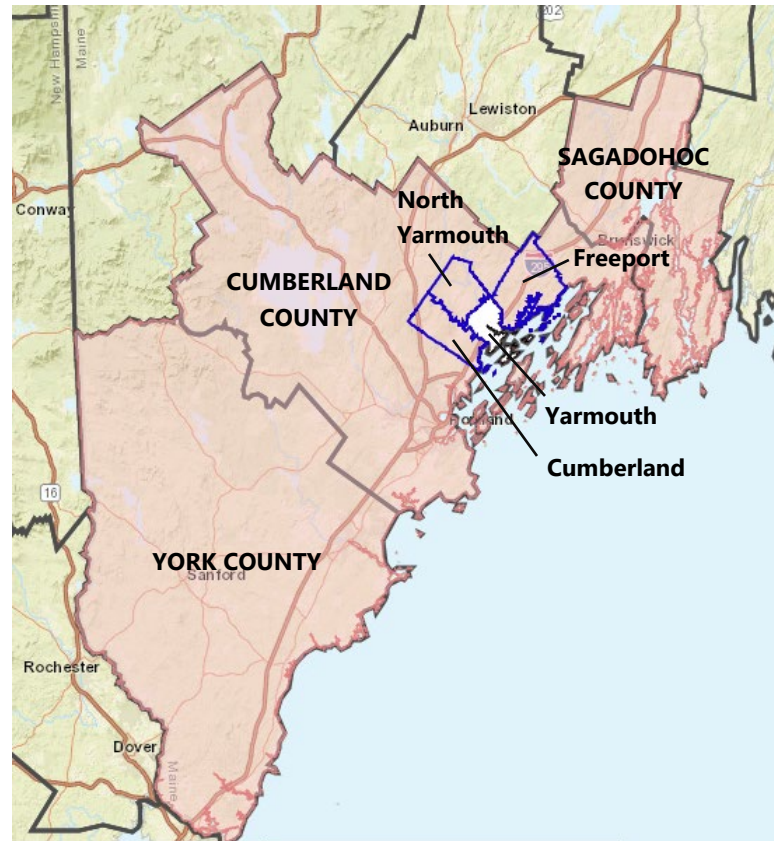
2. DEMOGRAPHIC AND SOCIOECONOMIC PROFILE

AREAS OF STUDY

The following analyses were conducted to identify demographic, socioeconomic, business, and industry trends in Yarmouth. In addition to data specific to Yarmouth,¹ data was also collected and analyzed for Cumberland County, the Portland-South Portland Metropolitan Statistical Area, Maine, and the United States. Where appropriate, Yarmouth is compared to the surrounding towns of Cumberland, North Yarmouth, and Freeport.

PORTLAND-SOUTH PORTLAND METROPOLITAN AREA

The Portland-South Portland MSA consists of Cumberland, York, and Sagadahoc counties, highlighted in red below. The surrounding towns of Cumberland, North Yarmouth, and Freeport are indicated by blue boundaries in the map below.



¹ Industry data from Lightcast is available at the ZIP code level. Therefore, "Yarmouth" refers to ZIP code 04096 where Lightcast data is used.

DEMOGRAPHIC & SOCIOECONOMIC PROFILE: KEY FINDINGS

POPULATION GROWTH

- ◆ Yarmouth's population is growing at a faster pace than the surrounding county, region, and state, but its growth rate is projected to slow in the next five years.

POPULATION CHARACTERISTICS

- ◆ Yarmouth has a significantly older population than the surrounding geographies, with a median age of 49.4. It has a comparatively high share of population aged 50+, and lower shares of young children and early-career aged individuals.
- ◆ Median household income in Yarmouth is higher than the surrounding region, with almost a quarter of its population living in households with income of \$200,000 or more.

COMMUTER CHARACTERISTICS

- ◆ 85% of Yarmouth residents commuted outside of Yarmouth for work, and Yarmouth also imported about 85% of its workforce from outside communities.

POPULATION

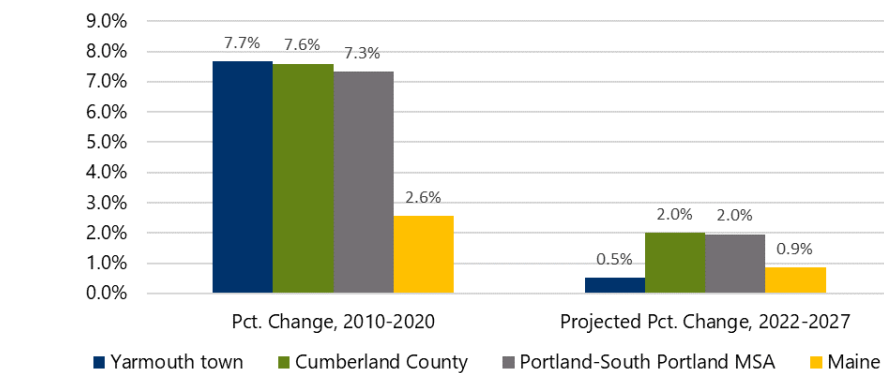
- ◆ Yarmouth's population grew by 7.7% or approximately 641 people from 2010 to 2020, which is higher than the rate of population growth in the surrounding county, region, and state.
- ◆ From 2022-2027, Yarmouth's population is projected to grow by 0.5%, or by about 50 people. This growth rate is slower than the surrounding county, region, and state.
- ◆ Yarmouth's population makes up a small portion of the surrounding area, at 3.0% of Cumberland County's population and 1.6% of the MSA's population.

Total Population

Site	Yarmouth town	Cumberland County	Portland-South Portland MSA	Maine
2010 Total Population	8,349	281,674	514,098	1,328,361
2020 Total Population	8,990	303,069	551,740	1,362,359
2022 Total Population	9,141	308,181	560,412	1,370,382
2027 Total Population	9,189	314,350	571,420	1,382,353
Compound Annual Growth Rate 2010-2020	0.7%	0.7%	0.7%	0.3%
Compound Annual Growth Rate, 2020-2022	0.8%	0.8%	0.8%	0.3%
Projected CAGR, 2022-2027	0.1%	0.4%	0.4%	0.2%

Source: Esri

Population Change, Historical and Projected

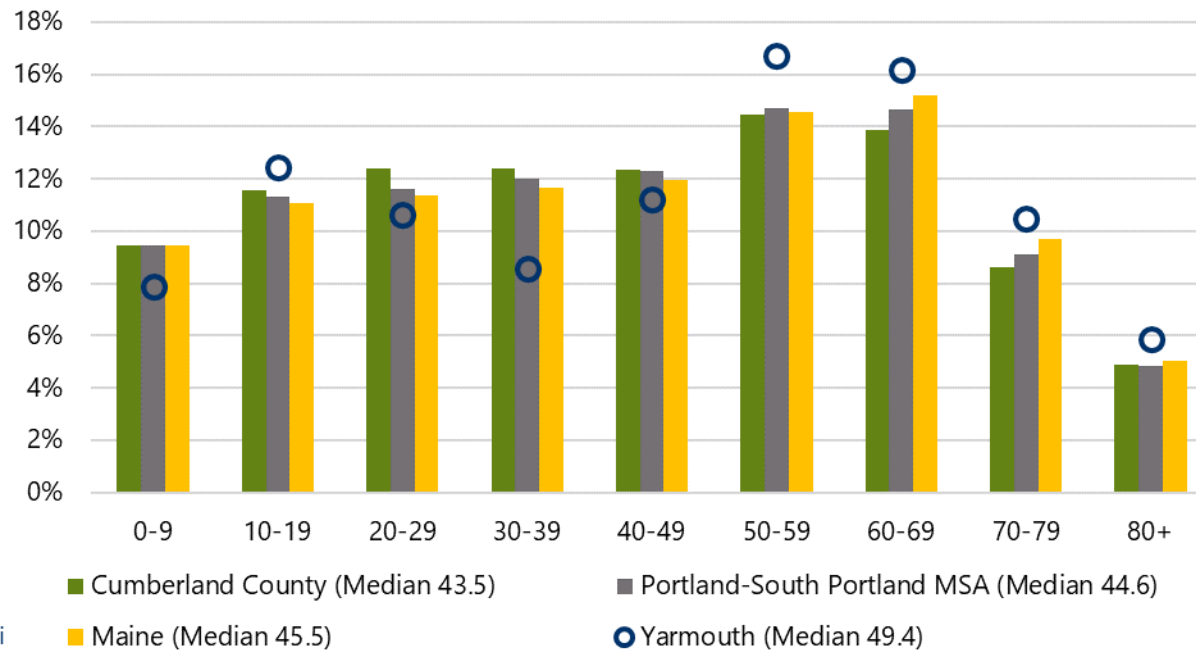


POPULATION CHARACTERISTICS (AGE DISTRIBUTION): REGIONAL COMPARISON

The following graph outlines age distribution ranges of the 2022 population in the Town of Yarmouth, Cumberland County, and larger regions.

- ◆ Yarmouth is significantly older than the surrounding geographies, with a higher median age (49.4) and a smaller proportion of children and adults under age 40. Yarmouth has a higher portion of adults 50 or older compared to the other geographies.

Population Age Distribution (2022)

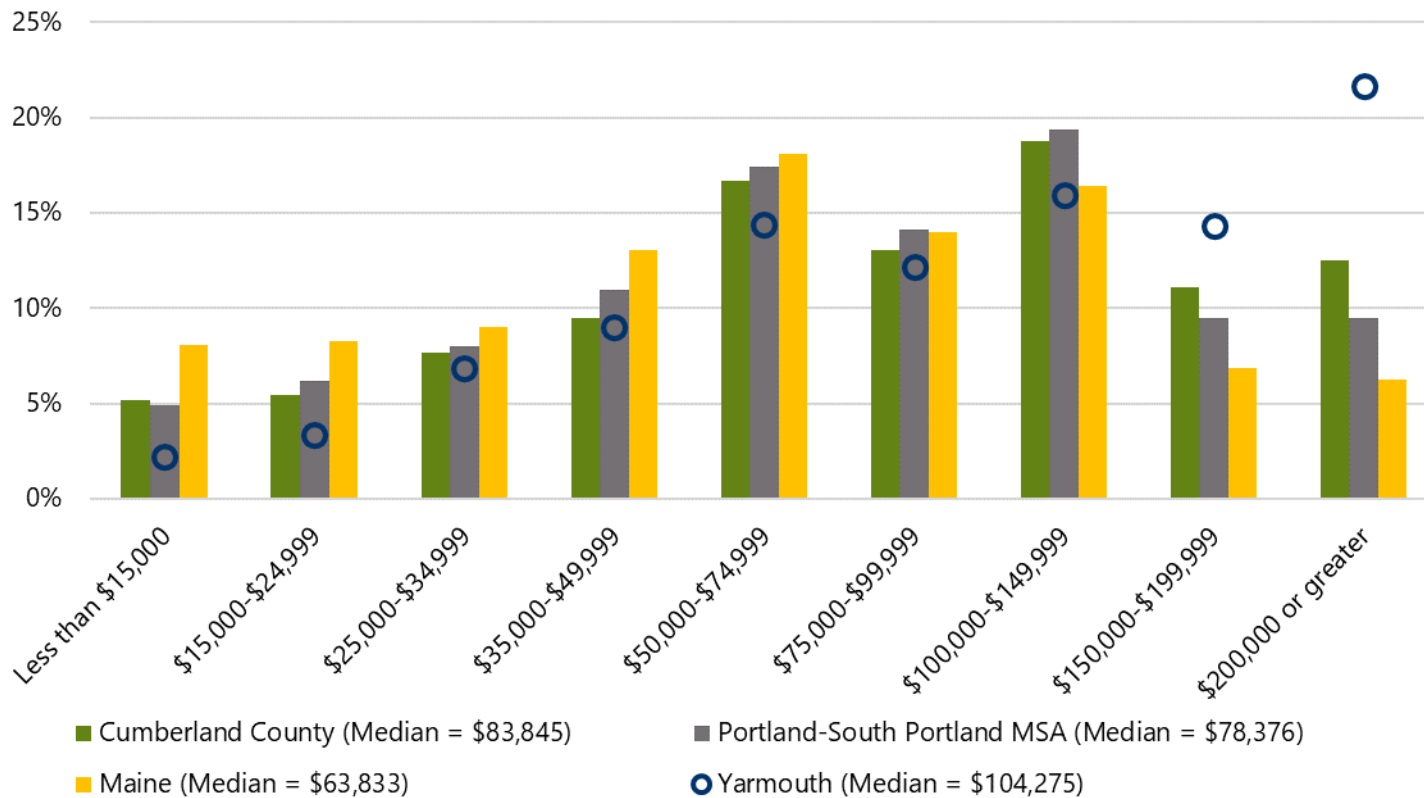


POPULATION CHARACTERISTICS (INCOME DISTRIBUTION): REGIONAL COMPARISON

The following figure outlines the 2022 household income distribution.

- ◆ Median household income in Yarmouth is significantly higher than the comparison geographies, at \$104,275. The largest share of households falls into the \$200,000 or greater category, at 22% compared to only 13% in Cumberland County, 9% in the greater region, and 6% in the state.

Household Income Distribution, 2022



COMMUTER TRENDS: TOWN OF YARMOUTH

- ◆ Almost 85% of Yarmouth's resident workers commuted outside of Yarmouth as of 2019.
- ◆ Yarmouth also imports about 85% of its workforce from outside communities.
- ◆ Other than Yarmouth, Portland is the top place where Yarmouth workers live and where Yarmouth residents are employed. 28% of Yarmouth residents work in Portland, by far the largest share of any neighboring community.
- ◆ South Portland and Freeport are also popular towns where Yarmouth residents commute to.
- ◆ Many Yarmouth residents work from home. While the commuting data displayed does include remote workers in employment numbers, it may not reflect their work-from-home status. Additionally, it reflects data from 2019, before the COVID-19 catalyst for working from home.
- ◆ According to American Community Survey data collected from 2017-2021, 14.9% of employed Yarmouth residents worked from home, representing about 677 workers. This compares to 14.0% of workers in Cumberland County overall. 1-year estimates for Cumberland County show that the share of workers who worked from home in 2021 jumped to 26.3%, a significant increase. While 1-year estimates are not available for Yarmouth, it is likely that the number of workers who worked from home increased in step with the County.

Town of Yarmouth Commuter Flows, 2019

	Count	Share
Workers		
Employed in Yarmouth, living out of town	3,577	85%
Employed and Living in Yarmouth	610	15%
Total Workers	4,187	100%
Residents		
Living in Yarmouth, working out of town	3,313	85%
Living and working in Yarmouth	610	16%
Total Residents	3,923	100%

Source: US Census OnTheMap

Top Home and Employment Destinations (2019)

Where Yarmouth Workers Live		Where Yarmouth Residents are Employed	
County Subdivision	Percent (%)	County Subdivision	Percent (%)
Yarmouth town (Cumberland, ME)	15%	Portland city (Cumberland, ME)	28%
Portland city (Cumberland, ME)	10%	Yarmouth town (Cumberland, ME)	16%
South Portland city (Cumberland, ME)	4%	South Portland city (Cumberland, ME)	7%
Cumberland town (Cumberland, ME)	4%	Freeport town (Cumberland, ME)	5%
Brunswick town (Cumberland, ME)	4%	Westbrook city (Cumberland, ME)	4%
Freeport town (Cumberland, ME)	4%	Brunswick town (Cumberland, ME)	4%
North Yarmouth town (Cumberland, ME)	4%	Falmouth town (Cumberland, ME)	4%
Windham town (Cumberland, ME)	3%	Scarborough town (Cumberland, ME)	3%
Westbrook city (Cumberland, ME)	3%	Lewiston city (Androscoggin, ME)	3%
Gray town (Cumberland, ME)	3%	Auburn city (Androscoggin, ME)	2%
All Other Locations	48%	All Other Locations	24%

Source: US Census OnTheMap

3. INDUSTRY AND OCCUPATION PROFILE

INDUSTRY ANALYSIS: KEY FINDINGS

EXISTING JOB TRENDS

- ◆ In 2022 there were approximately 6,191 jobs in Yarmouth, representing 3% jobs in Cumberland County. Between 2017 and 2022 Yarmouth's job growth was flat. Professional, Scientific, and Technical Services (+212 jobs); Agriculture, Forestry, Fishing, and Hunting (+58); and Construction (+27) added the most over this time period.
- ◆ Historically, Yarmouth's rate of job growth has outperformed the county, MSA, and state.
- ◆ Almost half of Yarmouth's total jobs are made up of Government (18%), Professional, Scientific, and Technical Services (18%), and Health Care and Social Assistance (14%). All three sectors are more concentrated in Yarmouth compared to the nation, with Professional, Scientific, and Technical Services being the most concentrated sector in the town (LQ of 2.5*).
- ◆ Average earnings per job across all sectors is \$74,867, similar to the average in Cumberland County but higher than the MSA and state.
- ◆ Yarmouth is expected to continue to see modest growth of 1% in the next five years, as projected gains in Professional, Scientific, and Technical Services, Agriculture, and others are partially outweighed by projected losses in sectors like Retail Trade and Government.

***Location quotient (LQ)** is a measure of industry concentration within a region. An LQ of 1.0 means that an industry is as concentrated within the region as it is on a national level. An LQ greater than 1.0 indicates that an industry is more concentrated in a region than at the national level.

EXISTING JOB TRENDS (2-DIGIT NAICS, 2022)

The table outlines 2022 jobs by industry in Yarmouth, the county, and the state of Maine.

- ◆ In 2022 there were 6,191 jobs in Yarmouth, representing about 3% of all jobs in Cumberland County
- ◆ Almost half of Yarmouth's total jobs are in the Government (18%), Professional, Scientific, and Technical Services (18%), and Health Care and Social Assistance (14%). Yarmouth has a high concentration of Professional, Scientific, and Technical Services compared to the county (9%), region (7%), and Maine (5%).

Jobs by Sector, 2022

NAICS	Description	Yarmouth		Cumberland County		Portland-South Portland MSA		Maine	
		#	%	#	%	#	%	#	%
11	Agriculture, Forestry, Fishing and Hunting	85	1%	2,560	1%	3,947	1%	17,548	2%
21	Mining, Quarrying, and Oil and Gas Extraction	0	0%	<10	0%	88	0%	274	0%
22	Utilities	32	1%	367	0%	533	0%	1,731	0%
23	Construction	324	5%	13,237	6%	21,213	6%	48,355	7%
31	Manufacturing	264	4%	12,862	6%	29,276	9%	56,881	8%
42	Wholesale Trade	99	2%	7,750	4%	9,498	3%	19,917	3%
44	Retail Trade	681	11%	22,613	10%	34,986	11%	85,143	12%
48	Transportation and Warehousing	14	0%	5,922	3%	7,739	2%	19,753	3%
51	Information	26	0%	3,604	2%	4,479	1%	8,213	1%
52	Finance and Insurance	235	4%	13,891	6%	16,162	5%	26,258	4%
53	Real Estate and Rental and Leasing	49	1%	4,295	2%	5,570	2%	9,554	1%
54	Professional, Scientific, and Technical Services	1,088	18%	19,235	9%	23,891	7%	38,070	5%
55	Management of Companies and Enterprises	<10	0%	6,239	3%	6,844	2%	14,935	2%
56	Administrative and Support and Waste Management and Remediation Services	149	2%	11,226	5%	15,759	5%	34,304	5%
61	Educational Services	143	2%	7,571	3%	10,215	3%	21,746	3%
62	Health Care and Social Assistance	882	14%	36,333	17%	47,213	14%	108,548	15%
71	Arts, Entertainment, and Recreation	58	1%	4,310	2%	5,955	2%	11,433	2%
72	Accommodation and Food Services	526	8%	16,109	7%	27,759	8%	56,271	8%
81	Other Services (except Public Administration)	436	7%	10,705	5%	15,481	5%	31,552	4%
90	Government	1,094	18%	20,503	9%	40,154	12%	103,179	14%
99	Unclassified Industry	0	0%	<10	0%	18	0%	3,191	0%
Total		6,191	100%	219,347	100%	326,779	100%	716,855	100%

Source: Lightcast

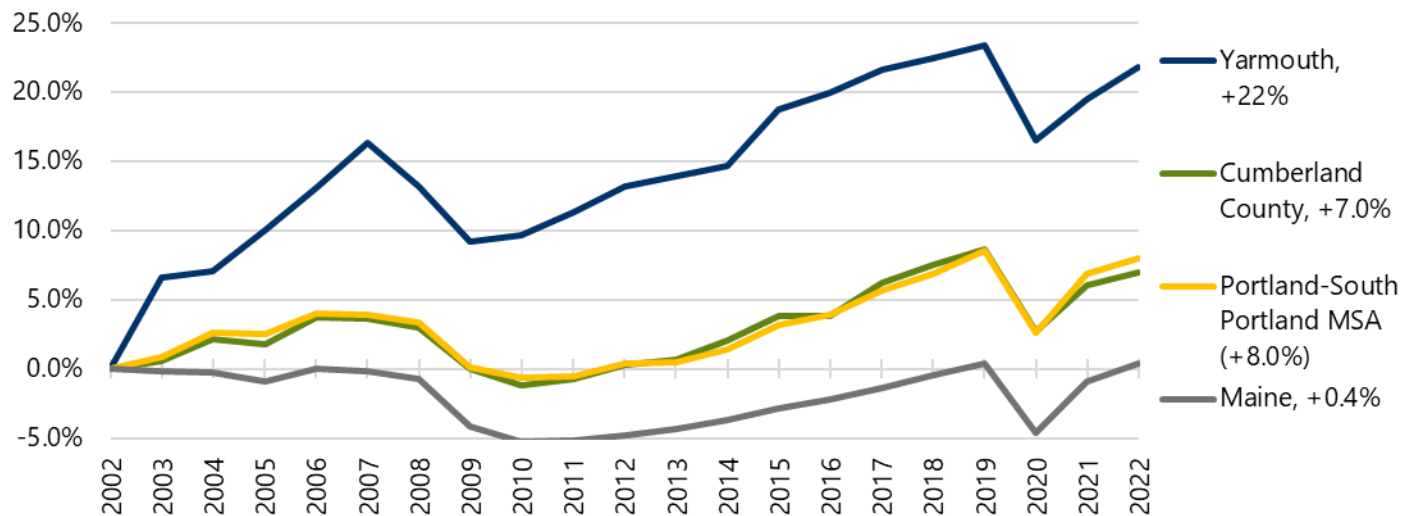
Note: NAICS 90, Government, includes federal, state, and local government (including military and postal service), prisons and jails, as well as public schools and hospitals.

TOTAL JOB GROWTH: REGIONAL COMPARISON

The figure below demonstrates the historical job growth trends in Yarmouth and the surrounding regions from 2002 to 2022.

- ◆ Yarmouth added over 1,100 jobs (a 22% increase) in the two decades from 2002 to 2022.
- ◆ Yarmouth had strong growth years in the early 2000s and in 2015, and mostly tracks regional trends in other years.
- ◆ All geographies experienced job losses due to the COVID-19 pandemic and have largely rebounded.

Cumulative Percent Change in Jobs, 2002-2022



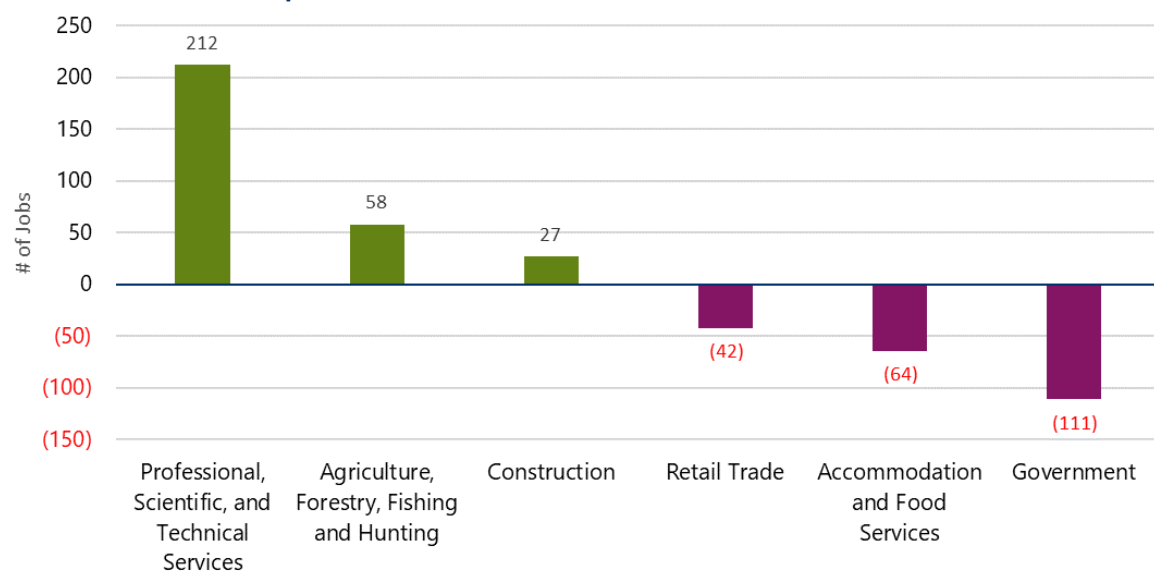
Source: Lightcast

JOB TRENDS (2-DIGIT NAICS): YARMOUTH

The following figure outlines the change in jobs from 2017-2022. The subsequent table also highlights this historic change along with projected change from 2022-2027.

- ◆ In the past five years, from 2022-2027, Yarmouth's job growth was flat, seeing a net increase of only 10 jobs. Sectors with the largest gains were Professional, Scientific, and Technical Services (+212 jobs) and Agriculture, Forestry, Fishing and Hunting (+58 jobs).
- ◆ Growth in Professional, Scientific, and Technical Services is driven by Scientific Research (+72 jobs) and Architectural, Engineering, and Related Services (+53 jobs). Crop Production (+49) was the fastest-growing Agricultural subsector.
- ◆ However, these gains were mostly offset by losses in other sectors. Government lost the most jobs (-111), which is largely attributed to local government losses (-92).
- ◆ Projections, which are based on current trends and do not consider potential projects that may be in the pipeline but deviate from historic growth patterns, suggest that Yarmouth will continue to see modest growth in the next five years, as projected gains in Professional, Scientific, and Technical Services, Agriculture, and others are partially outweighed by projected losses in sectors like Retail Trade and Government.

Town of Yarmouth Top Job Gainers and Losers, 2017-2022



Source: Lightcast

Town of Yarmouth Job Change

NAICS	Description	Historic		Projected	
		2017 - 2022 Change	2017 - 2022 % Change	2022 - 2027 Change	2022 - 2027 % Change
11	Agriculture, Forestry, Fishing and Hunting	58	215%	32	38%
21	Mining, Quarrying, and Oil and Gas Extraction	0	0%	0	0%
22	Utilities	2	5%	(2)	(5%)
23	Construction	27	9%	2	1%
31	Manufacturing	25	10%	15	6%
42	Wholesale Trade	(19)	(16%)	(4)	(5%)
44	Retail Trade	(42)	(6%)	(38)	(6%)
48	Transportation and Warehousing	(5)	(24%)	(1)	(5%)
51	Information	(6)	(19%)	(1)	(4%)
52	Finance and Insurance	16	7%	1	0%
53	Real Estate and Rental and Leasing	1	2%	(0)	(1%)
54	Professional, Scientific, and Technical Services	212	24%	93	9%
55	Management of Companies and Enterprises	Insf. Data	Insf. Data	Insf. Data	Insf. Data
56	Administrative and Support and Waste Management and Remediation Services	(14)	(9%)	(6)	(4%)
61	Educational Services	(32)	(18%)	6	4%
62	Health Care and Social Assistance	3	0%	11	1%
71	Arts, Entertainment, and Recreation	(7)	(11%)	3	5%
72	Accommodation and Food Services	(64)	(11%)	25	5%
81	Other Services (except Public Administration)	(35)	(7%)	2	0%
90	Government	(111)	(9%)	(57)	(5%)
Total		10	0%	81	1%

Source: Lightcast

JOB TRENDS (2-DIGIT NAICS): REGIONAL COMPARISON

The following table outlines the Portland-South Portland, ME MSA's job change trends.

- ◆ From 2017-2022, the region saw 2% job gains, outpacing Yarmouth's growth of 0%. Growth was highest for Professional, Scientific, and Technical Services, aligning with Yarmouth.
- ◆ Losses occurred in several sectors but were greatest in Accommodation and Food Services and Retail Trade. The region had slightly lower decline in these sectors compared to Yarmouth. Additionally, job loss associated with Government was less significant in the region than in Yarmouth.
- ◆ Projections from 2022-2027 show steady 2% growth in the coming five years, outpacing Yarmouth's 1% projected growth. Overall, the MSA is projected to net 5,954 new jobs added across many sectors. Retail Trade is projected to decline the most (-1,523 jobs).

Portland-South Portland MSA Job Change

NAICS	Description	Historic		Projected	
		2017 - 2022 Change	2017 - 2022 % Change	2022 - 2027 Change	2022 - 2027 % Change
11	Agriculture, Forestry, Fishing and Hunting	1,916	94%	1,163	29%
21	Mining, Quarrying, and Oil and Gas Extraction	(20)	(19%)	3	3%
22	Utilities	56	12%	(14)	(3%)
23	Construction	2,046	11%	414	2%
31	Manufacturing	3,447	13%	1,242	4%
42	Wholesale Trade	(372)	(4%)	(67)	(1%)
44	Retail Trade	(1,353)	(4%)	(1,523)	(4%)
48	Transportation and Warehousing	(665)	(8%)	(154)	(2%)
51	Information	191	4%	152	3%
52	Finance and Insurance	694	4%	(96)	(1%)
53	Real Estate and Rental and Leasing	162	3%	41	1%
54	Professional, Scientific, and Technical Services	4,729	25%	2,366	10%
55	Management of Companies and Enterprises	779	13%	488	7%
56	Administrative and Support and Waste Management and Remediation Services	(423)	(3%)	(225)	(1%)
61	Educational Services	375	4%	295	3%
62	Health Care and Social Assistance	(321)	(1%)	610	1%
71	Arts, Entertainment, and Recreation	(390)	(6%)	288	5%
72	Accommodation and Food Services	(2,477)	(8%)	1,700	6%
81	Other Services (except Public Administration)	(797)	(5%)	252	2%
90	Government	(693)	(2%)	(994)	(2%)
99	Unclassified Industry	--	--	11	63%
Total		6,902	2%	5,954	2%

Source: Lightcast

SECTOR CHARACTERISTICS (2-DIGIT NAICS): YARMOUTH

The following table outlines the concentration, competitiveness, and earnings per job by sector in Yarmouth.

- ◆ Professional, Scientific, and Technical Services is the most concentrated sector in Yarmouth (LQ of 2.50). This is followed by Utilities (LQ of 1.57). However, neither of the two have competitive advantage in Yarmouth.
- ◆ Agriculture, Forestry, Fishing and Hunting is the only industry that has competitive advantage in Yarmouth.
- ◆ Average earnings per job across all sectors is \$74,867. This is on par with the county and higher than the MSA and state.
- ◆ The top employers in Yarmouth are Tyler Technologies, Garmin/DeLorme, Yarmouth Town Schools, and Bush Equities. Various home health, rehabilitation centers, and family practice offices also make the list of top employers.

Town of Yarmouth Sector Characteristics

NAICS	Description	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing and Hunting	1.15	28	\$39,818
21	Mining, Quarrying, and Oil and Gas Extraction	0.00	0	\$0
22	Utilities	1.57	(2)	\$137,915
23	Construction	0.91	(16)	\$71,544
31	Manufacturing	0.55	5	\$66,087
42	Wholesale Trade	0.44	(9)	\$171,738
44	Retail Trade	1.13	(52)	\$50,261
48	Transportation and Warehousing	0.05	(2)	\$95,671
51	Information	0.22	(3)	\$85,948
52	Finance and Insurance	0.92	(13)	\$126,240
53	Real Estate and Rental and Leasing	0.46	(3)	\$81,527
54	Professional, Scientific, and Technical Services	2.50	(23)	\$98,664
55	Management of Companies and Enterprises	0.07	0	Insf. Data
56	Administrative and Support and Waste Management and Remediation Services	0.38	(16)	\$67,863
61	Educational Services	0.89	(9)	\$47,626
62	Health Care and Social Assistance	1.12	(73)	\$83,820
71	Arts, Entertainment, and Recreation	0.59	(3)	\$42,404
72	Accommodation and Food Services	1.06	(29)	\$34,992
81	Other Services (except Public Administration)	1.40	(24)	\$48,972
90	Government	1.22	(81)	\$77,994
Total		--	(326)	\$74,867

Source: Lightcast

Location Quotient and Competitive Effect

Both the location quotient and the competitive effect help to illustrate what makes a region unique.

Location quotient (LQ) is a measure of industry concentration within a region. An LQ of 1.0 means that an industry is as concentrated within the region as it is on a national level. An LQ greater than 1.0 indicates that an industry is more concentrated in a region than at the national level.

The **competitive effect** illustrates how much change in an industry is not explained by national economic or industry trends. A positive competitive effect means that the region has unique characteristics giving it a competitive advantage in that respective industry.

SECTOR CHARACTERISTICS (2-DIGIT NAICS): REGIONAL COMPARISON

The following table outlines the concentration, competitiveness, and earnings per job by sector in the Portland-South Portland MSA.

- ◆ Management of Companies and Enterprises is the most concentrated sector in the MSA (LQ of 1.44). This is followed by Finance and Insurance (LQ of 1.20). Of the two the MSA only holds a competitive advantage in Management of Companies and Enterprises. This varies significantly from Yarmouth, which has strong concentrations in Professional, Scientific, and Technical Services, Utilities, and Government.
- ◆ The average earnings per job is slightly higher in Yarmouth, at \$74,867 in 2022.

Portland-South Portland MSA Sector Characteristics

NAICS	Description	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing and Hunting	1.01	976	\$45,489
21	Mining, Quarrying, and Oil and Gas Extraction	0.08	(3)	\$81,113
22	Utilities	0.49	(21)	\$152,152
23	Construction	1.13	(772)	\$66,748
31	Manufacturing	1.16	140	\$86,611
42	Wholesale Trade	0.81	(455)	\$98,708
44	Retail Trade	1.09	(2,271)	\$46,800
48	Transportation and Warehousing	0.55	(985)	\$64,644
51	Information	0.73	(212)	\$82,600
52	Finance and Insurance	1.20	(1,049)	\$120,749
53	Real Estate and Rental and Leasing	0.98	(251)	\$72,387
54	Professional, Scientific, and Technical Services	1.04	(181)	\$97,790
55	Management of Companies and Enterprises	1.44	115	\$144,036
56	Administrative and Support and Waste Management and Remediation Services	0.77	(1,291)	\$52,810
61	Educational Services	1.20	(749)	\$43,964
62	Health Care and Social Assistance	1.14	(3,881)	\$77,312
71	Arts, Entertainment, and Recreation	1.14	(370)	\$35,946
72	Accommodation and Food Services	1.06	(1,124)	\$36,336
81	Other Services (except Public Administration)	0.94	(661)	\$37,755
90	Government	0.85	(1,896)	\$82,685
99	Unclassified Industry	0.03	4	\$35,613
Total			(14,938)	\$71,610

Source: Lightcast

EXISTING JOB TRENDS (4-DIGIT NAICS): YARMOUTH

The following table outlines the top growing industries (4-NAICS) by number of jobs in Yarmouth.

