

# TOWN OF SOUTH BERWICK

## Economic Development Market Analysis



JUNE 2023



### PREPARED FOR:

Town of South Berwick  
300 Main Street  
South Berwick, ME 03908

Adopted by South Berwick Town Council on June 27, 2023



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# EXECUTIVE SUMMARY

The Town of South Berwick engaged Camoin Associates to assist in the production of an economic development market analysis that will help the town understand the current market conditions for development. Having a comprehensive understanding of the market conditions will assist the town in identifying development opportunities and how best to leverage public and private sector investments to capitalize on the development opportunities.

The Town of South Berwick has implemented several initiatives aimed at promoting development and fostering a business-friendly environment. These initiatives include the creation of Tax Increment Financing (TIF) Districts and the passage of zoning regulations that encourage mixed-use developments that incorporate the preservation of historic sites.

Despite the positive market conditions and the initiatives of the town, there are several challenges that must be addressed. One of the most significant challenges is the lack of available land for development, particularly in sites closer to the downtown area. In addition, the local infrastructure has not kept pace with the town's growth, which may create barriers to future developments.

The following pages provide a summary of the key takeaways from the demographic, economic, and real estate data analysis and stakeholder interviews. This is followed by a description of the town's Opportunity Areas, and the Action Plan which recommends a series of projects and actions to advance economic prosperity in South Berwick. The full Market Analysis is also provided within the Appendix of this report.

## Key Takeaways from the Market Analysis

### Demographic & Socioeconomic Trends

- South Berwick's population is growing at a slower pace than the surrounding towns and region, but faster than the state. Based on census-based demographic models, the town's population is also projected to decline in the next five years at a faster rate than surrounding areas. These projections are driven by declining population under 18 and new housing development rates that lagged southern Maine between 2010 and 2020. It should be noted that, if additional land is made available for residential development and regional housing market trends continue, population decline would likely reverse and potentially grow. How much depends on both the volume and type of housing added. Data on housing permits points to a rising trend in housing with 2021 posting the highest levels of permits for new housing in the town in the past decade. This suggests that the population may in fact grow if housing demand continues and sufficient supply is made available.



- South Berwick's population is younger than surrounding towns and the state but is similar in age to the surrounding region. In 2022, its median age was 44.0. From 2010-2022, the town's population of residents aged 18 years and under contracted by 21.4%, a much faster rate of decline compared to the surrounding region and the state. This population is projected to see a further decline from 2022-2027.
- Median household income in South Berwick is higher than the surrounding towns and region, at \$95,422 in 2022. Nearly half of all households were making \$100,000 or more in 2022.
- South Berwick's unemployment rate was 2.0% in 2022, lower than the surrounding region (2.6%), the state (3.0%), and neighboring communities.
- Labor Force Participation is high in South Berwick (75.6%) compared to York County (66.6%) and the state (62.9%). The labor force participation in South Berwick has remained stable over the last five years despite generally trending downwards in most parts of the nation.
- South Berwick is a "Net Exporter" of workers, meaning more people commute to other towns to work compared with those who live in other towns but commute to South Berwick.

## Industry Trends

- In 2022, there were approximately 2,000 jobs in South Berwick. Between 2017 and 2022, South Berwick added 54 jobs, representing 3% growth. Construction (+48) and Professional, Scientific, and Technical Services (+46) added the most over this period. The 3% job growth in South Berwick from 2017-2022 outpaced both the region (1%) and state (2%).
- Government is the largest sector in South Berwick, with 374 jobs in 2022, accounting for 19% of all jobs in the town. These include local government and public K-12 education in South Berwick. Educational Services is the most highly concentrated sector, as the percentage of workers in this industry measures 3.8 times as concentrated in the town compared to the nation. This sector includes private education institutions and organizations (non-government).
- South Berwick will continue to see job growth of 3% in the next five years, driven by gains in Accommodation and Food Services; Professional, Scientific, and Technical Services; and Construction.
- Average earnings per job across all sectors is \$72,801, similar to the average in the 3-County Region (\$73,080) but higher than the statewide level (\$66,730).



## Workforce Trends

- The largest occupational category in South Berwick is Educational Instruction & Library Occupations, representing about 17% of all jobs in the town. This is also the most concentrated high-level occupation group in South Berwick and is about 2.9 times more concentrated in the town than in the nation overall.
- From 2022-2027, Food Preparation & Serving Related Occupations as well as Management Occupations are expected to see the strongest growth in South Berwick. In the Region overall, many of the occupations that are expected to see the most growth from 2022-2027 are those that require little to no formal education and exhibit low barriers to entry.

## Residential Market

- Approximately 77% of South Berwick's occupied housing units are owner-occupied, closely resembling the figure for Rockingham County (78%) but higher than York (75%) and Strafford (66%) Counties. Of the vacant housing stock in South Berwick, very little, 9%, is attributable to seasonal homes, significantly less than the surrounding counties.
- From 2010-2020, South Berwick's housing stock has grown by 3%, adding 76 total housing units over the decade. This growth significantly lags neighboring towns as well as surrounding counties, which grew between 6% and 11% during the same period.
- Given past trends, over the next five years (2022-2027) the number of households in South Berwick is projected to contract by 24. Again, this decline could reverse if housing supply increases based on recent market trends and land being available for development. Household growth will vary depending on income level. The number of households making less than \$100,000 is projected to contract significantly, outweighing the growth of households making over \$100,000.
- The South Berwick multifamily housing market has seen very little activity in the last five years, with no new deliveries or construction being tracked between 2019-2022. However, 23 units are currently under construction and will make a notable addition to the current inventory of units.
- In 2022, the median home sold in South Berwick cost \$444,231, a price well beyond the reach of most of the town's residents. To afford a home at this price level, a household would need income of around \$131,000, but that is about \$35,500 more than the current median household income.



## Retail Market

- In South Berwick's local trade area, approximately 15,000 SF of additional retail space could be supported by recapturing a portion of retail leakage (purchases going beyond the local retail market), with potential to recapture nearly \$5.1 million in sales. Limited-Service Restaurants have the highest retail potential in the local trade area.
- The ability of local retailers to satisfy local demand differs greatly by market segment. The sectors showing the greatest "retail gap" (local demand exceeding local sales) are categories in which residents need to leave the area to meet their needs. These include grocery and specialty food stores, restaurants, convenience stores, pharmacies, and other local-serving retail.
- The pipeline of new retail space in the market shows two projects totaling just over 14,000 SF currently under construction in York County. Rockingham County has the strongest retail pipeline, with 230,000 SF underway and steady development over the last several years. Strafford County currently has about 73,000 SF underway and has seen slow development in recent years.

## Office Market

- York County is a midsized submarket that contains about 4.4 million SF of office space. It currently registers as the tightest office market in the surrounding area, with a vacancy rate of 1.7% in the second quarter of 2023. This compares to 3.7% in Strafford County and 6.4% in Rockingham County.
- Currently, all new office space construction is occurring in Rockingham County. York County's inventory has expanded modestly, by about 0.4% over the last three years, while Strafford County's inventory has declined during the last decade due to demolitions.
- Locally, demand for general office space is expected to be stronger than that for medical office space. Over the past five years, from 2017-2022, employment in office-utilizing industries increased almost 24%, outpacing the 2.0% growth seen in the region during the same period. Over the next five years, South Berwick is projected to add another 49 jobs in office-using industries, a 5.4% gain, compared to the region's 3.3% growth.
- Meanwhile, South Berwick has seen a modest contraction of jobs that typically demand medical office space. From 2017-2022, these industries saw a decline of 11 jobs, and are projected to decline by another 4 jobs from 2022-2027.



## Industrial Market

- The York County submarket for industrial real estate market includes about 10.8 million SF of space, accounting for about a third of the broader Portland area market. In addition, Rockingham County has 28.3 million SF of industrial space while Strafford County posts 8.1 million SF.
- Overall, Rockingham County has the tightest market, with a vacancy rate of 2.5% in the most recent quarter, driven by a low vacancy for logistics space (0.5%). Meanwhile, specialized industrial space in York County (0.2% vacancy rate) and Strafford County (0.0% vacancy rate) has minimal availability.
- Significant development is underway in the York County Submarket in Saco, which should see an additional 180,000 SF added to the submarket's inventory. This is the newest construction in the submarket in over a decade. Additionally, construction of new industrial space is also underway in Rockingham County (160,000 SF).
- The York County submarket has remained active for industrial transactions in the last few years as properties have traded with regularity, but momentum has more recently slowed.
- South Berwick itself currently has little inventory of available industrial sites available for new development. The town has relatively little access to major highways compared to neighboring communities, which presents a challenge to South Berwick's expansion of industrial activity. Opportunities for new development may include small-scale manufacturing or construction businesses that serve local and regional clients.



## Opportunity Areas

As part of this study, two opportunity areas with economic and business development potential were identified: 1) Downtown and 2) Route 236/Punkintown Corridor. These opportunity areas are shown on the maps below and profiled on the following pages.

**South Berwick Opportunity Areas Map**



## Downtown Opportunity Area

The Downtown South Berwick Opportunity Area is centered around the convergence of Route 236, Route 4, and Main Street, where the highest density mixed-use development occurs within a true “downtown” setting. To capture the commercial activity in the town, the Downtown Opportunity Area is delineated by the borders with Berwick and New Hampshire to the north and west. The Downtown Opportunity Area then extends out to the Links at Outlook to the northeast and through Berwick Academy to the southeast. Locally, the downtown area is thought of as upper-main and lower-main.

Zoning in the Downtown Opportunity Area includes B1 Business Central, B2 Business Mixed, and R1 Residential. Downtown is the most significant opportunity for small business growth and mixed-use investments.

### Challenges

- Traffic congestion
  - Causes challenges for pedestrians, and business access
  - Commuter corridor, seen as a pass-through
- Parking
  - Year-round overnight parking restrictions
  - Perceived lack of space
  - No existing memorandums of understanding for shared parking
- Aging building facades, deteriorating sidewalks
- Lacks signage, wayfinding, lighting, and cohesive brand/vision
- Some commercial vacancies

- Upper-Main and Lower-Main are disconnected, especially from a pedestrian perspective

### Strengths and Opportunities

- Strong foundation of existing assets and infrastructure
- Town will be developing a Downtown Revitalization Plan
- Market demand exists for additional local businesses related to retail, restaurants, business, and personal services
- Talented mix of business owners dedicated to downtown
- Town now has a Transit-Oriented TIF District, through Rt. 236 that goes through the downtown
- Town will be pursuing a Downtown TIF District late 2023/early 2024



## Route 236/Punkintown Opportunity Area

Route 236 is a major corridor that runs through South Berwick Village/Downtown, connecting South Berwick to Berwick to the north and Eliot to the South, serving as a major commuting corridor for the Kittery Naval Shipyard and employment centers on the coast. It connects to Route 4, providing easy access to Dover, New Hampshire, a major commercial and residential center. The corridor also includes the Central Maine Power right-of-way.

There are two areas zoned for commercial and industrial development along the corridor, including the area towards Eliot and Punkintown which is zoned as I1 (Industrial 1). Parcels near and in the downtown area are zoned B1(Business 1) and B2(Business 2). Punkintown is the most significant opportunity for industrial and commercial development because it includes willing property owners, existing businesses, and sites currently available for development. However, it also faces challenges including zoning which does not accommodate mixed-use development, and a lack of public sewer and water.

### Challenges

- The area is fronted by Central Maine Power corridor requiring right-of-way. Right-of-way into Punkintown does currently exist and is being used to serve nearby properties.
- Punkintown is located on a major slope (side of mountain) requiring substantial site work.
- Lack of public water and sewer in Punkintown
- Most of Route 236 zoned residential, not zoned for mixed use-residential
- Lack of traffic light on 236 hinder access to Punkintown properties (high traffic is due to major corridor and across street from busy high school)

- Competition from sites in southern Maine and New Hampshire including sites that have better proximity to major highways and population centers

### Strengths and Opportunities

- Punkintown has multiple assets to attract future development:
  - Significant land area for development
  - Willing property owners – interested in development opportunities
  - Existing businesses already located in area
  - New light industrial business moving to area
  - Traffic and activity from the corridor and high school offer market/customer potential
  - Adjacent to land trust (an amenity for mixed-use)
- Existing Tax Increment Financing Districts: Punkintown TIF District and Transit-Oriented TIF District
- Re-zone appropriate land areas along Route 236 to commercial / industrial
- Market opportunities for:
  - Small-to-mid industrial/flex space
  - Construction
  - Local serving businesses, personal services, and mixed-use
  - Grocery store/pharmacy to serve demand in the local market, but will have competition from Dover, Somersworth, and North Berwick.



## Action Plan

The Action Plan recommends a series of projects and actions to advance economic prosperity in the Town of South Berwick. These projects and actions can be implemented incrementally starting now and continuing over the next 5-8 years to address the needs and opportunities identified throughout the market analysis.

### Project 1: Redevelop and Ignite the Downtown

Downtown can be transformed into an attractive, connected, and inviting commercial hub.

Downtown South Berwick is home to a small collection of businesses established by highly talented business owners and entrepreneurs, many of whom are women and minorities. Despite being grouped together in a downtown setting, the small businesses in the area are generally disconnected and must rely on their own individual resources to succeed. There is little foot traffic downtown, and much of the built environment is tired with aging façades and eroding streetscapes. The Town can step in to help build a sense of community and collaboration among the downtown business owners, create and communicate downtown's brand identity to attract a broader customer base, and make strategic physical investments to improve the overall human experience and quality of place.

- **Action 1:** Utilize tax increment financing (TIF) and other public dollars for needed public infrastructure improvements, such as traffic signalization, traffic calming, a façade program, signage, lighting, etc. Explore the feasibility of burying utility lines. Include strategies in the downtown revitalization plan.

- **Action 2:** Document all owners and businesses within the district and add their information to a CRM system. Prioritize downtown businesses for the business survey and visitation as part of the BRE program discussed below in Project 3.
- **Action 3:** Catalyze a downtown business and property owners' group (businesses, entrepreneurs, service providers). Start with an informal group to meet regularly, work on the downtown revitalization plan, get needed help, share ideas, and network. Establish a business advisory group for the town moving forward to advise as needed on new policies, programs, and initiatives.
- **Action 4:** Host more events that create a vibrant and lively atmosphere downtown, like Victorian Stroll in Troy, NY that invite people into storefronts and to see what's downtown.
- **Action 5:** Continue to engage in the York County Chamber and utilize that network to promote the accomplishments of downtown.
- **Action 6:** Explore opportunities for new attainable, mixed-use housing, and multi-family housing downtown. Housing is a critical need in South Berwick, and redeveloping areas in the downtown location with housing will bring more activity and vibrancy to the commercial hub, increase local market demand for downtown businesses, and add to the tax base.



## Project 2: Establish a Business Retention and Expansion (BRE) Program

Proactively engaging with South Berwick businesses can enable the early identification of needs and efficient allocation of resources.

Like many municipalities, the Town of South Berwick has historically taken a backseat to business support and development, only connecting with businesses when they approach the town seeking a permit, license, or another type of required approval for development and/or operation. This reactive approach means that businesses are often left to fend for themselves as challenges arise. Businesses are frequently unaware of programs and support they could qualify for and might receive benefits. Being unaware of these programs and support may lead businesses to relocate or expand elsewhere unnecessarily. The town can establish an ongoing, data-driven, systematic approach to identifying issues and opportunities within the South Berwick economy and help South Berwick businesses thrive and grow here.