- ◆ The town's fastest-growing sectors are largely within the Professional, Scientific, and Technical Services Sector. Scientific Research and Development Services (+72) and Architectural, Engineering, and Related Services (+53) added the most jobs over this time period, and both fall within the larger industry category.
- ◆ Of the top growing industries, Advertising, Public Relations, and Related Services is the most concentrated with a LQ of 4.77. This is followed by Architectural, Engineering, and Related Services, with a LQ of 4.06.
- ◆ Of the top ten fastest-growing sub-industries, six have average earnings higher than the overall average for all sectors in Yarmouth.

Town of Yarmouth, Top Growing Sub-Industries, 2017-2022

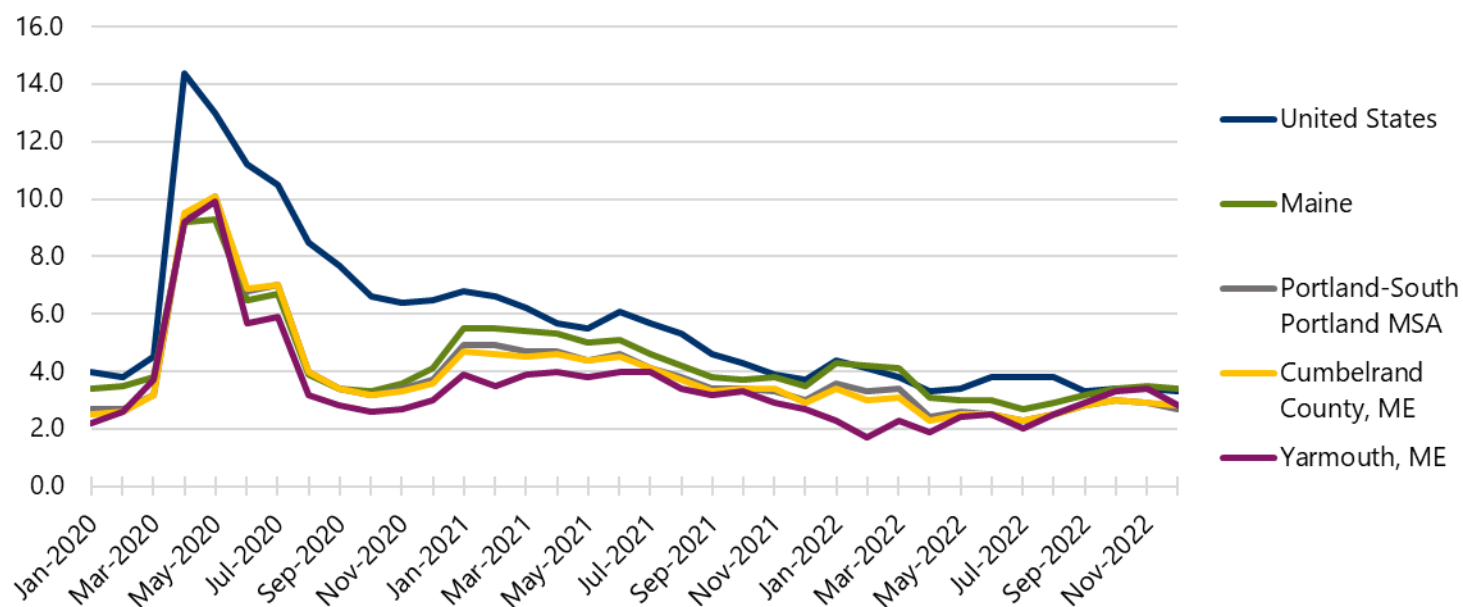
NAICS	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job
5417	Scientific Research and Development Services	32	104	72	223%	3.21	63	\$100,370
5413	Architectural, Engineering, and Related Services	200	252	53	26%	4.06	35	\$104,395
5222	Nondepository Credit Intermediation	16	65	49	315%	2.76	49	\$104,026
1110	Crop Production	25	74	49	199%	2.29	49	\$43,780
5416	Management, Scientific, and Technical Consulting Services	90	129	38	43%	1.67	20	\$109,339
5419	Other Professional, Scientific, and Technical Services	109	147	38	35%	3.91	19	\$70,109
4541	Electronic Shopping and Mail-Order Houses	67	88	21	31%	4.00	5	\$38,511
2361	Residential Building Construction	56	75	19	33%	1.52	2	\$60,541
5418	Advertising, Public Relations, and Related Services	75	93	18	24%	4.77	20	\$80,200
5411	Legal Services	190	208	18	9%	4.02	12	\$115,957

Source: Lightcast

UNEMPLOYMENT RATE TRENDS: REGIONAL COMPARISON

- ◆ The unemployment rate for Yarmouth has trended lower than comparison geographics for most months from 2017-2022.
- ◆ Since peaking at 9.9% in May 2020, Yarmouth's unemployment rate has steadily decreased, to an average of 2.8% in the second half of 2022, slightly higher than the pre-pandemic average of 2.0% during the second half of 2019 but still very low.

Unemployment Rate (% , not seasonally adjusted)



Source: Lightcast

4. REAL ESTATE OVERVIEW

TOWN OF YARMOUTH REAL ESTATE INVENTORY SNAPSHOT

Based on properties tracked by CoStar there is over 440,000 SF of rentable retail space across 73 properties in Yarmouth, of which only 1,300 SF is currently vacant. Offices and multi-family space are the next most common types of space in the area. There are 53 office properties accounting for over 490,000 SF of space, and 12 multi-family buildings accounting for 462,000 SF of space. Overall, vacancy is very tight for most types of real estate within the Town. Property inventory is summarized in the table below.

Town of Yarmouth Real Estate Inventory Summary

Row Labels	# of Properties	Avg. Year Built	Vacant SF	Rentable Building Area
Retail	73	1938	1,300	440,778
Office	53	1965	14,003	490,616
Multi-Family	12	1955	0	461,771
Specialty	5	1841	0	54,928
Industrial	3	1950	0	42,355
Health Care	3	1976	0	121,268
Flex	3	1986	23,000	207,928
Hospitality	1	1950	0	4,201
Total	162	1954	38,303	1,823,845

Source: CoStar

4.1 RESIDENTIAL MARKET ANALYSIS

RESIDENTIAL MARKET ANALYSIS: KEY FINDINGS

- ◆ Historically, the Greater Portland Market has not been known to have a significant multifamily market, with homeownership dominating. However, the rental market has strengthened in recent years, with minimal vacancies and strong rent growth prompting developers to respond to the improved market demand.
- ◆ Approximately 75% of Yarmouth's occupied housing units are owner-occupied. This is lower than the percentage of owner-occupied units in the surrounding towns, but similar to the Portland Metro Area and the State. New residential development in the town is focused on multifamily and mixed-use units, with approximately 100 units under development.
- ◆ Given past trends, over the next five years (2022-2027) the number of households in Yarmouth is projected to increase by 17. Age cohorts driving growth will be those aged 65+ and 25–34-year-olds. Growth will be concentrated among higher-income households. Households with incomes greater than \$100,000 will increase most, while households with incomes of \$100,000 or less will decrease.
- ◆ It is estimated that over the next five years up to 32 new rental housing units could be supported from demand within Yarmouth in addition to attraction from within the surrounding market. This is equal to up to 6 units per year for the next five years.
- ◆ It is also projected that over the next five years between 122 and 248 newly constructed for-sale housing units could be supported from demand within Yarmouth in addition to attraction from the surrounding market. This is equal to about 24-50 units per year for the next five years.
- ◆ The low amount of housing that has been produced in Yarmouth has constrained recent household growth. However, there is sufficient regional demand potential to significantly increase market-rate housing production.

Projected Demand for Housing Units in Yarmouth

	Renter		For-Sale	
	Baseline	High Growth	Baseline	High Growth
Net 5-year Supportable Demand	0	32	122	248
Net Annual Supportable Demand	0	6	24	50

Source: Camoin Associates

HOUSING INVENTORY: OCCUPANCY

The following charts outline existing housing units by occupancy status. Yarmouth's housing market is compared to surrounding towns, Cumberland County, the Portland-South Portland Metro Area, the state, and nation, where appropriate.

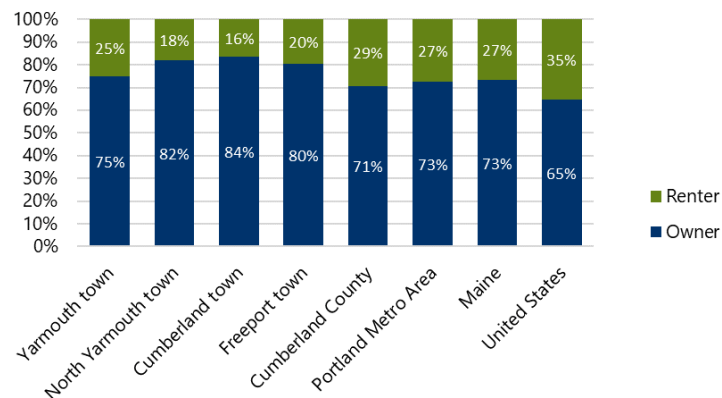
- ◆ 96% of Yarmouth's housing units are occupied and 4% are vacant.
- ◆ Of the occupied units, approximately 72% are owner-occupied. This is lower than the percentage of owner-occupied units in neighboring towns, but higher than Cumberland County. Yarmouth's rate of owner-occupied units most closely resembles the Portland Metro Area and the State.
- ◆ 2% of Yarmouth's housing units are attributed to seasonal homes, compared to 16% of housing units overall in Maine.

Housing Units by Occupancy, 2021

Town of Yarmouth		
	Number	Percent
Occupied	3,463	96%
<i>Owner occupied</i>	2,594	72%
<i>Renter Occupied</i>	869	24%
Vacant	149	4%
<i>Seasonal</i>	82	2%
<i>Other Vacant</i>	67	2%
Total	3,612	100%

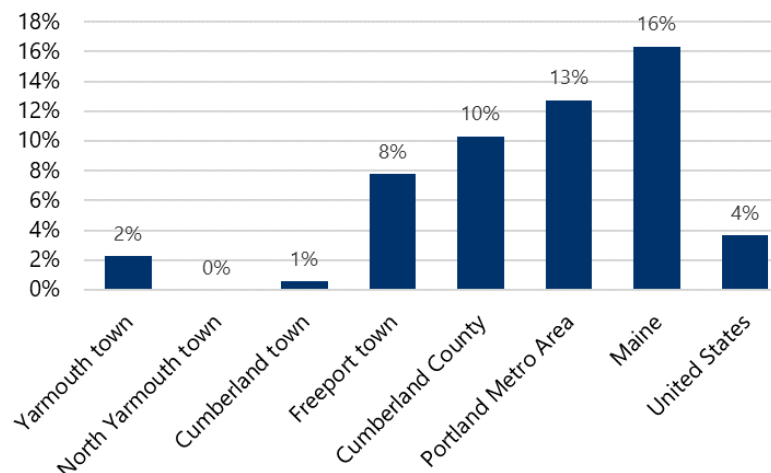
Source: 2021 ACS 5-Year Estimates

Occupied Housing Unit Breakdown



Source: 2021 ACS 5-Year

Seasonal Housing Units as a % of Total Units



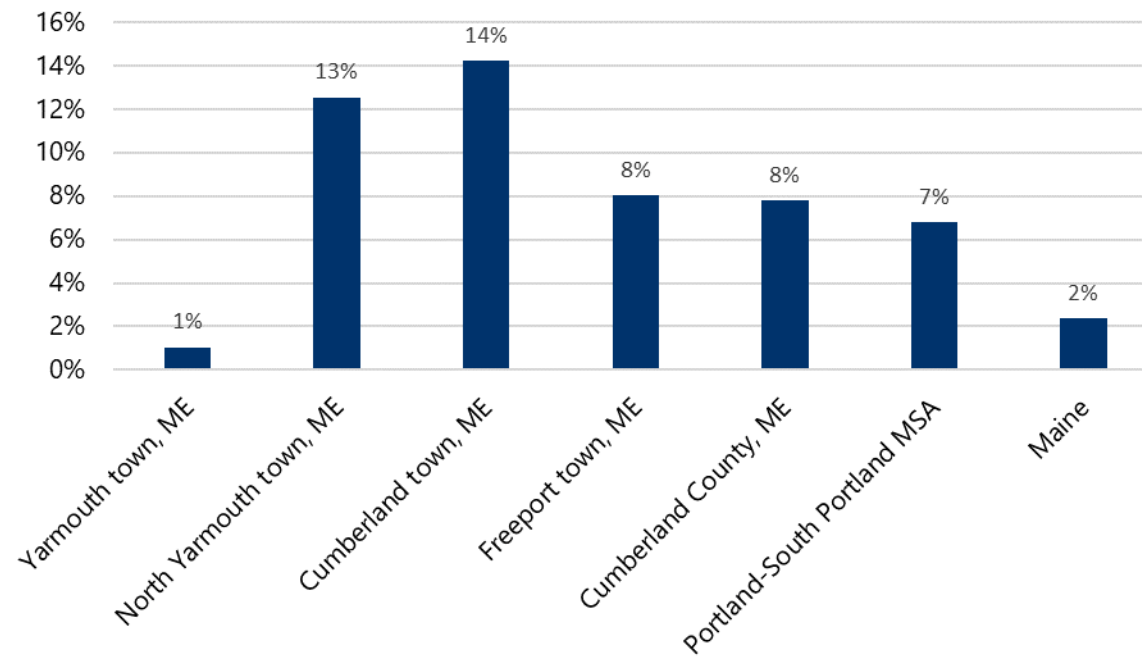
Source: ACS 2021 5-Year Estimates

HOUSING INVENTORY: UNITS

The following table outlines the change in number of housing units:

- ◆ Since 2010, the number of housing units in Yarmouth has increased by 1%, from 3,819 to 3,859. This is a *net* increase of 40 units over 10 years.
- ◆ Yarmouth's change in housing lags growth in Cumberland County and the Portland-South Portland MSA. It is most in line with Maine's growth in housing units (2%).
- ◆ Neighboring North Yarmouth recently placed a growth cap of 15 units in its village center and residential zones in 2022.

% Change in Housing Units, 2010-2020



Source: Esri, Decennial Data

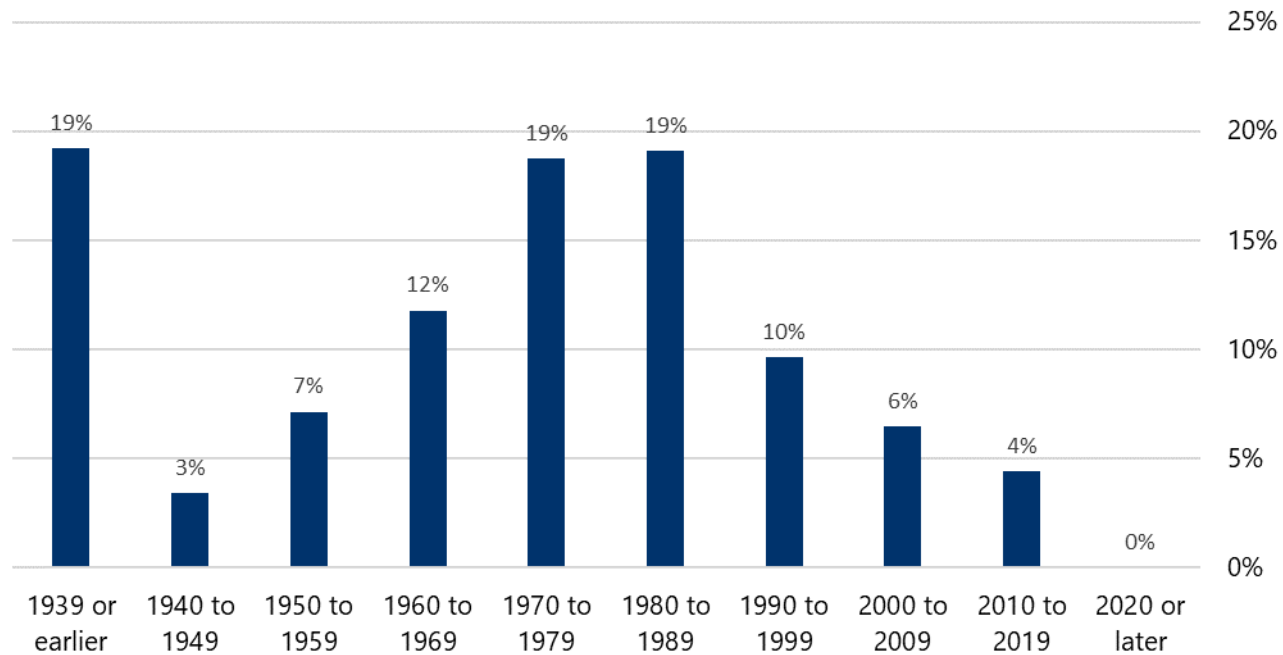
Note: The Decennial Census growth in Yarmouth's housing units differs from local reports and appears to undercount new housing growth in the last decade. However, it provides a helpful comparison to peer communities' housing growth in recent years.

HOUSING INVENTORY: HOUSING UNITS BY YEAR BUILT

The following chart outlines existing housing units by the year they were built:

- ◆ The median year that homes were built in Yarmouth is 1974.
- ◆ Only 11% of housing units have been built since 2000, while 19% were built in 1939 or earlier.

Total Housing Units by Year Built, Town of Yarmouth



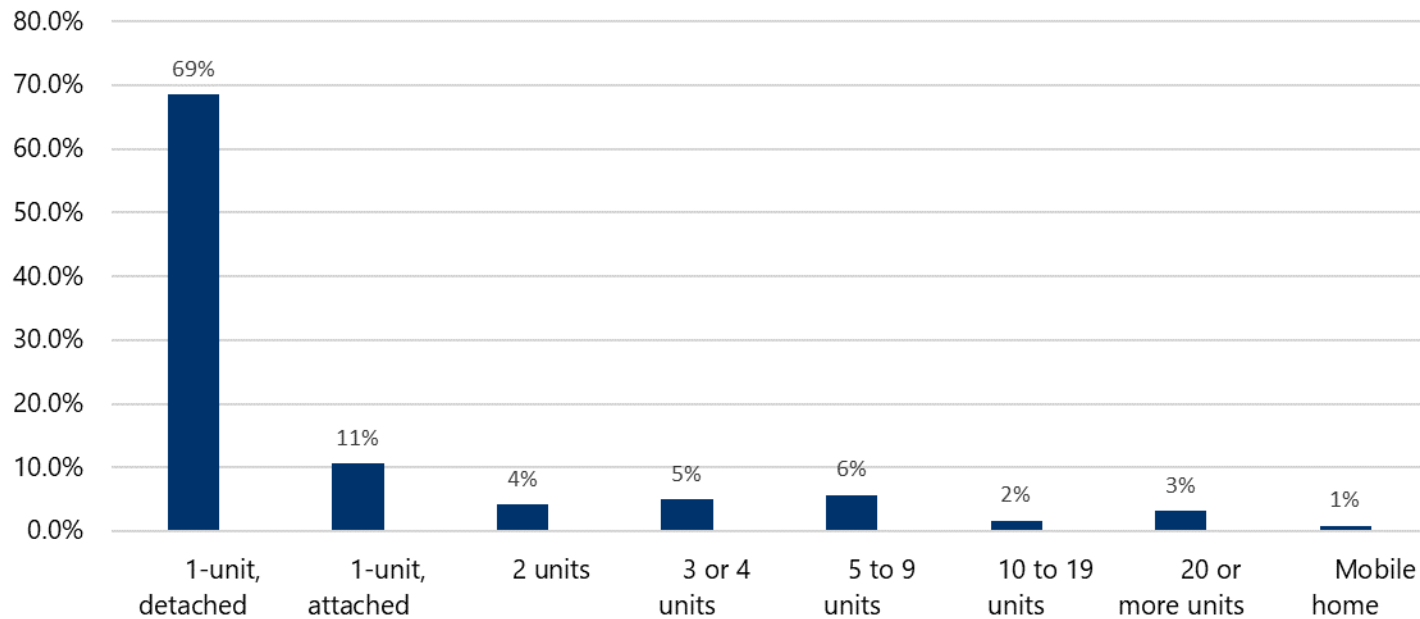
Source: US Census Bureau, American Community Survey, 2021 5-year

HOUSING INVENTORY: HOUSING UNITS BY UNITS IN STRUCTURE

The following chart outlines existing housing units by the number of units in structure:

- ◆ Yarmouth's housing stock has a large portion of 1-unit (single family) housing.
- ◆ About 20% of Yarmouth's housing stock is in multifamily structures (2+ units).

Share of Housing Units by Units in Structure, Town of Yarmouth



Source: American Community Survey, 2021 5-Year Estimates

HOUSING INVENTORY: BUILDING PERMITS

The following table outlines the number of residential building permits issued from 2012 to 2022, according to HUD and the Town:

- ◆ Since 2010 building permits have been issued for 233 single-family units and 44 multifamily units in Yarmouth. Nearly all multifamily permits were issued in 2021.
- ◆ The number of single-family permits issued has fluctuated through the years in Yarmouth, with development generally increasing from 2015-2018, and declining from 2019-2022. Housing development has been most substantial in Cumberland, with a total of 491 permits issued over the decade.

Residential Building Permits Issued, # of Units

Year	Yarmouth Town		North Yarmouth		Freeport Town		Cumberland Town	
	Single Family	Multifamily	Single Family	Multifamily	Single Family	Multifamily	Single Family	Multifamily
2012	5	0	13	0	34	3	25	0
2013	13	0	16	0	50	0	33	0
2014	22	0	11	0	38	2	65	0
2015	14	0	13	0	53	5	57	0
2016	25	0	20	0	44	2	58	0
2017	42	0	25	0	45	0	62	84
2018	44	0	27	2	45	6	39	25
2019	23	0	50	2	39	0	28	0
2020	21	2	29	0	33	0	41	2
2021	15	42	47	0	33	0	37	3
2022	9	0	37	2	30	0	46	47
Total	233	44	288	6	444	18	491	161

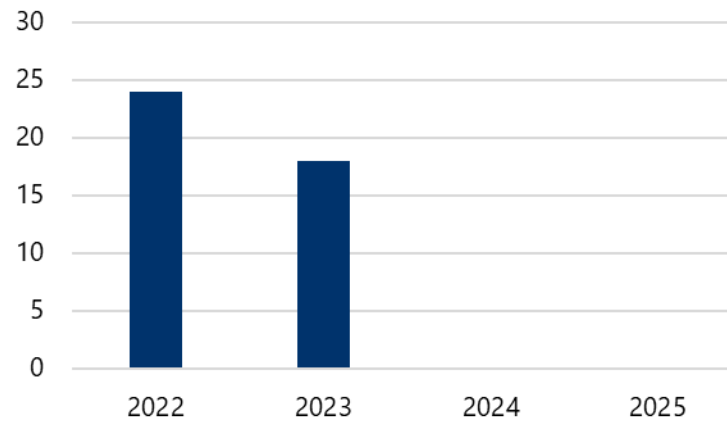
Source: Town of Yarmouth; Town of North Yarmouth; HUD

HOUSING INVENTORY: UNITS IN PIPELINE

The following tables shows the estimated number of residential units in the development pipeline in Yarmouth:

- ◆ In total, there are 42 residential units in the pipeline – 24 that were recently completed in 2022, and 18 that are pending final Certificate of Occupancy. No other residential units are in the development pipeline beyond 2023.
- ◆ A majority (24) of units are part of multifamily development, with the remaining (18) being mixed-use. All of the units are rental properties, with no owner-occupied properties in the development pipeline.

Est. Deliveries - Units in the Town of Yarmouth



Source: Yarmouth Town Planning Department

Residential Development Pipeline - Projects Proposed, Approved, Under Construction, and Recently Completed - Yarmouth

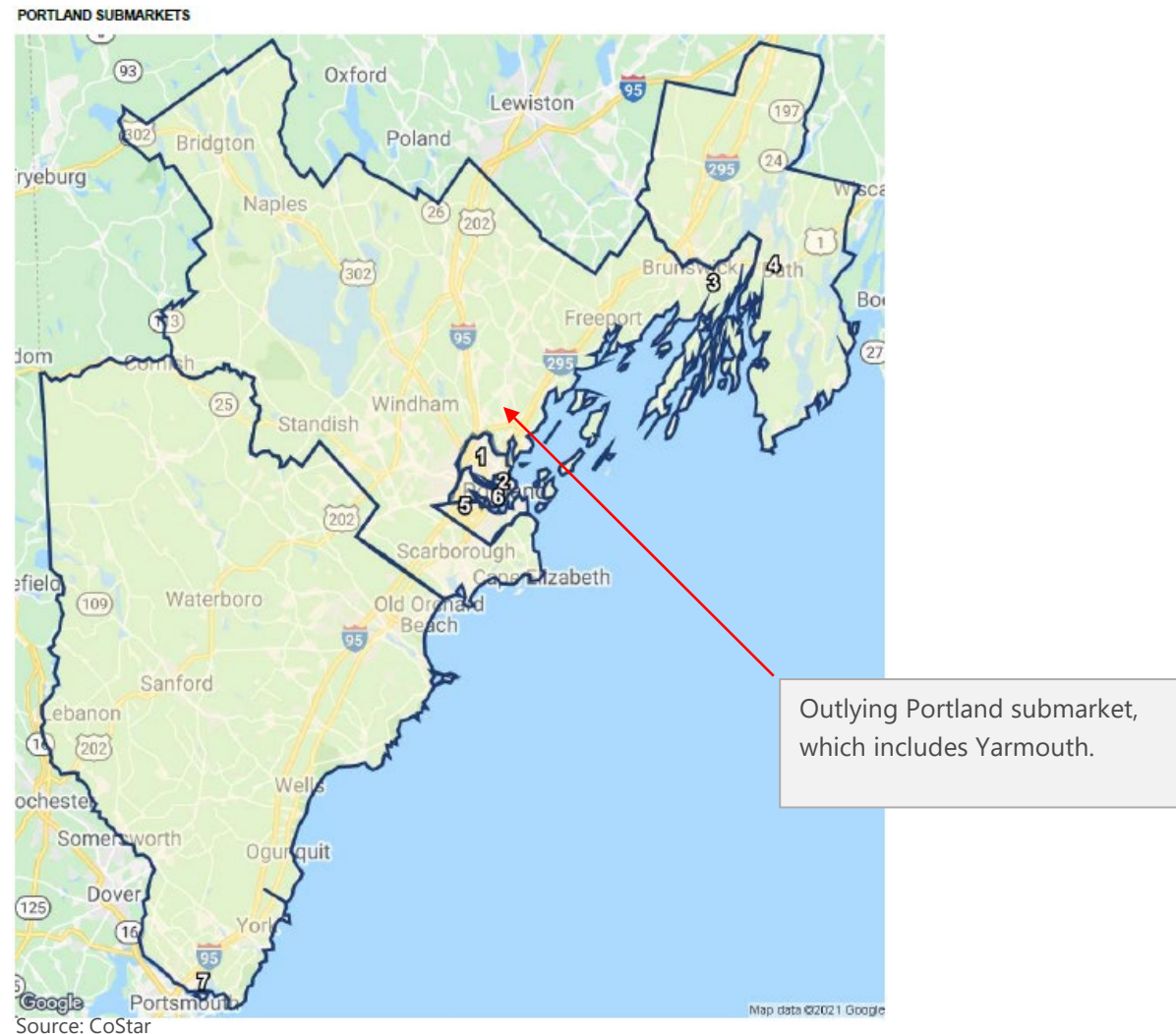
Project Name	Address	Type	Unit Count	Rental/ Owner	Development Status	Status Detail	Est. Completion
Yarmouth Commons	350 Route One	Mixed-Use	18	Rental	Completed	Pending final Certificate of Occupancy	2023
Sweetser Village	216 East Main Street	Multifamily	24	Rental	Completed	Completed	Completed 2022

Source: Yarmouth Town Planning Department; Camoin Associates

Note: Unit counts reflect units for which building permits have been issued. There may be other units in the development pipeline that are not captured here.

MULTIFAMILY MARKET: GEOGRAPHICAL CONTEXT

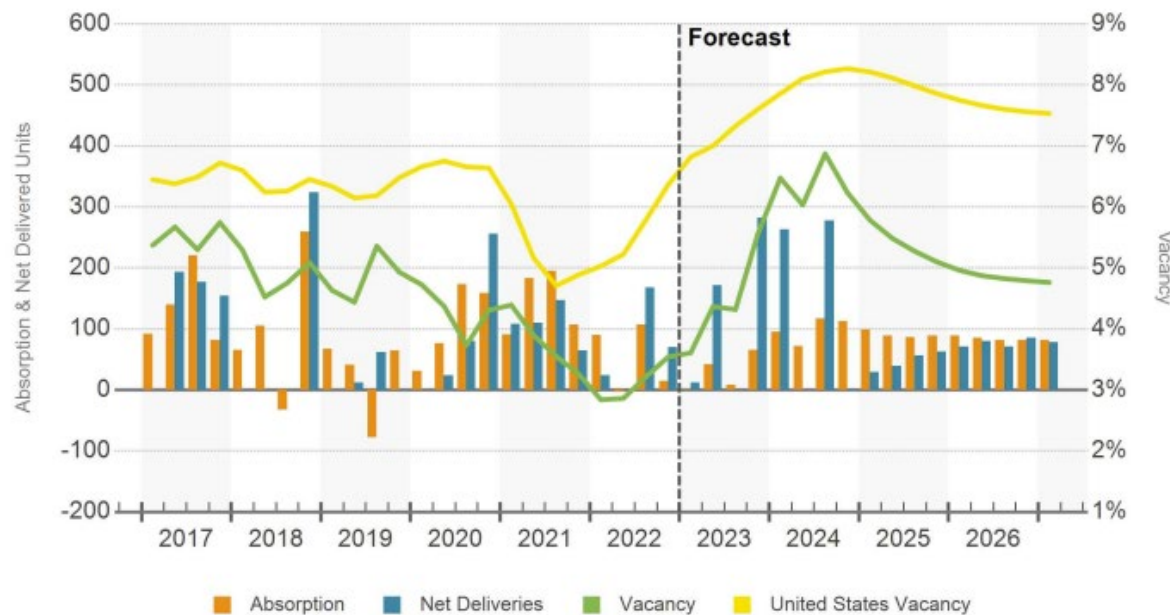
The Town of Yarmouth's multifamily market falls in the Portland, ME market, as defined by CoStar (the entire yellow area in the map below). Within this market, Yarmouth falls in the Outlying Cumberland submarket (#3 in below map). Trends from the Portland, ME market and Outlying Cumberland submarket are included in this analysis.



MULTIFAMILY MARKET: REGIONAL CONTEXT (PORTLAND, ME MARKET)

According to CoStar, Portland is typically a slow-growth multifamily market, with an inventory of just under 16,000 units and about 1,000 currently under construction. Vacancy has been tight in recent years, and although renter demand is cooling, has yet to budge at 3.6%. Meanwhile, pricing power for operators has begun to weaken as rent growth tailed off in the second half of 2022. Notable rent gains have been made in the luxury segment of the market, with units classified as 4 and 5 star (highest quality properties) increasing about 5.3% over the last 12 months. Asking rent growth is expected to average 2.4% YOY, down from a peak of 7.4% in the second quarter of 2022. Delivered units are expected to increase over the next 12 months, leading to a temporary spike in the vacancy rate as they are absorbed into the market.

ABSORPTION, NET DELIVERIES & VACANCY



Source: CoStar, as of 1Q23

Absorption, Deliveries, & Vacancy

These are three metrics that help to understand the full picture of a region's multifamily housing market.

Absorption refers to the change in occupancy over a given period of time and is calculated as the number of newly occupied units minus units that have been vacated.

Net Deliveries refers to the number of new housing units in the market that have recently completed construction.

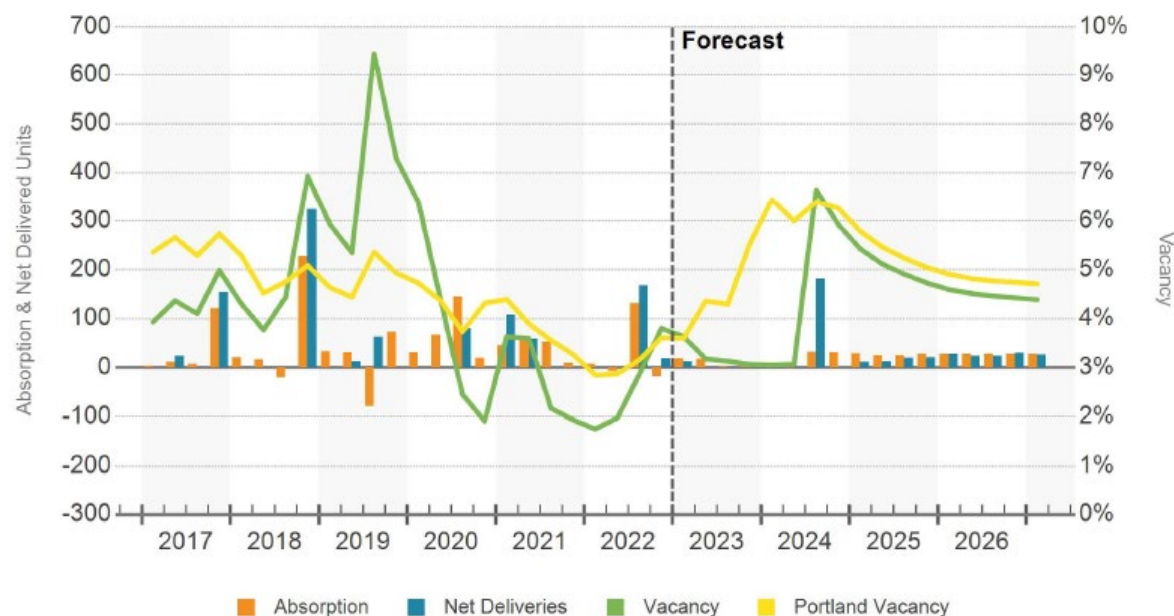
Vacancy is expressed as a percentage and refers to the amount of vacant units divided by the total number of units in the market.

MULTIFAMILY MARKET: YARMOUTH AREA (OUTLYING CUMBERLAND COUNTY SUBMARKET)

In Outlying Cumberland County specifically:

- ◆ The vacancy rate has expanded moderately over the past four quarters to 3.8%, aligning with the long-term average.
- ◆ About 200 units have been delivered in the past 12 months, consistent with the five-year average. These units were concentrated in Freeport (144 Units), though 18 units were finished at Yarmouth Commons in October 2022 along with 24 units at Sweetser Village in August 2022. Development of an additional 181 units is underway in Brunswick on Admiral Fitch Avenue. Additionally, 350 units have been proposed at Rock Row in Westbrook, with a planned completion in 2024. In Yarmouth, a total of 76 units are planned at Railroad Square and 298 Main Street.
- ◆ Rents have risen by 10.0% over the last year, the strongest annual increase in over 10 years and significantly exceeding average annual growth of 3.9% over the past decade.

ABSORPTION, NET DELIVERIES & VACANCY

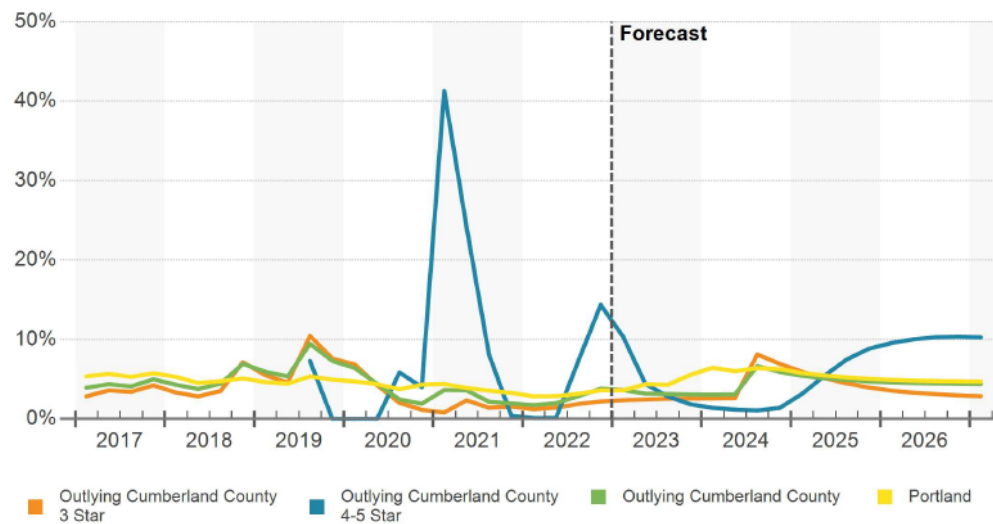


Source: CoStar, as of 1Q23

Within the submarket,

- ◆ Inventory is dominated by 3-star properties. 181 new 3-star units are under construction, entirely at Admiral Fitch Avenue in Brunswick.
- ◆ Asking rents average more than \$1,700 for all property classes. Rents on 4- and 5-star units are averaging approximately \$2,260.
- ◆ The largest recent deliveries have been concentrated in Brunswick and Freeport, with 108 units at Brunswick Landing Apartments in February 2021 and 144 units at the Residences at Crosstree in Freeport in October 2022. The latter is in close proximity to Yarmouth.
- ◆ The vacancy rate is 3.8%, with 4 & 5-star units having the highest vacancy rate (12.9%).

VACANCY RATE



KEY INDICATORS

Current Quarter	Units	Vacancy Rate	Asking Rent	Effective Rent	Absorption Units	Delivered Units	Under Constr Units
4 & 5 Star	340	12.9%	\$2,259	\$2,254	5	0	0
3 Star	2,433	2.3%	\$1,720	\$1,714	9	12	181
1 & 2 Star	1,041	4.3%	\$1,850	\$1,841	(2)	0	0
Submarket	3,814	3.8%	\$1,799	\$1,793	12	12	181

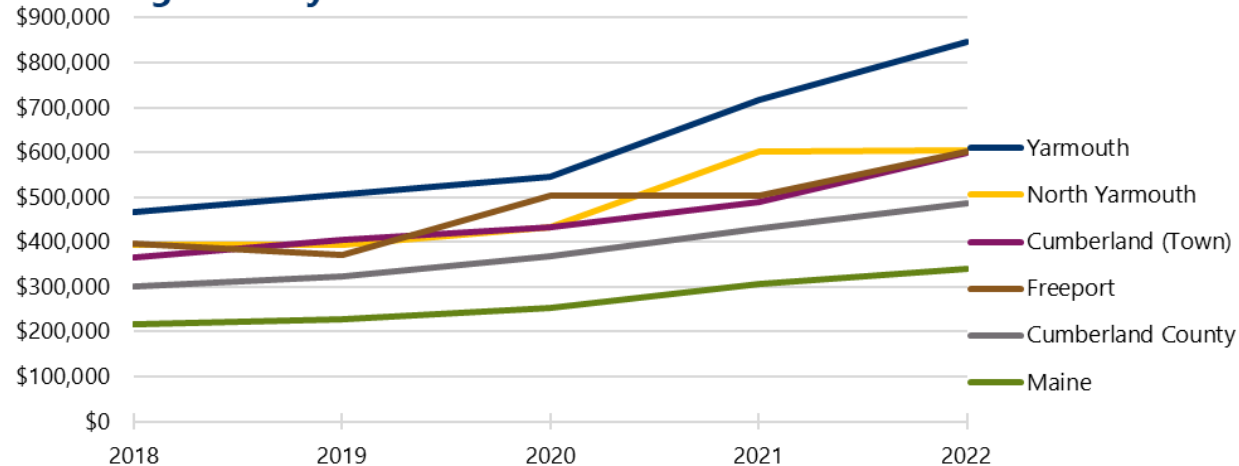
Source: CoStar, as of 1Q23

FOR-SALE MARKET: MEDIAN SALE PRICE

The figures below outline the median sale price of single-family homes in Yarmouth from 2018 to 2022:

- ◆ The median sale price of a single-family home in Yarmouth in 2022 was \$846,750, significantly higher than surrounding areas.
- ◆ Yarmouth's median sale price growth has far exceeded surrounding towns, Cumberland County, and Maine, at 81.5% from 2018-2022. The median home in Yarmouth now sells for over \$380,000 more than in 2018.
- ◆ The median sale price was approximately equal in North Yarmouth, Cumberland, and Freeport in 2022 at around \$600,000.
- ◆ Nationally, home values experienced a large increase in 2020-2022. From 2020 to 2022, the median home price in Yarmouth increased by over 55%, reaching an all-time peak of \$1.2 million in the fourth quarter of 2022.

Median Single Family Home Sale Price



Source: Redfin

Single Family Home Price Changes, 5-year trend

	Yarmouth	North Yarmouth	Cumberland (Town)	Freeport	Cumberland County	Maine
2018-2022 Change	\$380,250	\$209,500	\$232,475	\$205,913	\$185,100	\$123,550
2018-2022 % Change	81.5%	53.1%	63.6%	51.9%	61.5%	57.0%
2018-2022 CAGR	12.7%	8.9%	10.4%	8.7%	10.1%	9.4%

Source: Redfin

HOUSING DEMAND IN YARMOUTH: HOUSEHOLDS BY INCOME AND AGE

The table below combines all households by income and age in Yarmouth in 2022.

- ◆ As of 2022 there are an estimated 3,572 households in Yarmouth.
- ◆ The largest household age cohorts in Yarmouth are 55-64 (24%), 65-74 (20%), and 45-54 (18%).
- ◆ Households over 55 collectively account for 60% of all households.

Households by Income and Age, Town of Yarmouth, 2022

Income	15-24	25-34	35-44	45-54	55-64	65-74	75+	Total	% of Total
< \$15,000	10	11	6	8	11	17	17	80	2%
\$15,000-\$24,999	10	5	2	7	22	21	54	121	3%
\$25,000-\$34,999	14	21	16	13	47	49	86	246	7%
\$35,000-\$49,999	27	50	27	27	46	52	94	323	9%
\$50,000-\$74,999	19	53	40	52	74	145	130	513	14%
\$75,000-\$99,999	12	43	54	51	93	119	62	434	12%
\$100,000-\$149,999	10	56	72	119	152	112	49	570	16%
\$150,000-\$199,999	2	32	67	139	162	73	37	512	14%
\$200,000+	1	43	101	216	248	116	48	773	22%
Total	105	314	385	632	855	704	577	3,572	100%
% of Total	3%	9%	11%	18%	24%	20%	16%	100%	

Source: Esri

Scale:	1	<>	248
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HOUSING DEMAND IN YARMOUTH: PROJECTED CHANGE IN HOUSEHOLDS

The table below shows the projected change in all Yarmouth households from 2022-2027, by income and age, if past trends hold steady. Future household growth potential is constrained by the level of housing production locally.

- ◆ Over the next five years (2022-2027) the number of households in Yarmouth is expected to grow by 17 (net). Among household earnings over \$50,000, there will be 213 new households.
- ◆ Age cohorts driving growth will be those aged 65+ and 25-34-year-olds.
- ◆ Growth will be concentrated in higher-income households. Households with incomes greater than \$100,000 will grow the most, while households with incomes of \$75,000 or less are projected to decrease. This is the case across all age cohorts, with higher-income households at all age levels driving household growth in Yarmouth.

Projected Change in Households, Town of Yarmouth, 2022-2027

Income	15-24	25-34	35-44	45-54	55-64	65-74	75+	Total
< \$15,000	(2)	(2)	(2)	(5)	(8)	(7)	(1)	(27)
\$15,000-\$24,999	(2)	(1)	(1)	(5)	(11)	(8)	(7)	(35)
\$25,000-\$34,999	1	0	(4)	(8)	(23)	(17)	(1)	(52)
\$35,000-\$49,999	(4)	(8)	(12)	(16)	(20)	(17)	(5)	(82)
\$50,000-\$74,999	(7)	(12)	(15)	(29)	(32)	(38)	2	(131)
\$75,000-\$99,999	(1)	0	(15)	(19)	(27)	(21)	(3)	(86)
\$100,000-\$149,999	4	34	8	(7)	(9)	27	32	89
\$150,000-\$199,999	2	20	21	2	25	58	52	180
\$200,000+	0	26	15	(8)	7	71	50	161
Total	(9)	57	(5)	(95)	(98)	48	119	17

Source: Esri

HOUSING DEMAND IN CUMBERLAND COUNTY: HOUSEHOLDS BY INCOME AND AGE

The table below combines all households by income and age in Cumberland County in 2022.

- ◆ As of 2022 there are an estimated 130,552 households in Cumberland County.
- ◆ The largest household age cohorts in Cumberland County are 55-64 (21%), 45-54 (17%), and 65-74 (17%).
- ◆ Households over 55 collectively account for 50% of all households.

Households by Income and Age, Cumberland County, 2022

Income	Age 15-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65-74	Age 75+	Total	% of Total
< \$15,000	485	813	729	769	1,241	1,263	1,468	6,768	5%
\$15,000-\$24,999	383	842	600	655	1,166	1,483	2,021	7,150	5%
\$25,000-\$34,999	613	1,337	1,103	961	1,667	1,902	2,462	10,045	8%
\$35,000-\$49,999	737	1,896	1,503	1,328	1,930	2,344	2,654	12,392	9%
\$50,000-\$74,999	953	3,207	2,991	3,195	4,104	4,533	2,789	21,772	17%
\$75,000-\$99,999	545	2,729	2,909	3,008	3,490	2,866	1,490	17,037	13%
\$100,000-\$149,999	382	3,316	4,725	5,292	5,624	3,654	1,524	24,517	19%
\$150,000-\$199,999	122	1,973	2,575	3,399	3,566	1,835	1,050	14,520	11%
\$200,000+	75	1,652	3,011	4,157	4,115	2,229	1,112	16,351	13%
Total	4,295	17,765	20,146	22,764	26,903	22,109	16,570	130,552	100%
% of Total	3%	14%	15%	17%	21%	17%	13%	100%	

Source: Esri

Scale:	75	<>	5,624
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HOUSING DEMAND IN CUMBERLAND COUNTY: PROJECTED CHANGE IN HOUSEHOLDS

The table below shows the projected change in all Cumberland County households from 2022-2027, by income and age.

- ◆ Over the next five years (2022-2027) the number of households in Cumberland County is expected to grow by 3,054 on net.
- ◆ Age cohorts driving growth will be those aged 65+ and 35-44-year-olds. The age cohort of 45-64 years old will see a net decline in households from 2022-2027.
- ◆ Growth will be concentrated in higher-income households. Households with incomes greater than \$100,000 will grow the most, while households with incomes of \$75,000 or less are projected to decrease as household income rises

Projected Change in Households, Cumberland County, 2022-2027

Income	15-24	25-34	35-44	45-54	55-64	65-74	75+	Total
< \$15,000	(86)	(319)	(254)	(316)	(579)	(451)	(244)	(2,249)
\$15,000-\$24,999	(42)	(201)	(171)	(227)	(414)	(335)	(135)	(1,525)
\$25,000-\$34,999	(31)	(227)	(227)	(287)	(518)	(324)	(177)	(1,791)
\$35,000-\$49,999	(52)	(280)	(232)	(335)	(557)	(320)	(41)	(1,817)
\$50,000-\$74,999	(2)	(486)	(558)	(749)	(902)	(124)	609	(2,212)
\$75,000-\$99,999	21	(233)	(208)	(391)	(397)	264	481	(463)
\$100,000-\$149,999	156	639	661	223	363	1,369	1,092	4,503
\$150,000-\$199,999	63	805	1,001	709	974	1,147	1,069	5,768
\$200,000+	8	431	591	69	199	795	747	2,840
Total	35	129	603	(1,304)	(1,831)	2,021	3,401	3,054

Source: Esri

RENTAL DEMAND IN YARMOUTH: PROPENSITY TO RENT AND NEW UNITS

According to CoStar, market rents for units in the Outlying Cumberland County submarket average about \$1,800 per month. To afford a rent of \$1,800 per month, a household would need annual income of at least \$75,000 (assuming annual spending on rent to be no more than 30% of income). To estimate future rental demand, we segmented the market to consider only households earning \$75,000 and up. While overall household growth is nominal, there will be a significant shift toward these higher-income households that will drive growth.

We then considered the propensity to rent for each age cohort in this income group. Given overall declining affordability and accessibility of home ownership, it is likely that the propensity to rent among Yarmouth area residents will increase as renters spend more years renting than in previous years. Therefore, we assume that the propensity to rent will more closely resemble that of the United States than the current propensity to rent among Sagadahoc and Northern Cumberland County residents. Overall, 20% of U.S. households earning more than \$75,000 rent their homes, compared to 13% of Sagadahoc and Northern Cumberland County households. This varies greatly by age, with 70% of households under 25 renting and declining to just 8% of 65-74-year-old households renting, nationally (see below table).

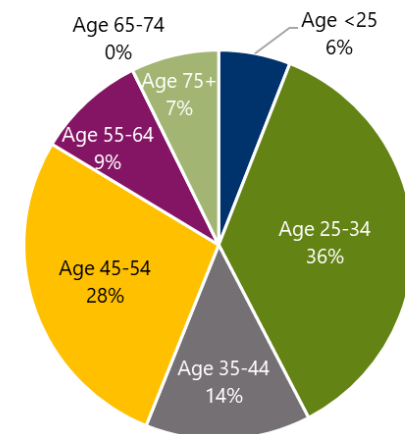
The chart below shows the composition of the renter target market for Yarmouth by age cohort. The largest renter demographic is 25-34-year-olds making up 36% of all renters, followed by 45-54-year-olds, representing just under a quarter of renters. The three senior cohorts (55-64, 65-74, and 75+) collectively make up 18% of the renter market.

Propensity to Rent by Age, Households with Income Over \$75,000

Age	<25	25-34	35-44	45-54	55-64	65-74	75+	Total
Sagadahoc and Northern Cumberland Counties								
Rental Propensity	50%	36%	11%	14%	4%	0%	6%	13%
United States								
Rental Propensity	70%	42%	23%	16%	11%	8%	9%	20%

Source: Census ACS 1-year PUMS, 2021

Yarmouth Market-Rate Rental Unit Demand Through 2027, by Household Age Cohort

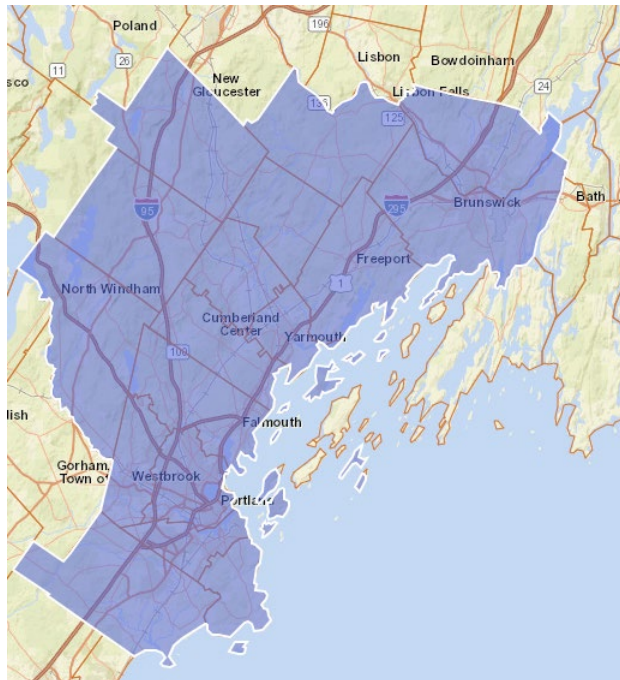


Source: Esri, Census ACS 1-year PUMS, 2021; Camoin Associates

HOUSING MARKET AREA DEMAND

In addition to absorbing demand by Yarmouth residents, new multifamily development in the town could capture a portion of the demand from the surrounding area. To estimate the demand for units that could be absorbed from the larger region, a housing market area (HMA) was used. This region extends from Scarborough in the south, to Durham and Topsham in the north, with Gray, New Gloucester, and Windham to the West. This represents a reasonable area from which Yarmouth could attract new residents, given the geographic location and demographic/housing characteristics of the selected communities. Towns in this market area are generally accessible to Yarmouth within a 30-minute drive. The region is highlighted on the map below.

The market area is projected to gain a net of 2,416 households from 2022-2027, a portion of which Yarmouth could reasonably be expected to capture. Under the Baseline Scenario, it is assumed that Yarmouth accounts for approximately 3.5% of the market area's housing units. However, it is likely that Yarmouth could capture a larger share of housing demand if housing unit development were to exceed historic trends, which is modeled using a 10% capture rate in the Growth Scenario. Furthermore, additional housing unit demand is generated through the replacement of old or obsolete housing, assumed to be approximately 2% of existing housing units over the next five years. After accounting for units that are currently in the pipeline, Yarmouth could support additional demand of between 0-32 rental units and between 122-248 for-sale units over the next five years. On an annual basis, this translates to between 0-6 rental units or between 24-50 owner-occupied units per year.



5-Year Projected Demand for Housing Units in Yarmouth

	Baseline		High Growth	
	Renter	Owner	Renter	Owner
Share of Projected HMA Demand	20%	80%	20%	80%
Projected HMA Demand	483	1,933	483	1,933
Yarmouth Capture Rate	3.5%	3.5%	10.0%	10.0%
Yarmouth Demand Capture	17	68	48	193
Yarmouth Replacement Demand (2%)	17	54	17	54
Total Supportable Demand	34	122	66	248
Currently in Pipeline	34	0	34	0
Net 5-year Supportable Demand	0	122	32	248
Net Annual Supportable Demand	0	24	6	50

Source: Esri, Town of Yarmouth, Camoin Associates

4.2 RETAIL MARKET ANALYSIS

RETAIL MARKET ANALYSIS: KEY FINDINGS

- ◆ Within the Portland market retail vacancy rates (except for malls and other retail) are trending downward. While the overall outlook is positive, challenges such as inflation, online retail, and labor shortages will continue to put a strain on the market.
- ◆ The pipeline of new retail space in the market is limited, with most new retail space being constructed in Portland and Topsham. Yarmouth has a small retail market that is not as competitive with the larger neighboring Freeport, Portland, and Topsham retail centers.
- ◆ Based on the data that is available for current retail demand, retail industries with the largest gap (demand exceeds sales) represent retail categories for which residents need to leave the area to meet their needs. These industries include:
 - **Local Trade Area:** Small-scale grocery, Boutique Clothing Stores, Restaurants and Cafés
- ◆ Up to about 34,000 SF of retail space could be supported as a result of leakage recapture of local trade area residents and household growth. Local small-scale grocery stores, for which the trade area has leakage, could fit into this category.

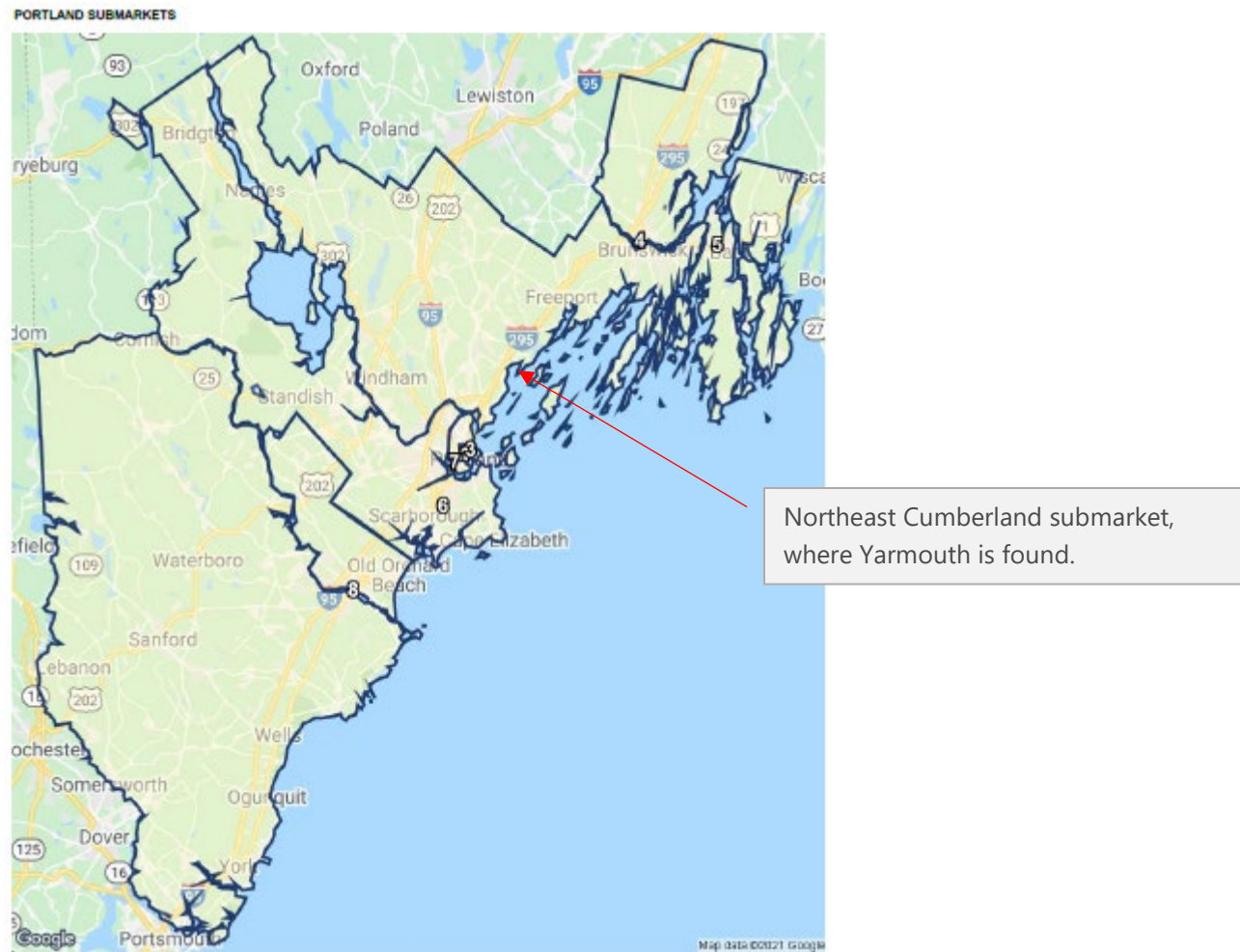
Local Trade Area Supportable Demand for New Retail Space

Demand From	SF
Demand from Existing Residents	32,262
Demand from New Residents	1,766
Total Supportable Demand	34,029
Currently Vacant	1,300
Net Supportable Demand	32,729

Source: CoStar, Camoin Associates

RETAIL MARKET: GEOGRAPHICAL CONTEXT

The Town of Yarmouth's retail market falls in the Portland, ME market (the entire yellow area on the map below). Within this market, Yarmouth falls in Northeast Cumberland submarket, indicated below. In this analysis, both the Portland, ME market and Northeast Cumberland County, ME submarket will be analyzed.

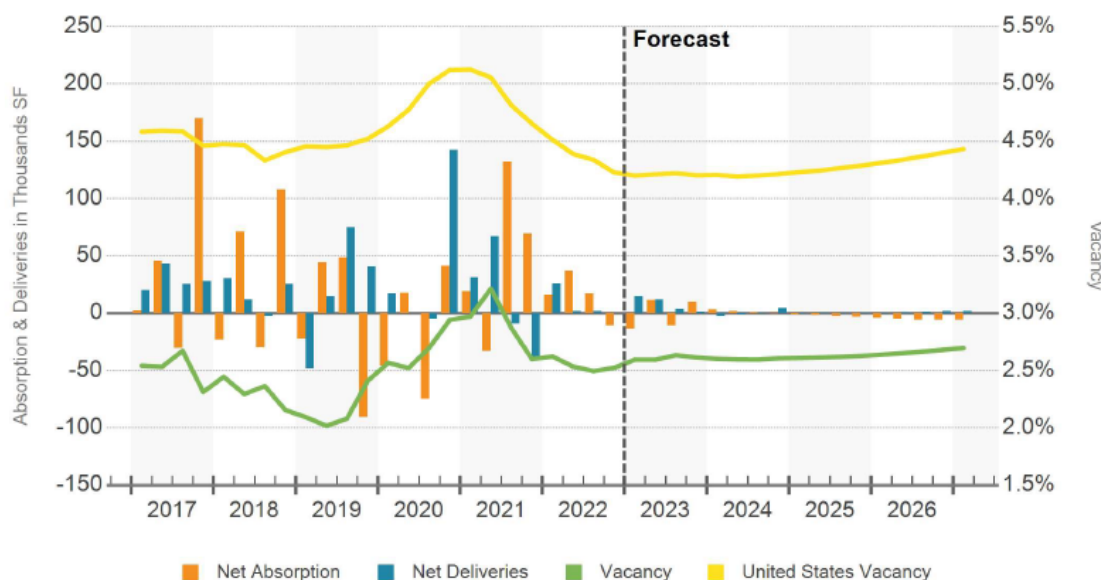


Source: CoStar

RETAIL MARKET: REGIONAL CONTEXT (PORTLAND, ME MARKET)

According to CoStar, vacancies in the Portland retail market have remained steady over the last four quarters and are in line with the 10-year average, with a 2.6% vacancy rate market-wide. 230,000 SF of space has delivered over the past three years. There is an additional 44,000 SF under construction, a fractional expansion. Most of this is located in close proximity to Portland, with smaller additions in Bridgton, Saco, and Topsham. Retail rents in the Portland market rose at a 2.4% annual rate in the first quarter of 2023, in line with the 3-year average gain of 2.0%. Net absorption in the Portland, ME Market is almost -20,000, driven by net absorption in general retail.

NET ABSORPTION, NET DELIVERIES & VACANCY



KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	2,901,566	5.2%	\$21.81	5.3%	(9,773)	0	0
Power Center	1,261,960	0.7%	\$20.42	0.7%	29,000	0	0
Neighborhood Center	6,481,130	5.4%	\$15.88	7.2%	(8,321)	0	0
Strip Center	1,105,352	1.5%	\$15.33	1.3%	(7,100)	0	0
General Retail	28,011,491	1.7%	\$15.72	2.0%	(23,761)	8,000	43,629
Other	307,636	7.3%	\$17.69	7.3%	0	0	0
Market	40,069,135	2.6%	\$16.34	3.1%	(19,955)	8,000	43,629

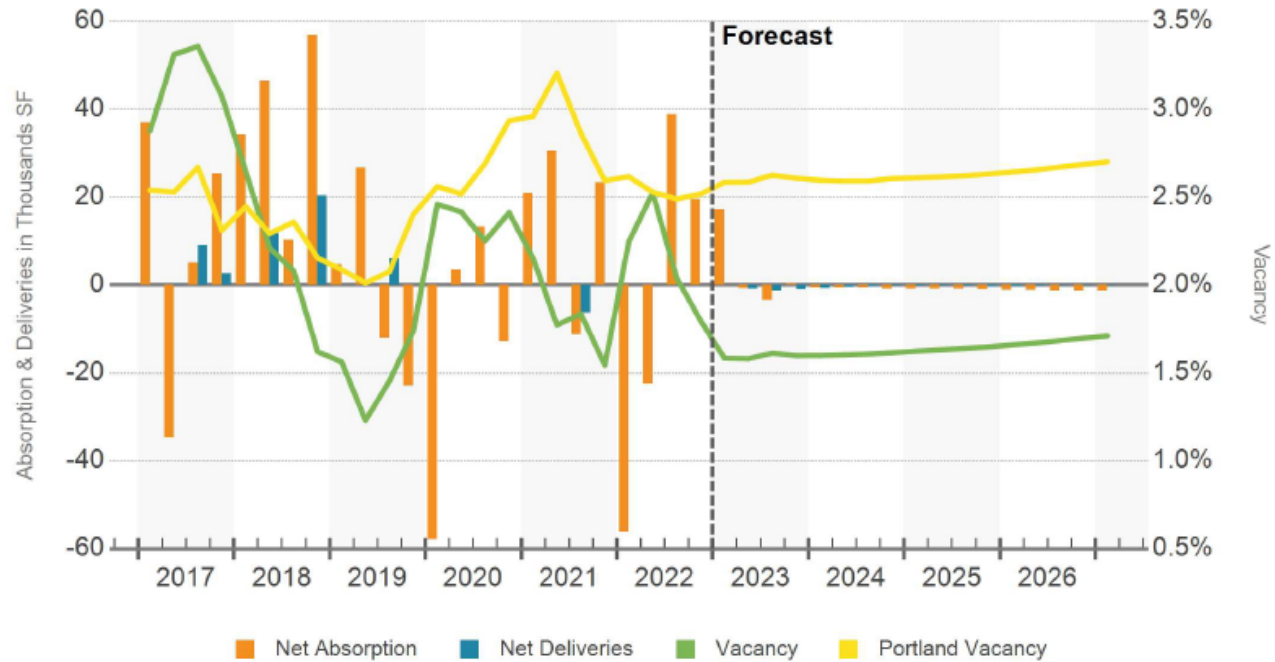
Source: CoStar, as of 1Q23

RETAIL MARKET: YARMOUTH AREA (NE CUMBERLAND SUBMARKET)

In NE Cumberland County specifically:

- ◆ Retail vacancies are below the Portland region's average and remain in line with the submarket's five-year average.
- ◆ Of properties tracked by CoStar, no new retail space is under construction, and inventory has contracted in the last three years due to demolitions.
- ◆ Rents have risen by 2.9% over the last year.

NET ABSORPTION, NET DELIVERIES & VACANCY

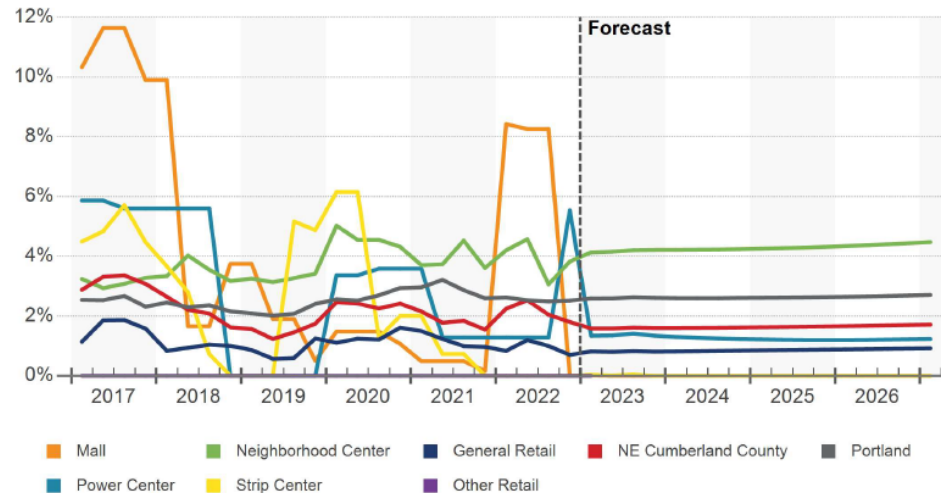


Source: CoStar, as of 1Q23

Within the submarket,

- ◆ The current retail vacancy rate is low at 1.6%. Vacancy rates have generally trended downward since 2017, with two notable jumps in 2020 during COVID-19 (driven by strip centers and power centers) and in 2022 (driven by mall space).
- ◆ Malls and strip centers have the lowest vacancy rate while neighborhood centers have the highest.

VACANCY RATE



KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	493,344	0.2%	\$17.85	0.2%	0	0	0
Power Center	678,715	5.6%	\$19.32	5.6%	0	0	0
Neighborhood Center	2,148,647	3.3%	\$15.77	3.4%	0	0	0
Strip Center	244,523	0%	\$14.89	0%	0	0	0
General Retail	4,440,093	0.8%	\$15.42	1.5%	8,589	0	0
Other	0	-	-	-	0	0	0
Submarket	8,005,322	1.8%	\$15.98	2.3%	8,589	0	0

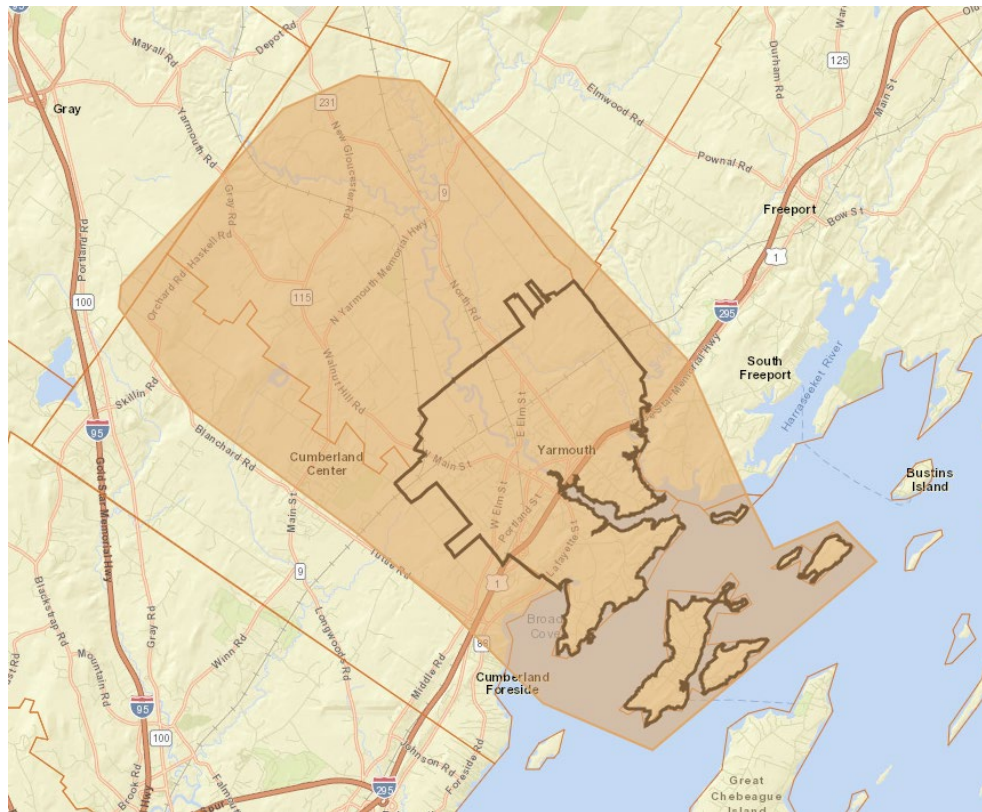
Power Center: Typically consists of several freestanding anchors with a minimum amount of small specialty tenants.