- **Action 1:** Implement the ExecutivePulse customer relationship management (CRM) system as the technology backbone upon which to build, manage, and grow the new BRE program.
- **Action 2:** Populate the CRM with a business list. Develop the list using existing contact lists, some of which have been developed as part of this Market Analysis process, to create a list of South Berwick businesses to participate in the BRE program.
- **Action 3:** Define the data to be collected and design the CRM to house that data in a way that can be easily tracked, reported, and analyzed by town staff.
- **Action 4:** Design a digital intake survey intended for ALL businesses in South Berwick to complete the first time they

participate in the program. This survey will ask for detailed information that will likely not change from year to year such as physical address, contact information, type of business, as well as all of the questions in the update survey described below.

- **Action 5:** Design a digital update survey intended to be completed annually by ALL South Berwick businesses in their second year of the program and beyond. Keep this survey short, with no more than 20 questions. Design the survey to identify major changes experienced by the business, or their industry sector, in the last 12 months, as well as current and future needs. Conclude by asking if they'd follow-up by the Town. Examples: [Advance Albany County Alliance, Albany County, NY](#) and [Lake George-Lake Champlain Regional Planning Board, NY](#).
- **Action 6:** Employ an annual marketing campaign that encourages businesses to complete the survey themselves. Utilize email, social media, and other forms of outreach. Specifically focus on engaging downtown businesses and home-based businesses.
- **Action 7:** Conduct in-person business visits. Set realistic goals for the number of businesses to be visited each month and year and then track progress toward those goals. Invite partners to business visits as necessary. Input information collected during visits into the CRM immediately and follow up with any connections or actions within 5-business days.
- **Action 8:** Track trends by frequently analyzing the data in the CRM to identify pervasive problems or trends in the South Berwick business community.
- **Action 9:** Report annual findings, follow-up actions taken, and emerging trends/issues/opportunities identified through the program. Promote the report through digital and traditional communication channels and ensure every business that participates in the program receives a copy.



## Project 3: Route 236 Development

### Inventorying and effectively marketing existing sites can help spur development along Route 236.

The Rte. 236 Corridor is South Berwick's best opportunity for commercial, light-industrial, and mixed-use development (besides the downtown). It is a major corridor for residents and commuters and includes the majority of larger commercial/industrial properties and businesses in the community.

- **Action 1:** Focus on opportunities for light industrial, commercial, professional, and technical services, construction, and mixed-use development. These fit with the market opportunities as well as the existing corridor.
- **Action 2:** Document zoning and land use (allowable uses) regulation along the corridor and make a priority list of changes including allowing mixed-use development. Explore re-zoning appropriate areas and/or overlays along Route 236 for commercial and industrial.
- **Action 3:** Complete a corridor infrastructure plan that prioritizes needed investments for economic and business development. The plan will be supported with Tax Increment Financing as appropriate.
- **Action 4:** Work with property owners and businesses in Punkintown area to create a district master plan including:
  - Zoning and land-use needs including allowable mixed-use developments.
  - Infrastructure improvements including bringing public water to sites and finding alternatives for sewer/wastewater.

- Plan for site uses to include industrial and commercial (both of which have current and forthcoming activity in the development area, and also multi-family housing).
- Overlay with a financial plan that includes public /private partnerships for development.
- Inventory sites available for development and market through the state site system ([www.selectmainesites.com](http://www.selectmainesites.com)) on the town's website, and updates to the economic development page (may need new landing page). Prior to inventory, immediately market known existing sites on the state's website.
- Coordinate site marketing with property and business owners.



## Project 4: Facilitate the Development of Attainable Housing

Housing that is attainable to workers and persons seeking to remain in South Berwick and age in place are critical to a resilient local economy and community.

Consistent with the housing market in southern Maine and New Hampshire, home prices have risen dramatically in the past several years. This has been driven by a combination of factors that include in-migration of population, pent-up demand from economic recovery following the 2008 recession, demand by aging baby boomers, COVID, supply chain issues, rising interest rates, and overall rising costs of supplies. In South Berwick, it is also driven by a lack of supply of available properties for sale, further driving up prices. All together this makes finding housing for workers very difficult and constrains those seeking to downsize as they age. Multi-family housing is especially in short supply and high demand, but the problem exists with attainable single-family housing as well.

- **Action 1:** Revise land-use and zoning ordinances to allow residential development within mixed-use commercial areas, including specifically Rout 236 and Punkintown. Ensure zoning allows home-occupations/home-based businesses.
- **Action 2:** Market new opportunities to housing developers within the region.
- **Action 3:** Utilize Tax Increment Financing to support mixed-use development and development of attainable housing.
- **Action 4:** Work with housing trust and organizations for continued focus on attainable housing.
- **Action 5:** Be sure to address this in a comprehensive plan and implement it.



## Project 5: Promote South Berwick for Economic Development

Strategic marketing and communication can establish a consistent message and brand for economic development in South Berwick.

Having recently created an Economic & Community Development Department, the Town of South Berwick is working to establish marketing and communication channels for economic development and establish itself as a place that is proactively working on business retention and attraction initiatives. The town maintains a website for all town-related communication and information at [www.southberwickmaine.org](http://www.southberwickmaine.org), including a section for Economic & Community Development where businesses and developers can find information about licensing, TIF, available properties, and other relevant information. The town is also looking to hire new staff to support digital communications, which would include economic development communications.

- **Action 1:** In addition to listing properties on the town site, ensure that priority development sites are listed on the state's site listing service. Connect with site owners to obtain current information and ensure they are aware of the listing.
- **Action 2:** Engage with the regional economic and business development partners to brief them on the town's new economic development Market Analysis and Action Plan. Partners to engage include the Southern Maine Planning and Development Commission (SMPDC), York Region Chamber of Commerce, The Falls Chamber of Commerce, Maine Department of Economic and Community Development (DECD), and Maine & Co. Maintain working relationships with partners and provide updates on implementation progress as appropriate.

- **Action 3:** Review the [Economic & Community Development](#) portion of the town's website and reorganize the resources and information from the perspective of existing businesses, prospective businesses, and developers. Aim to reduce the amount of text where possible and introduce visual content to enhance resource pages. Continue to build out pages with relevant information for these targeted audiences.
- **Action 4:** Focus on external messaging and building the town's brand for economic development on downtown, the river, and a small community with an excellent school system, and great access to the coast, mountains, Boston, New Hampshire, and southern Maine. Focus on being responsive to future RFP's with materials that prioritize these assets instead of focusing on a specific sector.
- **Action 5:** Focus internal messaging on educating and engaging the public on the importance of and need for economic and business development in South Berwick. Work with the Business Advisory Group (to be created as part of Project 1: Redevelop and Ignite the Downtown) and other local leaders from the community to provide testimonials and help communicate the information to their customers and community.





# MARKET ANALYSIS

The market analysis for the Town of South Berwick, ME delves into the dynamic realms of residential, retail, office, and industrial economic and real estate trends. In today's ever-evolving landscape, understanding the trends and fluctuations within these sectors is crucial for informed decision-making and successful economic development investments.

This market analysis brings together a wealth of data, local business and industry expertise, and comprehensive research to provide the Town of South Berwick with a holistic view of the economic and real estate markets. Additionally, this information can provide businesses, developers, and other investors with the knowledge needed to navigate the emerging economic trends effectively, capitalize on emerging opportunities, and achieve long-term success for South Berwick.

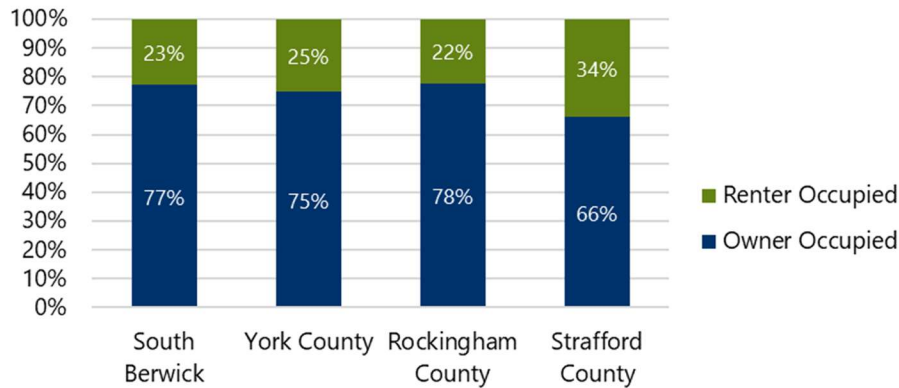


# RESIDENTIAL MARKET ANALYSIS



# HOUSING INVENTORY: OCCUPANCY

## Occupied Housing Unit Breakdown



Source: ACS 5-Year Estimates

## Housing Units by Occupancy, 2021

	South Berwick		York County		Rockingham		Strafford County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<b>Occupied</b>	<b>2,772</b>	<b>90%</b>	<b>87,914</b>	<b>79%</b>	<b>124,080</b>	<b>92%</b>	<b>50,630</b>	<b>92%</b>
Owner Occupied	2,148	77%	65,916	75%	96,541	78%	33,577	66%
Renter Occupied	624	23%	21,998	25%	27,539	22%	17,053	34%
<b>Vacant</b>	<b>291</b>	<b>10%</b>	<b>23,638</b>	<b>21%</b>	<b>10,373</b>	<b>8%</b>	<b>4,517</b>	<b>8%</b>
Seasonal	26	9%	18,467	78%	5,569	54%	1,658	37%
Other Vacant	265	91%	5,171	22%	4,804	46%	2,859	63%

Source: ACS 5-Year Estimates

The following charts outline existing housing units by occupancy status. South Berwick's housing market is compared to surrounding counties.

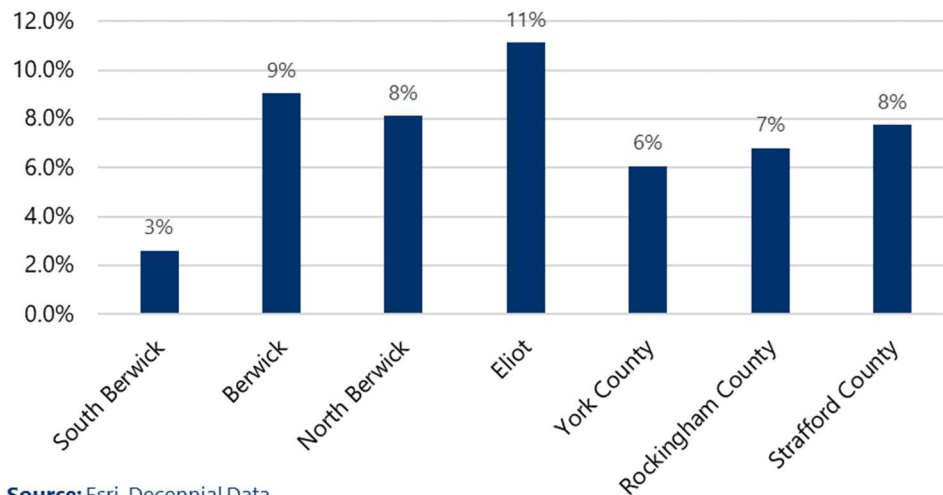
- 90% of South Berwick's housing units are occupied and 10% are vacant.
- Of the occupied units, approximately 77% are owner-occupied. This is higher than the percentage of owner-occupied units in York County (75%) and Strafford County (66%). South Berwick's rate of owner-occupied units most closely resembles Rockingham County.
- 9% of South Berwick's vacant housing units are attributed to seasonal homes, significantly lower than York County (78%) and slightly lower than Rockingham County (54%) and Strafford County (37%).
- Other reasons that housing units might be vacant in South Berwick are that the unit is sold but not occupied, the unit is used for storage, the owner is elderly and living with family or in another facility, or that it is being repaired, among other reasons.



# HOUSING INVENTORY: UNITS

- Since 2010, the number of housing units in South Berwick has increased by 3%, reaching 2,987 units. This is an increase of 76 units over 10 years.
- South Berwick's change in housing significantly lags surrounding towns and counties. For example, surrounding towns of Berwick, North Berwick, and Eliot saw growth ranging from 8%-11%, while the surrounding counties saw growth ranging from 6%-8%.

**% Change in Housing Units, 2010-2020**



Source: Esri, Decennial Data

**Housing Units, 2010-2020**

	2010 Total Housing Units	2020 Total Housing Units	Change	Percent Change
South Berwick	2,911	2,987	76	3%
Berwick	2,934	3,200	266	9%
North Berwick	1,930	2,087	157	8%
Eliot	2,669	2,966	297	11%
York County	105,773	112,198	6,425	6%
Rockingham County	126,709	135,338	8,629	7%
Strafford County	51,697	55,706	4,009	8%

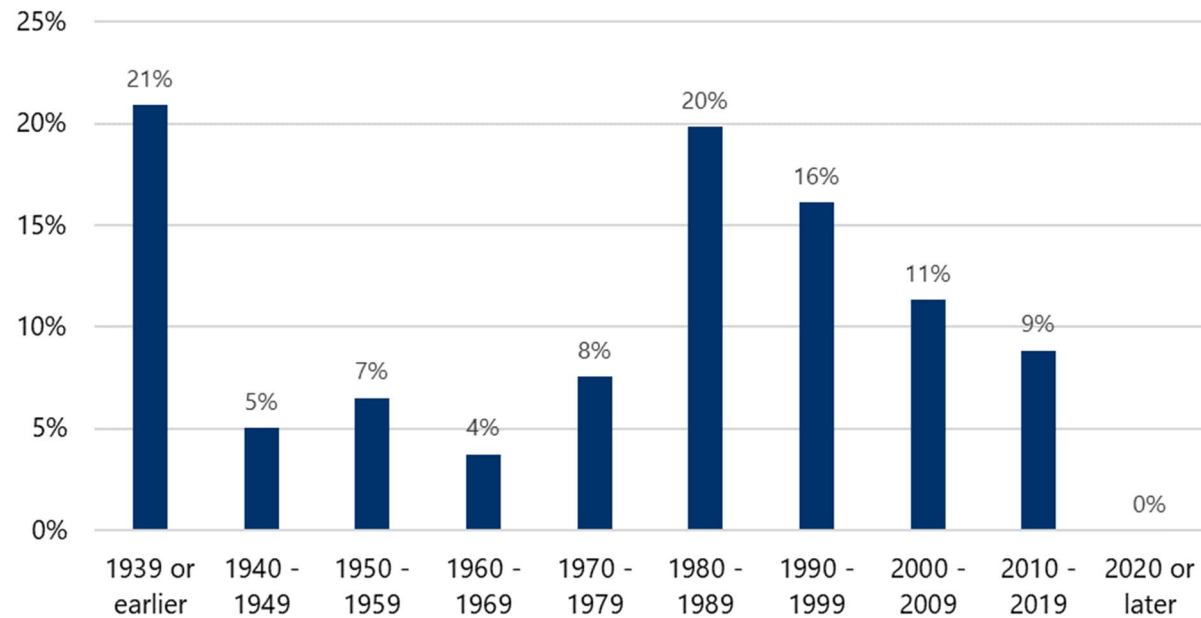
Source: Esri, Decennial Data



## HOUSING UNITS: INVENTORY BY YEAR BUILT

- The median year that homes were built in South Berwick is 1983.
- About 20% of homes were built since 2000, while 21% were built prior to 1940.
- South Berwick's housing stock is of similar age compared to the surrounding counties of York (median year 1979), Rockingham (1981), and Strafford (1977).