Neighborhood Center: Provides for the sales of convenience goods and personal services for day-to-day living needs of the immediate neighborhood, with a supermarket being the principal tenant.

Strip Center: An attached row of stores or Service outlets managed as a coherent retail entity, with on-site parking usually located in front of the stores.

LOCAL RETAIL TRADE AREA

- ◆ The local retail trade area (red shading on map) delineates the draw area for “everyday” needs: grocery, pharmacy, personal care services, bank, fitness, quick meals, etc.
- ◆ The local retail trade serves a small geographic and is a 5 to 15-minute drive time that covers primarily Yarmouth and North Yarmouth.
- ◆ Customers outside this area typically shop for daily needs in surrounding communities: Cumberland, Freeport, Falmouth and Gray.



Source: Esri

MARKET DEMAND: TAPESTRY SEGMENTATION

TAPESTRY SEGMENTATION

A tool used by retail site selectors in determining the characteristics of a particular trade area is market segmentation, which is the classification of consumers according to demographic, socioeconomic, housing, and lifestyle characteristics. It is how retailers and site selectors compare consumer trends across trade areas when considering many site locations.

Market segmentation is based on the concept that people with similar demographic characteristics, purchasing habits, and media preferences naturally gravitate toward each other and into the same communities. Businesses utilize segmentation to understand their customers' lifestyle choices, purchasing preferences, and how they spend their free time.

Market segmentation data for the regional trade area were obtained from Esri's Tapestry segmentation model. Additional information about Esri's model can be [found here](#). We will focus on the characteristics of consumers living in the broader regional trade area since the retail categories with the best potential for success in the area tend to have a regional reach.

It is important to recognize that the classifications and labels that ESRI uses for defining market segments are generalizations. The descriptions of each segment are based on comparisons with the U.S. as a whole and reflect the propensity of households within that segment to exhibit certain demographic, lifestyle, and consumer characteristics relative to the overall population. The purpose of this exercise is to compare local consumer trends to those of consumers across the U.S. so businesses and developers not familiar with the region understand consumer demand in this area.

The top Esri Tapestry segment for the local trade area is listed in the table below, with profiles of each segment, including household composition, housing type, income, age, education, and consumer habits listed in Attachment B.

Top Tapestry Segments of the Local Retail Trade Area

Rank	Tapestry Segment	Percent
1	Affluent Estates	44.0%
2	GenXurban	27.5%
3	Cozy country Living	14.1%
4	Family Landscapes	9.9%
5	Middle Ground	4.5%

Source: Esri

RETAIL INVENTORY IN THE LOCAL TRADE AREA

Retail Inventory

Category	Town of Yarmouth/Local Trade Area
Grocery	Hannaford; Rosemont Market & Bakery
Pharmacy	Walgreens; Hannaford Pharmacy (inside Hannaford)
General Merchandise	
Convenience Stores	Big Apple Store; Cumberland Farms
Household Furnishings	Fiore Home (Fiore Interiors LLC); Pistol Pete's Upholstery Shop; Conversation Caning; Venn & Maker; Mattress by Appointment; Kit Clark Furniture; Centerline Design & Build
Electronics	AT&T Store
Office Supplies	
Apparel	Found Trading Co; Chattel; Gingham; Svetlana Custom Clothing & Couture
Home Improvement/Lawn & Garden	Sherwin-Williams Paint Store; Coastal Maine Interiors; Augustine Interiors (Painting); The Trunk Shop; The Cabinet Shop; Coastal Hardware, Inc.; McVety's Heath & Home; Water Treatment Equipment, Inc.; Farmhouse Floral by Estabrook's; Estabrook's
Pets	Pet Scripts Pharmacy; The Puppy Parlor; Blue Seal Animal Feed Store; Belted Cow Company Warehouse Store
Hobby/Crafts/Games	W.M. Schwind Antiques; Island Treasure Toys; Maine Modelworks; The Village Framer
Cards/Gifts	Royal River Books
Sporting Goods	KB Wheels; Maine Fly Company; Soul Surf Collective; Lakeside Archery; Robinson Arms
Quick-Service Restaurants	Maggie Mae's; Dunkin'; Maples Bakery; Subway; Little China Express; Clayton's Café; Bruce's Burritos; China Taste; Thoroughfare; Peachy's Smoothie Café; Toots Ice Cream; Freeport Café; Gifford's HomeMaine Ice Cream; Toots Ice Cream
Full-Service Restaurants	Otto; Romeos Pizza; Chopstick Sushi; Royal River Grill House; Brickyard Hollow; Gather; Locally Sourced; The Garrison; Pat's Pizza; Binga's Wingas Yarmouth; Owl & Elm; Trudy Bird's Olbar; Muddy Rudder; Goodfire Tasting Room & Kitchen
Entertainment	
Personal Care Services	Studio 88 Salon; Boston Hair; Tove Hair Salon; Snip & Clip Hair Design; Epic Image Salon; KR Studios; Lee Nails; Lucinda's Day Spa & Hair Studio; Tranquility In Balance Center for Wellness; Salon Haute Couture; The Barbershop; Shear Joy Hair & Body Salon; LA Nails: Cozy Nails & Spa
Fitness	CrossFit Yarmouth; Zbon Fitness; Rivebend Yoga & Meditation Studio; Jibe Cycling Studio; YMCA of Southern Maine; Village Body Works
Auto Parts & Services	O'Reilly Auto Parts; NAPA Auto Parts; Casco Bay Ford Parts; North Yarmouth Automotive Services

Note: This inventory list is not comprehensive, but provides a general overview of the types and quantities of retail business types in the Town of Yarmouth at the time of writing.

MARKET DEMAND: LEAKAGE ANALYSIS

RETAIL GAP ANALYSIS

In a retail gap analysis, the existing retail sales ("supply") of trade area businesses are compared to the estimated retail spending of trade area residents ("demand"). The difference between demand and supply is referred to as the "retail gap."¹ The retail gap can be positive or negative.

When the demand (spending by trade area residents) for goods and services is greater than sales at trade area businesses, sales are said to "leak out" of the trade area, creating a positive retail gap (i.e., sales leakage).

Conversely, if the supply of goods sold (local trade area sales) exceeds trade area demand (spending by trade area residents), it is assumed that non-residents are coming into the trade area and spending money, creating a negative retail gap (i.e. sales surplus).

Sales leakage and sales surplus carry different implications. In many cases, sales leakage presents an opportunity to capture unmet demand in a trade area since a percentage of residential spending occurs outside the trade area. This demand can be met within the trade area by opening new businesses or expanding existing businesses within retail sectors that show sales leakage. However, not all retail categories that exhibit sales leakage within a particular trade area are a good fit for the region. Rapidly changing retail norms mean long term consequences for potential build out of retail space. It is important to consider that while there may be leakage indicated for a certain industry, that leakage could be due to ecommerce and therefore is not a retail category that would be as productive as a brick-and-mortar space. What were once retail locations may have more economic potential as flex space, office or redevelopment in housing. This data should be used as a starting point to determine if what categories have leakage and whether they are viable for brick-and-mortar locations.

A sales surplus might exist for several reasons. For example, the region might be a popular shopping destination for tourists and other out-of-towners, or a cluster of competing businesses offering a similar product or service may be located within the trade area, creating a specialty cluster that draws in spending by households from outside the trade area. Alternatively, a sales surplus could be an indicator of market saturation.

The following Retail Gap Analysis table contains a list of industries by 6-digit NAICS codes and includes figures for sales demand (estimated purchases by local trade area residents both in and out of the trade area, and purchases by non-trade-area residents), sales supply (existing sales within the trade area), and retail gap (demand minus supply). Retail categories with the greatest sales leakage are displayed. Retail industries with the largest gap (demand exceeds sales) are similar between the Town of Yarmouth and the local trade area and include:

- ◆ **Local Trade Area:** Small-scale grocery, Boutique Clothing Stores, Restaurants and Cafés

MARKET DEMAND: RETAIL POTENTIAL ANALYSIS – EXISTING RESIDENTS

RETAIL POTENTIAL ANALYSIS

In the following analysis, we compare the retail gaps within the retail categories that have sales leakage to the average sales of similar businesses in the town, local, and regional trade areas. This allows us to identify which of the industries with sales leakage may have enough unmet demand to warrant opening a new store or expanding existing stores.

The tables below identify the number of new businesses that, theoretically, could be supported in the geographies, assuming:

1. 25% of the sales leakage is recaptured and
2. New businesses have sales comparable to the average sales business of all businesses. In this analysis, we assume an average of \$325 per square feet across all retail categories.

While no industries could support a new business on their own, businesses that cater to multiple retail needs could potentially be supported, or existing businesses could be expanded. For each geography:

- ◆ **Local Trade Area:** Nearly \$10.5 million in sales could be recaptured, which would support about 32,300 square feet of retail space.

Retail Gap, 6-Digit NAICS, Local Trade Area (2022)

NAICS	Description	Total Demand	Total Sales	Retail Gap (Demand-Sales)	Leakage Capture Rate (25%)	Total Supportable Square Feet
445110	Supermarkets and Other Grocery (except Convenience) Stores	\$10,449,796	\$4,034,321	\$6,415,475	\$1,603,869	4,935
441110	New Car Dealers	\$10,315,216	\$6,659,541	\$3,655,676	\$913,919	2,812
452210	Department Stores	\$3,637,001	\$86,851	\$3,550,150	\$887,538	2,731
443142	Electronics Stores	\$3,056,656	\$615,541	\$2,441,115	\$610,279	1,878
448140	Family Clothing Stores	\$2,215,252	\$90,109	\$2,125,143	\$531,286	1,635
722511	Full-Service Restaurants	\$20,502,383	\$18,687,150	\$1,815,234	\$453,808	1,396
312120	Breweries	\$2,472,540	\$943,376	\$1,529,165	\$382,291	1,176
442110	Furniture Stores	\$1,606,546	\$202,827	\$1,403,719	\$350,930	1,080
448120	Women's Clothing Stores	\$1,310,033	\$79,349	\$1,230,684	\$307,671	947
722515	Snack and Nonalcoholic Beverage Bars	\$1,524,511	\$322,634	\$1,201,877	\$300,469	925
451110	Sporting Goods Stores	\$1,321,277	\$346,417	\$974,860	\$243,715	750
441120	Used Car Dealers	\$1,840,063	\$898,921	\$941,141	\$235,285	724
448210	Shoe Stores	\$1,016,393	\$108,045	\$908,349	\$227,087	699
441310	Automotive Parts and Accessories Stores	\$1,688,376	\$860,898	\$827,478	\$206,870	637
448190	Other Clothing Stores	\$867,558	\$111,391	\$756,167	\$189,042	582
446120	Cosmetics, Beauty Supplies, and Perfume Stores	\$811,727	\$69,833	\$741,894	\$185,474	571
312130	Wineries	\$944,319	\$241,498	\$702,821	\$175,705	541
453310	Used Merchandise Stores	\$956,280	\$267,183	\$689,097	\$172,274	530
444190	Other Building Material Dealers	\$2,554,089	\$1,874,476	\$679,613	\$169,903	523
448310	Jewelry Stores	\$1,390,252	\$735,745	\$654,506	\$163,627	503
445310	Beer, Wine, and Liquor Stores	\$743,654	\$110,080	\$633,574	\$158,394	487

Source: Lightcast, Camoin Associates, ICSC

Retail Gap (continued), 6-Digit NAICS, Local Trade Area (2022)

NAICS	Description	Total Demand	Total Sales	Retail Gap (Demand-Sales)	Leakage Capture Rate (25%)	Total Supportable Square Feet
453220	Gift, Novelty, and Souvenir Stores	\$677,998	\$79,905	\$598,093	\$149,523	460
444220	Nursery, Garden Center, and Farm Supply Stores	\$842,379	\$262,970	\$579,409	\$144,852	446
722513	Limited-Service Restaurants	\$20,989,562	\$20,453,305	\$536,257	\$134,064	413
448150	Clothing Accessories Stores	\$493,806	\$53,619	\$440,187	\$110,047	339
453991	Tobacco Stores	\$578,343	\$145,034	\$433,309	\$108,327	333
446199	All Other Health and Personal Care Stores	\$577,959	\$180,860	\$397,099	\$99,275	305
812320	Drycleaning and Laundry Services (except Coin-Operated)	\$331,470	\$0	\$331,470	\$82,868	255
442210	Floor Covering Stores	\$634,288	\$307,200	\$327,088	\$81,772	252
713940	Fitness and Recreational Sports Centers	\$1,581,635	\$1,257,131	\$324,504	\$81,126	250
812111	Barber Shops	\$307,134	\$0	\$307,134	\$76,783	236
454210	Vending Machine Operators	\$412,106	\$143,143	\$268,963	\$67,241	207
441228	Motorcycle, ATV, and All Other Motor Vehicle Dealers	\$523,033	\$264,908	\$258,125	\$64,531	199
445299	All Other Specialty Food Stores	\$401,417	\$148,675	\$252,742	\$63,185	194
451120	Hobby, Toy, and Game Stores	\$495,438	\$244,777	\$250,660	\$62,665	193
443141	Household Appliance Stores	\$356,168	\$107,096	\$249,071	\$62,268	192
512131	Motion Picture Theaters (except Drive-Ins)	\$242,854	\$0	\$242,854	\$60,714	187
446130	Optical Goods Stores	\$361,247	\$120,643	\$240,604	\$60,151	185
441210	Recreational Vehicle Dealers	\$511,614	\$294,389	\$217,225	\$54,306	167
448110	Men's Clothing Stores	\$304,622	\$90,976	\$213,646	\$53,412	164
445230	Fruit and Vegetable Markets	\$221,530	\$15,925	\$205,605	\$51,401	158
812910	Pet Care (except Veterinary) Services	\$635,684	\$431,938	\$203,746	\$50,937	157
446191	Food (Health) Supplement Stores	\$281,516	\$95,071	\$186,445	\$46,611	143
448130	Children's and Infants' Clothing Stores	\$215,042	\$55,571	\$159,470	\$39,868	123
453110	Florists	\$370,335	\$214,596	\$155,739	\$38,935	120
453920	Art Dealers	\$306,700	\$171,351	\$135,348	\$33,837	104
453910	Pet and Pet Supplies Stores	\$590,378	\$469,213	\$121,165	\$30,291	93
448320	Luggage and Leather Goods Stores	\$141,060	\$23,253	\$117,808	\$29,452	91
445210	Meat Markets	\$268,532	\$162,784	\$105,748	\$26,437	81
722514	Cafeterias, Grill Buffets, and Buffets	\$123,673	\$19,858	\$103,815	\$25,954	80
444110	Home Centers	\$4,111,111	\$4,011,021	\$100,089	\$25,022	77
Total					\$10,485,290	32,262

Source: Lightcast, Camoin Associates, ICSC

Note: Includes industries for which the gap is greater than \$100,000

MARKET DEMAND: RETAIL POTENTIAL ANALYSIS – NEW RESIDENTS

RETAIL POTENTIAL ANALYSIS

By 2027 it is projected that the number of households the local trade area will increase by 118, reflecting 1.8% growth. A similar rate of spending growth could be expected as these new households will make purchases within the trade area, increasing the amount of supportable retail within the town.

Based on the current retail spending per household in the local trade area, the total new purchases for projected new households were calculated. This spending translates to approximately 1,766 SF of additional supportable retail space in the local trade area.

Additional Retail Supportable by New Residents

	Local Trade Area
Purchases by Residents in Region	\$32,680,554
Current Households	6,717
Current Retail Purchases in Region Per Household	\$4,865
New Households (2027)	118
New Purchases	\$574,111
Average Retail Sales per SF	\$325
Additional Retail SF Supportable	1,766

Source: Lightcast, Esri, Camoin Associates

4.3 INDUSTRIAL/FLEX MARKET ANALYSIS

INDUSTRIAL/FLEX MARKET: KEY FINDINGS

- ◆ The Portland industrial market has approximately 33.2 million SF of space, over half of which is categorized as logistics space, with the rest being split between specialized industrial and flex space.
- ◆ In general, the Portland industrial market is somewhat tight, with low vacancy. Recent demographic trends in and around the Portland market have made it an increasingly attractive location for final mile distribution centers and warehouse space. The Portland market could serve as a key location in helping to address national supply chain and bottleneck issues due to an overall lack of supply of industrial space to warehouse products and distribute to consumers.
- ◆ In the NE Cumberland County (1.7% vacancy) submarket, the overwhelming majority of stock is occupied, with vacancy of 1.1%. Currently, no industrial construction is underway.
- ◆ The submarket has remained active for industrial transactions in the past few years, but momentum has more recently slowed. Vacancy is expected to remain low due to the prolonged period of no new development, which has lasted over three years.
- ◆ Local demand could support up to approximately 10,000 SF of industrial space in Yarmouth. Regionally, logistics space is in greatest demand.

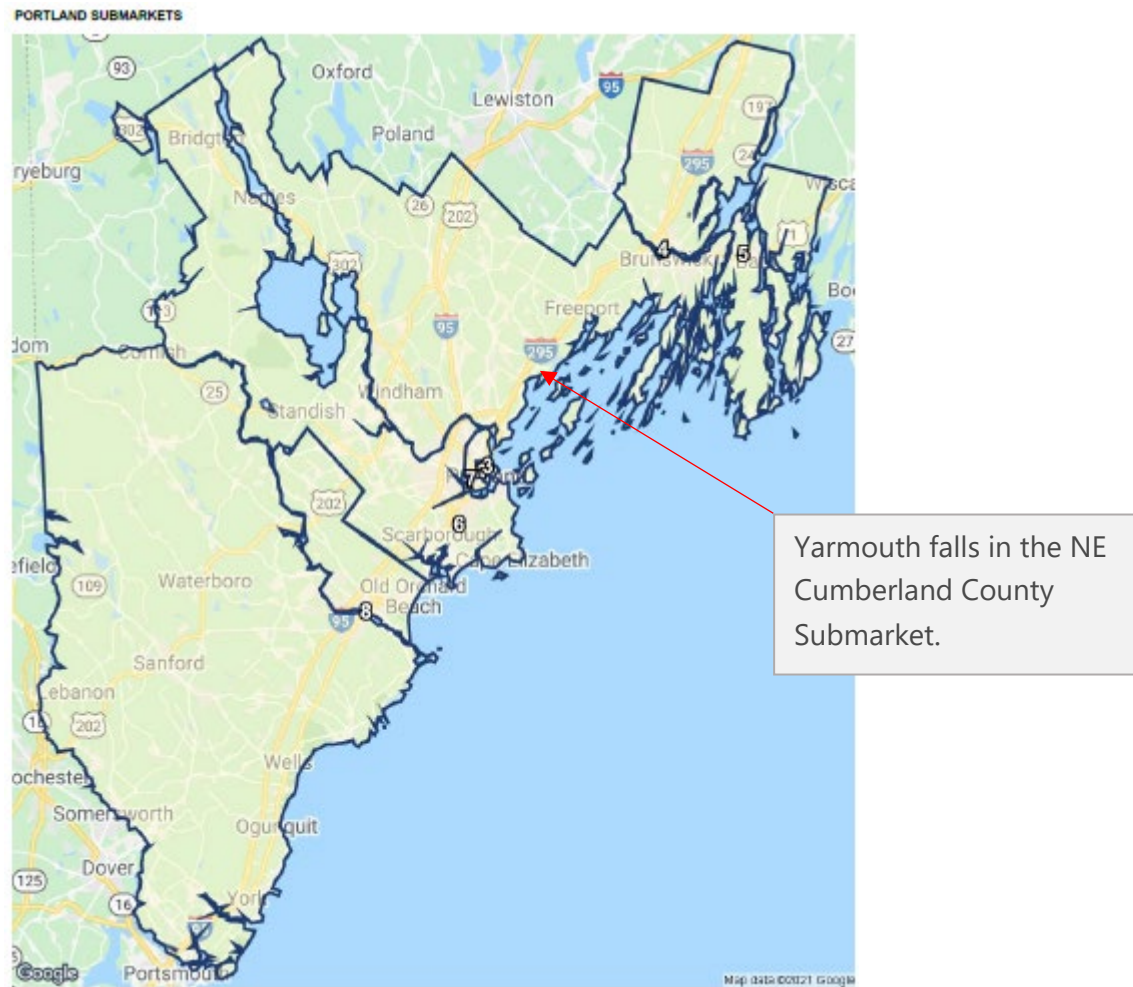
Yarmouth Net Supportable Industrial Demand

	Baseline	High Growth
Supportable SF	16,542	33,084
Current Vacant SF		23,000
Net Supportable Industrial Demand	-6,458	10,084

Source: CoStar, Camoin Associates

INDUSTRIAL/FLEX MARKET: GEOGRAPHICAL CONTEXT

The Town of Yarmouth's industrial/flex market falls in the Portland, ME market (the entire yellow area on the map below). Within this market, Yarmouth falls in the NE Cumberland County submarket (#4 in below map). Trends from the Portland, ME market and NE Cumberland submarket are included in this analysis.

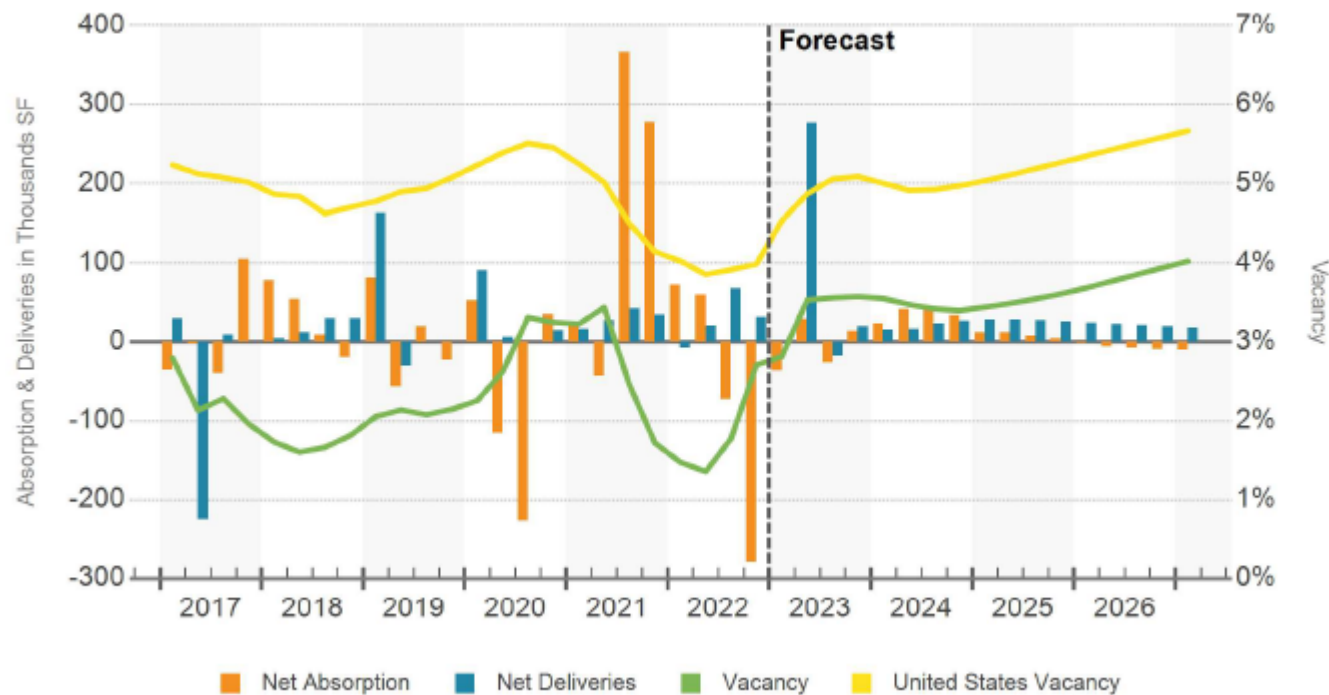


Source: CoStar

INDUSTRIAL/FLEX MARKET: REGIONAL CONTEXT (PORTLAND, ME MARKET)

According to CoStar, the Portland industrial market has approximately 33.2 million square feet of space, over half of which is categorized as logistics space with the rest being split between specialized industrial and flex space. Industrial rents in the Portland Market were rising at an 8.2% annual rate during the first quarter of 2023 and have posted an average annual gain of 7.3% over the past three years. In addition to the 290,000 SF that has delivered over the past three years (a cumulative inventory expansion of 0.9%), there is 330,000 SF currently underway. Vacancies in the metro were in line with the 10-year average as of 2023Q1 and trended up over the past four quarters.

NET ABSORPTION, NET DELIVERIES & VACANCY



Source: CoStar, as of 1Q23

INDUSTRIAL/FLEX MARKET: YARMOUTH AREA (NE CUMBERLAND COUNTY SUBMARKET)

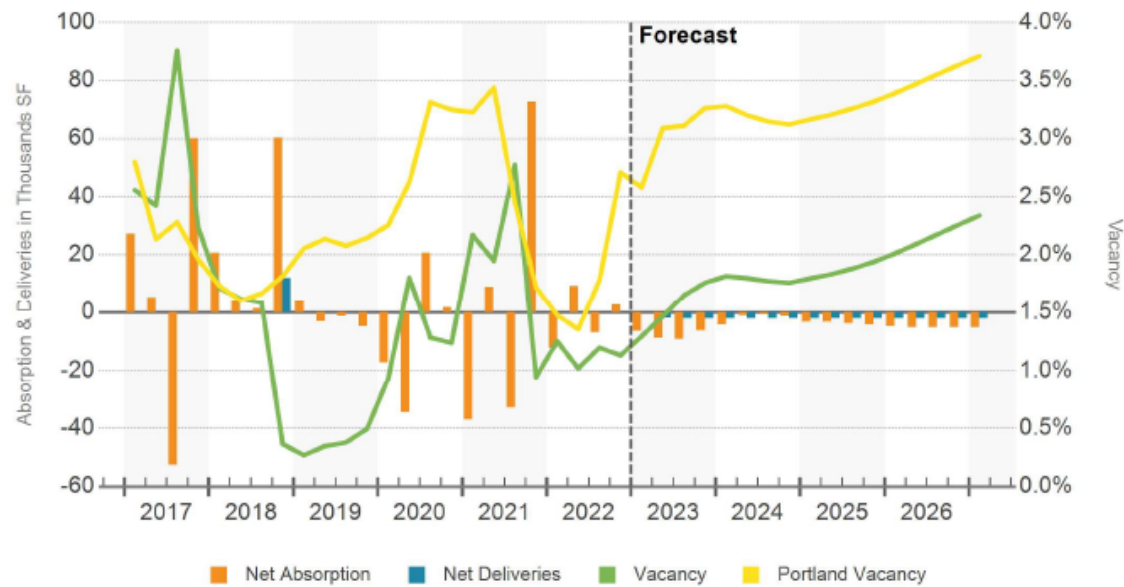
The NE Cumberland County submarket is a mid-sized submarket that contains around 3.9 million SF of industrial space. In the submarket:

- ◆ The overwhelming majority of stock is occupied. Vacancies have been relatively unchanged over the last year and the current rate of 1.1% remains low with little room for further tightening.
- ◆ Net absorption was -65 SF in the last 12 months, but was better over the last five years, at an average of 14,000 SF annually.
- ◆ Rents have risen by 4.2% annually on average over the last 10-years, and by 8.4% over the 12 months.
- ◆ Existing flex and light industrial space in Yarmouth is present in the Cuddledown business district, which is zoned Commercial 2. Additional marine-related industrial exists along the Royal River as Water Oriented Commercial.
- ◆ Wyman Station, the site of Wyman Energy, presents opportunity as a site with long-term viability for over 100 acres of industrial land.

Within the submarket,

- ◆ Most of the inventory is logistics space (2.1 million SF). The submarket also has a sizable flex presence (1.0 million SF).
- ◆ The vacancy rate for logistics is extremely low, at 0%, with no availability. At 2.5% and 2.4%, respectively, both specialized industrial and flex space have some availability but are operating under a tight market.

NET ABSORPTION, NET DELIVERIES & VACANCY



KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Logistics	2,108,499	0%	\$8.76	0%	0	0	0
Specialized Industrial	812,591	2.5%	\$9.74	3.0%	0	0	0
Flex	1,049,222	2.4%	\$12.59	7.6%	0	0	0
Submarket	3,968,312	1.1%	\$9.97	2.6%	0	0	0

Source: CoStar, as of 1Q23

INDUSTRIAL MARKET EMPLOYMENT

Employment in industrial utilizing industries is one way to estimate the future demand for industrial space. Compared to the Portland-South Portland MSA, Yarmouth has experienced lower rates of growth in industrial utilizing industries over the last five years. This trend is projected to continue over the next five years, with growth in Yarmouth being driven by Manufacturing and Construction but offset by declines in other industries.

Yarmouth Industrial Utilizing Industries

NAICS Description	2022 Jobs	Historic		Projected	
		2017 - 2022 Change	2017 - 2022 % Change	2022 - 2027 Change	2022 - 2027 % Change
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0%	0	0%
22 Utilities	32	2	5%	(2)	(5%)
23 Construction	324	27	9%	2	1%
31 Manufacturing	264	25	10%	15	6%
42 Wholesale Trade	99	(19)	(16%)	(4)	(5%)
48 Transportation and Warehousing	14	(5)	(24%)	(1)	(5%)
Total	734	30	4%	10	1%

Source: Lightcast

Portland-South Portland MSA Industrial Utilizing Industries

NAICS Description	2022 Jobs	Historic		Projected	
		2017 - 2022 Change	2017 - 2022 % Change	2022 - 2027 Change	2022 - 2027 % Change
21 Mining, Quarrying, and Oil and Gas Extraction	88	(20)	0%	3	0%
22 Utilities	533	56	12%	(14)	(3%)
23 Construction	21,213	2,046	11%	414	2%
31 Manufacturing	29,276	3,447	13%	1,242	4%
42 Wholesale Trade	9,498	(372)	(4%)	(67)	(1%)
48 Transportation and Warehousing	7,739	(665)	(8%)	(154)	(2%)
Total	68,347	4,492	7%	1,425	2%

Source: Lightcast

INDUSTRIAL MARKET DEMAND: NE CUMBERLAND SUBMARKET

In 2022, the regional industrial market was characterized by supply constraints, with five years of sub-3% vacancies. While transactional volume increased year-over-year, transactional value plateaued, as did lease rates. According to The Dunham Group, new inventory in the market is quickly absorbed, as the market remains highly competitive. Over the next year, industrial space in Southern Maine is expected to see an increasing vacancy rate. Investment demand is projected to be steady but include more risky acquisitions; transactional volume is expected to increase, but be dominated by smaller deals.

Future demand for industrial and flex space can be estimated using inventory and vacancy data by industrial subtype. In this case, data from the submarkets surrounding and bordering Yarmouth were used (the NE Cumberland County) as this represents the most likely market for space for Yarmouth. A target vacancy rate of 5% was used in conjunction with current rental building area and vacancy data from CoStar to calculate the amount of new industrial space that could be supported. In other words, how much space can be added so that the vacancy rate does not exceed 5%? Across both submarkets, 262,600 SF of new industrial space could be supported in the NE Cumberland submarket.

Regional Industrial Space Demand

Subtype	Current Space 2022 YTD				Potential Space		
	Rentable Building Area (SF)	Vacant Space (SF)	Vacancy Rate	Target Vacancy Rate	Rentable Building Area (SF)	Vacant Space (SF)	SF That Can Be Added
NE Cumberland County Submarket							
Logistics	2,106,499	0	0%	5.0%	2,217,367	110,868	110,868
Specialized Industrial	812,591	0	2.5%	5.0%	855,359	42,768	42,768
Flex	1,049,222	25,000	2.4%	5.0%	1,078,128	53,906	28,906
Total Submarket	3,968,312	25,000	1.1%	5.0%	4,150,855	207,543	182,543
Portland-South Portland MSA Submarket							
Logistics	19,400,111	696,333	3.6%	5.0%	19,688,187	984,409	288,076
Specialized Industrial	9,313,916	128,442	1.4%	5.0%	9,668,920	483,446	355,004
Flex	4,467,310	74,000	1.7%	5.0%	4,624,537	231,227	157,227
Total Submarket	33,181,337	898,775	2.7%	5.0%	33,981,644	1,699,082	800,307
Total New Space to be Supported (SF)							
					NE Cumberland Submarket	Captured from MSA	Total
Logistics					110,868	28,808	139,676
Specialized Industrial					42,768	35,500	78,268
Flex					28,906	15,723	44,629
Total					182,543	80,031	262,573

Source: CoStar, Camoin Associates

Note: YTD as of March 1, 2023

INDUSTRIAL MARKET DEMAND: YARMOUTH

It is reasonable to assume that Yarmouth could capture a portion of this supportable demand. According to CoStar, Yarmouth currently has approximately 250,000 SF of industrial space, accounting for 6.3% of the submarket's inventory. This reflects the baseline scenario of capture. Under a high growth scenario, we assume Yarmouth's capture would double, to 12.6% of the submarket's inventory.

According to CoStar, Yarmouth currently has 23,000 SF of vacant Industrial space, which is entirely comprised of Flex space. After accounting for this vacant space, Yarmouth could support up to 10,084 SF of industrial space.

Yarmouth Net Supportable Industrial Demand

	Baseline	High Growth
Supportable SF	16,542	33,084
Current Vacant SF	23,000	
Net Supportable Industrial Demand	-6,458	10,084

Source: CoStar, Camoin Associates

4.4 OFFICE MARKET ANALYSIS

OFFICE MARKET: KEY FINDINGS

- ◆ Portland is a midsize secondary market with roughly 26 million SF of office space. Relatively little supply has kept vacancies low in the market. Vacancy rates in both downtown and suburban areas are expected to tick up slightly and plateau in mid-2023.
- ◆ In the NE Cumberland County submarket, no new construction of office buildings is currently underway, although inventory has expanded by 1.2% over the last three years.
- ◆ Locally, demand for medical office space is expected to be stronger than for general office space. Over the next five years, demand from Yarmouth could support over 4,000 SF of new medical office space, compared to minimal new traditional office space. Yarmouth could also capture a portion of demand from the larger region. Within the MSA it is estimated that there will be net demand for nearly 150,000 SF of new medical office space and minimal net new demand of traditional office space in the next five years.
- ◆ Major office users in Yarmouth include Tyler Technologies and Garmin. Garmin is currently planning expansion that has the potential to support up to 300 employees, beginning with 25,000 SF for 50 new employees in the near term.

Supportable Demand for New General Office Space, 5-Year

Demand From	Low Office Intensity	Medium Office Intensity	High Office Intensity
Demand (SF)			
Yarmouth	600	900	1,200
Portland-South Portland MSA	224,100	336,150	448,200
Net Demand (Minus Current Vacancy)			
Yarmouth	-13,403	-13,103	-12,803
Portland-South Portland MSA	-897,662	-785,612	-673,562

Source: Camoin Associates

Supportable Demand for New Medical Office Space, 5-Year Estimates (SF)

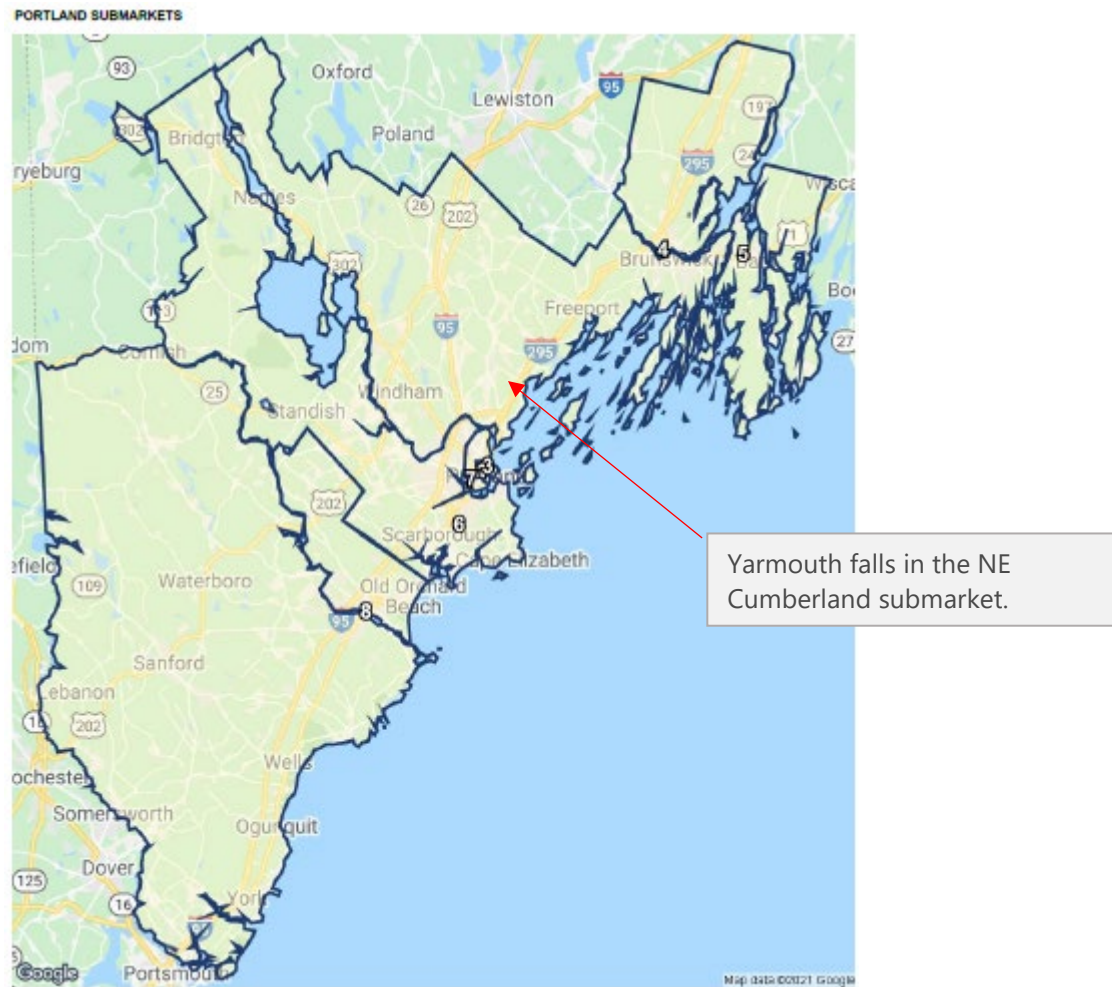
Demand From	Yarmouth	Portland-South Portland MSA
New Demand (SF)	4,260	227,657
Currently Vacant (SF)	0	78161
Net New Demand (SF)	4,260	149,496

Source: CoStar, Camoin Associates

Note: Vacancy for YTD 2023

OFFICE MARKET: GEOGRAPHICAL CONTEXT

The Town of Yarmouth's office market falls in the Portland, ME market (the entire yellow area on the map below). Within this market, Yarmouth falls in the NE Cumberland submarket (#4 in below map). Trends from the Portland, ME market and NE Cumberland County Submarket are included in this analysis.

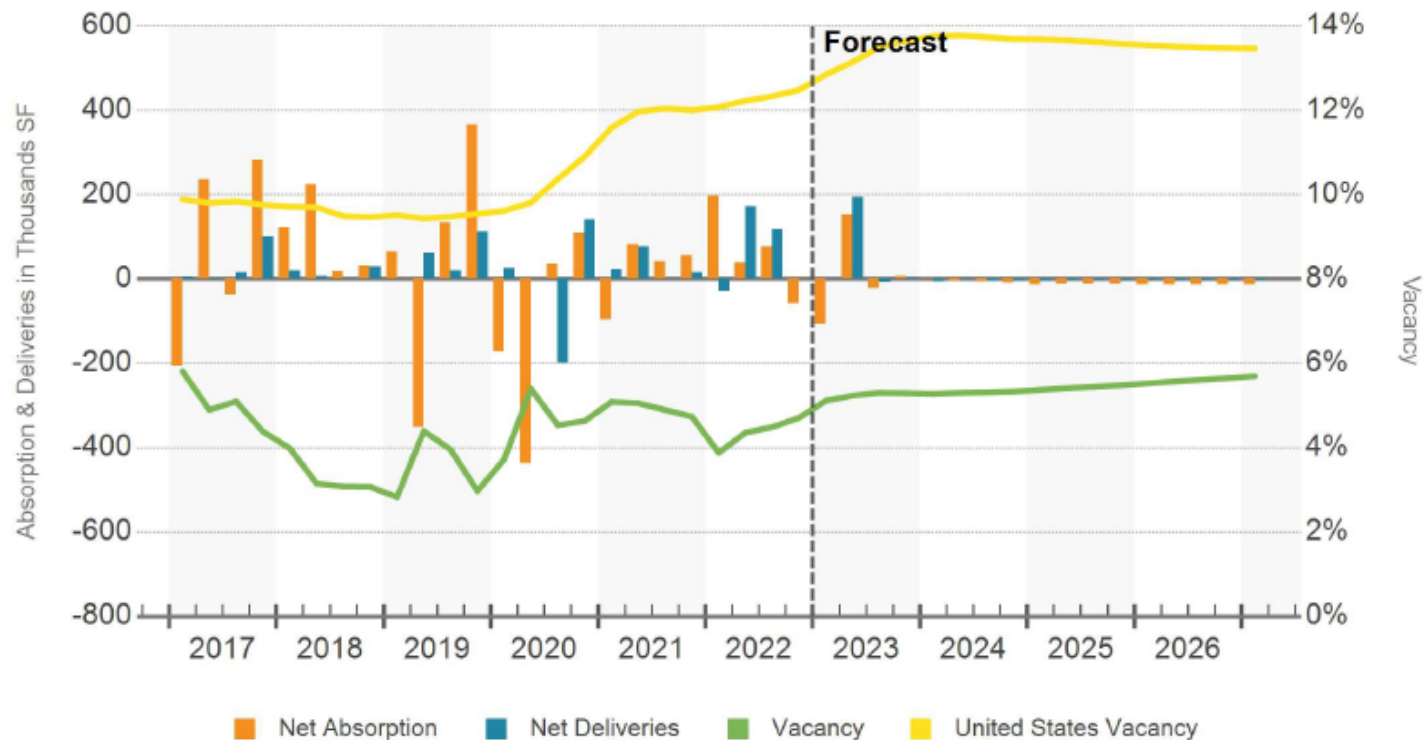


Source: CoStar

OFFICE MARKET: REGIONAL CONTEXT (PORTLAND, ME MARKET)

According to CoStar, Portland is a midsize secondary market with roughly 26 million SF of office space. Over the past three years, inventory has expanded by 1.2%, or 330,000 SF. There is currently 217,000 SF currently under construction. Vacancies are trending up slightly in the last four quarters and are in line with the 10-year average – currently at 5.2% in the first quarter of 2023. The Portland Metro’s jobs are recently increasing at an annual rate of 4.6%, posting the strongest job creation in more than a year, a welcome sign for the local office market.

NET ABSORPTION, NET DELIVERIES & VACANCY



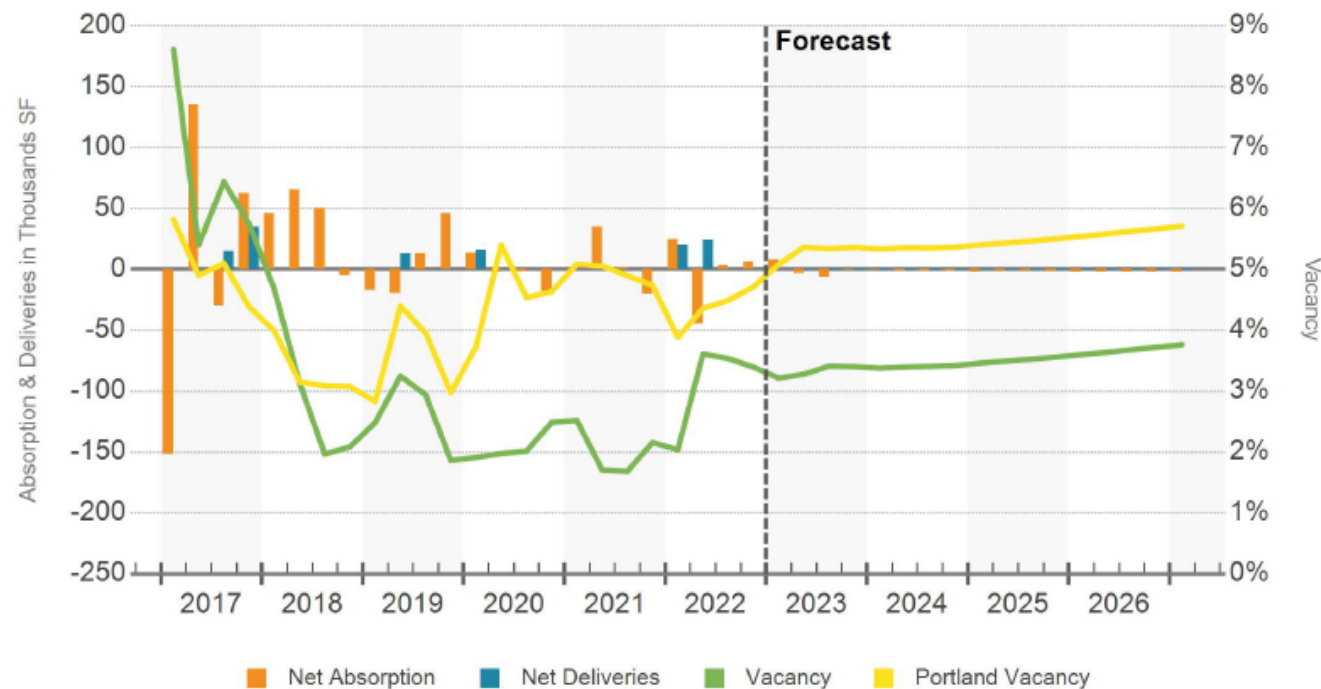
Source: CoStar, as of 1Q23

OFFICE MARKET: YARMOUTH AREA (NE CUMBERLAND COUNTY SUBMARKET)

NE Cumberland County submarket is a mid-sized submarket that contains around 4.3 million SF of office space. In the submarket:

- ◆ The vacancy rate risen slightly the last year. At 3.1% this is well below the 10-year average for the submarket.
- ◆ Net absorption over the past year has been negative, though the last five years average net absorption of 45,000 SF per year.
- ◆ Rents have risen by 1.8% over the last year, below the 2.9% average annual change over the last ten years.
- ◆ Currently, there are no new office constructions being tracked in this submarket, though inventory has expanded by approximately 1.2% over the last three years.

NET ABSORPTION, NET DELIVERIES & VACANCY

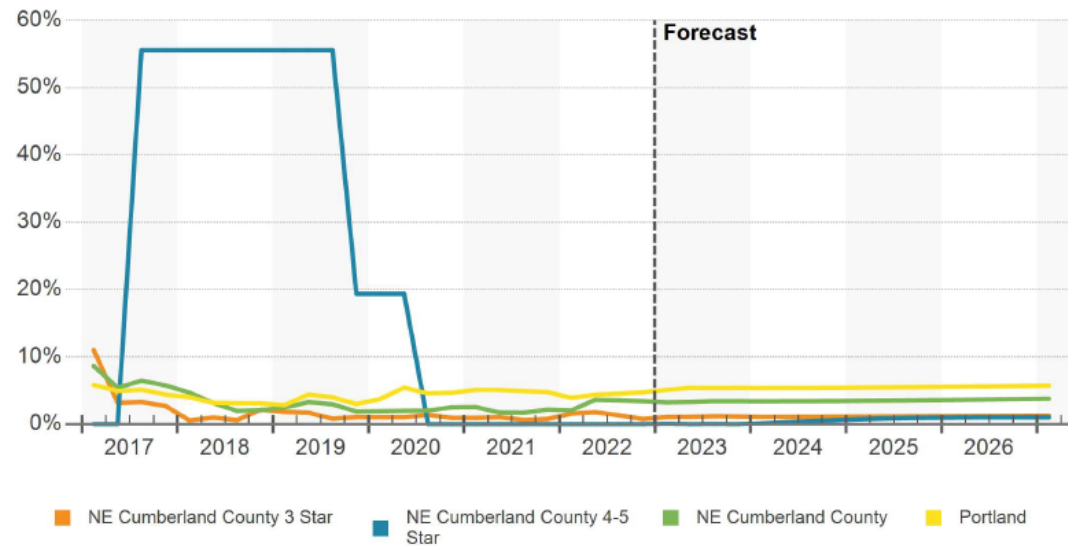


Source: CoStar, as of 1Q23

Within the submarket,

- ◆ Most of the office space inventory is 1- and 2-star space. Offices in this category have a vacancy rate of 4.8%.
- ◆ There is no availability of 4- and 5-star space within the submarket. 3-star space has a low availability rate, 2.2%.
- ◆ Due to limited inventory of 4- and 5-star space within the submarket, small changes in overall space occupancy result in large swings in the vacancy rate.

VACANCY RATE



KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
4 & 5 Star	56,150	0%	\$26.25	0%	0	0	0
3 Star	1,810,287	1.0%	\$23.08	2.2%	(3,934)	0	0
1 & 2 Star	2,468,363	4.8%	\$17.58	4.9%	15,669	0	0
Submarket	4,334,800	3.1%	\$19.99	3.7%	11,735	0	0

Source: CoStar, as of 1Q23

OFFICE MARKET DEMAND

Throughout 2023 it is expected that demand for office space will stay relatively low. Both Portland and NE Cumberland market areas are projected to have vacancy that ticks up slightly and plateaus mid-year.

The demand outlook for office space depends on growth in the types of industries and jobs that utilize office space in the region. The following tables show the categories of office utilizing industries and the historical change in the number of jobs in those industries in the last five years. From 2017-2022 the estimated number of office jobs in Yarmouth remained flat at 1% growth, while the Portland-South Portland MSA saw more significant growth of 8%. In 2022, there were 1,728 jobs in office-using industries in Yarmouth, representing about 28% of all jobs in the Town. This is comparable to the MSA (25.4%)

Yarmouth Office Utilizing Industries

NAICS	Description	Historic		Projected	
		2017 - 2022 Change	2017 - 2022 % Change	2022-2027 Change	2022-2027 % Change
5112	Software Publishers	0	0%	0	0%
512	Motion Picture and Sound Recording Industries	Insf. Data	Insf. Data	Insf. Data	Insf. Data
515	Broadcasting (Except Internet)	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5173	Wired and Wireless Telecommunications Carriers	7	67%	3	17%
5179	Other Telecommunications	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5191	Other Information Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
52	Finance and Insurance	16	7%	1	0%
531	Real Estate	(2)	(13%)	(0)	(0%)
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	0	Insf. Data	0	0
5411	Legal Services	18	9%	9	4%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	(24)	(37%)	(8)	(19%)
5413	Architectural, Engineering, and Related Services	53	26%	27	11%
5414	Specialized Design Services	9	17%	7	11%
5415	Computer Systems Design and Related Services	(10)	(16%)	(1)	(2%)
5416	Management, Scientific, and Technical Consulting Services	38	43%	11	9%
5418	Advertising, Public Relations, and Related Services	18	24%	4	4%
55	Management of Companies and Enterprises	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5611	Office Administrative Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5613	Employment Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5614	Business Support Services	(20)	(56%)	(6)	(36%)
5615	Travel Arrangement and Reservation Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	(32)	(13%)	(2)	(1%)
9011	Federal Government, Civilian	(8)	(8%)	(15)	(15%)
9029	State Government, Excluding Education and Hospitals	(9)	(25%)	(5)	(19%)
9039	Local Government, Excluding Education and Hospitals	(41)	(14%)	(15)	(6%)
Total		15	1%	6	0%

Source: Lightcast

Portland-South Portland MSA Office Utilizing Industries: Employment Projections

NAICS	Description	Historic		Projected	
		2017 - 2022 Change	2017 - 2022 % Change	2022-2027 Change	2022-2027 % Change
5112	Software Publishers	65	20%	105	48%
512	Motion Picture and Sound Recording Industries	41	7%	(62)	(9%)
515	Broadcasting (Except Internet)	(59)	(12%)	(77)	(13%)
5173	Wired and Wireless Telecommunications Carriers	158	14%	267	32%
5179	Other Telecommunications	(11)	(18%)	(5)	(8%)
5191	Other Information Services	(14)	(4%)	(71)	(16%)
52	Finance and Insurance	(96)	(1%)	694	4%
531	Real Estate	137	3%	399	9%
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5411	Legal Services	29	1%	142	5%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	68	3%	381	22%
5413	Architectural, Engineering, and Related Services	394	8%	774	20%
5414	Specialized Design Services	76	8%	(4)	(0%)
5415	Computer Systems Design and Related Services	845	16%	1,501	41%
5416	Management, Scientific, and Technical Consulting Services	617	13%	1,303	39%
5418	Advertising, Public Relations, and Related Services	(23)	(4%)	(18)	(3%)
55	Management of Companies and Enterprises	488	7%	779	13%
5611	Office Administrative Services	(35)	(7%)	32	6%
5613	Employment Services	2	0%	211	7%
5614	Business Support Services	(251)	(19%)	(695)	(34%)
5615	Travel Arrangement and Reservation Services	(8)	(2%)	(45)	(8%)
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	55	1%	(348)	(7%)
9011	Federal Government, Civilian	81	1%	1,162	13%
9029	State Government, Excluding Education and Hospitals	(232)	(13%)	(245)	(12%)
9039	Local Government, Excluding Education and Hospitals	(84)	(1%)	(253)	(3%)
Total		2,241	3%	5,931	8%

Source: Lightcast

OFFICE MARKET DEMAND

Demand for Future Office Space

	Yarmouth	Portland-South Portland MSA
Office Utilizing Industry Jobs (2022)	1,728	82,968
5-Year Growth Forecast	0%	3%
Projected New Jobs (5-Year)	6	2,241
Pipeline Office Expansion	25-150KSF	
	New SF to be Supported	
High WFH Scenario (100 SF per Employee)	600	224,100
Hybrid Office Use Scenario (150 SF per Employee)	900	336,150
Fully In Office Scenario (200 SF per Employee)	1,200	448,200
Currently Vacant	14,003	1,121,762
	Net New SF to be Supported	
High WFH Scenario (100 SF per Employee)	-13,403	-897,662
Hybrid Office Use Scenario (150 SF per Employee)	-13,103	-785,612
Fully In Office Scenario (200 SF per Employee)	-12,803	-673,562

Source: CoStar, Lightcast, JLL, Camoin Associates

Note: Vacancy as YTD 2023

According to job forecasts provided by Lightcast, the number of jobs in office utilizing industries in the Portland-South Portland MSA are expected to grow by 3% over the next five years, while Yarmouth is projected to add just slightly over 0%. Therefore, it is estimated that there will be approximately 5 new office utilizing jobs in Yarmouth and 2,241 in the Portland-South Portland MSA in the next five years.

According to surveys conducted by JLL Research, the average square foot per office employee was 196 in 2020. This is up from JLL's estimates of 120 to 150 square feet per employee (depending on the industry) pre-COVID-19. However, the office-using landscape has shifted drastically since the onset of COVID-19, with the more common use of work-from-home and hybrid arrangements that require fewer square feet per employee. Therefore, we estimate a series of office-use scenarios, with High Work-From-Home (WFH) scenario reflecting high work-from-home take-up, Hybrid Office Use scenario reflecting a moderate mix of work-from-home, hybrid, and in-office arrangements, and Fully In Office scenario reflecting a scenario with workers mostly working in an office setting.

Under all three scenarios, Yarmouth is expected to have need for very little office space, ranging from about 500-1,000 SF in the next five years. This would represent a 0.1%-0.2% increase from the current 473,000 square feet of office space in Yarmouth. However, the Portland-South Portland MSA will be able to support more office space, ranging from about 224,000 to 448,000 SF. That said, it is possible for Yarmouth to capture some of the larger market's demand.

Currently in 2023, there is approximately 14,000 SF of vacant office space in Yarmouth and 1.1 million SF of vacant office space in the Portland-South Portland MSA.

Garmin, one of Yarmouth's largest office users, has plans for expansion beginning with 25,000 square feet for 50 new employees with potential for up to 300 new employees. This following analysis captures office demand beyond this planned expansion.

MEDICAL OFFICE MARKET DEMAND

Aside from traditional office space, Medical Office Buildings (MOBs) are another type of commercial office space that could be explored. MOBs have unique characteristics and a different market than traditional office space.

According to Colliers International's 2022 Healthcare Marketplace report, national medical office vacancy rates fell in 2021 to 8.3%, compared to an increase in the broader office sector to 14.8%.

Other significant trends in the field of MOBs include increasing volume of MOB construction and a pivot to focus on off-campus locations. These off-campus locations represent a shift away from in-patient hospital care and toward readily accessible locations for out-patient clinics. These facilities tend to be smaller than new on-campus facilities, and account for nearly 70% of MOB construction projects.

To estimate the future demand of MOB in Yarmouth and the market area, employment projections for ambulatory care services were examined. This includes various types of doctor's offices, dentist offices, laboratories, and health care services. Over the next five years Yarmouth is projected to add 20 jobs, while the MSA is projected to grow by 1,100. An assumption of an average of 207 square feet per employee was used to calculate demand for medical office space (source: Institute of Transportation Engineers).

Over the next five years it is estimated that there will be:

- ◆ Net demand for 4,260 SF of new office space in Yarmouth
- ◆ Net Demand for 149,496 SF of new medical office space in the Portland-South Portland MSA.

The tables on the following page illustrate the projected change in employment and associated demand for space.

Supportable Demand for New Medical Office Space, 5-Year Estimates (SF)

Demand From	Yarmouth	Portland-South Portland MSA
New Demand (SF)	4,260	227,657
Currently Vacant (SF)	0	78161
Net New Demand (SF)	4,260	149,496

Source: CoStar, Camoin Associates

Note: Vacancy for YTD 2023

Yarmouth Medical Office Utilizing Industries

NAICS	Description	Historic		Projected		New Demand (SF)
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change	
6211	Offices of Physicians	8	19%	6	12%	1,239
6212	Offices of Dentists	0	-2%	3	11%	600
6213	Offices of Other Health Practitioners	6	18%	5	12%	1,029
6214	Outpatient Care Centers	9	54%	7	25%	1,392
6215	Medical and Diagnostic Laboratories	Insf. Data	Insf. Data	Insf. Data	Insf. Data	0
6219	Other Ambulatory Health Care Services	Insf. Data	Insf. Data	0	-3%	0
Total		31	24%	20	13%	4,260

Source: Lightcast, Institute of Transportation Engineers

Portland-South Portland MSA Medical Office Utilizing Industries

NAICS	Description	Historic		Projected		New Demand (SF)
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change	
6211	Offices of Physicians	269	4%	209	3%	43,180
6212	Offices of Dentists	161	8%	126	6%	26,060
6213	Offices of Other Health Practitioners	301	10%	258	8%	53,337
6214	Outpatient Care Centers	1,235	116%	511	22%	105,816
6215	Medical and Diagnostic Laboratories	(174)	(22%)	(23)	(4%)	(4,830)
6219	Other Ambulatory Health Care Services	295	65%	20	3%	4,095
Total		2,087	15%	1,100	7%	227,657

Source: Lightcast, Institute of Transportation Engineers

ATTACHMENT A: DATA SOURCES



Lightcast (formerly Emsi Burning Glass) is a global leader in labor market analytics, offering a data platform that gives a comprehensive, nuanced, and up-to-date picture of labor markets at all scales from national to local. Key components of the platform include traditional labor market information, job postings analytics, talent profile data, compensation data, and skills analytics. Lightcast integrates government data with information from online job postings, talent profiles, and resumes to produce timely intelligence on the state of the labor market. Job and compensation data is available by industry, occupation, educational program, and skill type. [Click to learn more.](#)



Esri ArcGIS Business Analyst combines proprietary statistical models covering demographic, business, and spending data with map-based analytics to offer insights on market opportunities for industries, businesses, and sites. Business Analyst integrates datasets covering a wide range of topics including demographics, consumer spending, market potential, customer segmentation, business locations, traffic counts, and crime indexes, which can be overlaid spatially to produce customizable maps and uncover market intelligence. Data can be pulled for standard and custom geographies, allowing for valuable comparison between places. [Click to learn more.](#)



CoStar is a comprehensive source of commercial real estate intelligence, offering an inventory of over 6.4 million commercial properties spanning 135 billion square feet of space in 390 markets across the US. CoStar covers office, retail, industrial, hospitality, and multifamily markets. Property- and market-level data on absorption, occupancy, lease rates, tenants, listings, and transactions are researched and verified through calls to property managers, review of public records, visits to construction sites, and desktop research to uncover nearly real-time market changes. [Click to learn more.](#)



Redfin is a national real estate brokerage and analytics firm that offers access to its extensive for-sale residential property listings database. Data is aggregated from the hundreds of local multiple listings services (MLS) used by real estate agents in the markets where it operates. The data covers broker-listed homes from the MLS, homes in foreclosure, select for-sale by owner (FSBO) homes, and records of past sales. Redfin's downloadable data on market trends is released monthly and is available at the national, metro, state, county, city, ZIP code, and neighborhood level. [Click here to learn more.](#)

OnTheMap | US Census Bureau

OnTheMap is a tool developed through the US Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. It offers visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. [Click to learn more.](#)

ATTACHMENT B: TAPESTRY SEGMENTS

AFFLUENT ESTATES

- ◆ Average Household Size: 2.85
- ◆ Median Age: 45.1
- ◆ Median Household Income: \$108,700

These residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside of the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.

GENX URBAN

- ◆ Average Household Size: 2.51
- ◆ Median Age: 40.9
- ◆ Median Household Income: \$60,000

These suburbanites have achieved the dream of home ownership. They have purchased homes that are within their means. Their homes are older, and townhomes and duplexes are not uncommon. Many of these families are two-income married couples approaching retirement age; they are comfortable in their jobs and their homes, budget wisely, but do not plan on retiring anytime soon or moving. Neighborhoods are well established, as are the amenities and programs that supported their now independent children through school and college. The appeal of these kid-friendly neighborhoods is now attracting a new generation of young couples.

COZY COUNTRY LIVING

- ◆ Average Household Size: 2.44
- ◆ Median Age: 47.4
- ◆ Median Household Income: \$56,400

These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to homegrown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level.

FAMILY LANDSCAPES

- ◆ Average Household Size: 2.75
- ◆ Median Age: 36.1
- ◆ Median Household Income: \$59,800

These neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, as the housing boom spread beyond large metropolitan cities. Residents are traditional, family-oriented customers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

MIDDLE GROUND

- ◆ Average Household Size: 2.06
- ◆ Median Age: 37.4
- ◆ Median Household Income: \$59,200

These consumers live in lower-density neighborhoods of urban areas throughout the country. Young and mobile, they are more likely to rent. Half have a college degree and a professional occupation. Incomes close to the US median come primarily from wages, investments, and self-employment. This group is highly connected, using the internet for entertainment and making environmentally friendly purchases. Long hours on the internet are balanced with time at the gym. Many embrace the “foodie” culture and enjoy cooking adventurous meals using local and organic foods. Music and art are major sources of enjoyment. They travel frequently, both abroad and domestically.

ABOUT CAMOIN ASSOCIATES

As the nation's only full-service economic development and lead generation consulting firm, Camoin Associates empowers communities through human connection backed by robust analytics.

Since 1999, Camoin Associates has helped local and state governments, economic development organizations, nonprofit organizations, and private businesses across the country generate economic results marked by resiliency and prosperity.

To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on [LinkedIn](#), [Facebook](#), and [YouTube](#).

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SERVICE LINES



Strategic and
Organizational
Planning



Real Estate
Development
Services



Lead Generation
and Relationships



Business
Attraction and
Retention



Entrepreneurship
and Innovation



Industry and
Workforce
Analytics



Impact
Analysis





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Community Engagement Summary and Draft Vision Statement

Town of Yarmouth, ME



October 2022

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Acknowledgements

TOWN PROJECT TEAM

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Thank you to all of the Town boards and committees, residents, employees, business owners, students, and other stakeholders who participated in this process and/or hosted an activity. Special thanks to the Yarmouth School Department and North Yarmouth Academy for the access to the school communities.

PHOTOGRAPHY CONTEST

Throughout this document and on the cover you will see photos submitted by community members as part of a Photography Contest held during September and October 2022. The contest winners are Peter Interland, Jill Sady, and Grace Goodall. The contest judges are Leigh Kirchner, Michael Leonard, Elizabeth Newman, Melissa Sylvester, Jennifer Van Allen, and Dennis Welsh.



*Photo credits from top to bottom:
Charlene Ferguson, Jill Sady,
Joseph Coulombe*

1

Introduction

In May 2022, the Town of Yarmouth (Town) initiated a community engagement and visioning process to develop a vision statement that will inform the Town’s upcoming Comprehensive Plan update.

The purpose of this project was to identify common values and priorities for the future through community input in a fair and representative engagement process. To guide the development of a vision for the Town, a robust public engagement effort was conducted to obtain input from as many Town residents and stakeholders as possible. The purpose of this effort was to understand community values, priorities, and goals for the Town’s future.

Prior to initiating engagement activities, the Town project team and consultant team reviewed background information including the 281 responses from the Town branding initiative survey. This survey asked similar questions to those that this project sought to understand, and this visioning effort builds upon this feedback.

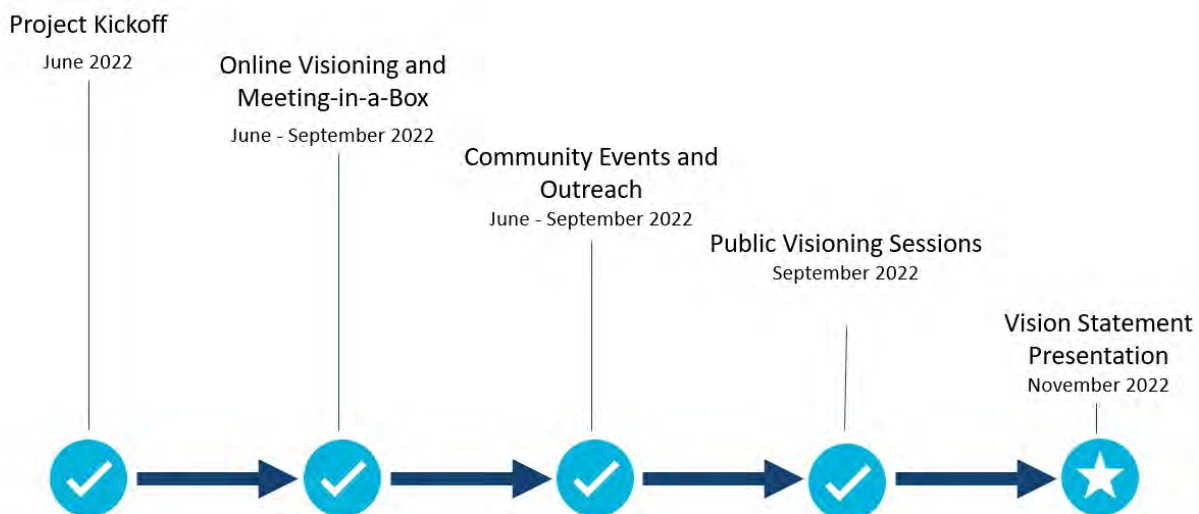
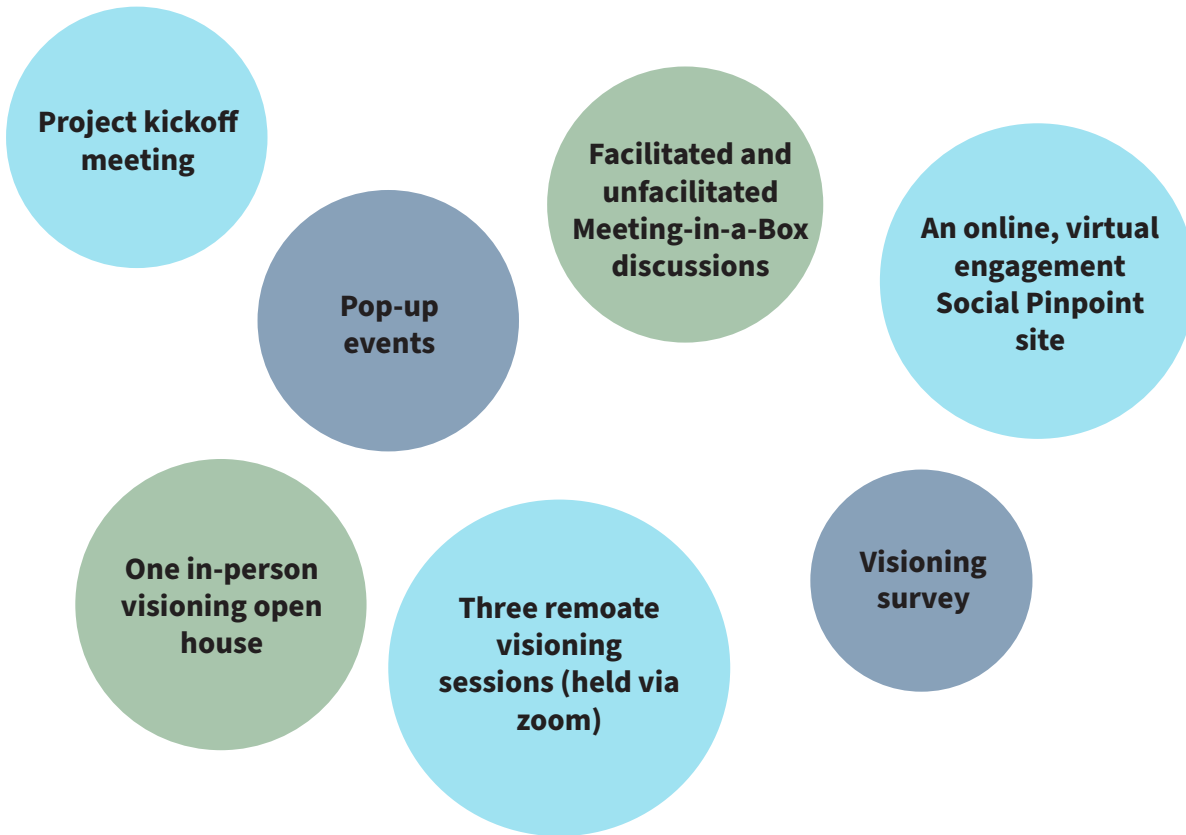
Throughout the project, a variety of tools and platforms were used to obtain feedback from the public and engage stakeholders in discussion about the future of the Town. To make the process accessible and inclusive, project materials and engagement activities were provided online, in hard copy, and in-person. In addition, public meeting announcements were made through the project and Town websites, email blasts, the Town’s Facebook page, and in the local newspaper.