**Total Housing Units by Year Built, Town of South Berwick (2021)**



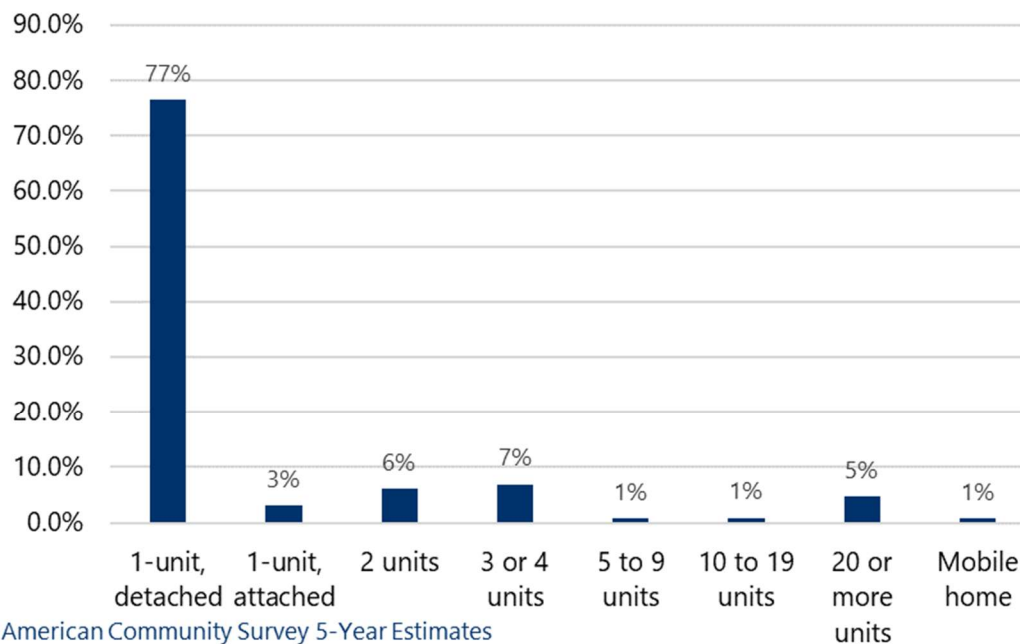
Source: American Community Survey 5-Year Estimates



# HOUSING INVENTORY: HOUSING UNITS BY UNITS IN STRUCTURE

- About 80% of South Berwick’s housing stock is made up of single-family housing.
- Just under 20% of South Berwick’s housing stock is in multifamily structures (2+ units).
- South Berwick has a proportionally higher share of single-family housing compared to York County (73%), Rockingham County (73.0), and Strafford County (60.1%).

**Share of Housing Units by Units In Structure - South Berwick (2021)**



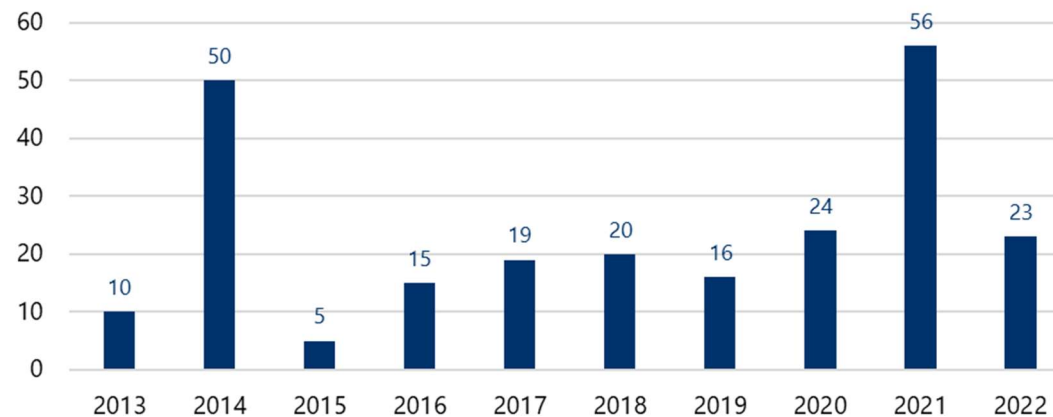
Source: American Community Survey 5-Year Estimates



## HOUSING INVENTORY: BUILDING UNIT PIPELINE

- Since 2010, the number of units approved by building permits in the town has fluctuated, generally ticking up from 2015-2020. Multi-family building permits were relatively quiet throughout the decade but spiked in 2014 and 2021. In the last decade, most of the development occurring in South Berwick has been single-family homes.
- According to the Town of South Berwick, several other housing development projects have taken place in the last several years. These include:
  - Easy Street Properties Subdivision – 5 lots – approval in December 2022
  - Meadow Woods Subdivision – 6 lots – approval in May 2021
  - Blackmore Road Development (Laurens Lane) – 25 units – approval in October 2020
  - Great Hill Road Subdivision – 6 lots – approval in October 2020
  - Cole Lane (Kast Farm Subdivision) – 11 lots – approval in January 2019
  - Bittersweet Lane (Outlook Subdivision) – 24 units – approval in December 2016

**Total New Housing Units Approved By Permits, South Berwick**



Source: Town of South Berwick



# HOME VALUES

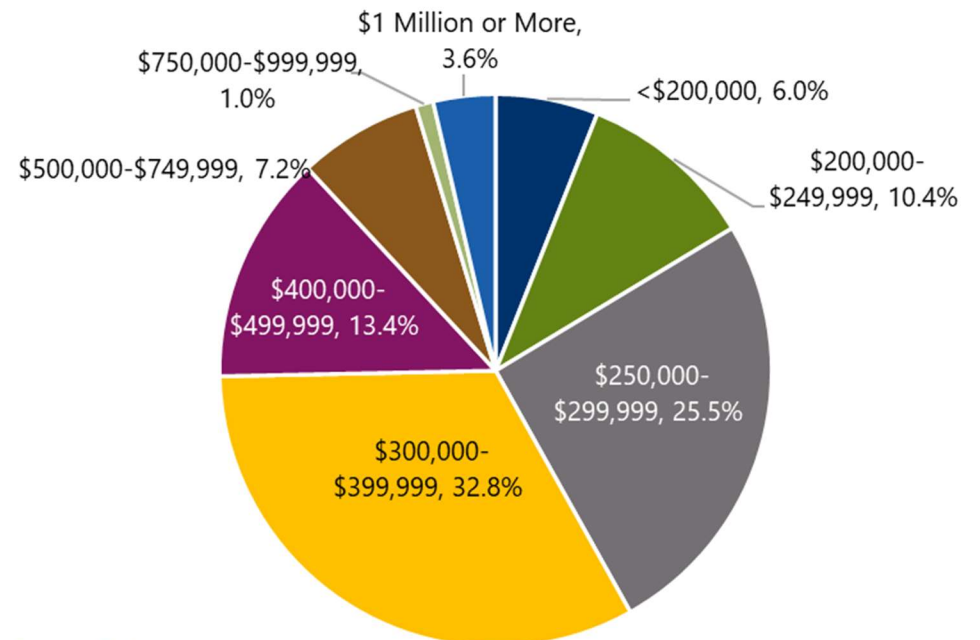
- The largest share of South Berwick’s housing stock has values between \$300,000 - \$399,999, at 32.8% of homes.
- Another 25.5% of South Berwick’s homes have values between \$250,000 - \$299,999, while about 12% have values over \$500,000.
- In 2022, the median home value in South Berwick was \$324,747.

## 2022 Housing Inventory by Home Value, South Berwick

Value	Number	Percent
<\$50,000	17	0.8%
\$50,000-\$99,999	35	1.7%
\$100,000-\$149,999	22	1.0%
\$150,000-\$199,999	53	2.5%
\$200,000-\$249,999	219	10.4%
\$250,000-\$299,999	539	25.5%
\$300,000-\$399,999	693	32.8%
\$400,000-\$499,999	283	13.4%
\$500,000-\$749,999	153	7.2%
\$750,000-\$999,999	22	1.0%
\$1,000,000-\$1,499,999	33	1.6%
\$1,500,000-\$1,999,999	2	0.1%
\$2,000,000 or greater	42	2.0%
<b>Median Home Value</b>	<b>\$324,747</b>	

Source: Esri

## 2022 Breakdown of Home Values in South Berwick



Source: Esri



# GROSS RENT

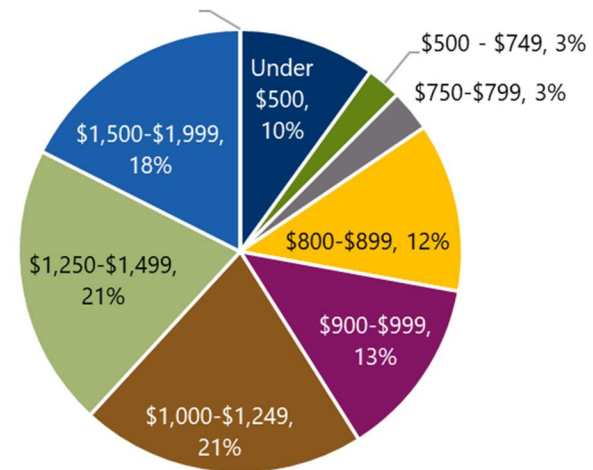
- The median rent paid in South Berwick in 2021 was \$1,108. This is lower than Strafford County (\$1,178) and Rockingham County (\$1,371) but closely resembles York County's median (\$1,090).
- The largest share of rented units had rent between \$1,000 and \$1,499 per month, representing about 42% of all rented units. In 2021, there were no units recorded that paid rent over \$2,000 per month.

## Gross Rent in South Berwick (2021)

	Number	Percent
Households Paying Gross Rent	592	
Under \$500	59	10%
\$500 - \$749	15	3%
\$750-\$799	18	3%
\$800-\$899	73	12%
\$900-\$999	78	13%
\$1,000-\$1,249	123	21%
\$1,250-\$1,499	122	21%
\$1,500-\$1,999	104	18%
\$2,000 and over	0	0%
<b>Median Gross Rent</b>	<b>\$1,108</b>	

Source: ACS 5-Year Estimates via Esri

2021 Breakdown of Gross Rent Paid in South Berwick  
\$2,000 and over, 0%



Source: American Community Survey 5-Year Estimates, via Esri



## HOUSING AFFORDABILITY

- In South Berwick, the median household could afford a maximum rent of \$2,386 per month or a home of up to \$351,000.
- In 2022, the median home sold in South Berwick cost \$444,231. Based on this data, South Berwick’s housing market can be considered unaffordable, as the median household could not afford to buy the median house. In 2022, a household would need income of about \$131,000 in order to afford the median home, about \$35,500 more than the current median household income.

### South Berwick Income Brackets and Housing Affordability

Household income Bracket	Number of Households	Percent of Households	Max. Affordable Rent	Max. Affordable Home Value
Less than \$24,999	174	6%	Less than \$625	\$92,000 or Less
\$25,000 - \$49,999	431	15%	\$625 - \$1,250	\$92,000 - \$184,000
\$50,000 - \$74,999	360	13%	\$1,251 - \$1,875	\$184,000 - \$276,000
\$75,000 - \$99,999	546	19%	\$1,876 - \$2,500	\$276,000 - \$368,000
\$100,000 - \$149,999	757	26%	\$2,501 - \$3,750	\$368,000 - \$552,000
\$150,000 - \$199,999	351	12%	\$3,751 - \$5,000	\$552,000 - \$736,000
\$200,000 or more	250	9%	\$5,000 or more	\$736,000 or more
<b>Median Household (\$95,442)</b>			<b>\$2,386</b>	<b>\$351,000</b>

**Note:** Assumes 10% Down Payment and 6.6% 30 Yr Fixed Mortgage. Affordability is defined as costing less than 30% of income, including property taxes, insurance, and utilities.

**Source:** Camoin Associates, Esri



## HOUSING DEMAND IN SOUTH BERWICK: HOUSEHOLDS BY INCOME AND AGE

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

- As of 2022 there are an estimated 2,869 households in South Berwick.
- The largest household age cohorts in South Berwick are 55-64 (25%), 65-74 (20%), and 45-54 (19%).
- Households under 55 collectively account for 48% of all households.

**Households by Income and Age, Town of South Berwick, 2022**

	15-24	25-34	35-44	45-54	55-64	65-74	75+	Total	% of Total
< \$15,000	6	12	11	11	20	23	30	113	4%
\$15,000-\$24,999	3	4	2	7	12	18	15	61	2%
\$25,000-\$34,999	11	25	16	17	42	46	78	235	8%
\$35,000-\$49,999	13	29	21	24	25	38	46	196	7%
\$50,000-\$74,999	13	48	35	48	80	87	49	360	13%
\$75,000-\$99,999	16	100	64	99	138	96	33	546	19%
\$100,000-\$149,999	8	85	147	169	218	101	29	757	26%
\$150,000-\$199,999	3	40	41	93	108	51	15	351	12%
\$200,000+	0	40	39	66	74	22	9	250	9%
<b>Total</b>	<b>73</b>	<b>383</b>	<b>376</b>	<b>534</b>	<b>717</b>	<b>482</b>	<b>304</b>	<b>2,869</b>	
<b>% of Total</b>	<b>3%</b>	<b>13%</b>	<b>13%</b>	<b>19%</b>	<b>25%</b>	<b>17%</b>	<b>11%</b>		

Source: Esri



## HOUSING DEMAND IN SOUTH BERWICK: PROJECTED CHANGE IN HOUSEHOLDS

### Projected Change in Households, Town of South Berwick (2022-2027)

	15-24	25-34	35-44	45-54	55-64	65-74	75+	Total
< \$15,000	(3)	(5)	(5)	(6)	(10)	(8)	(3)	(40)
\$15,000-\$24,999	(1)	(2)	0	(5)	(5)	(5)	0	(18)
\$25,000-\$34,999	(2)	(9)	(4)	(8)	(22)	(8)	0	(53)
\$35,000-\$49,999	(4)	(7)	(5)	(11)	(13)	(12)	(1)	(53)
\$50,000-\$74,999	(5)	(20)	(15)	(26)	(45)	(25)	(5)	(141)
\$75,000-\$99,999	(2)	(5)	(6)	(35)	(39)	9	14	(64)
\$100,000-\$149,999	5	18	56	(15)	12	80	41	197
\$150,000-\$199,999	1	16	21	6	24	49	21	138
\$200,000+	0	(1)	9	(12)	(9)	14	9	10
<b>Total</b>	<b>(11)</b>	<b>(15)</b>	<b>51</b>	<b>(112)</b>	<b>(107)</b>	<b>94</b>	<b>76</b>	<b>(24)</b>

Source: Esri

### Projected Change in Households, 3-County Region (2022-2027)

	15-24	25-34	35-44	45-54	55-64	65-74	75+	Total
< \$15,000	199	633	1,816	(276)	226	2,622	1,762	6,982
\$15,000-\$24,999	(128)	(439)	(374)	(559)	(1,041)	(821)	(232)	(3,594)
\$25,000-\$34,999	68	905	2,102	832	1,506	2,198	1,630	9,241
\$35,000-\$49,999	14	608	1,810	452	999	1,939	1,256	7,078
\$50,000-\$74,999	(101)	(508)	(346)	(587)	(1,004)	(557)	(44)	(3,147)
\$75,000-\$99,999	(148)	(779)	(546)	(967)	(1,534)	(693)	389	(4,278)
\$100,000-\$149,9	42	(724)	(447)	(1,448)	(1,796)	503	1,653	(2,217)
\$150,000-\$199,9	51	(521)	(154)	(1,029)	(1,181)	745	1,075	(1,014)
\$200,000+	(49)	(352)	(260)	(443)	(962)	(517)	92	(2,491)
<b>Total</b>	<b>(52)</b>	<b>(1,177)</b>	<b>3,601</b>	<b>(4,025)</b>	<b>(4,787)</b>	<b>5,419</b>	<b>7,581</b>	<b>6,560</b>

Source: Esri

These tables show the projected change in all South Berwick and regional households from 2022-2027, by income and age.