The Town and consulting team conducted events in a variety of locations, including local businesses, parks, schools, public buildings, and online via Zoom, and provided opportunities for stakeholders to meet privately and submit feedback to the Town.

This high-level summary includes an overview of each of these engagement components and what was learned about the community’s values and vision for the Town. Following the summary of engagement, a draft vision statement is presented based on the community values, priorities, and goals identified as part of this process.



The engagement strategy included the following:



2 Kickoff Meeting

On June 28, 2022, the Town facilitated a meeting at the Log Cabin on Main Street to introduce community members to the project and hear their initial thoughts on the Town's future.

This meeting was held in a hybrid format using the technology at the Log Cabin, enabling attendees to join in person or virtually. Additionally, the meeting was broadcast live on Yarmouth Municipal Television and recorded for later viewings on the local television channel and online through the project website, after the meeting. More than 20 attendees participated in person or online. Prior to the kickoff meeting, attendees were able to provide input on comment cards, write responses to questions on a chalk wall, respond to a visual preference survey, and talk with Town staff, the consultant team, and other community members.

During the meeting, the Town introduced the project, and community members participated in a short interactive poll and group discussion. A summary of the interactive poll results and discussion topics are below.

POLLING

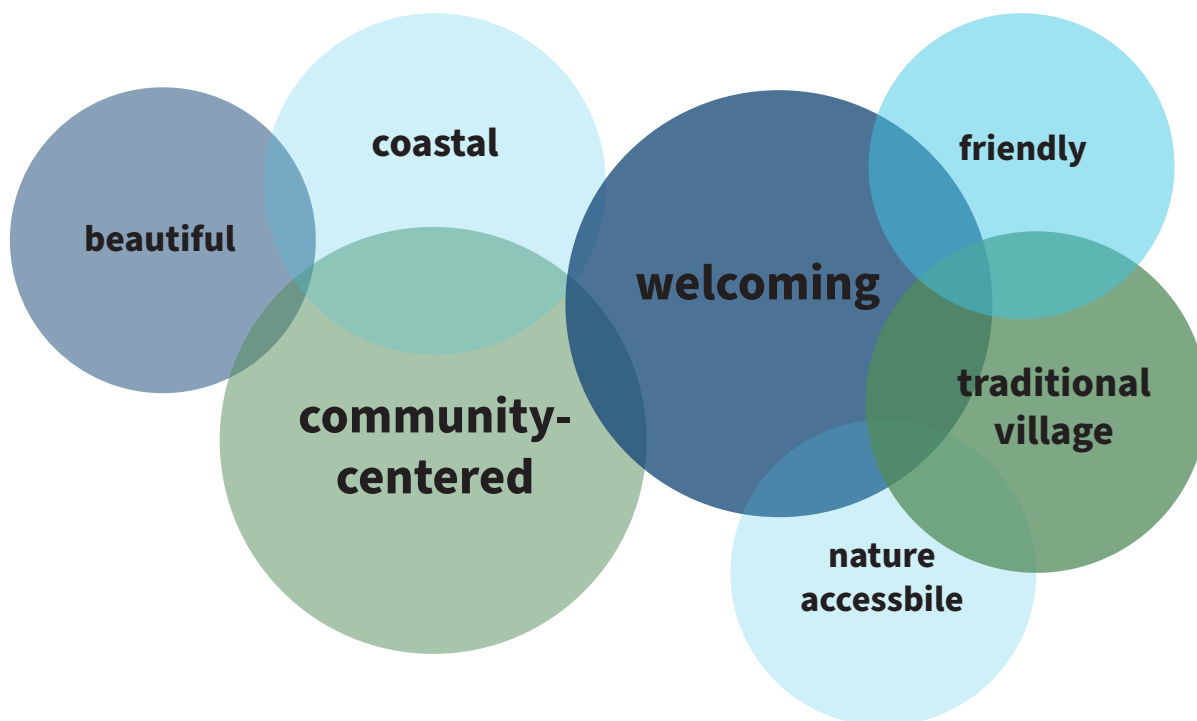
- Words used to describe the Town included beautiful, coastal, friendly, welcoming, community-centered, traditional village, and nature accessible.
- Participants would like to see more done to grow the Town's economic base, preserve the historic character, and address affordable housing.

DISCUSSION

Community members value the historic, small-town feel of the Town. It is important to preserve this character while finding ways to make housing more affordable. Continued access to outdoor recreation spots is also important to stakeholders. Key discussion points are listed below:

- Developing affordable housing, as well as continuing to take measures to help ensure that current residents can afford to stay in their homes
- Preserving the Town's historic identity, Main Street, and open spaces
- Protecting natural areas and maintaining access to the waterfront and trail systems throughout the Town
- Maintaining the walkability of the Town
- Increasing the number of bike lanes
- Continuing to enhance the sense of community
- Developing a recreation center and Town pool, and expanding the Children's Center at the Merrill Memorial Library (in addition to current plans to develop a community center)

In one word, how would you describe Yarmouth?



IMAGINE YARMOUTH

Building a Vision for the Future of Yarmouth

The Town of Yarmouth would like your input in the development of a **Town Vision Statement**. The resulting Vision Statement will become the foundation for the next Yarmouth Comprehensive Plan. The visioning process is meant to be a community-wide discussion of residents, business owners, employees, and other stakeholders to understand the Town's priorities and goals.

Join your friends and neighbors to help shape the future of Yarmouth!

 Please visit the project website for more information, to share your ideas, and to participate in the survey.

<https://berrydunn.mysocialpinpoint.com/imagine-yarmouth-me>

3 Pop-Up Events

The Town engaged community members at pop-up events throughout the summer. Pop-up events provided information about the visioning process and opportunities to provide input.

These events were intended to increase awareness of the visioning effort and provide more opportunities for community members to provide feedback. Town staff met community members at several locations across the Town. Additionally, Town staff set up unstaffed informational tables with self-directed activities at school open houses with the Yarmouth School Department's support.

Activities at each event allowed people to learn about the project, provide general comments on the future of Yarmouth, and share what they value about the Town. Town staff interacted with more than 300 people at 17 events throughout the summer and into fall.

More than 75 written comments were received during these events. Of the written comments provided, more than 20 referenced improving safety, accessibility, and connectivity for pedestrians and bicyclists. More than 20 comments referenced housing, including the need for more affordable housing and variety of housing types, housing for specific demographic groups, and zoning changes needed to allow more housing. Several comments related to social connectivity, including the need for more community gathering spaces, events, and opportunities to share information and meet other community members. Other commonly mentioned topics included more shops and cafés in Town, a dog park, waterfront access and amenities, sustainability initiatives, and preservation of the small-town character.



POP-UP EVENTS HOSTED BY TOWN STAFF

YARMOUTH FOOD PANTRY

MERRILL MEMORIAL LIBRARY

CLAYTON'S CAFE

BARTLETT WOODS AND BARTLETT CIRCLE

BRICKYARD HOLLOW

ESTABROOK'S

YARMOUTH FARMERS' MARKET

TOWN LANDING

PLEIN AIR ARTS FESTIVAL

CLAM FESTIVAL

CHEBEAGUE ISLAND FERRY

MADELEINE POINT

ROWE ELEMENTARY SCHOOL

YARMOUTH HIGH SCHOOL

NORTH YARMOUTH ACADEMY

STATIC POP-UP INFORMATIONAL TABLES

**YARMOUTH ELEMENTARY
SCHOOL OPEN HOUSE**

**ROWE ELEMENTARY SCHOOL
OPEN HOUSE**

**HARRISON MIDDLE SCHOOL
OPEN HOUSE**

**YARMOUTH HIGH SCHOOL
OPEN HOUSE**

17 events

300+ people engaged

732 votes



3 Pop-Up Events Continued...

As part of the pop-up event engagement activities, a vision board with photos of various community features was presented for participants to vote on using dot stickers to indicate what they would like to see (or see more of) in Yarmouth. Over the course of the engagement process, 732 votes were collected. The following list indicates the number of votes received by participants for each image, in order of most votes:

It is acknowledged that the materials prepared and presented for the pop-up events were framed positively; specifically, “what would you like to see (or see more of) in Yarmouth.”

Overwhelmingly, individuals added dots to photos that were important to them, and perhaps did not add dots to photos that they did not want to see or see more of in Yarmouth. Still, there were individuals that we engaged with who noted this nuance and asked how to specify what they do not want to see. In those cases, photos that received “no” votes included the detached single-family subdivision, office building/office park, temporary traffic calming, and attached townhouse development. In consideration of the other feedback received as part of this initiative, it is not surprising that denser housing development as depicted in these photos were ones that individuals identified as not desirable.



- Sidewalk café (photo 1) – 95
- Shared-use path (photo 5) – 76
- Hiking trail (photo 12) – 70
- Bicycle lane (photo 17) – 60
- Downtown pedestrian plaza (photo 9) – 58
- Solar panels (photo 6) – 57
- Community garden (photo 16) – 57
- Outdoor community event (photo 18) – 45
- Playground (photo 7) – 44
- Tiny home/accessory dwelling (photo 13) – 33
- Electric vehicle charging (photo 11) – 29
- Tennis/pickleball courts (photo 8) – 23
- Signalized crosswalk (photo 4) – 21
- Traffic calming/speed bump (photo 14) – 15
- Curb bump-outs (photo 19) – 14
- Attached townhouse development (photo 15) – 13
- Detached single-family subdivision (photo 3) – 10
- Mixed-use/residential development (photo 2) – 8
- Office building/office park (photo 10) – 4



4 Meetings-in-a-Box and...

Meeting-in-a-Box is a community engagement tool designed for community groups or friends to gather and share their ideas for the future of the Town.

Participants were able to have discussions at a time and place convenient for them and where they felt comfortable sharing thoughts on the future of Yarmouth. Using the Meeting-in-a-Box materials, meeting hosts facilitated a group discussion with participants to discuss and respond to four questions about Yarmouth's future.

While three groups, including the Yarmouth Community Alliance for Racial Equity, chose to complete the Meeting-in-a-Box unfacilitated, five groups preferred to have a Town staff member facilitate the discussion. The five groups that hosted facilitated discussions include Yarmouth Bicycle and Pedestrian Committee, Economic Development Advisory Board, Royal River Alliance, Cousins and Littlejohn Islands Improvement Association, and the Yarmouth High School Student Senate.

Responses to the four questions received from all submissions are summarized in following pages.



Question 1: How should Yarmouth balance the need for housing with preserving the community's history, character, and sense of place?

Most groups agreed that there is a need for more housing, especially affordable workforce housing; however, some groups noted that growth should be limited. Several responses noted the need for balance, including balancing housing development and preservation of open space, maintaining the historic integrity of the Town, and preserving the sense of place. Respondents also expressed concern about the Town becoming too exclusive and expensive as well as the need for new development to be built in an environmentally sustainable way, which was expressed most notably by the Yarmouth High School Student Senate participants. Suggestions for how to grow in a thoughtful way varied, including:

- Provide incentives for affordable housing outside the Town center
- Encourage adaptive reuse of existing buildings
- Identify areas to target for growth
- Incentivize denser development to reduce sprawl
- Prioritize building new residential buildings near public transportation and existing services
- Focus on workforce housing
- Consider locations for mixed-use development
- Consider allowing multiple types of housing (i.e., apartments, single family, multifamily)
- Promote a diverse and inclusive Town by encouraging more diversity in Town government

Community Group Meetings

2

Question 2: What types of economic growth and development initiatives could be implemented to meet your vision of Yarmouth's future?

Groups were in consensus on the desire to prioritize supporting local small businesses over attracting big box stores to the area. Respondents suggested supporting businesses in the Town center; the development of eco-tourism, recreation, green energy, and aquaculture industries; and expanding professional services uses. To support economic growth, respondents also noted that the Town should support initiatives that enhance the quality of life for residents, including developing a community center or other community gathering spaces, developing the arts community, improving transit and connectivity, enhancing parks and recreation facilities and public access to the waterfront, expanding services to meet community needs, and supporting the growth of walkable local businesses that meet the needs of residents. Respondents also noted the need to address the future of Wyman Station and development of Route 1.



Photo credit: Rosyln Rosalia

4 Meetings-in-a-Box and...

3

**Question 3: What can Yarmouth do to support a sustainable future?
What does a sustainable future mean to you?**

Respondents had the following suggestions related to supporting a sustainable future:

- Maintain and support the local community by supporting Town businesses, taking care of open spaces, and supporting the Town's current community members
- Encourage infill development and encourage new development to follow the U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) certification standards
- Encourage investment in renewable energy, recycling, planting trees, and other Town and individual efforts to promote sustainability
- Enact and enforce local ordinances to support the Town's sustainability goals
- Implement the 2019 Open Space Plan
- Prioritize the health of trees and forest cover across the Town
- Maintain and grow open spaces and protect and restore ecosystems
- Encourage community members to drive less, by improving pedestrian and bicycle infrastructure, increasing public transportation access, implementing bike shares, and installing electric vehicle charging stations
- Support the work of the Committee for Energy Efficiency and Sustainability and the Town's climate planning initiative
- Address policy issues through a climate change lens to help prevent harm to people and the environment
- Increase community outreach and education on environmental issues



Community Group Meetings

4

Question 4: The greater Portland region is represented by communities that have unique characteristics which contribute to making the region a desirable place to live, work, and play. How do you see Yarmouth fitting into the region in the future?

Respondents noted that the Town is unique in the greater Portland area because of its small size, historic integrity, and location on Route 1, I-295, Casco Bay, and two rivers, among other desirable contributions. Stakeholders would like to see improvements in regional connectivity, including bike trails, bus lanes, and more public transportation options. The Town should improve regional access while preserving its historic Main Street, sense of community, civic engagement, and other features that make it unique in the region. Respondents also noted that the Town should move forward on issues of inclusivity and sustainability. The Town could be more inclusive and foster community by creating places for gathering. Yarmouth can also lead the region by modeling sustainability practices and environmental stewardship.



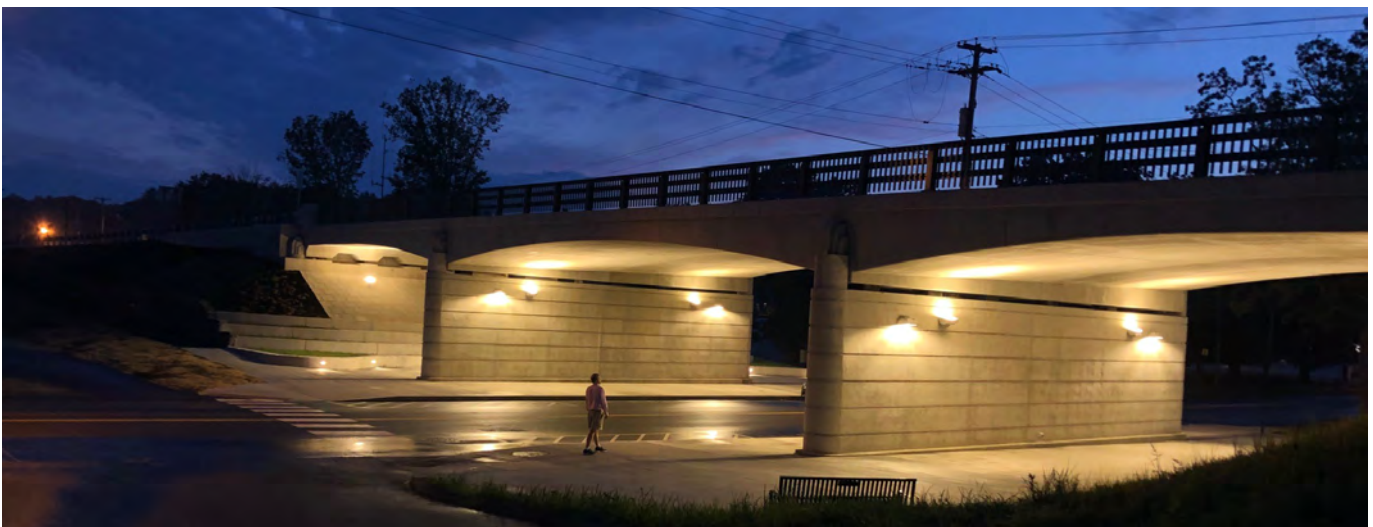
Photo credit: Charlene Ferguson

5 Visioning Survey

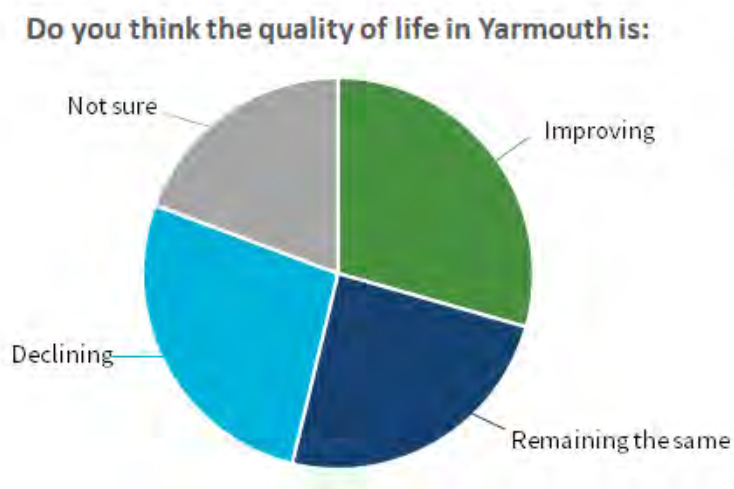
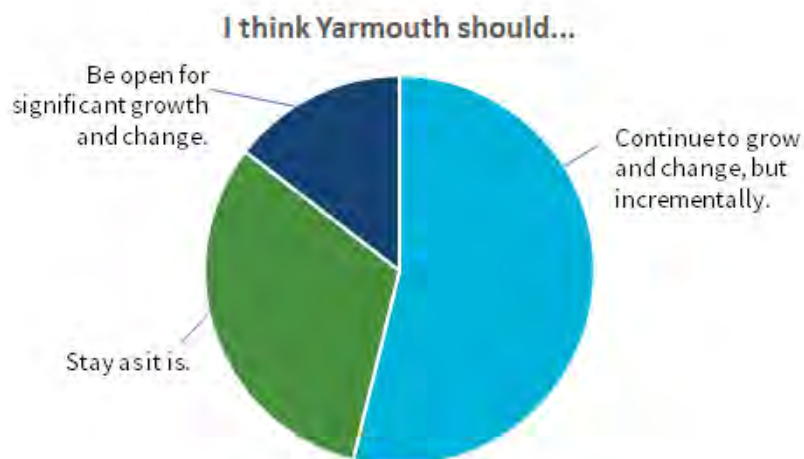
The survey was designed to help the Town identify stakeholder priorities for the future. Community members were able to complete the survey through the Social Pinpoint site or fill out paper at Town Hall and at in-person events.

A total of 123 survey responses were received. A detailed summary of survey results is included in Appendix A. Some key statistics from the survey include:

- 85% of respondents (105) live in Yarmouth full time and 76% (93) own a home in the Town.
- 63% of respondents (78) have lived, worked, or gone to school in Yarmouth for more than 10 years.
- Royal River Park, Main Street, and Merrill Memorial Library are respondents' favorite places.
- Of the options provided, preserving natural areas and open space, housing affordability, cost of living, and preserving the historic character of the community were stakeholders' biggest concerns for the future.
- On average, respondents gave Yarmouth a 7.5 on a scale of 1 (poor) to 10 (excellent) regarding how well the Town meets expectations of a great community or place to live.
- 51% of respondents (63) think Yarmouth should grow and change incrementally; 30% (37) would like Yarmouth to stay as it is; and 14% (17) think Yarmouth should be open for significant growth and change.
- Respondents were about evenly split as to whether the Town's quality of life is improving (28%), declining (26%), or remaining the same (24%). About 19% of respondents indicated they were "not sure."



SELECTED SURVEY RESULTS



What are your biggest concerns?

1
Preserving
natural areas
and open
space

2 Housing affordability

3
Cost of living

What are your favorite places in Yarmouth?



6 Social Pinpoint Summary

Social Pinpoint is an online engagement tool used to gather community feedback.

The Imagine Yarmouth Social Pinpoint project website included three opportunities for community members to provide input on the Town vision statement including:

- **Survey** (See Section 5.0)
- **Interactive Town Map** with options to post comments regarding strengths, challenges, and general suggestions for the Town
- **Vision Board** with options to post comments discussing what community members like about the Town, what they want to change, and general suggestions

The site also included access to previous event information, other ways to participate in the project, and future event information.

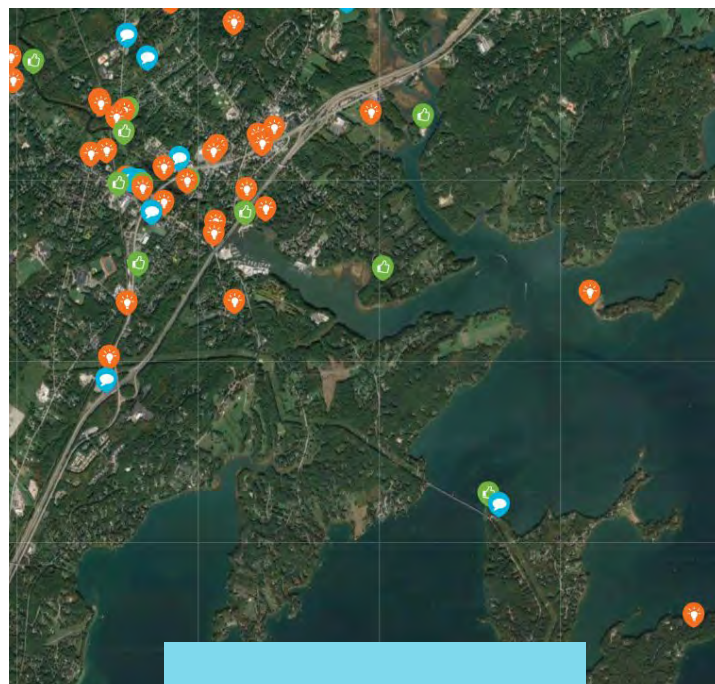
In total, the site attracted 1,085 unique users who provided 61 comments and submitted 123 survey responses.

INTERACTIVE MAP

The interactive map allowed users to post a comment connected to a pin on the map. Below is a summary of comments received through the interactive map.

For strengths, comments referenced the Town's many parks and preserves and noted the Town's efforts to preserve critical open spaces and environmentally sensitive areas.

Challenges and general suggestions stakeholders noted were largely focused on connectivity, including street connectivity and traffic circulation as well as pedestrian and bicycle infrastructure to improve connectivity and safety. Other comments included improving access to parks, open spaces, and trails; consideration for alternative uses for Wyman Station; the need for bus shelters and bike racks for the BREEZ bus system; increasing recreational amenities (including a public pool); implementing sustainability initiatives; addressing impacts to the Royal River; consideration of the Town's indigenous peoples' history; and consideration of potential development of open spaces and the cost of development to the Town.



1,085 unique users

143 comments

123 survey responses

VISION BOARD

The Vision Board allowed community members to share their thoughts on the Town and engage with others about their vision for the future.

Something I like...

Commenters enjoy the walkability of the Town Center and access to public transportation, like the BREEZ bus service. Commenters considered the Royal River Park, Spear Farm Estuary Preserve, and other open spaces as strengths.

Something I would like to change...

Changes respondents noted included the need for more affordable housing and zoning changes, consideration of balancing development in the Town Center and preserving the historic character, and bicycle and pedestrian infrastructure. Comments noted that increased traffic and speeds on major Town roads are a concern. Respondents were also concerned about the impacts of climate change, the use of Wyman Station, broadband internet access, and loss of open spaces.

General Suggestions

Commentors provided suggestions related to the environment, including impacts of rising sea levels, tree canopy cover, and invasive plants in Town. Suggestions also noted the importance of preserving the Town's village, library, skating pond, and overall character and walkability. Respondents also suggested beautification efforts, like flower boxes in store windows and holiday decorations. Related to public engagement, respondents stated that the COVID-19 taskforce/neighborhood communicator outreach was helpful in staying up to date on Town events and important information.

The screenshot displays a digital 'Vision Board' interface with a header 'Share with us about...' and three icons: 'Something I Would Like to Change', 'Something I Like', and 'General Suggestions'. The board is organized into a grid of discussion cards. Each card features a title, a user's comment, and interactive elements like 'Join the discussion', 'Like', and 'Dislike' buttons. The cards cover a wide range of topics including school budgeting, town staff, bicycle infrastructure, town walkability, river restoration, electric vehicle charging, and local infrastructure. The interface is designed to facilitate community engagement and idea sharing.

7 Visioning Sessions

In September, the Town hosted one in-person open house visioning sessions and three virtual visioning sessions.

On September 20, 2022, the Town hosted an in-person open house visioning session at Yarmouth High School. The session included the opportunity to provide feedback and suggestions on the topics of housing, transportation and connectivity, economic development, resiliency and climate planning, and open space and community facilities. The open house event also included a presentation and group discussion in which seven people participated.

The Town also hosted three virtual visioning sessions via Zoom on September 21, September 22, and September 29, 2022. The sessions were held at different times during the day to accommodate a variety of schedules. The sessions included a presentation and group discussion about the sense of community in, and the future of, the Town.

Following is a summary of written comments and discussion from the visioning sessions.

HOUSING

- Address housing affordability
- Promote adaptive re-use of existing structures and preserving existing architecture
- Preserve the Town character

TRANSPORTATION AND CONNECTIVITY

- Increase the availability of public transportation, including the BREEZ
- Maintain the walkability of the Town
- Increase access to bike paths

OPEN SPACE AND COMMUNITY FACILITIES

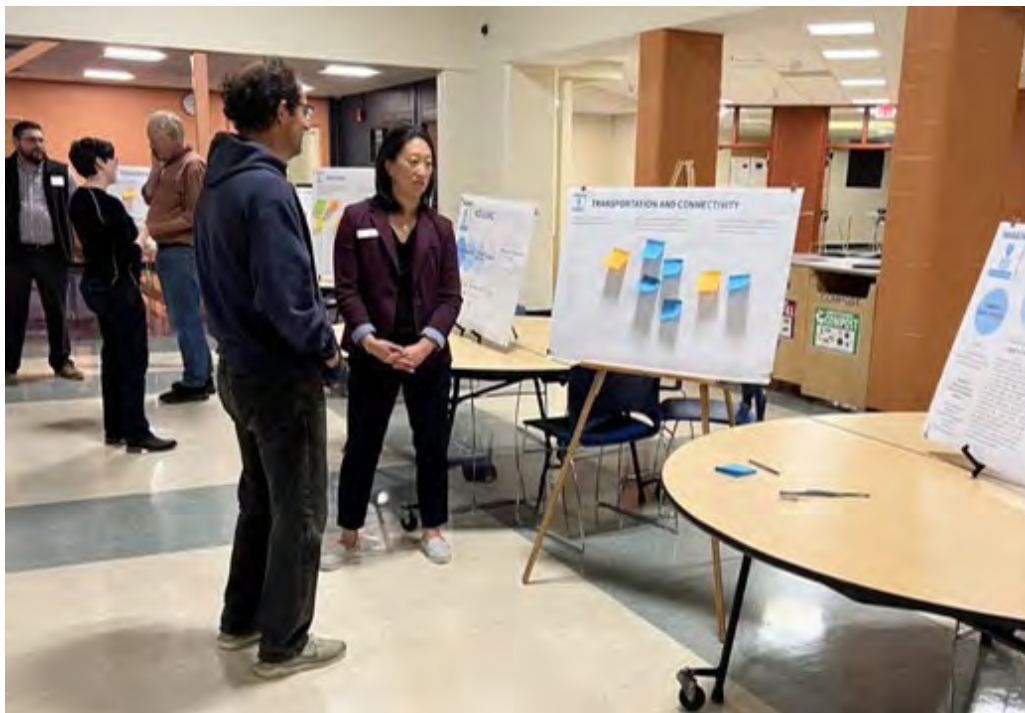
- Preserve undeveloped acreage in the village and do not develop
- Prioritize the preservation of historic places and open space, while allowing for development along Route 1
- Allow for smaller housing units and smaller lot sizes to address housing affordability concerns

ECONOMIC DEVELOPMENT

- Allow more development along Route 1 instead of the Village Center
- Maintain the walkability of the Town

CLIMATE AND RESILIENCY

- Address concern about the impact of droughts on farms
- Provide financial assistance to convert homes to more environmentally friendly heating sources



GROUP DISCUSSION

- **The sense of community in Yarmouth is based on three themes: the physical geography and architecture of the Town, the people who live and work there, and the history of the community that ties the people and place together.**
- **Historically, Yarmouth has been economically diverse, and there is fear that this diversity will be lost.**
- **It is important to develop affordable housing and create housing options that match the historic character of the Town.**
- **New community members should feel welcome.**
- **There is a strong sense of volunteerism in the community, but since some health concerns related to the COVID-19 pandemic have eased, concern was expressed that volunteerism and engagement has waned.**

8

High-Level Themes

BerryDunn collected, reviewed, and summarized feedback from stakeholders from all engagement activities.

Several common themes were heard throughout the process. There were also some larger concerns about growth and development for which consensus was not evident. Based on the information gathered during the public engagement process, the following key themes have been identified:



The draft vision statement addresses these themes and the values that they represent and establishes clear priorities for the future based on the community input received through this visioning process.



Photo credit: Carrie Martin



Photo credit: Charlene Ferguson

9

Draft Vision Statement

The purpose of conducting an engagement and visioning effort prior to initiating the comprehensive planning process was to involve the community and focus attention on the big picture vision for the Town's future.

A plan should be rooted in the Town's values and guided by a vision that is truly the community's vision.

The following values were expressed by residents and stakeholders throughout the visioning process. While not all participants agreed on how the Town should move forward, there was consensus on the community values that are fundamental to the Town's identity. The subsequent draft vision statement attempts to unite these values into a clear vision for supporting and enhancing these values in the future.

COMMUNITY VALUES

We value the **natural environment**, including the numerous parks, open space preserves, rivers, and Casco Bay, and prioritize preserving and protecting these areas for enjoyment by all and as critical ecosystems.

We value a **connected community** where residents have strong social bonds through a shared commitment to civic engagement, and where community members can safely and easily access services, amenities, recreation, jobs, and social opportunities within the Town.

We value the **history and culture** of the people and land that is now the Town of Yarmouth and the physical environment that embodies that history, from the natural land and water features to the built environment.

We value a **welcoming and inclusive environment** where neighbors help one another and a strong sense of community brings all people together, regardless of background.

DRAFT VISION STATEMENT

The following draft vision statement was developed based upon the themes and values that were expressed by community members throughout the visioning process. This statement is intended to be a clear but broad aspiration for the future of Yarmouth and is meant to guide the development of the Town's next Comprehensive Plan, but to also be adaptable as the planning process moves forward and additional research, discussions, and engagement exposes new aspects and nuances of the Town's future goals.

The Town of Yarmouth is a small coastal community with a vibrant and picturesque village center. Yarmouth's identity is deeply rooted in the Town's history, beauty, and commitment to community. The walkability of the Town's historic Main Street, abundant open space areas, and active community groups all contribute to community members' sense of connectedness to the Town.

The Town is dedicated to protecting and preserving what makes Yarmouth a great place to live. At the same time, residents recognize the significant local, regional, and global challenges that the Town faces, and are committed to addressing these issues with careful consideration for the Town's history and culture and with creativity to leverage opportunities to enhance the Town's defining characteristics—beauty, history, inclusivity, abundant open spaces and recreation opportunities, and commitment to volunteerism – to build an even stronger community.

To meet the needs of residents and community members, the Town will plan and make decisions through a lens of equity, sustainability, and fiscal responsibility to ensure that the community's values and critical assets are sustained for future generations.

10

Next Steps

The draft vision statement will serve as the foundation for the development of the Town's next Comprehensive Plan.

The planning process is expected to begin in late 2022 and be completed in the spring of 2024. While the draft vision statement will guide the planning process, it may continue to be modified and adapted in accordance with new information and feedback received during the planning process. The final vision statement will be incorporated in the final Comprehensive Plan.

Additional outreach and engagement will continue through the Comprehensive Plan development and will build upon the work done through this initiative. Town staff will look to the community for continued input on goals, policies, and strategies that are aligned with community values and will support the Town in achieving its vision for the future.