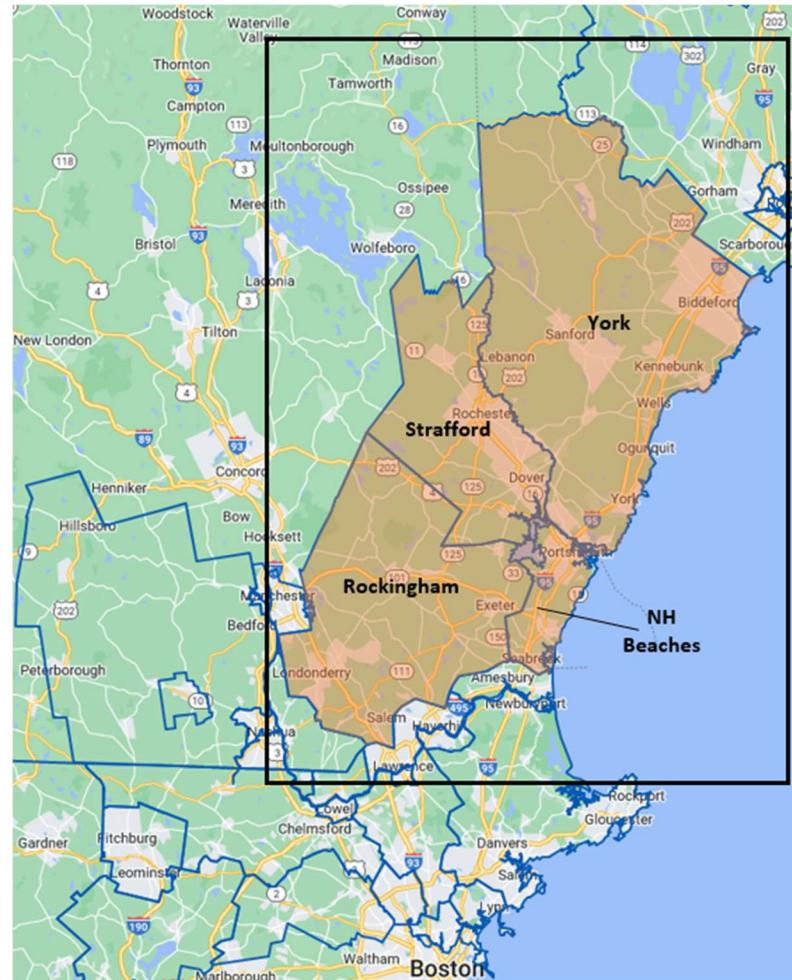
In South Berwick:

- Over the next five years (2022-2027), the number of households in South Berwick is expected to decline by 24 (net). Among household earnings over \$100,000, there will be 345 new households, while the number of households making under \$100,000 will decline by 369.
- Age cohorts driving growth will be those aged 65+ and 35-44-year-olds.
- Growth will be concentrated in older, higher-income households. For example, households aged 55+ with income over \$100,000 are projected to grow by 241, accounting for 70% of all growth in households making \$100,000 or more.
- Despite South Berwick's decline in households overall, regional growth in households presents an opportunity for the town, where land is cheaper and may allow for comparatively affordable housing projects.



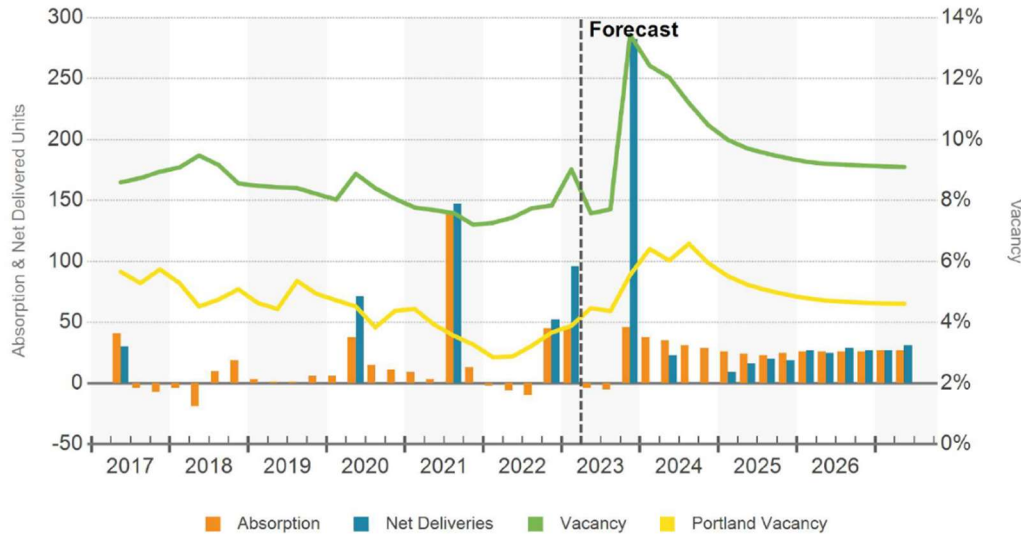
## MULTIFAMILY MARKET: GEOGRAPHICAL CONTEXT

The Town of South Berwick's multifamily market falls in the York County, ME market, as defined by CoStar and indicated on the map below. Additionally, the Strafford County, Rockingham, and New Hampshire Beaches submarkets fall within the larger Boston market. Trends for South Berwick as well as the York County, Strafford County, Rockingham, and New Hampshire Beaches submarkets are included in this analysis.



# MULTIFAMILY MARKET: REGIONAL CONTEXT (YORK COUNTY SUBMARKET)

ABSORPTION, NET DELIVERIES & VACANCY



- The vacancy rate has expanded moderately over the past four quarters to 8.9%, slightly above the long-term average.
- About 150 units have been delivered in the past 12 months, outpacing the five-year average. These units were concentrated in Biddeford (96 Units) and York (52 Units). Development of an additional 282 units is underway in Kittery and another 23 elsewhere in York County.
- Rents have risen by 6.9% over the last year, significantly exceeding the average annual rate of 2.8% in the last ten years.

## 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.

## KEY INDICATORS

Current Quarter	Units	Vacancy Rate	Asking Rent	Effective Rent	Absorption Units	Delivered Units	Under Constr Units
4 & 5 Star	325	1.4%	\$1,603	\$1,598	0	0	282
3 Star	1,245	11.4%	\$1,585	\$1,563	6	0	23
1 & 2 Star	1,884	8.5%	\$1,084	\$1,079	0	0	0
<b>Submarket</b>	<b>3,454</b>	<b>8.9%</b>	<b>\$1,509</b>	<b>\$1,493</b>	<b>6</b>	<b>0</b>	<b>305</b>

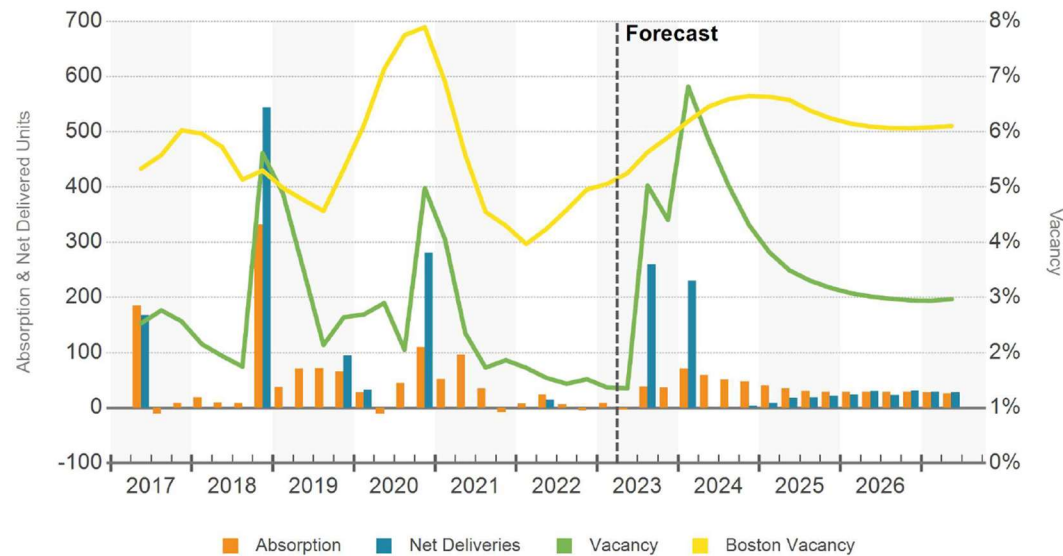
Source: CoStar, as of 2Q23



## MULTIFAMILY MARKET: REGIONAL CONTEXT (ROCKINGHAM SUBMARKET)

- The vacancy rate has remained stable over the past four quarters at 1.4%, slightly below the long-term average.
- Inventory is unchanged in the last year, though the market has expanded over the last five years. Development of approximately 490 units is underway, a substantial addition to existing inventory.
- Rents have risen by 2.5% over the last year, lagging the average annual rate of 4.6% in the last ten years.

ABSORPTION, NET DELIVERIES & VACANCY



### KEY INDICATORS

Current Quarter	Units	Vacancy Rate	Asking Rent	Effective Rent	Absorption Units	Delivered Units	Under Constr Units
4 & 5 Star	1,083	2.1%	\$2,358	\$2,253	0	0	230
3 Star	2,745	1.4%	\$1,725	\$1,722	0	0	260
1 & 2 Star	1,828	1.0%	\$1,542	\$1,538	0	0	0
<b>Submarket</b>	<b>5,656</b>	<b>1.4%</b>	<b>\$1,812</b>	<b>\$1,787</b>	<b>0</b>	<b>0</b>	<b>490</b>

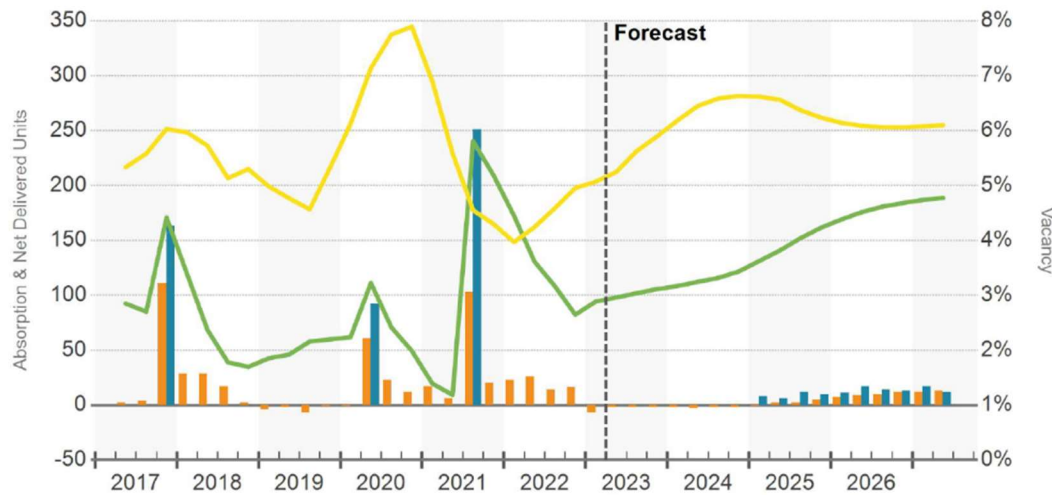
Source: CoStar, as of 2Q23



# MULTIFAMILY MARKET: REGIONAL CONTEXT (NH BEACHES SUBMARKET)

- The vacancy rate has fallen over the past year and sits at 2.9%, in line with the long-term average.
- Inventory is unchanged in the last year, and supply will remain minimal in the near-term as no projects are currently under construction.
- Rents have risen by 4.7% over the last year, in line with the average for the past decade.

ABSORPTION, NET DELIVERIES & VACANCY



Source: CoStar, as of 2Q23

■ Absorption ■ Net Deliveries ■ Vacancy ■ Boston Vacancy

## KEY INDICATORS

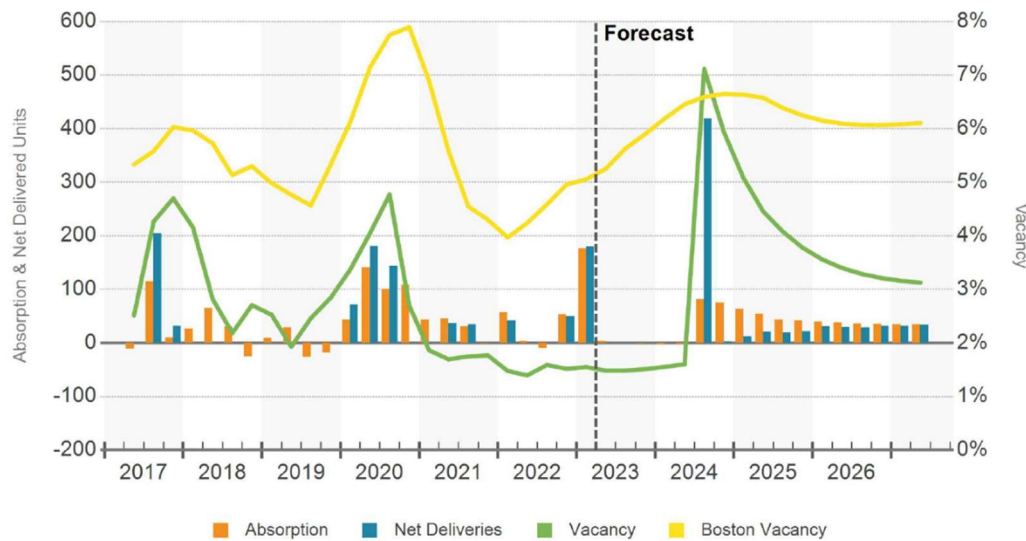
Current Quarter	Units	Vacancy Rate	Asking Rent	Effective Rent	Absorption Units	Delivered Units	Under Constr Units
4 & 5 Star	846	4.2%	\$2,596	\$2,586	0	0	0
3 Star	1,122	2.8%	\$2,021	\$2,016	0	0	0
1 & 2 Star	1,174	2.0%	\$1,426	\$1,423	0	0	0
<b>Submarket</b>	<b>3,142</b>	<b>2.9%</b>	<b>\$2,006</b>	<b>\$2,000</b>	<b>0</b>	<b>0</b>	<b>0</b>



## MULTIFAMILY MARKET: REGIONAL CONTEXT (STRAFFORD COUNTY)

- The vacancy rate has remained stable over the past four quarters at 1.6%, slightly below the long-term average.
- About 230 units have been delivered in the past 12 months, outpacing the five-year average. Development of approximately 420 units is underway, a substantial addition to existing inventory.
- Rents have risen by 7.0% over the last year, significantly exceeding the average annual rate of 3.8% in the last ten years.

ABSORPTION, NET DELIVERIES & VACANCY



### KEY INDICATORS

Current Quarter	Units	Vacancy Rate	Asking Rent	Effective Rent	Absorption Units	Delivered Units	Under Constr Units
4 & 5 Star	810	2.5%	\$2,449	\$2,444	(1)	0	0
3 Star	2,726	1.5%	\$1,689	\$1,682	0	0	418
1 & 2 Star	2,028	1.2%	\$1,249	\$1,245	0	0	0
<b>Submarket</b>	<b>5,564</b>	<b>1.6%</b>	<b>\$1,713</b>	<b>\$1,708</b>	<b>(1)</b>	<b>0</b>	<b>418</b>

Source: CoStar, as of 2Q23



## MULTIFAMILY MARKET: SOUTH BERWICK

- The vacancy rate has fallen in the first quarter of the year and sits at 3.1%, in line with the long-term average.
- The market has had very little activity in the last five years, with no deliveries or construction occurring between 2019-2022. That said, 23 units are currently under construction in South Berwick, which will make an addition to current inventory.
- Rents have risen significantly by 9.8% over the last year, significantly exceeding the average annual rate of 2.9% in the last ten years. Rent growth spiked significantly in 2021, when asking rent grew by 10.1% year-over-year. Since then, growth has remained high within the town. High demand for rental housing no development of new inventory are factors that contribute to high rent growth both in the local area and in communities throughout the nation.

### South Berwick Key Multifamily Metrics

Year	Total Units	Asking Rent Per Unit	Asking Rent Per SF	Asking Rent % Growth/Yr.	Vacant Units	Vacancy Rate	Absorption	Under Construction	Deliveries
2019	175	\$1,327	\$1.51	0.4%	5	3.0%	1	-	-
2020	175	\$1,334	\$1.52	0.5%	4	2.5%	-	-	-
2021	175	\$1,469	\$1.67	10.1%	5	3.1%	-	-	-
2022	175	\$1,610	\$1.82	9.6%	7	3.9%	-1	-	-
2023 YTD	175	\$1,658	\$1.87	9.8%	5	3.1%	1	23	-

Source: CoStar, As of 1Q23



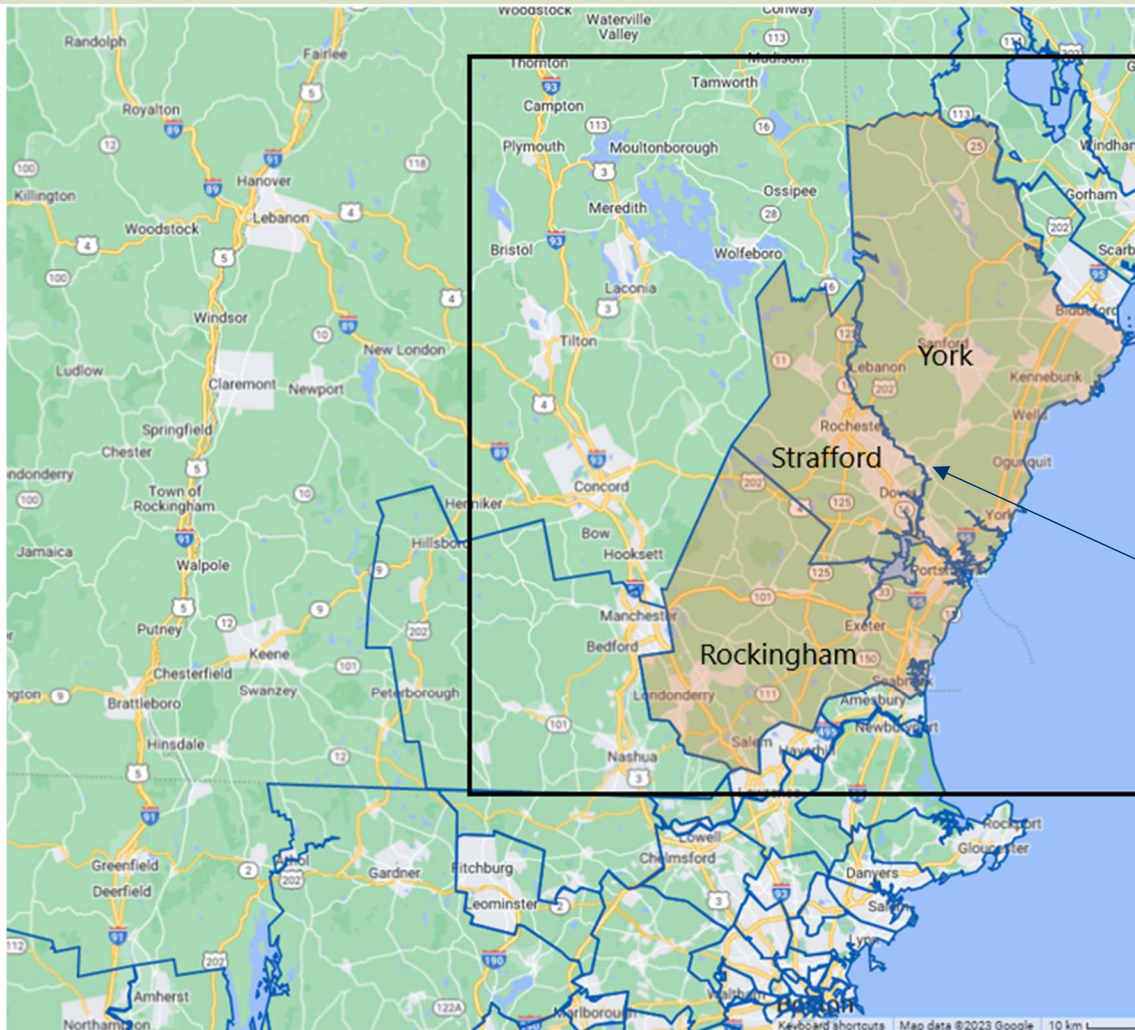


# RETAIL MARKET ANALYSIS



## RETAIL MARKET: GEOGRAPHICAL CONTEXT

The Town of South Berwick's retail market falls in the York County, ME submarket, as defined by CoStar and indicated on the map below. Additionally, the Strafford County and Rockingham County submarkets fall within the larger Boston market. Trends for South Berwick as well as the York County, Strafford County, and Rockingham County submarkets are included in this analysis.

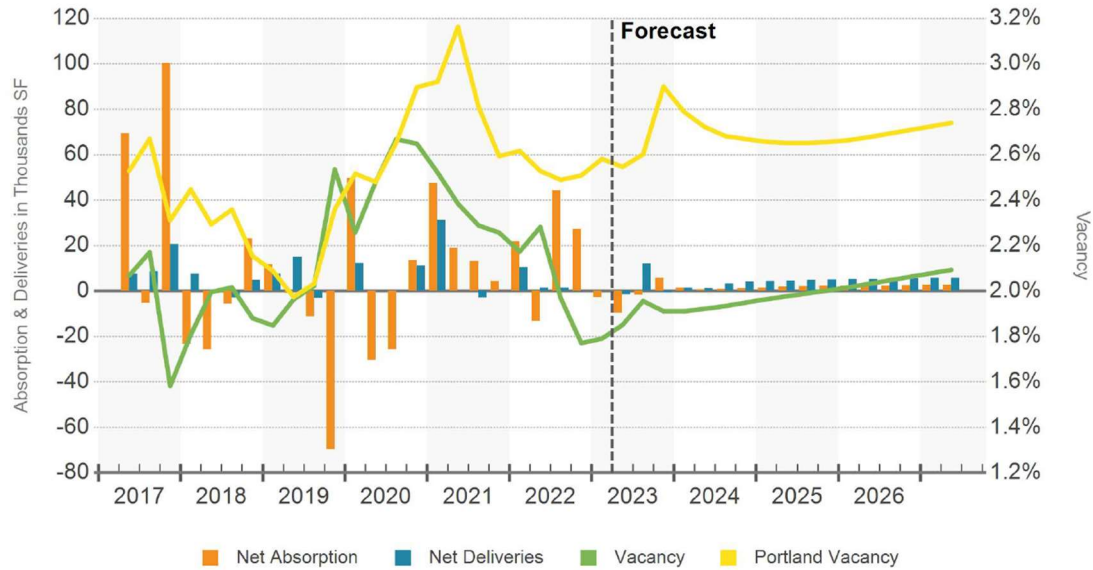


South Berwick is part of the York County, ME submarket.



# RETAIL MARKET: REGIONAL CONTEXT (YORK COUNTY, ME SUBMARKET)

NET ABSORPTION, NET DELIVERIES & VACANCY



Within the York County submarket:

- Retail vacancies are roughly in line with the five-year average and essentially unchanged from a year ago at 1.8%
- Of properties tracked by CoStar, 14,318 SF of general retail space is under construction. Development has been relatively steady over the past few years. Both projects under construction are located in Old Orchard Beach.
- Rents have risen by 1.4% over the last year.
- The current retail vacancy rate is low at 1.8%. Vacancy rates have generally remained flat since 2017, though they were slightly elevated during 2020 and 2021, mostly due to Mall and Neighborhood Center retail space.
- General retail and malls have the lowest vacancy rate while neighborhood centers and other retail have the highest.

## KEY INDICATORS

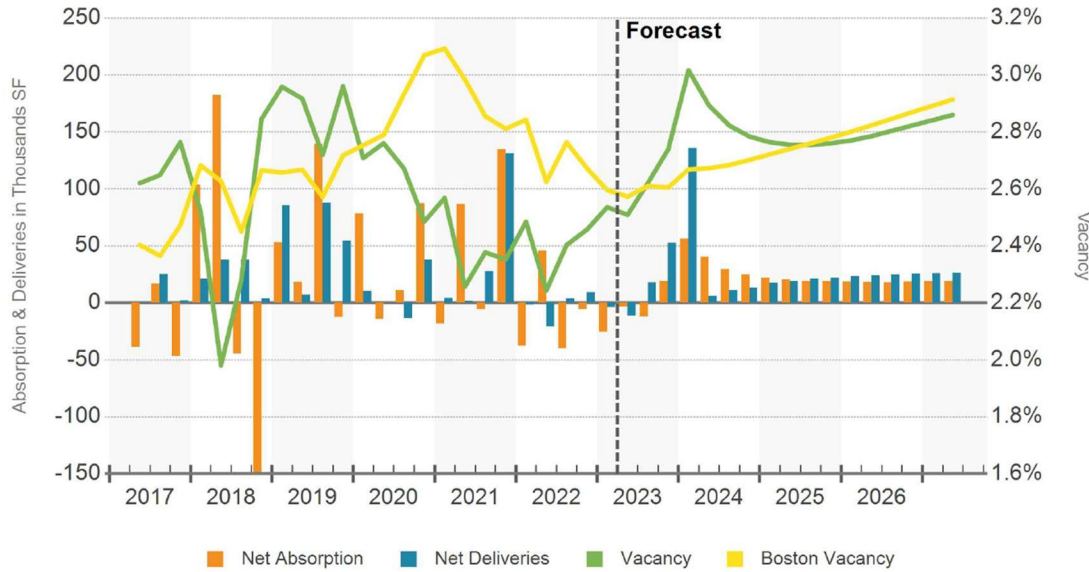
Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	625,560	0%	\$17.32	0%	0	0	0
Power Center	0	-	-	-	0	0	0
Neighborhood Center	1,606,137	5.9%	\$13.02	8.1%	0	0	0
Strip Center	427,906	2.5%	\$14.73	2.5%	0	0	0
General Retail	10,739,974	1.1%	\$14.25	1.5%	(3,222)	0	14,318
Other	307,636	7.3%	\$17.88	7.3%	0	0	0
<b>Submarket</b>	<b>13,707,213</b>	<b>1.8%</b>	<b>\$14.35</b>	<b>2.4%</b>	<b>(3,222)</b>	<b>0</b>	<b>14,318</b>

Source: CoStar, as of 2Q23



# RETAIL MARKET: REGIONAL CONTEXT (ROCKINGHAM COUNTY, NH SUBMARKET)

NET ABSORPTION, NET DELIVERIES & VACANCY



Within the Rockingham County submarket:

- Retail vacancies are roughly in line with the five-year average and essentially unchanged from a year ago at 2.5%
- Of properties tracked by CoStar, about 230,000 of general retail space is under construction. Development has been relatively steady over the past few years.
- Rents have risen by 6.2% over the last year.
- The current retail vacancy rate is low at 2.5%. Vacancy rates have been volatile since 2017 and was elevated starting in 2019 and generally falling until 2022.
- General retail and strip centers have the lowest vacancy rates, while Malls have by far the highest vacancy rate. Vacancy for mall space spiked in the fourth quarter of 2022.

## KEY INDICATORS

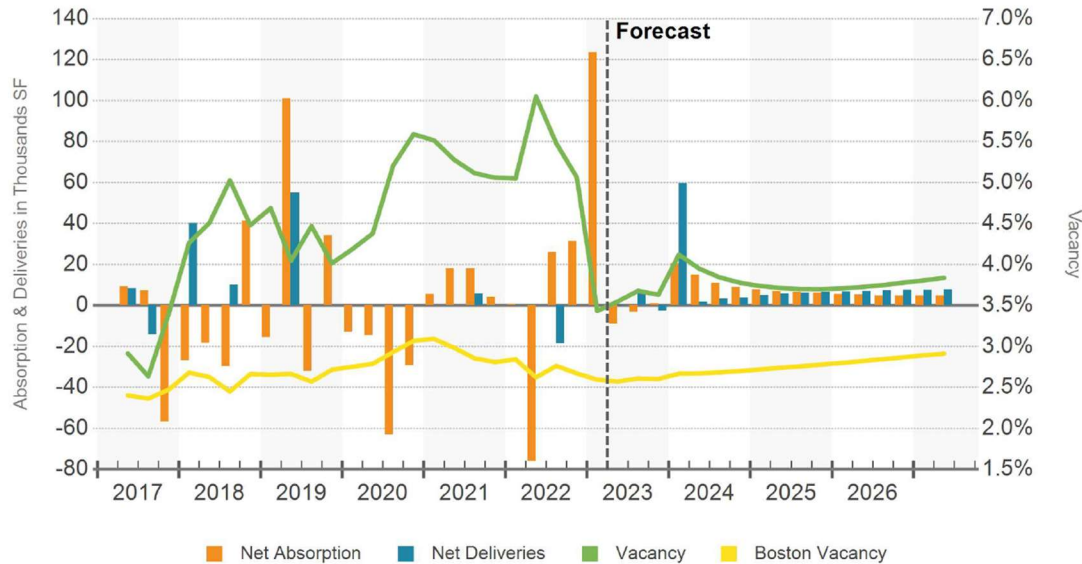
Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	1,656,440	13.4%	\$46.05	8.8%	0	0	0
Power Center	1,836,239	4.8%	\$21.08	5.0%	0	0	0
Neighborhood Center	7,217,323	3.0%	\$20.05	3.3%	(2,129)	0	0
Strip Center	1,570,146	2.1%	\$18.42	1.7%	6,248	0	0
General Retail	15,167,437	0.9%	\$19.25	2.0%	2,280	0	230,080
Other	0	-	-	-	0	0	0
<b>Submarket</b>	<b>27,447,585</b>	<b>2.5%</b>	<b>\$21.14</b>	<b>2.9%</b>	<b>6,399</b>	<b>0</b>	<b>230,080</b>

Source: CoStar, as of 2Q23



# RETAIL MARKET: REGIONAL CONTEXT (STRAFFORD COUNTY SUBMARKET)

NET ABSORPTION, NET DELIVERIES & VACANCY



Within the Rockingham County submarket:

- Retail vacancies are below the five-year average and have fallen compared to a year ago at 2.5%.
- Of properties tracked by CoStar, about 73,055 of general retail space is under construction. Development has been slow in the past few years, though construction has recently returned to the market.
- Rents have risen by 7.7% over the last year.
- The current retail vacancy rate is 3.5%. Vacancy rates declined sharply beginning in the third quarter of 2022 after remaining elevated throughout 2020 and 2021.
- General retail and strip centers have the lowest vacancy rates, while Malls have by far the highest vacancy rate. Vacancy for mall space spiked in the fourth quarter of 2022.

## KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	0	-	-	-	0	0	0
Power Center	595,615	1.5%	\$14.71	1.5%	0	0	0
Neighborhood Center	1,388,786	14.5%	\$14.81	7.7%	0	0	0
Strip Center	233,179	4.3%	\$15.12	4.3%	(2,800)	0	0
General Retail	5,364,575	0.8%	\$14.94	1.0%	1,040	0	73,055
Other	0	-	-	-	0	0	0
<b>Submarket</b>	<b>7,582,155</b>	<b>3.5%</b>	<b>\$14.91</b>	<b>2.4%</b>	<b>(1,760)</b>	<b>0</b>	<b>73,055</b>

Source: CoStar, as of 2Q23



## RETAIL MARKET: LOCAL CONTEXT (TOWN OF SOUTH BERWICK)

South Berwick has a relatively quiet but tight retail real estate market. The table below describes the last ten years of the town's retail market.

- There are 75,920 SF of retail space spread across 27 buildings currently being tracked by CoStar.
- There has been no new construction of retail space in South Berwick in the last ten years. The most recent delivery was 1,140 SF in 2012.
- The vacancy rate is very low in South Berwick. In 2023, the vacancy rate is 1.6%, though occupancy has been 100% for 8 of the years between 2013-2023.

### South Berwick Retail Market Snapshot

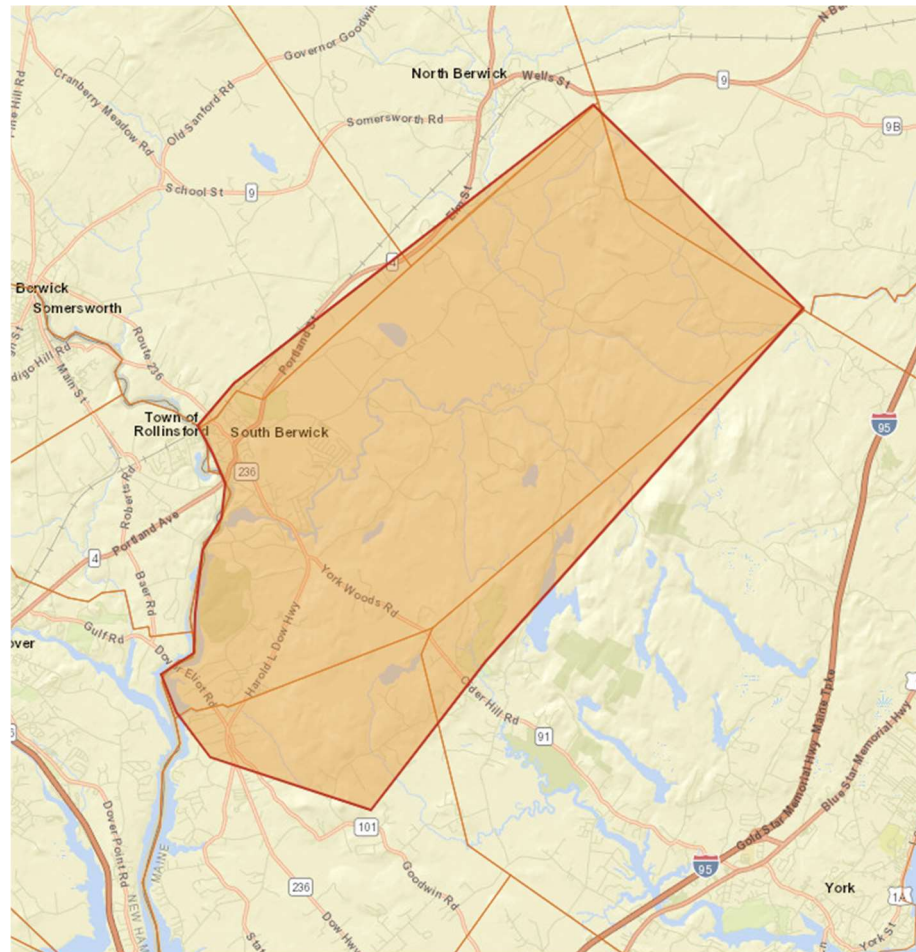
	Buildings	SF	Vacant SF	Vacancy Rate	Deliveries	Net Absorption	Under Construction
2013	27	75,920	-	-	-	500	-
2014	27	75,920	-	-	-	-	-
2015	27	75,920	-	-	-	-	-
2016	27	75,920	1,025	1.4%	-	(1,025)	-
2017	27	75,920	-	-	-	1,025	-
2018	27	75,920	-	-	-	-	-
2019	27	75,920	-	-	-	-	-
2020	27	75,920	-	-	-	-	-
2021	27	75,920	-	-	-	-	-
2022	27	75,920	-	-	-	-	-
2023 YTD	27	75,920	1,232	1.6%	-	(1,232)	-

Source: CoStar, as of 2Q2023



## LOCAL RETAIL TRADE AREA

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



# 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.” 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, a 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) in the trade area with viable development include:

- **Local Trade Area:** Limited- Service Restaurants, Gasoline Stations and Convenience Stores, Supermarkets and Grocery Stores



## 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 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 supportable retail square footage that, theoretically, could be supported in the geographies, assuming:

1. 10% of the sales leakage is recaptured and
2. New businesses have sales comparable to the average sales per square foot of all businesses. In this analysis, we assume an average of \$325 per SF, a national average across all categories of retail adjusted for inflation (source: ICSC 2021, adjusted to 2022 dollars).

Results of the retail leakage analysis find that:

- **Local Trade Area:** About \$5.1 million in sales could be recaptured, which would support about 15,000 SF of retail space. Grocery and specialty food stores, restaurants, convenience stores, or pharmacies, and other local-serving retail present the greatest opportunities for the trade area. While other industries also have high trade gaps, the nature of South Berwick's retail environment and its current inventory of assets indicate that the above listed retail types are most likely to succeed within the town.

Overall, South Berwick faces several challenges to expansion of retail trade, such as its distance from major thoroughfares and existence of large competing retail areas in nearby communities. South Berwick's major corridors include Route 4 (along Main Street), and Route 236 serve as the main viable locations for potential retail expansion in the town.

Overall, South Berwick faces several challenges to expansion of retail trade, such as its distance from major thoroughfares and existence of large competing retail areas in nearby communities. South Berwick's major corridors include Route 4 (along Main Street) and Route 236 serve as the main viable locations for potential retail expansion in the town.



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

NAICS	Description	2022 Total Demand	2022 Total Sales	Retail Gap (Demand - Sales)	Leakage Capture (10%)	Total Supportable Square Feet
441110	New Car Dealers	\$5,122,731	\$779	\$5,121,952	\$512,195	1,576
722513	Limited-Service Restaurants	\$10,848,611	\$6,148,544	\$4,700,067	\$470,007	1,442
454110	Electronic Shopping and Mail-Order Houses	\$4,885,946	\$433,975	\$4,451,972	\$445,197	1,361
447110	Gasoline Stations with Convenience Stores	\$3,146,697	\$89,960	\$3,056,737	\$305,674	932
445110	Supermarkets and Other Grocery (except Convenience) Stores	\$5,594,937	\$2,859,394	\$2,735,543	\$273,554	831
452311	Warehouse Clubs and Supercenters	\$3,896,514	\$1,203,877	\$2,692,638	\$269,264	816
722511	Full-Service Restaurants	\$9,330,079	\$7,260,040	\$2,070,039	\$207,004	625
452210	Department Stores	\$1,941,116	\$18,315	\$1,922,801	\$192,280	579
446110	Pharmacies and Drug Stores	\$2,271,648	\$360,377	\$1,911,271	\$191,127	574
312120	Breweries	\$1,328,654	\$6,723	\$1,321,931	\$132,193	396
454390	Other Direct Selling Establishments	\$1,899,854	\$760,968	\$1,138,886	\$113,889	340
444190	Other Building Material Dealers	\$1,204,011	\$65,166	\$1,138,844	\$113,884	339
443142	Electronics Stores	\$1,592,539	\$570,819	\$1,021,720	\$102,172	303
441120	Used Car Dealers	\$912,707	\$35,457	\$877,250	\$87,725	260
448140	Family Clothing Stores	\$1,197,174	\$385,078	\$812,096	\$81,210	240
441310	Automotive Parts and Accessories Stores	\$841,962	\$54,534	\$787,428	\$78,743	232
442110	Furniture Stores	\$833,016	\$58,054	\$774,962	\$77,496	227
812112	Beauty Salons	\$1,358,647	\$590,665	\$767,982	\$76,798	225
713940	Fitness and Recreational Sports Centers	\$822,874	\$75,167	\$747,707	\$74,771	218
451110	Sporting Goods Stores	\$688,164	\$55,181	\$632,983	\$63,298	184
448120	Women's Clothing Stores	\$709,671	\$82,044	\$627,627	\$62,763	182
722515	Snack and Nonalcoholic Beverage Bars	\$594,281	\$5,328	\$588,953	\$58,895	170
452319	All Other General Merchandise Stores	\$1,053,735	\$469,496	\$584,238	\$58,424	168
453998	All Other Miscellaneous Store Retailers (except Tobacco Stores)	\$1,031,523	\$500,787	\$530,736	\$53,074	153
312130	Wineries	\$505,103	\$1,262	\$503,841	\$50,384	144
441320	Tire Dealers	\$529,788	\$38,015	\$491,773	\$49,177	141
448210	Shoe Stores	\$550,299	\$61,602	\$488,697	\$48,870	139
453310	Used Merchandise Stores	\$496,812	\$27,373	\$469,440	\$46,944	133
312140	Distilleries	\$453,619	\$3,660	\$449,960	\$44,996	127
448310	Jewelry Stores	\$754,668	\$307,518	\$447,150	\$44,715	126
444130	Hardware Stores	\$433,058	\$17,782	\$415,276	\$41,528	117
446120	Cosmetics, Beauty Supplies, and Perfume Stores	\$439,535	\$30,055	\$409,480	\$40,948	115

Source: Lightcast, Camoin Associates



**Continued: Retail Gap and Potential, 6-Digit NAICS, Local Trade Area (2022)**

NAICS	Description	2022 Total Demand	2022 Total Sales	Retail Gap (Demand - Sales)	Leakage Capture (10%)	Total Supportable Square Feet
454310	Fuel Dealers	\$560,547	\$168,809	\$391,738	\$39,174	110
447190	Other Gasoline Stations	\$450,123	\$64,713	\$385,410	\$38,541	108
812113	Nail Salons	\$468,596	\$91,475	\$377,121	\$37,712	105
448190	Other Clothing Stores	\$471,035	\$97,174	\$373,861	\$37,386	104
445310	Beer, Wine, and Liquor Stores	\$398,211	\$60,785	\$337,426	\$33,743	94
722410	Drinking Places (Alcoholic Beverages)	\$332,340	\$34,693	\$297,647	\$29,765	82
453991	Tobacco Stores	\$301,928	\$15,260	\$286,668	\$28,667	79
453910	Pet and Pet Supplies Stores	\$308,729	\$27,769	\$280,959	\$28,096	77
446199	All Other Health and Personal Care Stores	\$315,609	\$42,434	\$273,175	\$27,317	75
442210	Floor Covering Stores	\$329,458	\$67,894	\$261,564	\$26,156	72
441228	Motorcycle, ATV, and All Other Motor Vehicle Dealers	\$261,613	\$15,392	\$246,221	\$24,622	67
451120	Hobby, Toy, and Game Stores	\$257,230	\$17,443	\$239,787	\$23,979	65
311811	Retail Bakeries	\$259,264	\$23,500	\$235,764	\$23,576	64
453210	Office Supplies and Stationery Stores	\$252,584	\$17,748	\$234,836	\$23,484	64
454210	Vending Machine Operators	\$216,163	\$0	\$216,163	\$21,616	58
441210	Recreational Vehicle Dealers	\$256,009	\$46,914	\$209,095	\$20,910	56
445120	Convenience Stores	\$387,487	\$196,744	\$190,743	\$19,074	51
446130	Optical Goods Stores	\$195,681	\$31,052	\$164,628	\$16,463	44
445299	All Other Specialty Food Stores	\$215,547	\$53,596	\$161,950	\$16,195	43
812910	Pet Care (except Veterinary) Services	\$252,551	\$90,853	\$161,698	\$16,170	43
448110	Men's Clothing Stores	\$165,411	\$19,347	\$146,063	\$14,606	39
445210	Meat Markets	\$143,994	\$4,521	\$139,473	\$13,947	37
448150	Clothing Accessories Stores	\$268,044	\$137,990	\$130,054	\$13,005	34
446191	Food (Health) Supplement Stores	\$152,499	\$25,994	\$126,505	\$12,651	33
453920	Art Dealers	\$160,411	\$42,669	\$117,742	\$11,774	31
444120	Paint and Wallpaper Stores	\$168,270	\$63,859	\$104,411	\$10,441	27
<b>Total</b>					<b>\$5,078,268</b>	<b>15,082</b>