Photo credit: Grace Goodall

A

Appendix A: Visioning Survey Summary

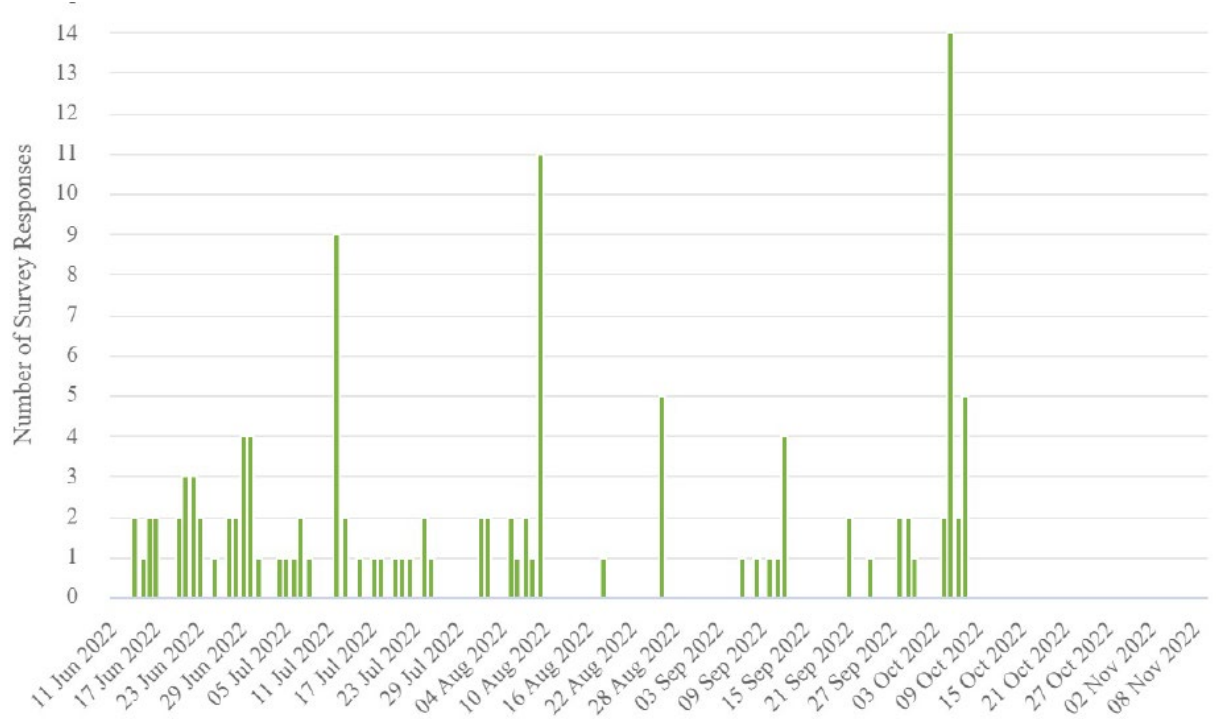
Please refer to the PDF document entitled “Yarmouth Visioning Survey Summary”.



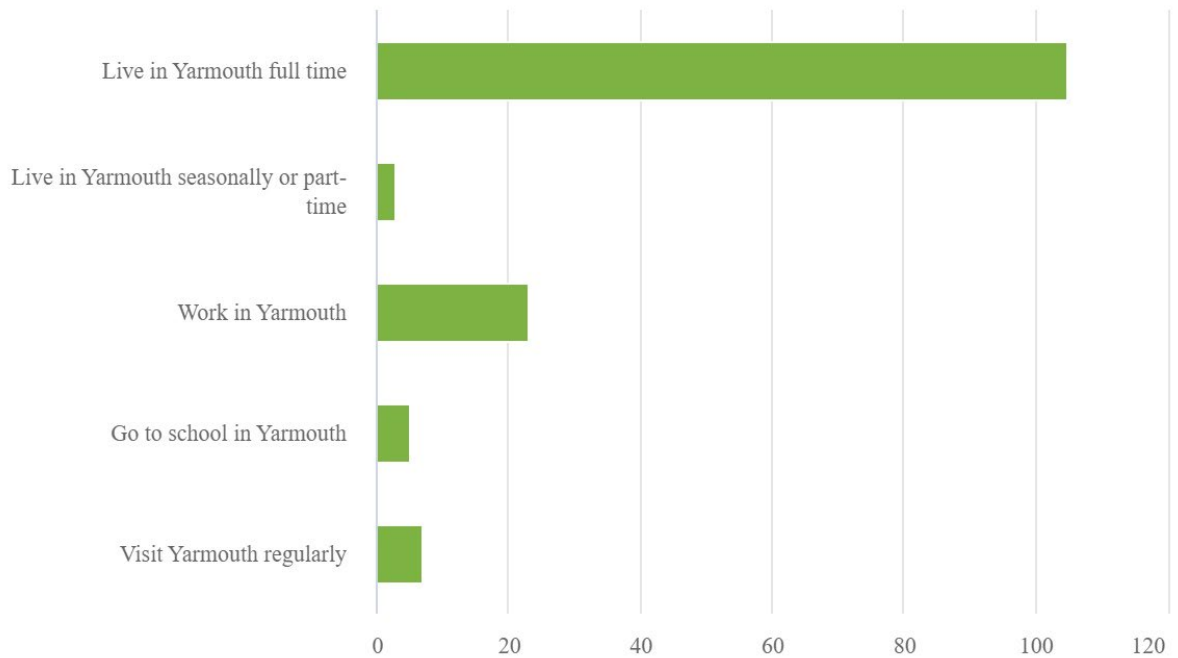
Photo credit: Kristen Bouse

Imagine Yarmouth Visioning Survey Summary

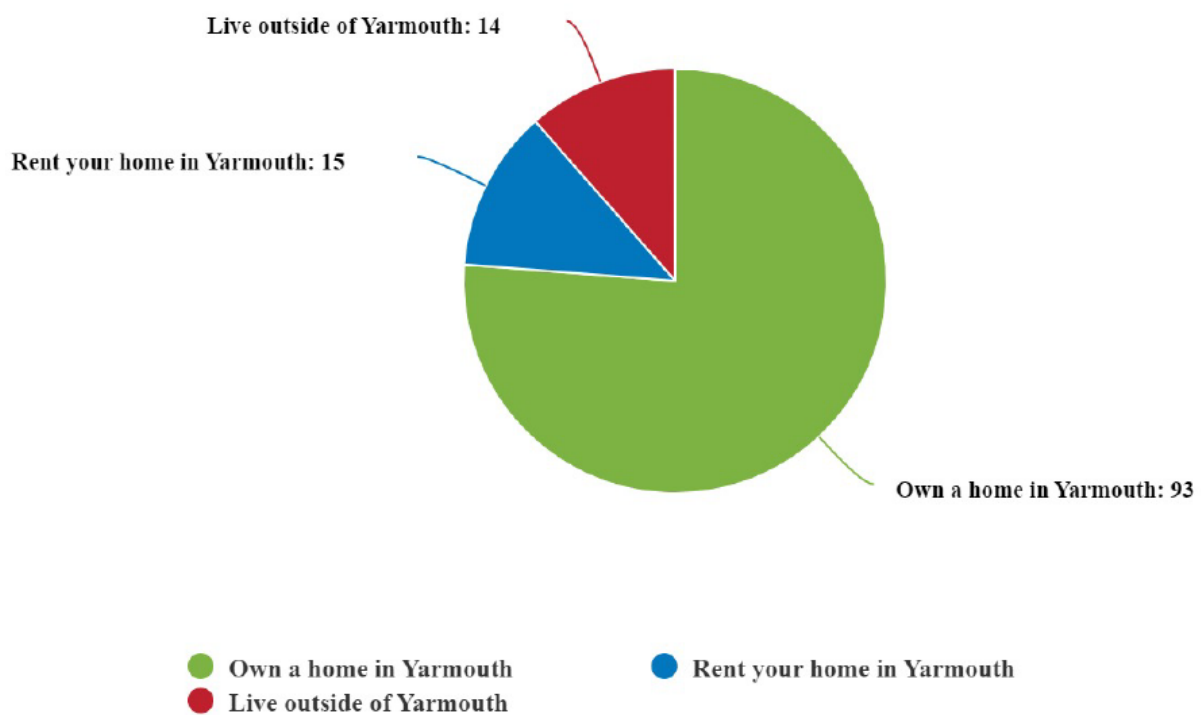
Number of Survey Responses by Day



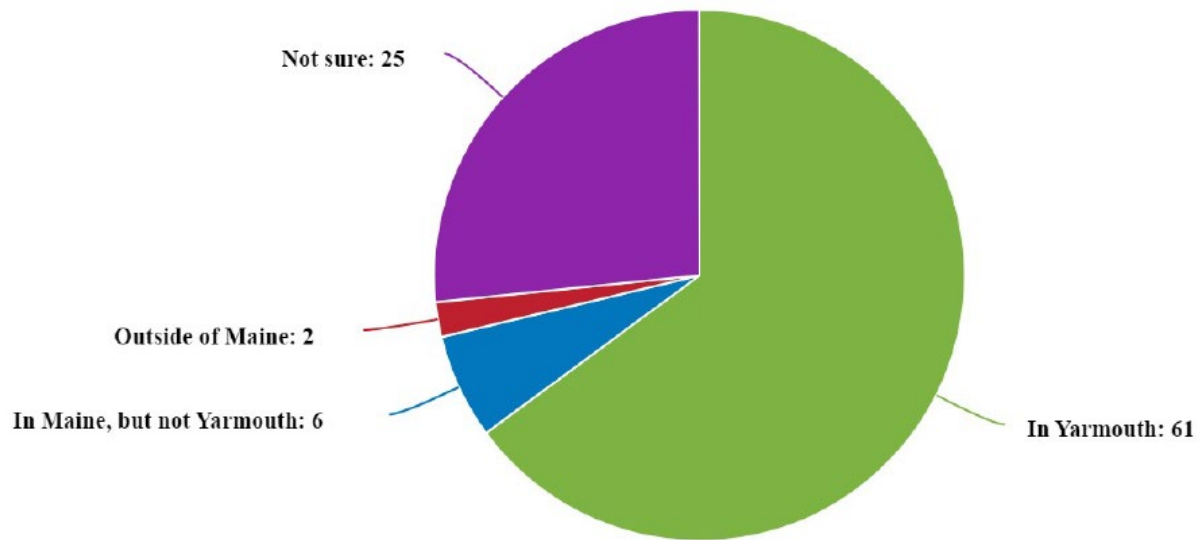
1. Please tell us about yourself. Do you...



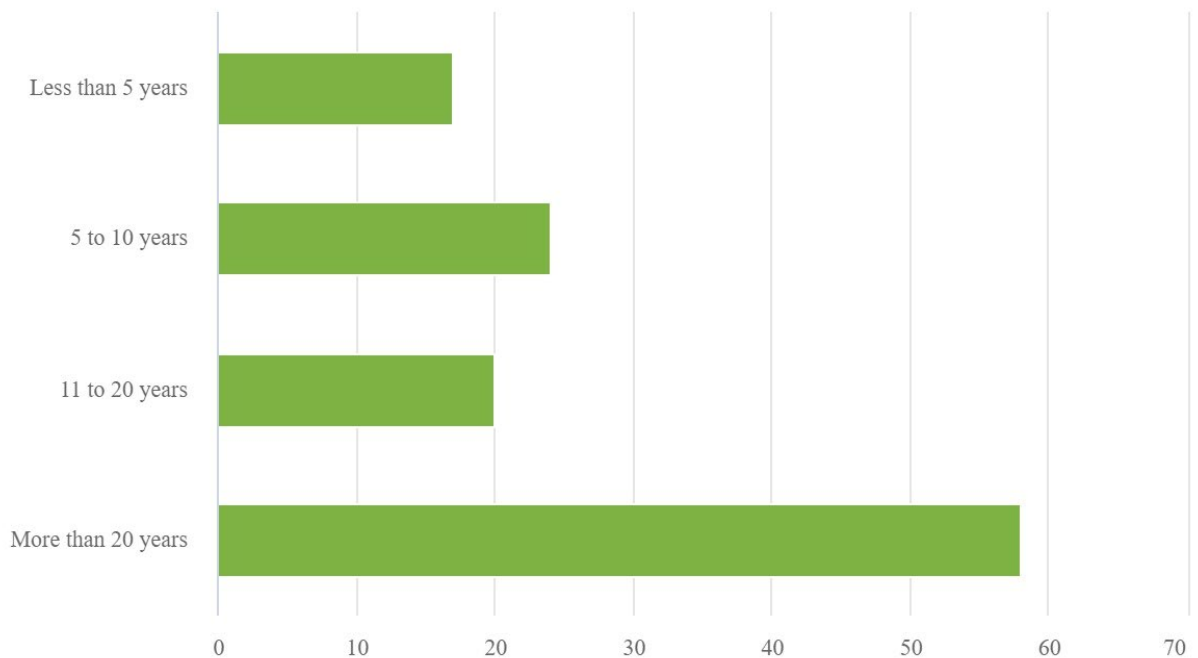
2. Do you...



3. Where do you see yourself living 10 years from now?



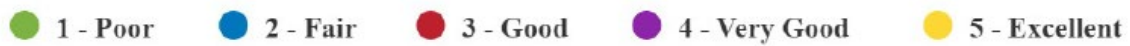
4. How long have you lived, worked, or attended school in Yarmouth?



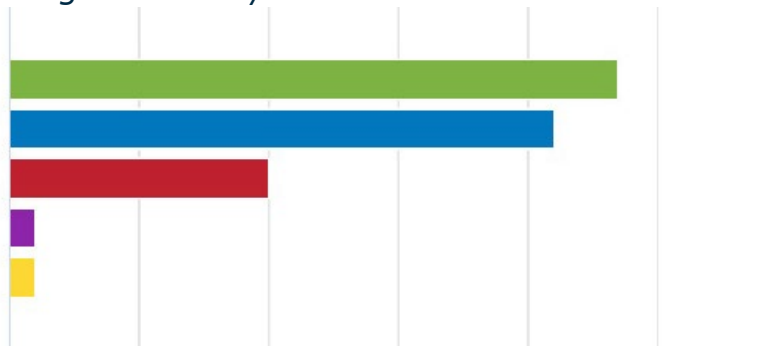
5. What are your favorite places in Yarmouth?



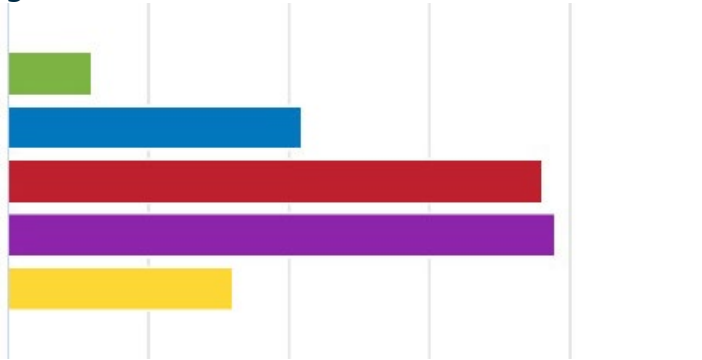
6. Please rate how well the Town is doing in addressing each of these concerns.



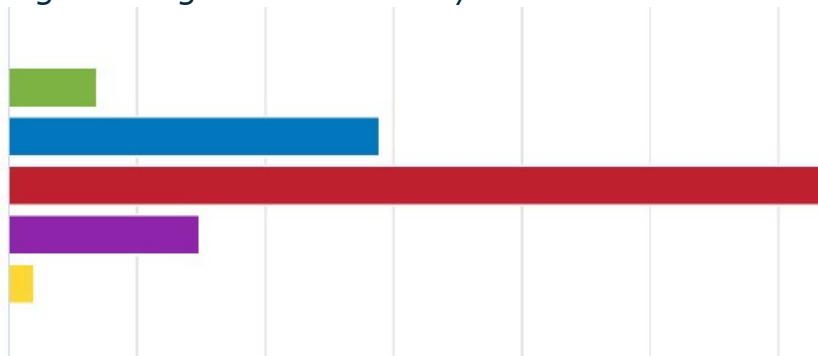
Addressing housing affordability:



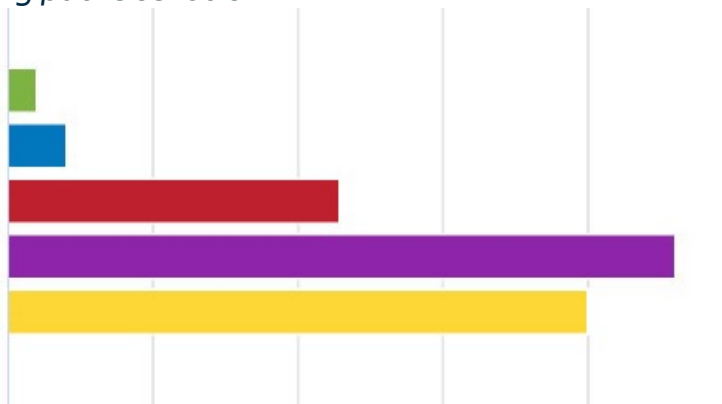
a. Preserving natural areas:



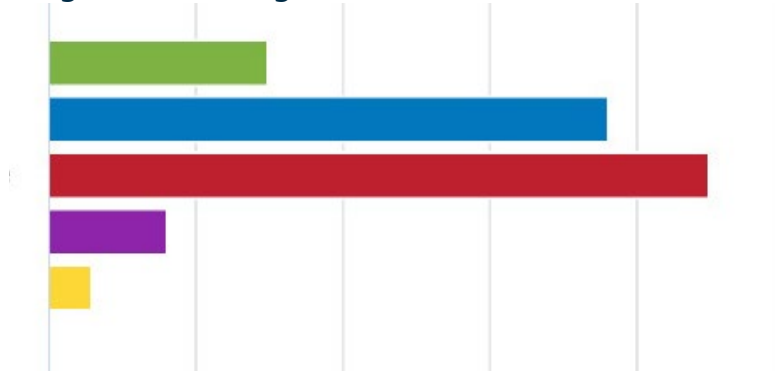
b. Developing a thriving business economy:



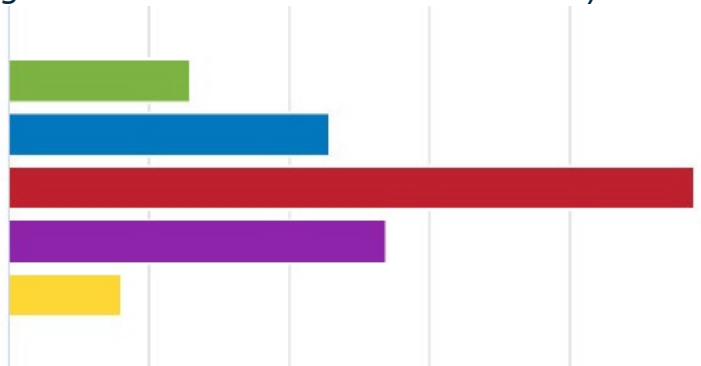
c. Supporting public schools:



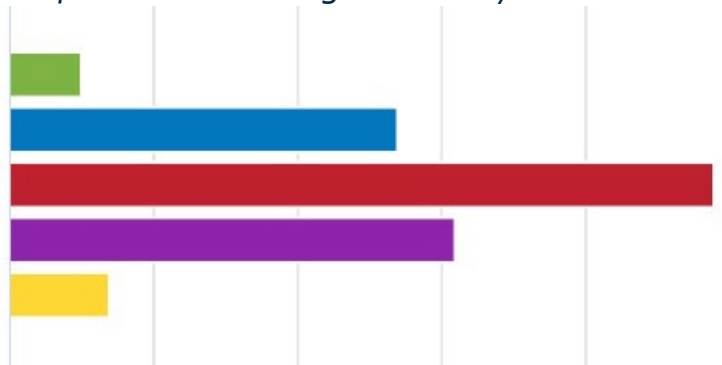
d. *Addressing climate change:*



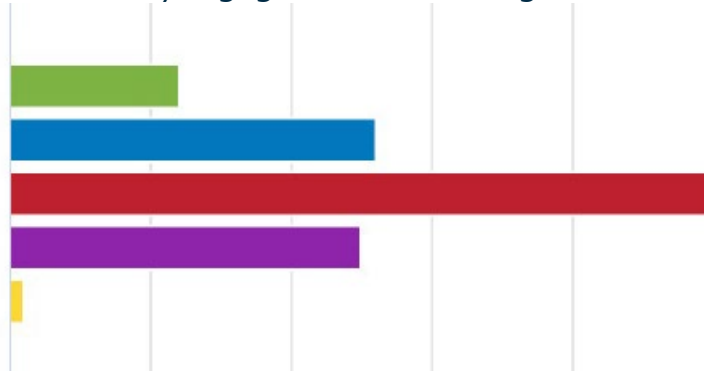
e. *Preserving the historic character of the community:*



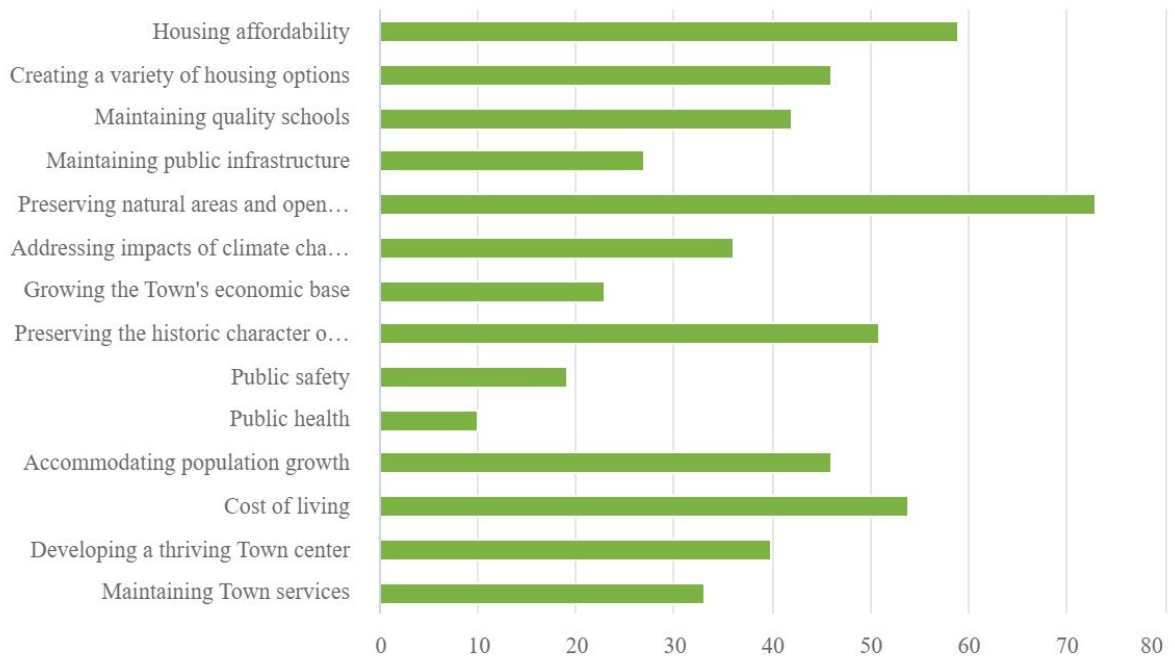
f. *Creating an open and welcoming community:*



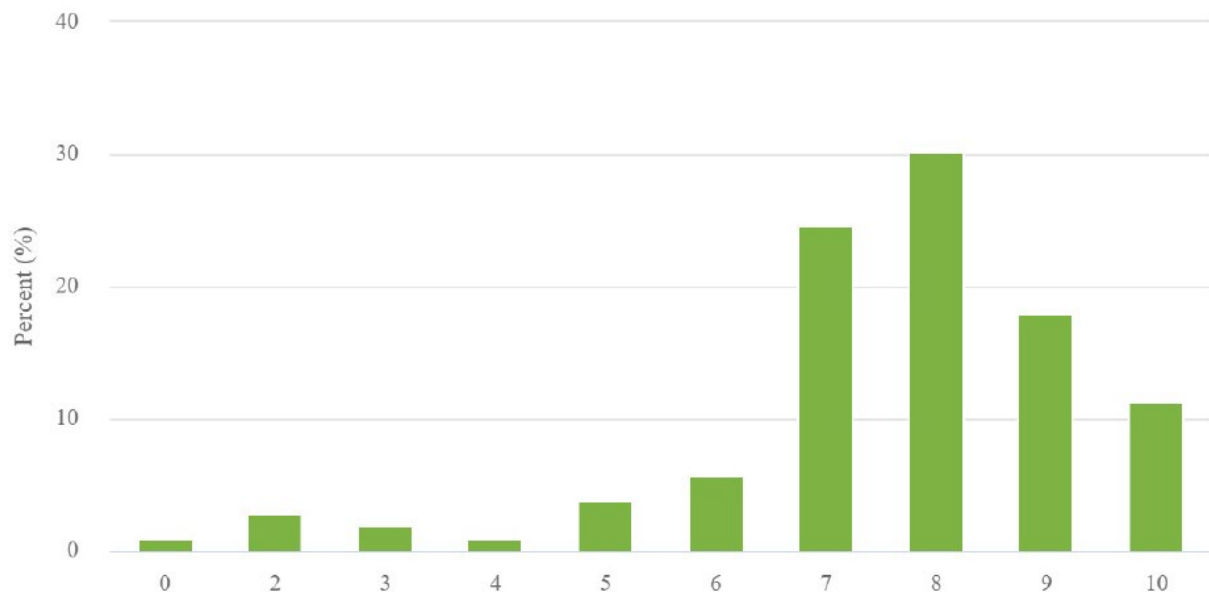
g. Fostering community engagement with local government:



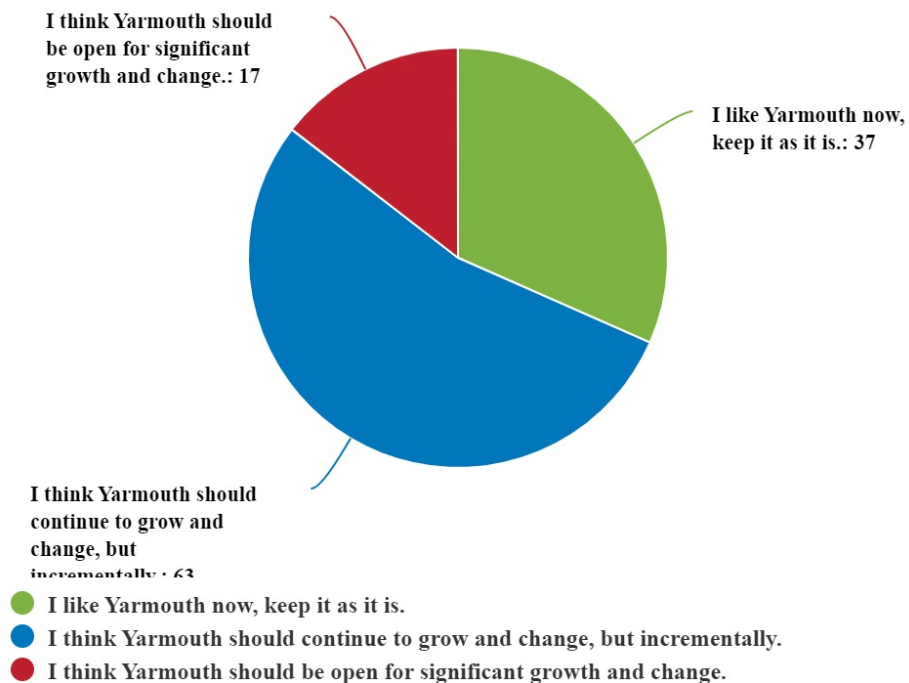
7. What are your biggest concerns as Yarmouth continues to grow and change? (Select up to 5 responses)



8. How well does Yarmouth meet your expectations of a great community or great place to live? (Sliding scale from 0 – poor to 10 – excellent)



9. Select the statement that best represents your thoughts about Yarmouth.



12. Which of the following statements best represent your vision for Yarmouth?

A town with a walkable, vibrant center that is a place for the community to gather.	58	49%
A town that is committed to preserving the environment and natural systems for the protection of wildlife, enjoyment by the community, and wellbeing for all.	47	40%
A town with a unique historic identity and small town character.	40	34%
A town where a strong quality of life is available to all, including access to safe and affordable housing, jobs, transportation, recreation, and education.	33	28%
A welcoming community with a strong social structure that supports diversity and inclusivity.	29	24%
A town where people feel safe and comfortable where they live, work, learn and play.	27	23%
A town that balances growth that supports quality housing and economic opportunity and protection of natural areas and open space.	25	21%
A town with a thriving and diverse local economy that supports new and existing businesses.	23	19%
A town that is innovative and forward-thinking while also respectful of the community's history and traditions.	22	19%
A town with abundant open space and recreational opportunities.	17	14%
A vibrant coastal community with vital commercial and recreational waterfront activities.	14	12%
A town where community members are actively engaged and empowered to participate in decision making that impacts the community.	14	12%



Photo credit: Jill Sady



May 15, 2024

Erin Zwirko, Director of Planning & Development
200 Main Street
Yarmouth, Maine 04096

Dear Erin,

The Department of Agriculture, Conservation & Forestry thanks the Town of Yarmouth for submitting its Comprehensive Plan for review for consistency with the Growth Management Act in accordance with our Comprehensive Plan Review Criteria Rule (the Rule).

As soon as the plan was accepted for review, we invited other state agencies, neighboring municipalities, and your regional planning organization to review it and submit written comments. By the end of the comment period, we received written comments from the Maine Department of Marine Resources, Maine Drinking Water Program, Maine Department of Transportation, Maine Department of Environmental Protection, and the Maine Beginning with Habitat Program. Those written comments are attached to this letter. The comments contain suggestions for improving and strengthening the plan. We urge the Comprehensive Planning Committee to consider how the plan might be revised to incorporate suggestions found in the comments.

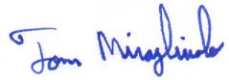
We are now happy to report that we find the ***Yarmouth 2024 Comprehensive Plan*** to be **complete and consistent**. This means that we have found all sections of the plan, including the future land use section, to be consistent with the Growth Management Act.

Our finding of consistency is not conditional; however, we urge the Committee to consider amending the plan to incorporate the attached agency comments. Per Chapter 208 the town may incorporate the agency comments without resubmitting the Plan to the state.

We appreciate the efforts of community members and municipal staff who contributed to this plan. All involved clearly dedicated a lot of time and discussion to draft this very complete plan. Thanks to the skill and hard work of all involved, this plan will provide important guidance to the community's decision-makers for years to come. Please don't hesitate to contact me at 441-1288 or tom.miragliuolo@maine.gov

if you have any questions.

Sincere Best Wishes,



Tom Miragliuolo, Senior Planner
Municipal Planning Assistance Program

Attachments:

- Public comments (5)

cc: Kate Burch, North Star Planning
Ben Smith, North Star Planning
Julie Dubovsky, Yarmouth Assistant Planner
Matt Panfil, GPCOG



JANET T. MILLS
GOVERNOR

STATE OF MAINE
DEPARTMENT OF MARINE RESOURCES
21 STATE HOUSE STATION
AUGUSTA, MAINE
04333-0021

PATRICK C. KELIHER
COMMISSIONER

To: Tom Miragliuolo, Senior Planner, Municipal Planning Assistance
Program, Department of Agriculture, Conservation and Forestry

From: Melissa Britsch, Maine Coastal Program, Maine Department of Marine Resources

Re: Town of Yarmouth Comprehensive Plan Review

Date: May 2, 2024

Thank you for the opportunity to review the marine resources section of Yarmouth's Comprehensive Plan. I have provided the following comments and suggestions for your consideration.

Appropriate use of data provided by Maine Department of Marine Resources

Yarmouth's Comprehensive Plan is thorough and the provided data were used correctly, although we were unsure if all licenses were reported in the plan. We would like the town to ensure that information about all marine licenses is reported; possibly by including a table. If this is included elsewhere in the plan, please add a reference to the marine resources section.

How the plan's policies and implementation strategies promote State goals relating to DMR's principal objectives and directives

The proposed policies and implementation strategies will do much to promote State and DMR goals. We would like to encourage the town to address whether current water access is adequate for both recreational and commercial use, and what access needs could look like in the future. We would also like the town to address whether there are opportunities to improve or expand water access, and if so, what will be done to act on them. We would like the town to consider adding a strategy for local and regional harbor management plans, which was missing from the list of objectives and action items. We appreciate that the plan includes several additional goals and action items, and the plan is very thorough. The importance of marine resources and water access is clear, and the plan will do much to help the town improve access and ensure it remains resilient.

Consistency of the plan with DMR's programs and policies

Overall, the plan is consistent with DMR's programs and policies. The plan is very detailed and will be a strong guide for future planning efforts. We are encouraged to see that the town is dedicated to maintaining water access facilities and is planning for continued access and working waterfront viability in a variety of ways. The comprehensive plan is detailed and it is clear that marine resources, coastal access, water quality, and the waterfront are valuable to the town.

Measures DMR recommends the town take to ensure its plan addresses and identifies deficiencies and inconsistencies

Refer to my comments below.

Marine Resources	✓	Page	Comment #
Analyses			
Is coastal water quality being monitored on a regular basis?	x	125	
Is there a local or regional plan in place to identify and eliminate pollution sources?	x	131	
Has closing of clam or worm flats threatened the shellfishing industry, and are sources of contamination known? If so, are sources point (direct discharge) or nonpoint sources?	x	129	
Are traditional water-dependent uses thriving or in decline? What are the factors affecting these uses? If current trends continue, what will the waterfront look like in 10 years?	x	128	
Is there reasonable balance between water-dependent and other uses, and between commercial and recreational uses? If there have been recent conversions of uses, have they improved or worsened the balance?	x	128	1
How does local zoning treat land around working harbors?	x	130	2
Is there a local or regional harbor or bay management plan? If not, is one needed?	x	131	
Are there local dredging needs? If so, how will they be addressed?	x	130	
Is there adequate access, including parking, for commercial fishermen and members of the public? Are there opportunities for improved access?	x	121	3
Are important points of visual access identified and protected?	x	123	4
Comments: 1) With respect to the balance among uses, does the town anticipate further changes in the future? Is there currently conflict among users or could there be conflict in the future? 2) Will there be any changes in local zoning? 3) Is access adequate for current demand? Is there enough access for both recreational and commercial users? Does the town see any opportunities to improve access and/or reduce crowding, or have plans to upgrade existing facilities? 4) We appreciate seeing the information about which sites are or are not protected. Does the town have plans to protect the sites that are currently unprotected?			
Condition and Trends			
The community's Comprehensive Planning Marine Resources Data Set prepared and provided to the community by the Department of Marine Resources, and the Office, or their designees.	x	128, 129	5
A map and / or description of water-dependent uses.	x	122	6
A brief summary of current regulations influencing land use patterns on or near the shoreline.	x	130	
A description of any local or regional harbor or bay management plans or planning efforts.	x	131	7
The location of facilities (wharves, boat ramps, pump-out stations, etc.), with a brief description of any regional or local plans to improve facilities.	x	121	3
A description or map showing public access points to the shore. Include a brief description of their use, capacity, physical condition, and plans to improve, expand, or acquire facilities such as parking or toilets.	x	122	3
A list of scenic resources along the shoreline, including current ownership	x	123	4

(public or private) and any protections.			
Comments:			
5) Please add a table with a summary of all licenses. We want to be sure the information is accessible for future planning efforts. If this information is elsewhere in the plan, please include a reference to the location.			
6) We appreciate the detail in this section!			
7) Does the town need to create a harbor management plan or a mooring plan? We appreciate that the town has plans for the land side of the harbor and is working to implement them.			
Policies			
To protect, maintain and, where warranted, improve marine habitat and water quality.	x	69	
To foster water-dependent land uses and balance them with other complementary land uses.	x	69	
To maintain and, where warranted, improve harbor management and facilities.	x	69	
To protect, maintain and, where warranted, improve physical and visual public access to the community's marine resources for all appropriate uses including fishing, recreation, and tourism.	x	69	
Comments: NA			
Strategies			
Identify needs for additional recreational and commercial access (which includes parking, boat launches, docking space, fish piers, and swimming access).	x	69	
Encourage owners of marine businesses and industries to participate in clean marina/boatyard programs.	x	69	
Provide information about the Working Waterfront Access Pilot Program and current use taxation program to owners of waterfront land used to provide access to or support the conduct of commercial fishing activities.	x	70	
Support implement of local and regional harbor and bay management plans.	not discussed		8
If applicable, provide sufficient funding for and staffing of the harbormaster and/or harbor commission.	x	69	9, 10
Work with local property owners, land trusts, and others to protect major points of physical and visual access to coastal waters, especially along public ways and in public parks.	x	70	
Comments:			
8) We didn't see a strategy to support the implementation of local and regional harbor and bay management plans. Should this be included? We would encourage the town to add it as a strategy.			
9) We appreciate the extra goal to support Yarmouth's working waterfront and the action items supporting the goal. Enhancing access, considering zoning amendments, planning for where working waterfronts can move in the future, and connecting people to working waterfronts is critical for their long-term viability.			
10) We also appreciate the action item to assess public waterfront infrastructure for sea level rise vulnerability and to incorporate needed upgrades into the town's capital plan.			
The plan as a whole is very good.			