**Source:** Lightcast, Camoin Associates

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



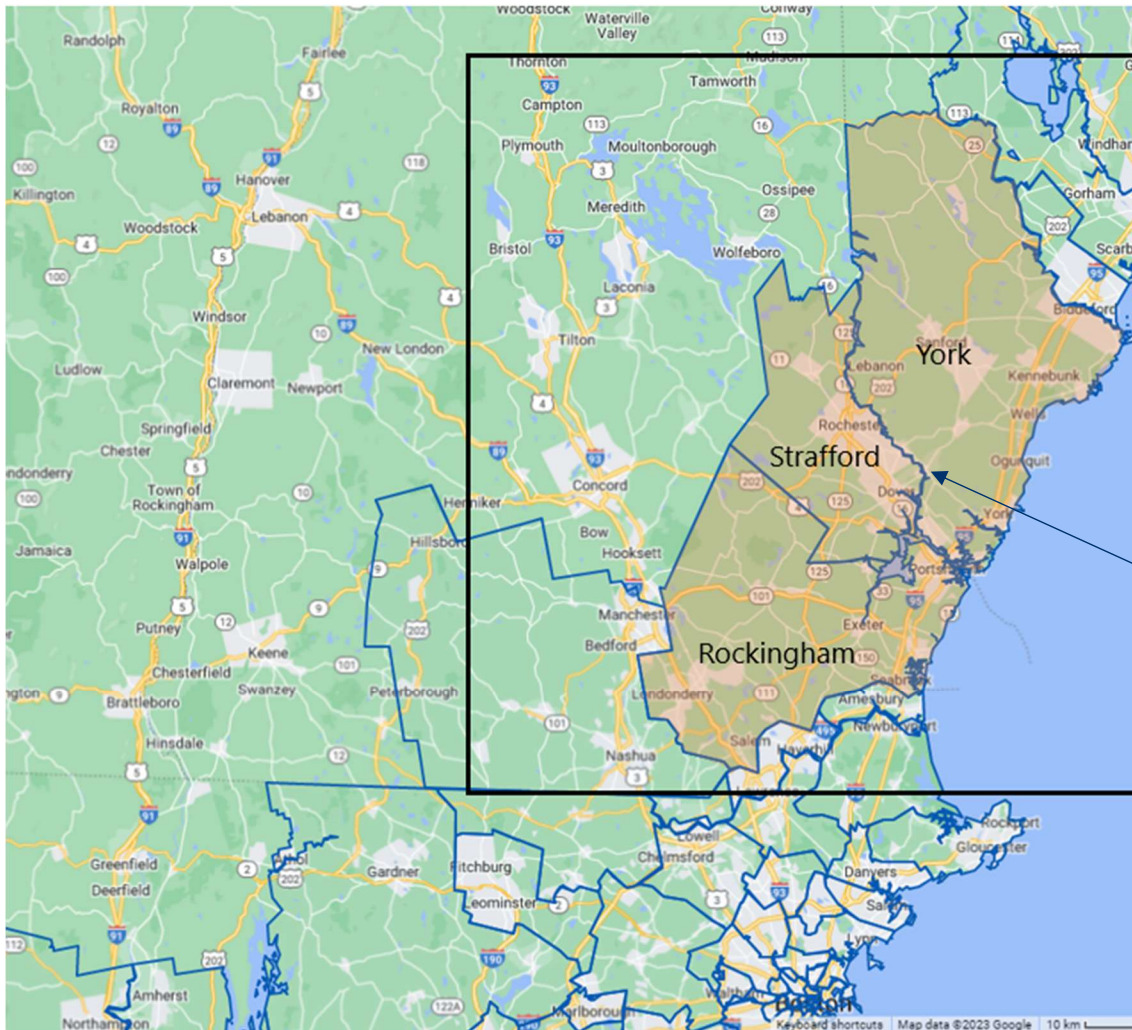


# OFFICE MARKET ANALYSIS



## OFFICE MARKET: GEOGRAPHICAL CONTEXT

The Town of South Berwick's office market falls in the York County, ME submarket. Additionally, the Strafford County, NH and Rockingham County, NH submarkets, both part of the larger Boston market, are included in this analysis.

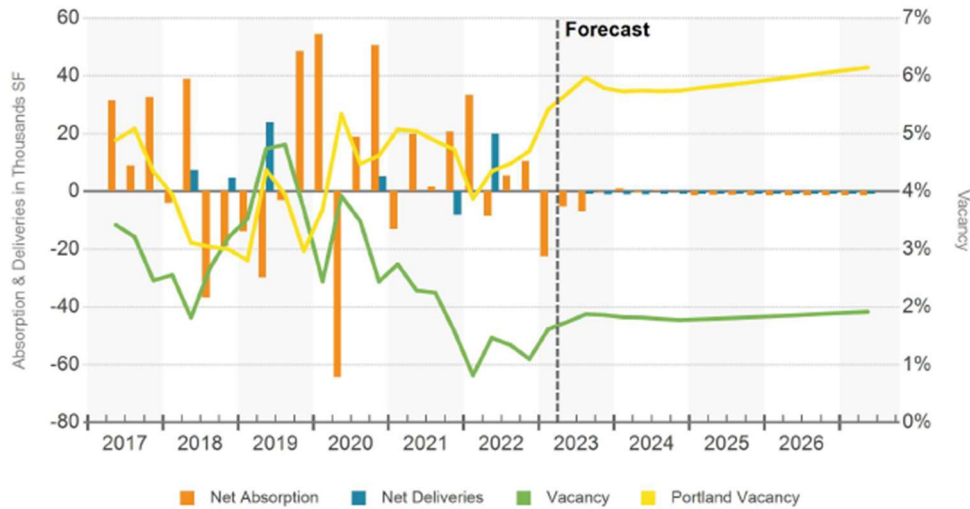


South Berwick is part of the York County, ME submarket.



# OFFICE MARKET: REGIONAL CONTEXT (YORK COUNTY, ME SUBMARKET)

NET ABSORPTION, NET DELIVERIES & VACANCY



The York County submarket is a midsized submarket that contains around 4.4 million SF of office space. In the submarket:

- The vacancy rate risen slightly the last year to 1.7%, however this is below the 10-year average.
- Net absorption over the past year has been negative, though the last five years average net absorption of 22,000 SF per year.
- Rents have risen by 1.9% over the last year, below the 3.1% 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 0.4% over the last three years.

## KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
4 & 5 Star	116,700	0%	\$25.12	0%	1,700	0	0
3 Star	841,528	4.5%	\$20.12	5.7%	0	0	0
1 & 2 Star	3,418,134	1.0%	\$18.20	1.0%	(3,252)	0	0
<b>Submarket</b>	<b>4,376,362</b>	<b>1.7%</b>	<b>\$18.75</b>	<b>1.9%</b>	<b>(1,552)</b>	<b>0</b>	<b>0</b>

Source: CoStar, as of 2Q2023

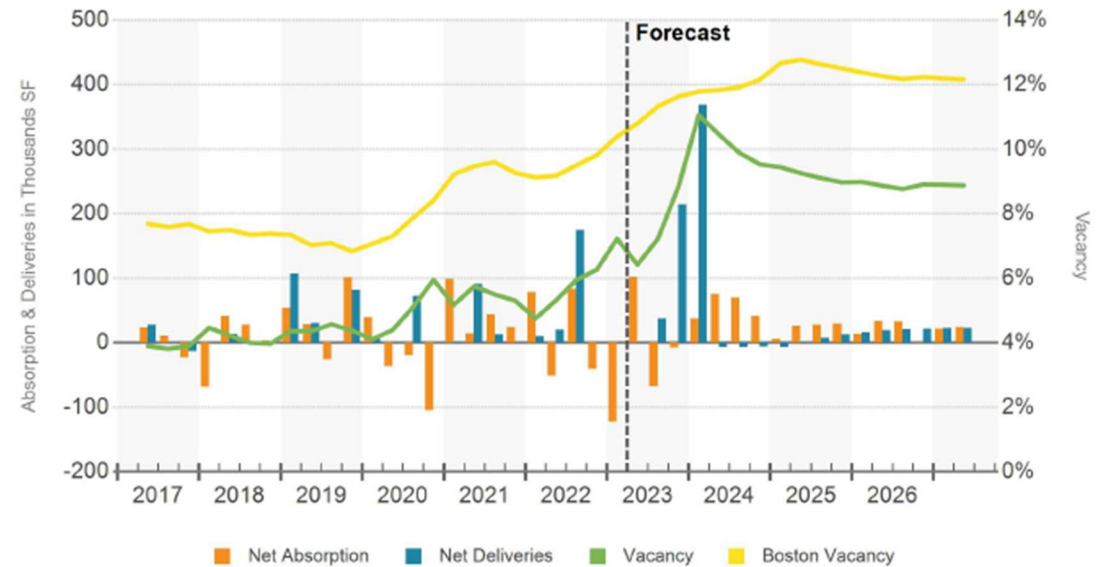


## OFFICE MARKET: REGIONAL CONTEXT (ROCKINGHAM COUNTY, NH SUBMARKET)

The Rockingham County submarket is a very large submarket that contains around 12.7 million SF of office space. In the submarket:

- The vacancy rate has risen moderately over the last year to 6.4%, slightly higher than the 10-year average.
- Net absorption over the past year has been flat, though the last five years average net absorption of 51,000 SF per year.
- Rents have risen by 2.4% over the last year, somewhat below the average in the last decade.
- Currently, there is almost 640,000 SF of office space under construction, nearly all of it being for 4- and 5-star space.

NET ABSORPTION, NET DELIVERIES & VACANCY



### KEY INDICATORS

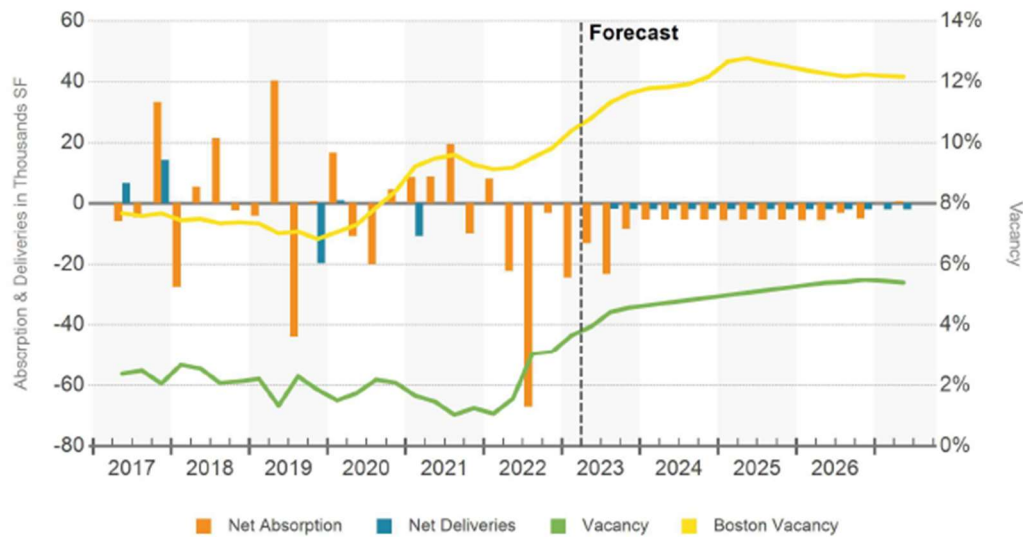
Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
4 & 5 Star	1,249,174	8.7%	\$38.23	24.2%	0	0	598,300
3 Star	5,693,966	10.9%	\$27.03	13.9%	96,096	0	43,600
1 & 2 Star	5,804,233	1.6%	\$24.98	2.1%	4,603	0	0
<b>Submarket</b>	<b>12,747,373</b>	<b>6.4%</b>	<b>\$27.68</b>	<b>10.2%</b>	<b>100,699</b>	<b>0</b>	<b>639,900</b>

Source: CoStar, as of 2Q2023



# OFFICE MARKET: REGIONAL CONTEXT (STRAFFORD COUNTY, NH SUBMARKET)

NET ABSORPTION, NET DELIVERIES & VACANCY



The Rockingham County submarket is a midsize submarket that contains around 4.5 million SF of office space. In the submarket:

- The vacancy rate has risen significantly over the last 12 months to 3.7%, its highest rate in more than five years.
- Net absorption over the past year has been negative, and annual net absorption over the last five years has averaged -13,000 SF.
- Rents have risen by 2.5% over the last year, somewhat below the average in the last decade.
- Currently, there is no office space under construction activity in the submarket. Additionally, inventory has contracted in the last decade due to demolition outpacing new construction.

## KEY INDICATORS

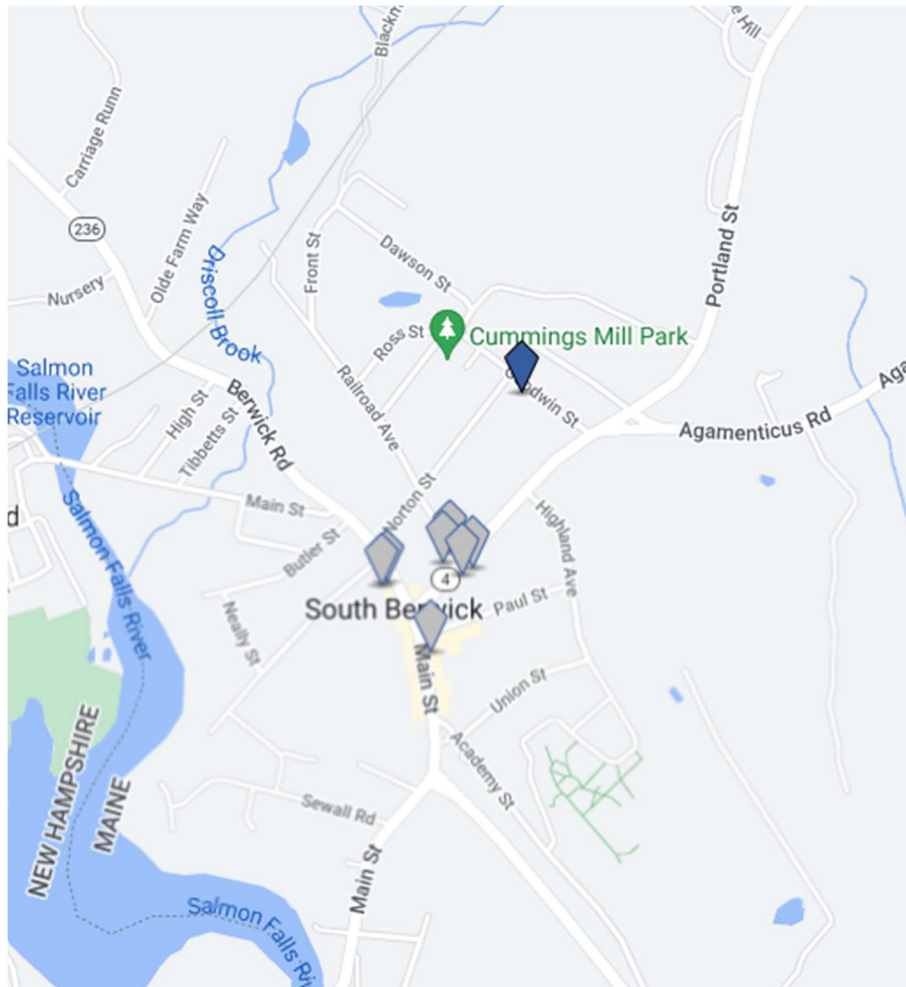
Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
4 & 5 Star	472,444	0.7%	\$37.87	0.7%	0	0	0
3 Star	1,940,108	6.9%	\$22.60	7.4%	0	0	0
1 & 2 Star	2,096,198	1.3%	\$22.95	1.3%	0	0	0
<b>Submarket</b>	<b>4,508,750</b>	<b>3.7%</b>	<b>\$24.36</b>	<b>3.8%</b>	<b>0</b>	<b>0</b>	<b>0</b>

Source: CoStar, as of 2Q2023



## LOCAL OFFICE MARKET: SOUTH BERWICK

**Map: Office Space in South Berwick**



- Locally, South Berwick has 75,915 SF of office space as tracked by CoStar. In total, there are 9 buildings classified as office space in South Berwick.
- Vacant office space in South Berwick is nonexistent. Since 2014, occupancy of office space has been 100%, meaning that there is no available space in the town.
- 24,000 SF of office space was delivered in 2019, increasing the town's office supply by 46%.



## OFFICE MARKET DEMAND

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 South Berwick grew by 23.6%, driven by Federal Civilian Government, while the 3-county region saw slower growth of 2.0%. In 2022, there were 908 jobs in office-using industries in South Berwick, representing about 65.4% of all jobs in the town. This is a larger share than the 3-county region (22.0%).