To: Tom Miragliuolo, Senior Planner, DACF
From: Ashley Hodge, Source Water Protection Coord., Maine CDC Drinking Water Program
Re: Review of 2024 Town of Yarmouth Comprehensive Plan
Date: May 2, 2024

On behalf of the Maine CDC, Drinking Water Program (MEDWP), I have reviewed the Town of Yarmouth's 2024 Comprehensive Plan and have provided the following comments.

As you are aware, The Drinking Water Program works to ensure safe drinking water in Maine, to protect public health, by administering and enforcing drinking water and subsurface wastewater regulations, providing education and technical and financial assistance. The comments submitted below are based on the Maine State Planning Office's (SPO) instructions for agency commentors.

I. General Comments:

- a. All of the Yarmouth Water District public drinking water sources are located within the town of North Yarmouth. The Town of Yarmouth may consider partnering with the Town of North Yarmouth to help protect these drinking water sources.
- b. The town should continue to maintain, enact, and/or amend protections for groundwater and aquifer recharge areas. Taking proactive measures to protect Yarmouth's aquifers will continue to support safe drinking water now and in the future, should the Town need to expand their public water supply.

Please feel free to contact me should you have any questions regarding this information.

April 12, 2022
Tom Miragliuolo
Senior Planner, Municipal Planning Assistance Program
Department of Agriculture, Conservation and Forestry
22 State House Station
Augusta, Me 04333-0022

Dear Tom,

MaineDOT finds the Town of Yarmouth 2024 Comprehensive Plan consistent with its mobility and transportation policies and goals. The Plan is a well-researched and smartly written document paired with useful chapter highlights. One can learn a great deal about Yarmouth and its planning activities over recent decades in reading this comprehensive plan. The “Climate Connections” featured in the Plan’s chapters are thoughtful and demonstrate how inextricably climate challenges/opportunities are connected to all planning activities.

In the Transportation chapter, the Plan deftly clarifies municipal vs. state responsibilities for maintenance of infrastructure and permitting on local and state roads. These distinctions aren’t always clear to citizens or volunteers on municipal boards, so the document performs a helpful role in this regard.

Under Implementation, Yarmouth aims to “continue to collaborate with MaineDOT on a plan to transition Rt. 1 from Portland St. to I-295 from an auto-centric commercial corridor to a mixed-use boulevard that is people-centered.” The challenge for all parties is to increase density without increasing the volume of vehicles on Rt. 1. Will new residential growth and infill development occur without a concomitant up-tick in automobiles and traffic? The outcome is unclear, unless transportation alternatives are available and desirable.

Thank you for the opportunity to review Yarmouth’s 2024 Comprehensive Plan.

Sincerely,
Stephen Cole
Regional Planner, Southern & Midcoast Maine

To: Tom Miragliuolo, Senior Planner, Municipal Planning Assistance Program, Department of Agriculture, Conservation and Forestry

From: Alaina Chormann, Watershed Management Unit, Division of Environmental Assessment, Department of Environmental Protection

Re: Yarmouth Comprehensive Plan Review

Date: 4/30/2024

Thank you for the opportunity to review Yarmouth's Comprehensive Plan (Plan) as it relates to surface waters. I have developed the following comments and suggestions for your consideration.

Appropriate use of data provided by the DEP Division of Environmental Assessment

- The Plan includes waterbody and watershed identification and description, water quality information for Royal river estuary, Little John Causeway, Upper whistler cover, Cousins Island, Pratt Brook, and the Royal River. This information is used appropriately.

How the Plan's policies and implementation strategies promote the State goals relating to DEP's principal objectives and directives

1. Plan does a great job of recognizing that stormwater erosion contributes to the degradation of water quality and habitat in both fresh water and marine water systems. However, the plan does not explain why and the term "pollutants" is often used. Plan would benefit from making the connection between erosion and input of nutrients. Specifically, phosphorus (freshwater) and nitrogen (for marine sources). While the policies contained within the plan meet the minimum requirements of the checklist, they do not directly address limiting nutrient inputs to water resources. This is particularly important for eelgrass bed protection. Including language about regulating nutrient loads into waterbodies would greatly strengthen the plan. For example:
 1. Consider incorporating requirements for stormwater Phosphorus/Nitrogen impact analysis and mitigation for new development within the town's riverine and marine watersheds into subdivision and site review ordinances.
 2. Consider adding future water quality monitoring goals, especially for threatened or impaired waterbodies. Goal of better identification of phosphorus/nitrogen sources.

Consistency of Plan with DEP's programs and policies.

- Overall, the Plan consistent with the DEP Watershed Management Units programs

Measures DEP recommends the town take to ensure its plan addresses and identifies deficiencies and inconsistencies

- Comments regarding deficiencies and minor inconsistencies are included in the attached checklist.

Please feel free to contact me directly at (email/phone) if you have additional questions or would like more information.

This checklist was developed to ease the preparation of comprehensive plans. Its contents are taken directly from the Comprehensive Plan Review Criteria Rule (07 105 Chapter 208). There are no requirements to submit this checklist for review as it is intended only for the plan preparers.

Water Resources	✓	Page
Analyses		
Are there point sources (direct discharges) of pollution in the community? If so, is the community taking steps to eliminate them?	No point source pollution mentioned	
Are there non-point sources of pollution? If so, is the community taking steps to eliminate them?	✓ Non-point source pollution mentioned for marine waterbodies, town will implement current MS4 permit.	2-119, 2-127, 2-151
How are groundwater and surface water supplies and their recharge areas protected?	✓ Number of existing measures to protect water quality. Updated erosion and sedimentation control, MS4 permit, shoreland zoning, SOD and RPD. However, plan does not state specifically how drinking water sources are protected	2-151
Do public works crews and contractors use best management practices to protect water resources in their daily operations (e.g. salt/sand pile maintenance, culvert replacement street sweeping, public works garage operations)?	No specifics provided about what BMPs they use in their operations	
Are there opportunities to partner with local or regional advocacy groups that promote water resource protection?	✓	2-158
Condition and Trends		
The community's Comprehensive Planning Water Resources Data Set prepared and provided to the community by the Department of Inland Fisheries and Wildlife, the Department of Environmental Protection and the Office, or their designees.	✓	2-146
A description of each great pond, river, surface drinking water supply, and other water bodies of local interest including: a. ecological value; b. threats to water quality or quantity; c. documented water quality and/or invasive species problems.	A. Ecological value discussed for all waterbodies. B. Threats are generally discussed but not discussed	2-124, 2-147

	for each individual water body. C. Invasive and water quality issues discussed	
A summary of past and present activities to monitor, assess, and/or improve water quality, mitigate sources of pollution, and control or prevent the spread of invasive species.	Summary of invasive species monitoring is provided but no discussion of mitigation efforts.	2-146
A description of the location and nature of significant threats to aquifer drinking water supplies.	Discussion of drinking water supply, no location provided for Yarmouth wells, no threats to drinking water supplies specified	2-151
A summary of existing lake, pond, river, stream, and drinking water protection and preservation measures, including local ordinances.	There is a summary of local ordinances but no discussion of how the town is planning on protecting current/potential drinking water sources	2-155
Policies		
To protect current and potential drinking water sources.	✓	1-75
To protect significant surface water resources from pollution and improve water quality where needed.	✓	1-75, 1-76
To protect water resources in growth areas while promoting more intensive development in those areas.	✓	1-76
To minimize pollution discharges through the upgrade of existing public sewer systems and wastewater treatment facilities.	Not really discussed how public sewer systems/wastewater facilities will be upgraded	
To cooperate with neighboring communities and regional/local advocacy groups to protect water resources.	✓	1-77
Strategies		

Adopt or amend local land use ordinances as applicable to incorporate stormwater runoff performance standards consistent with: a. Maine Stormwater Management Law and Maine Stormwater regulations (Title 38 M.R.S.A. §420-D and 06-096 CMR 500 and 502). b. Maine Department of Environmental Protection's allocations for allowable levels of phosphorus in lake/pond watersheds. c. Maine Pollution Discharge Elimination System Stormwater Program	✓	1-77
Consider amending local land use ordinances, as applicable, to incorporate low impact development standards.	✓ adding low impact development requirements as part of MS4 permit	1-76
Where applicable, develop an urban impaired stream watershed management or mitigation plan that will promote continued development or redevelopment without further stream degradation.	✓ Not applicable since there are no Urban Impaired streams in Yarmouth currently	1-76
Maintain, enact or amend public wellhead and aquifer recharge area protection mechanisms, as necessary.	Vague about what mechanisms would/could be used to accomplish this strategy	1-75
Encourage landowners to protect water quality. Provide local contact information at the municipal office for water quality best management practices from resources such as the Natural Resource Conservation Service, University of Maine Cooperative Extension, Soil and Water Conservation District, Maine Forest Service, and/or Small Woodlot Association of Maine.	✓	1-75
Adopt water quality protection practices and standards for construction and maintenance of public and private roads and public properties and require their implementation by contractors, owners, and community officials and employees.	✓ Sufficiently discusses the different strategies that will be employed to protect water quality in Yarmouth	1-75
Participate in local and regional efforts to monitor, protect and, where warranted, improve water quality.	Could provide more details about current/ongoing efforts that the town plans to participate in	1-77
Provide educational materials at appropriate locations regarding aquatic invasive species.	Would be good to include what type of locations will be targeted for this outreach	1-77
Comments:		

Overall the comprehensive plan does do a good job of addressing water resource objectives and goals for the town. Demonstrates an understanding of threats to both marine and freshwater resources in the town and identifies management practices being implemented to mitigate these threats. Some things of note are:

There is a lack of any specific strategies the town plans to implement to protect its drinking water sources. This could be because they have not identified any threats, or they feel current zoning and ordinances are sufficient to protect this resource.

There is also a lack of discussion about specific water quality threats for specific waterbodies in Yarmouth. The discussion of water quality threats to the Royal River and other waterbodies mentioned is general on pages 2-151 to 2-153. Could be lack of available water quality data.

Stormwater and watershed development are discussed as potential threats to water quality in Yarmouth however nutrients as a threat is not really discussed. See notes on page one about this.

Date: May 2, 2024

To: Tom Miragliuolo, Municipal Planning Assistance

From: Lisa St. Hilaire, MNAP and Justin Schlawin, MDIFW

Re: Yarmouth Comprehensive Plan Review

On behalf of Beginning with Habitat (BwH), the Maine Department of Inland Fisheries and Wildlife (MDIFW) and the Maine Natural Areas Program (MNAP) have reviewed the town of Yarmouth's 2024 Comprehensive Plan (the Plan) and provide the following comments.

Beginning with Habitat equips Maine communities, landowners, and conservation partners with tools to protect, restore, and connect important habitats and ecosystems in a changing climate. Housed within the Maine Department of Inland Fisheries and Wildlife, Beginning with Habitat staff work with species experts, ecologists, and conservation partners to translate biodiversity information into conservation action at both a local and statewide scale.

BwH compiles habitat information from multiple sources, integrates it into one package, and makes it accessible to towns, land trusts, landowners, conservation organizations, and others to use proactively in conservation planning. The habitat information BwH provides is objective, comprehensive, and equips local decision-makers with the necessary tools to make informed and responsible land use decisions that mesh wildlife and habitat conservation with future growth needs. While BwH information is comprised of both regulated and non-regulated features, it should be used for planning purposes only. Other resources, such as MDIFW's Environmental Review Program (<https://www.maine.gov/ifw/programs-resources/environmental-review/index.html>) and MNAP's Environmental Review Program (<https://www.maine.gov/dacf/mnap/assistance/review.htm>) should be contacted for assistance as projects get closer to the design or permitting review phase.

BwH is housed at MDIFW but is comprised of more than ten public agencies and conservation partners. Comments provided below represent two BwH public agency partners (MDIFW and MNAP) but are guided by the overall conservation principles of the BwH program. Feedback and recommendations included in this memo are based on the Maine Municipal Planning Assistance Program at the Department of Agriculture, Conservation and Forestry (DACF) instructions for agency comments.

Appropriate Use of Data Provided by BwH

MDIFW and MNAP data were appropriately used in the Yarmouth Comprehensive Plan. BwH provides natural resource data to all Maine municipalities on behalf of MNAP and MDIFW. Information regarding rare plants and natural communities is provided by MNAP within DACF. MDIFW data depict high-value animal occurrences, wildlife habitats, and Critical Natural Resources.

Resources identified on BwH maps are accurate at the time they are produced; however, it is important to note that the data contained on these maps are regularly updated. It is recommended that requests for updated maps be made annually to ensure best available information is being used. Much of this updated information is accessible to the public online through the BwH Map Viewer:

<https://webapps2.cgis-solutions.com/beginningwithhabitat/mapviewer/>

The Town may request updated paper and digital BwH maps from MDIFW as often as needed during Plan completion and implementation:

<https://www.maine.gov/ifw/fish-wildlife/wildlife/beginning-with-habitat/maps/index.html>

Additional mapped information on stream habitats and barriers is available on the Maine Stream Connectivity Workgroup's Maine Stream Habitat Viewer:

<https://webapps2.cgis-solutions.com/mainestreamviewer/>

Additional land use planning resources and tools intended for use at the municipal level are available through BwH: <https://www.maine.gov/ifw/fish-wildlife/wildlife/beginning-with-habitat/municipalities/index.html>

Relation of Plan's Policies and Implementation Strategies to BwH Principal Objectives and Directives

The policies and implementation strategies proposed are consistent with BwH objectives and directives. Yarmouth has a clear appreciation for their Critical and Important Natural Resources, and has also committed to evaluating the impacts of climate change throughout the Plan. Beginning with Habitat staff would be happy to provide further assistance as the Town works to implement the Plan, such as providing updated maps, or technical assistance with ordinance revisions or climate planning. We have included suggested opportunities to engage Beginning with Habitat and partners to implement strategies outlined in the plan.

Consistency of Plan with BwH Programs and Policies

The proposed policies, strategies, and Future Land Use Plan are consistent with BwH programs and policies.

Critical and Important Natural Resources

The availability of high-quality habitats for plants, animals, and fish is essential to maintaining abundant and diverse populations for ecological, economic, and recreational purposes. Yarmouth is home to many Critical Natural Resources including extensive Tidal Waterfowl and Wading Bird Habitat, Roseate Tern Essential Habitat, Significant Vernal Pools, Shorebird Feeding and Roosting Areas along the Royal and Cousins River, a Seabird Nesting Island on 'The Nubbin', saltmarsh sparrow, Salt-Hay Saltmarsh along the Royal River and Cousins River, and wild leek (*Allium tricoccum*), mountain honeysuckle (*Lonicera dioica*), and American Chestnut (*Castanea dentata*). Important Natural Resources include Maquoit and Middle Bay Focus Area of Statewide Significance and numerous large Undeveloped Habitat Blocks mapped throughout the town. The plan discusses strategies to conserve these natural resources.

In addition to these Critical and Important Natural Resources, regional fisheries biologist Nick Kalejs has indicated that there are three regionally important brook trout streams in Yarmouth (Portions of the Royal River, Unnamed Brook at approximately 43.80, -70.18, and Headwater Streams of the East Branch Piscataqua River). We have appended a note describing strategies for the conservation of this resource.

Specific Plan comments and recommendations below are provided by the following staff:

- *MDIFW: Justin Schlawin (Beginning with Habitat Program Coordinator), Nick Kalejs (MDIFW Fisheries)*
- *MNAP: Kristen Puryear (Ecologist) and Lisa St. Hilaire (Information Manager),*

Resources to aid Implementation of the Yarmouth Comprehensive Plan:

Beginning with Habitat and partner organizations are available to engage Yarmouth with various strategies of the Yarmouth comprehensive plan:

- Beginning with Habitat staff are available to engage in presentations with the Comprehensive Plan Implementation Committee to collaborate on the open space acquisition goals and other strategies to protect Critical and Important Natural Resources, and with the planning department on the designation of Critical Resource Areas.
- Beginning with Habitat staff are available to review and assist with the review and update of the Conservation Value Map from the 2019 Open Space Plan, and identification of wildlife corridors throughout Yarmouth.
- The Maine Natural Areas Program maintains a user-friendly community science database for mapping and controlling invasive plant species. Maine Natural Areas Program Invasive Plant Biologist Chad Hammar offers training opportunities for residents to learn about the management of invasive plant species. chad.hammar@maine.gov
- Joe Roy, Private Lands Biologist within the Maine Department of Fisheries and Wildlife Beginning with Habitat Program provides outreach services to private landowners who wish to manage their lands to benefit wildlife. Joe is available to provide educational workshops for property owners on sustainable land management practices.
<https://www.maine.gov/ifw/fish-wildlife/wildlife/beginning-with-habitat/about/index.html>
- The Maine Natural Areas Program maintains a free service to evaluate the ecological merits of potential voluntary fee or easement conservation projects:
<https://www.maine.gov/dacf/mnap/assistance/preacquisition.html>
- Maine DOT administers several funding sources for municipal culvert replacement and infrastructure resilience that may be of interest to address stream barriers noted in the plan. More information on these funding opportunities can be found online:
<https://www.maine.gov/mdot/grants>.

Suggested Comprehensive Plan Edits:

- Mention of spotted turtle should be removed from the comprehensive plan. While a credible observation of spotted turtle was made in Yarmouth, MDIFW is uncertain whether a breeding

population of spotted turtle exists in Yarmouth. Given the uncertainty, it is difficult for the town to make strategies to plan around conservation of spotted turtle habitat.

- Page I-71, strategy NR-1.2, change the language to: “Designate Critical Natural Resources as Critical Resource Areas per the Beginning with Habitat Program in the Future Land Use Plan.”
- Page I-71, strategy NR-1.4, change the language to: “Through local land use ordinances, require the planning board (or other designated review authority) to include as part of the review process consideration of pertinent Beginning with Habitat maps and information regarding critical natural resources, and agency consultation”.
- Natural Resources section, beginning page 2-135: Mountain honeysuckle is endangered, not ‘Threatened’.
- Page 2-161, consider adding references to the Maine Geological Survey’s Sea Level Rise page and MNAP’s Marsh Migration/Coastal Resiliency page.
https://www.maine.gov/dacf/mgs/hazards/slr_ss/index.shtml
https://www.maine.gov/dacf/mnap/assistance/coastal_resiliency.html
- Page 2-147, consider adding the following language “Tidal marshes are unique and valuable coastal habitats, capable of migrating inland where geomorphic conditions and land-use permit, as long as they can migrate inland faster than they convert to open water. Surface restoration and/or removing tidal barriers can play a significant role in allowing marshes to adapt and remain resilient. Inland marsh migration space is finite and large regional models project a net loss of tidal marsh habitat under all sea level rise scenarios due to a lack of undeveloped and/or topographically suitable migration space.”
- Map Fig. 9.5 Include salt marshes as a mapped ‘natural communities’ per the Maine Natural Areas Program, not just generic wetlands.

We appreciate the opportunity to comment on Yarmouth’s 2024 Comprehensive Plan, and hope that these suggestions are helpful. Please reach out to Beginning with Habitat Program Coordinator Justin Schlawin by email at justin.schlawin@maine.gov , or by phone at (207) 557-1885 should you have any questions. Additional staff contact information and reference material are included below.

MDIFW Regional Contact Information

5 Game Farm Road
Gray, ME 04039
(207) 287-2345

Fisheries

James Pellerin, Regional Biologist - press 1; email: James.Pellerin@maine.gov

Nicholas Kalejs Asst. Regional Biologist - press 2; email Nicholas.Kalejs@maine.gov

Brian Lewis, Biology Specialist- press 3; email: Brian.Lewis@maine.gov

Wildlife

Scott Lindsay, Regional Biologist - press 3; email: Scott.Lindsay@maine.gov

Joshua Matijas, Asst. Regional Biologist; email: Josh.Matijas@maine.gov

Sean Campbell, Asst. Regional Biologist; email: Sean.A.Campbell@maine.gov

MNAP Contact Information

Lisa St. Hilaire, Information Manager – 207-287-8044; email lisa.st.hilaire@maine.gov

Kristen Puryear, Ecologist – 207-287-8043; email: kristen.puryear@maine.gov

Appendix 1: Fisheries Comments

April 19, 2024

TO: Corinne Michaud-LeBlanc -- MDIFW

FROM: Nick Kalejs – MDIFW Fisheries

SUBJ: Yarmouth Comprehensive Plan – MDIFW Fisheries Review

To whom it may concern,

The Fisheries Division of MDIFW has completed its review of Yarmouth's comprehensive town growth plan and we offer the following comments. The comments provided below identify key issues of importance with regard to ensuring consistency with MDIFW fisheries management programs.

I. Protection and Enhancement of Fisheries and Fisheries Habitat

The plan addresses some fisheries habitat protection issues and indicates that protecting natural resources is a priority and guiding principle of future town land use. However, more emphasis should be placed on the importance of inland fisheries habitat as a natural resource. Wild brook trout are present in Yarmouth and represent a species of special conservation importance in Maine. Many streams in Yarmouth have been inventoried by MDIFW with some flowing waters supporting wild brook trout; a list of these waters has been attached at the end of these comments and should be part of an inventory of important natural resources. The Royal River is also stocked with brook trout and brown trout, representing a significant investment of state resources. Additional protection should be considered to protect these waters and other important natural resources when reviewing proposed development projects. Brook trout habitat is particularly vulnerable to a host of land-based activities, which often lead to a concurrent loss of riparian habitat. We typically request 100-foot undisturbed buffers along both sides of any stream, including stream-associated wetlands. Buffers should be measured from the upland wetland edge of stream-associated wetlands; if the natural vegetation has been previously altered then restoration may be warranted¹. Protection of riparian areas diminishes erosion/sedimentation problems, reduces thermal impacts, maintains water quality, and supplies leaf litter/woody debris (energy and habitat) for the system. Protection of these important riparian functions ensures that the overall health of the stream habitat is maintained. In addition, smaller headwater and lower order streams are often affected the greatest by development and these systems benefit the most from adequately sized, vegetated buffers.

Based on MDIFW surveys around the region, many road maintenance and construction projects also often inadvertently impede passage at stream crossings. The Town identifies known and potential barriers on the landscape and should consistently adopt stream-crossing practices (i.e., culvert installation/maintenance) which do not impede fish passage as required by the Natural Resources Protection Act². Refer to guidelines attached to this document. In addition, the Army Corps of Engineers has adopted regulations regarding stream crossings that potentially affect municipal road maintenance programs. Maine Audubon, along with many local and federal partners, has also developed a "Stream Smart" design methodology for road crossings built according to high standards of aquatic organism passage. Such a methodology may be of use to the Town in future development projects.

II. Public Access

There is a public need to provide safe angler access to all Town waters that support recreational and commercial fisheries, as well as other recreational uses. The Town plan should adopt language that reflects State and MDIFW goals^{3,4,5} and access development should be consistent with those goals. For example, public access to public waters must not be limited to Town residents only, as such action

would jeopardize existing MDIFW stocking and management programs⁶ and is inconsistent with MDIFW and State public access goals.

Based on this review, few formal boat access sites to inland waters exist within the Town. According to the plan, Yarmouth Community Services (YCS) manages a hand-carry boat launch, but it is not clearly identified by location, nor is it clear if it is a freshwater or tidal access site. The Town should ensure that consideration of future public access development includes inland waters as well as marine.

The plan does a good job of identifying public access facilities to marine waters located within the Town of Yarmouth; however, more information should similarly be provided on freshwater access. The town plan should identify and describe the status of public access to all freshwater within the Town's boundaries, including more detailed enumeration of parking capacity, facilities, and type of boat launch present, if applicable. Yarmouth encompasses or borders no Great Ponds at least ten acres in size; however, the Town contains miles of flowing waters. Waters such as the Royal River, the Cousins River, and headwater streams that form the East Branch Piscataqua River may be of special interest to anglers. Recreational access to some of these waters is displayed on a map but should be more detailed and include any existing facilities or amenities, if applicable. There is some discussion regarding the development of new access sites, and the desire to expand public access to natural resources comprises part of the plan. The Town could explicitly outline strategies to maintain or expand public access to additional water bodies, including in the form of future development goals. These strategies should help prioritize public access needs based on a variety of factors including existing access, fisheries present, water size, proximity to population centers, land availability and cost, existing waterfront development, and other related factors. Lastly, the Town should consider MDIFW and DACF as a potential partner in future public access projects. By working together Town and State agencies are more likely to be successful in achieving our common goal of improving public access.

In adopting measures to address land use and development issues, it is imperative that language and measures not be adopted which could preclude efforts by the Town, MDIFW, or other State agencies from developing public access to public waters of the State, which would be inconsistent with State and MDIFW goals^{3,4,5}. Also, land use zoning ordinances and practices designed to protect water quality should not be so strict as to impede the development of public access opportunities. Restrictive measures could limit or eliminate good access prospects on heavily developed waterfront areas. An "exemption" for public access projects should be adopted for projects which are consistent with Town, State, and MDIFW public access goals. This measure will ensure consistency while foregoing the need to undertake a very detailed and comprehensive review of all plan provisions, including their implications.

Open space is being used more and more by Towns to provide recreational opportunities and access. This is a good idea, particularly when public resources (i.e., rivers and streams) are located within or adjacent to the designated open space areas. Additionally, the open space that public water resources provide can greatly expand the total amount of recreational space for town residents and visitors. However, the Town should be sure that such areas are open to and can accommodate use by all Maine citizens and not just Town residents.

III. Significant Habitats and Fisheries

The plan discusses few habitats and values for inland waters within the Town of Yarmouth. More attention should be paid to wild brook trout habitat in particular, including promotion of protections that would allow them to flourish. Presenting trout habitat as an essential part of local environmental systems reinforces the Town's commitment to conservation of important fisheries resources. Brook trout are of special conservation importance to the State of Maine, and habitats necessary to sustain

wild populations merit additional protections. As wild brook trout habitat is present in Yarmouth, this knowledge may be useful for prioritizing public access needs/improvements, identifying significant fisheries habitats for protection, securing additional partnerships with conservation organizations, and addressing other Town planning needs.

Finally, we note that potential restoration of ecological function of the Royal River is listed as a Town action item. Should this proceed, the Town should work with MDIFW to ensure that inland fisheries habitat is considered as part of any holistic restoration effort.

IV. Miscellaneous Items/Errors

(1) Descriptions of boat access sites within the Marine Resources section includes a hand-carry access sites to the Royal River above tidal waters (page 2-123). This information should be included in the Natural and Freshwater Resources section, along with any other similar freshwater access sites.

Please call (207-287-2345) or email (nicholas.kalejs@maine.gov) if I can be of any further assistance.

Nick Kalejs
Fisheries Biologist, MDIFW

Attachments: References/Supporting Documentation, Stream Crossing Guidelines, Wild Brook Trout Streams

¹ MAINE DEPARTMENT OF INLAND FISHERIES AND WILDLIFE, STANDARD ENVIRONMENTAL REVIEW RECOMMENDATIONS

Riparian Buffers Along Streams

We recommend that 100-foot undisturbed vegetated buffers be maintained along streams. Buffers should be measured from the edge of stream or associated fringe and floodplain wetlands. Maintaining and enhancing buffers along streams that support coldwater fisheries is critical to the protection of water temperatures, water quality, natural inputs of coarse woody debris, and various forms of aquatic life necessary to support conditions required by many fish species. Stream crossings should be avoided, but if a stream crossing is necessary, or an existing crossing needs to be modified, it should be designed to provide full fish passage. Small streams, including intermittent streams, can provide crucial rearing habitat, cold water for thermal refugia, and abundant food for juvenile salmonids on a seasonal basis and undersized crossings may inhibit these functions. Generally, MDIFW recommends that all new, modified, and replacement stream crossings be sized to span at least 1.2 times the bankfull width of the stream. In addition, we generally recommend that stream crossings be open bottomed (i.e. natural bottom), although embedded structures which are backfilled with representative streambed material have been shown to be effective in not only providing habitat connectivity for fish but also for other aquatic organisms. Construction Best Management Practices should be closely followed to avoid erosion, sedimentation, alteration of stream flow, and other impacts as eroding soils

from construction activities can travel significant distances as well as transport other pollutants resulting in direct impacts to fish and fisheries habitat. In addition, we recommend that any necessary instream work occur between July 15 and October 1.

MDIFW Fisheries will rely on MDEP to review project applications for the adequacy of wetland functional assessments and the adequacy of proposed stream buffers, which should be reviewed based upon the aforementioned guidance.

² MDEP, Natural Resources Protection Act, 38 M.R.S.A SS.480-A to 480-Z, Statute, revised 4/3/2002

SS. 480-Q. Activities for which a permit is not required... 2. Maintenance and repair... "B. Crossings do not block fish passages in water courses;"

2-A. Existing road culverts..."and that the crossing does not block fish passage in the water course."

³ MSPO, Comprehensive Planning: A manual for Maine's communities.

"State Goal: To promote and protect the availability of outdoor recreation opportunities for all Maine citizens, including access to surface waters.

⁴ Strategic Plan for Providing Public Access to Maine Waters for Boating and Fishing, MDOC & MDIFW, March 1995.

"Boating and Fishing Access Goal – The primary, long term goal of state fishing and boating access programs is to ensure legal, appropriate, adequate, and equitable means of public access to waters where recreational opportunities exist."

⁵ MDIFW, Administrative Policy Regarding Fisheries Management, 12/2002

"The purpose of the Department's Access Program is to ensure that the public is able to gain access to Maine's public waters and to the fisheries within them. By law, all great ponds belong to the people of Maine. Private land ownership may limit access to great ponds. Fishing opportunity is directly linked to the public's ability to get to the waters to fish, so acquiring publicly-owned private points of access is critical, especially in areas where heavy development or restrictive private access already limits legal access by the public to the lake or pond.

It is also important to provide legal public access to flowing waters, although there is no parallel legal right to use flowing waters. Such acquisitions must, therefore, include enough land to allow access to stretches of the river or stream."

⁶ MDIFW, Administrative Policy Regarding Fisheries Management, 12/2002

"The Department will not stock waters without reasonable, legal public access, since stocking programs are to benefit the general fishing public, and not only the people that own land around a lake, pond, river or stream."

⁷ MSPO, Comprehensive Planning: A manual for Maine's communities.

"Legislative requirement: The act requires that each comprehensive plan include an inventory and analysis of: Significant or critical natural resources, such as wetlands, wildlife and fisheries habitats..."

Stream Crossing Guidelines

A good reference for information on fish passage at stream crossings may be found in the Maine Department of Transportation Fish Passage Policy and Design Guide. The following recommendations reduce the potential for culvert installations to create impediments to fish passage for most resident stream fish typically found in Fisheries Management Region A. These recommendations apply to circular culverts installed in streams.

- Do not install hanging culverts.
- Culvert installation should occur between July 1 and October 1.

- Culvert invert (downstream bottom end of the culvert) should be installed below streambed elevation; 6 inches deep for culverts less than 48 inches in diameter and 12 inches deep for larger culverts.
- Installation should not exceed the existing natural gradient.
- Use corrugated steel/aluminum culverts with the largest available corrugations. Smooth concrete and corrugated plastic culverts should only be used in very low gradient areas where water backs up the entire length of the pipe. In addition, polyethylene slip liners and smooth bore plastic culverts are becoming more popular for new or replacement installations due their longevity and low cost; however, they are creating serious fish passage problems around the State. A review of flow capacity specifications for Snap-Tite, a local distributor of slip liner technology, reveals that in all applications where smaller diameter Snap-Tite Solid liners are installed in existing corrugated metal pipes (CMP) flow capacities are increased, even though effective pipe size is decreased. For example, when a 28-inch (26 inch inside diameter) solid liner is installed in a 30 inch (inside diameter) CMP the new liner provides 187% of the original capacity provided by the metal pipe. The increase in capacity results from the smooth walls and nonwetting characteristic of polyethylene, which reduce friction within the pipe. The increased velocities that result from slip liner and smooth bore polyethylene culverts usually far exceed that which can be negotiated by most fish typically occurring in Maine streams, which typically ranges between 1 and 2 feet per second. Furthermore slip liner projects effectively increase the invert elevation, creating a hydraulic drop at the outlet, which creates an additional obstacle to fish passage. Increased flow velocities within the pipe also increase downstream scour, which can lead to degradation of the outlet plunge pool, important staging habitat for fish attempting to pass through culverts. Resulting erosion can also create "head cuts" or nick points that cause additional scouring of the stream channel and associated habitat degradation. Impediments and barriers to fish passage will generally be created using slip liners and smooth bore culverts, except under the following conditions:

- 1) In drainage ditches or similar circumstances where water is not being conveyed in a jurisdictional stream channel;
- 2) In streams where there are no fish present and where the presence of natural/artificial barriers prevent seasonal use by fish species lower in the drainage;
- 3) In very low gradient settings where water backs up the entire length of the pipe, and where the water depth at the inlet end of the liner/culvert is at least 4-6 inches deep at low flows.
- 4) Where a permanent, natural barrier is located upstream/downstream within 150 feet of the stream crossing. A permanent/natural barriers is defined as a vertical drop of at least 4 feet over a rock/ledge substrate, as measured during summer low flows. Beaver dams would not be considered a permanent impassable barrier.

- Culverts should be installed so as to provide a minimum water depth of 4-inches within the culvert during critical, seasonal movement/migration periods (spawning, summer refugia, etc.), which will vary by species. This minimum water depth is needed to provide passage opportunities for smaller fish that dominate the streams in Region A. MDOT's Fish Passage Policy and Design Guide provides information on movement periods.
- Flow velocities within the culvert should not exceed 1 and 2 feet per second during critical, seasonal movement/migration periods (spawning, summer refugia, etc.), which will vary by species. These low flows velocities are needed to provide passage opportunities for smaller fish that dominate the streams in Region A. The aforementioned flows should not be exceeded more than 50% of the time during periods of movement. MDOT's Fish Passage Policy and Design Guide provides information on movement periods and how to evaluate this standard.
- Two offset culverts may be used, such that one pipe provides passage conditions during low flow periods and the other is installed to pass design peak flows. An experienced engineer should design multiple culvert installations.
- Efforts to mitigate for fish passage problems (e.g., fish ladder, tailwater control, baffles, etc.) should always be coordinated through MDIFW.

MDIFW Inventory of Yarmouth Wild Brook Trout Streams (2024)

Stream Name:

- Royal River
- Unnamed Brook (approx. 43.80, -70.18)
- Headwater Streams: East Branch Piscataqua River