### South Berwick Office Utilizing Industries

NAICS	Description	Historic		Projected	
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change
5112	Software Publishers	Insf. Data	Insf. Data	Insf. Data	Insf. Data
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	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5179	Other Telecommunications	0	Insf. Data	0	0.0%
5191	Other Information Services	0	Insf. Data	0	0.0%
52	Finance and Insurance	0	0.0%	0	0.0%
531	Real Estate	2	12.1%	0	1.5%
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	0	Insf. Data	0	0.0%
5411	Legal Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5413	Architectural, Engineering, and Related Services	(0)	(0.4%)	(0)	(0.2%)
5414	Specialized Design Services	Insf. Data	Insf. Data	11	27.2%
5415	Computer Systems Design and Related Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5416	Management, Scientific, and Technical Consulting Services	9	58.9%	5	21.1%
5418	Advertising, Public Relations, and Related Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5511	Management of Companies and Enterprises	0	Insf. Data	0	0.0%
5611	Office Administrative Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5613	Employment Services	Insf. Data	Insf. Data	8	25.8%
5614	Business Support Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5615	Travel Arrangement and Reservation Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	1	6.1%	2	9.7%
9011	Federal Government, Civilian	106	23.3%	23	4.0%
9029	State Government, Excluding Education and Hospitals	0	2.1%	(1)	(6.5%)
9039	Local Government, Excluding Education and Hospitals	3	3.0%	1	1.3%
<b>Total</b>		<b>174</b>	<b>23.6%</b>	<b>49</b>	<b>5.4%</b>

Source: Lightcast



### 3-County Region Office Utilizing Industries

NAICS	Description	Historic		Projected	
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change
5112	Software Publishers	(81)	(6.5%)	(126)	(10.7%)
512	Motion Picture and Sound Recording Industries	(10)	(2.2%)	57	12.8%
515	Broadcasting (except Internet)	(59)	(39.1%)	(33)	(35.9%)
5173	Wired and Wireless Telecommunications Carriers	(706)	(50.5%)	(219)	(31.7%)
5179	Other Telecommunications	(32)	(38.1%)	(1)	0.0%
5191	Other Information Services	(29)	(10.5%)	(1)	0.0%
52	Finance and Insurance	199	1.9%	(111)	0.0%
531	Real Estate	361	9.8%	211	5.2%
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	Insf. Data	Insf. Data	Insf. Data	0.0%
5411	Legal Services	(18)	(1.2%)	(42)	(2.8%)
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	251	13.2%	33	1.5%
5413	Architectural, Engineering, and Related Services	523	15.7%	338	8.7%
5414	Specialized Design Services	(71)	(8.3%)	108	13.8%
5415	Computer Systems Design and Related Services	(804)	(13.0%)	545	10.1%
5416	Management, Scientific, and Technical Consulting Services	680	24.6%	471	13.7%
5418	Advertising, Public Relations, and Related Services	4	0.8%	25	5.2%
5511	Management of Companies and Enterprises	863	35.5%	281	0.0%
5611	Office Administrative Services	127	7.4%	234	12.8%
5613	Employment Services	(791)	(17.6%)	(151)	(4.1%)
5614	Business Support Services	(66)	(3.9%)	(62)	(3.9%)
5615	Travel Arrangement and Reservation Services	7	1.9%	27	7.6%
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	(206)	(6.1%)	203	6.4%
9011	Federal Government, Civilian	1,518	19.0%	458	4.8%
9029	State Government, Excluding Education and Hospitals	(157)	(9.0%)	(78)	(4.9%)
9039	Local Government, Excluding Education and Hospitals	(141)	(1.5%)	153	1.7%
<b>Total</b>		<b>1,364</b>	<b>2.0%</b>	<b>2,323</b>	<b>3.3%</b>

Source: Lightcast



## 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.

The demand outlook for medical office space depends on growth in the types of industries and jobs that utilize medical office space in the region. The following tables show the categories of medical 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 medical office jobs in South Berwick declined by 9.9%, while the region saw growth of 9.8% Medical office jobs are projected to further decline by 4.7% from 2022-2027 in South Berwick, compared to 9.3% growth in the region.

### South Berwick Office Utilizing Industries

NAICS	Description	Historic		Projected	
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change
6211	Offices of Physicians	(11)	(13.2%)	(5)	(6.9%)
6212	Offices of Dentists	2	15.7%	0	2.6%
6213	Offices of Other Health Practitioners	(1)	(10.4%)	(0)	(1.5%)
6214	Outpatient Care Centers	Insf. Data	Insf. Data	Insf. Data	Insf. Data
6215	Medical and Diagnostic Laboratories	Insf. Data	Insf. Data	Insf. Data	Insf. Data
6219	Other Ambulatory Health Care Services	Insf. Data	Insf. Data	Insf. Data	Insf. Data
<b>Total</b>		<b>(11)</b>	<b>(9.9%)</b>	<b>(4)</b>	<b>(4.7%)</b>

Source: Lightcast



### 3-County Region Office Utilizing Industries

NAICS	Description	Historic		Projected	
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change
6211	Offices of Physicians	351	6.2%	479	8.0%
6212	Offices of Dentists	285	13.9%	211	9.0%
6213	Offices of Other Health Practitioners	393	16.1%	354	12.5%
6214	Outpatient Care Centers	333	18.9%	248	11.8%
6215	Medical and Diagnostic Laboratories	(133)	(34.2%)	(32)	(12.4%)
6219	Other Ambulatory Health Care Services	(3)	(1.0%)	26	9.3%
<b>Total</b>		<b>1,226</b>	<b>9.8%</b>	<b>1,286</b>	<b>9.3%</b>

Source: Lightcast



# INDUSTRIAL MARKET ANALYSIS



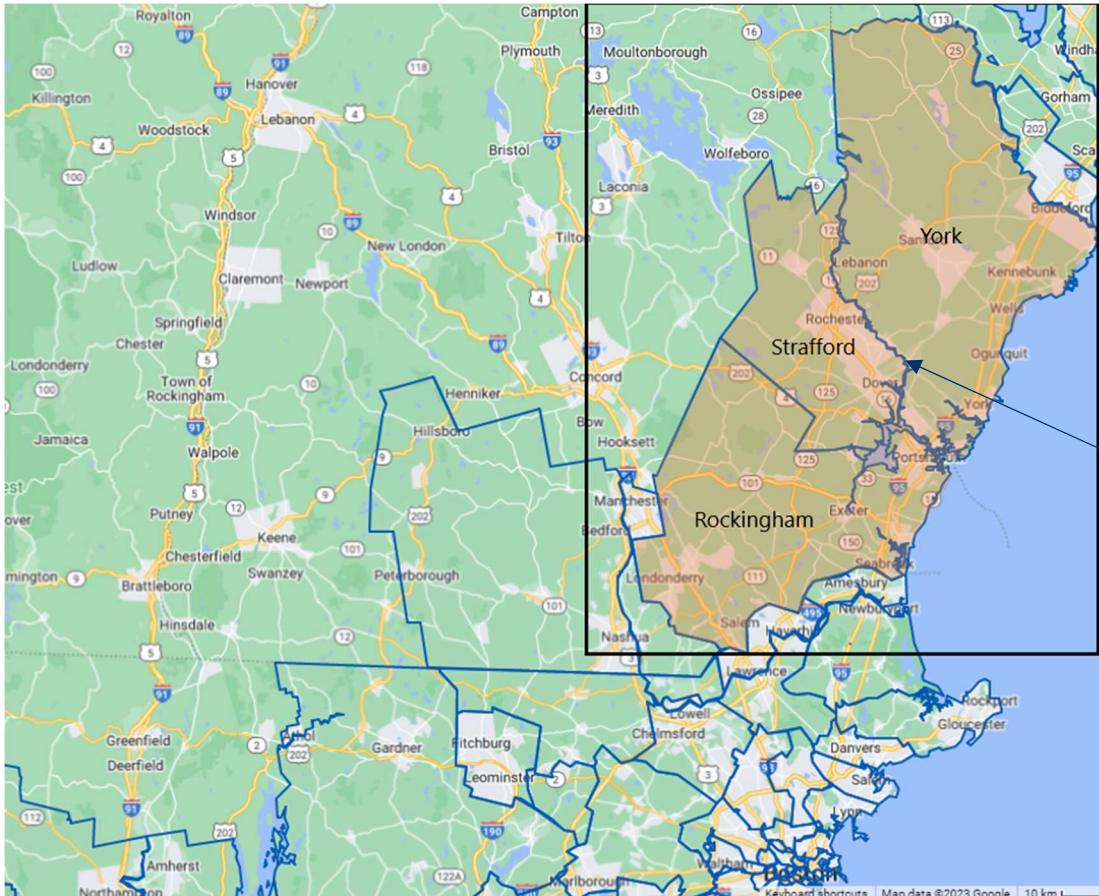
## INDUSTRIAL MARKET: KEY FINDINGS

- The York County submarket contains about 10.8 million SF of industrial space, accounting for about a third of the overall Portland market's 33.2 million SF of industrial real estate. In addition, Rockingham County has 28.3 million SF of industrial space and Strafford County posts 8.1 million SF.
- Overall, Rockingham County has the tightest market, with a vacancy rate of 2.5% in the most recent quarter, driven by very low vacancy for logistics space (0.5%). Meanwhile, specialized industrial space in York County (0.2%) and Strafford County (0.0%) has minimal availability.
- Significant development is underway in the York County Submarket in Saco, which will add 180,000 SF to the submarket's inventory. This is the newest construction in the submarket in over a decade. Other new construction of industrial space is underway in Rockingham County (160,000 SF) but not in Strafford County.
- The York County submarket has remained active for industrial transactions in the last few years as properties have traded with regularity, but momentum has more recently slowed.
- South Berwick itself currently has no known inventory of industrial real estate, according to CoStar. The town has relatively little direct access to major highways compared to neighboring communities, which presents a challenge to South Berwick's expansion of industrial activity. That said, the town has Opportunities may include small-scale manufacturing or construction businesses that serve local clients.



## INDUSTRIAL MARKET: GEOGRAPHICAL CONTEXT

The Town of South Berwick's retail market falls in the York County, ME submarket, as defined by CoStar and indicated on the map below. Additionally, the Strafford County and Rockingham County submarkets fall within the larger Boston market. Trends for South Berwick as well as the York County, Strafford County, and Rockingham County submarkets are included in this analysis.



South Berwick is part of the York County, ME submarket.

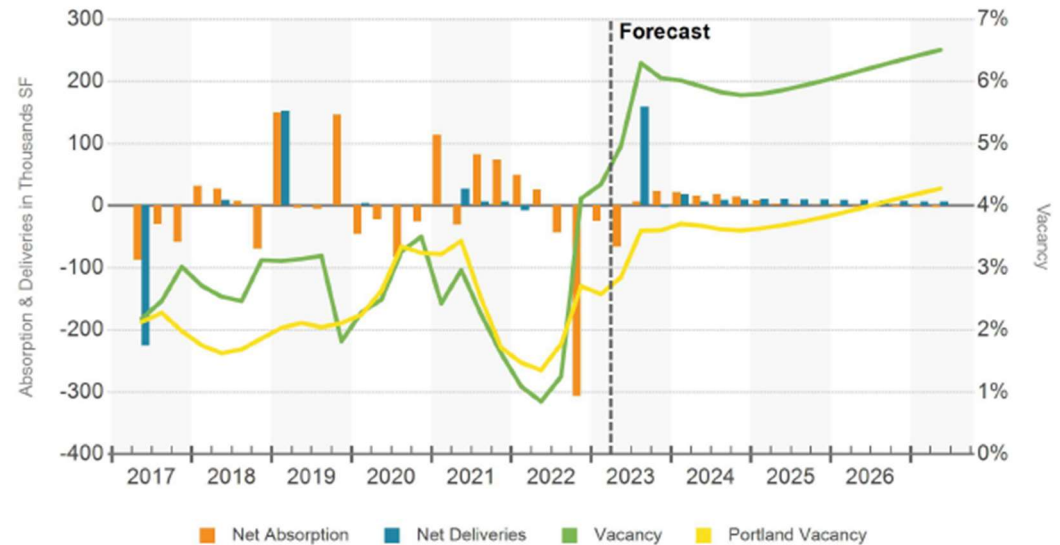


# INDUSTRIAL MARKET: REGIONAL CONTEXT (YORK COUNTY, ME SUBMARKET)

York County has approximately 10.7 million SF, representing a large portion of the Portland market's industrial inventory.

- Logistics space accounts for the largest share of inventory, with over 6 million SF. Another 3.3 million SF of specialized industrial space and 1.4 million SF of flex space exist in the York County submarket.
- Overall, the industrial vacancy rate is 4.8%, rising by 3.8% over the last year. Vacancy is highest for Logistics space, 8.1%. Specialized industrial and flex space have very low vacancy in the submarket.
- Rents have risen by 8.6% over the last year, well above the 4.8% average in the last decade.
- Currently, there is 180,000 SF underway in the submarket, the most in over a decade. All the industrial development underway is located in Saco. A further 50,000 SF has been proposed in Eliot.

NET ABSORPTION, NET DELIVERIES & VACANCY



## KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Logistics	6,029,721	8.1%	\$8.15	8.7%	(50,920)	0	180,600
Specialized Industrial	3,320,086	0.2%	\$7.82	0.4%	0	0	0
Flex	1,351,697	1.3%	\$9.68	2.2%	0	0	0
<b>Submarket</b>	<b>10,701,504</b>	<b>4.8%</b>	<b>\$8.24</b>	<b>5.3%</b>	<b>(50,920)</b>	<b>0</b>	<b>180,600</b>

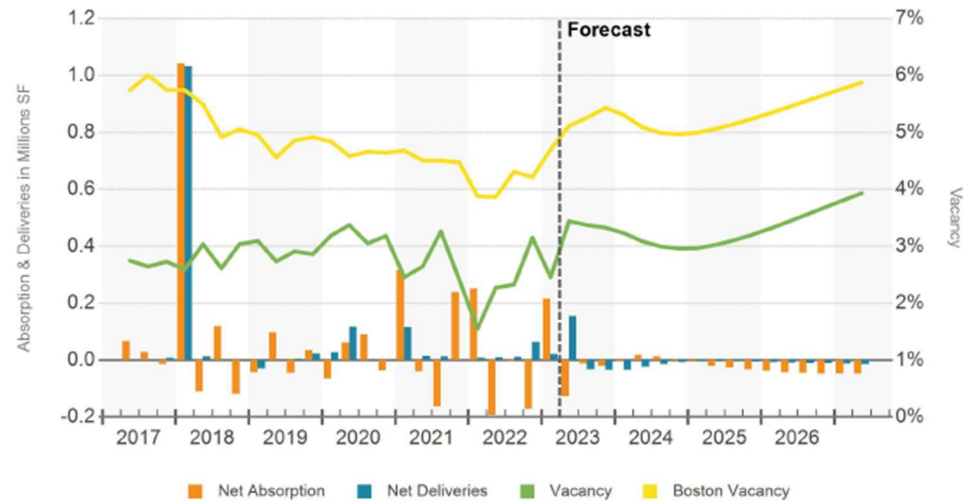


# INDUSTRIAL MARKET: REGIONAL CONTEXT (ROCKINGHAM COUNTY, NH SUBMARKET)

Rockingham County is a very large submarket with 28.3 million SF of industrial real estate.

- Logistics space accounts for the largest share of inventory, with over 13.3 million SF. Another 8.2 million SF of specialized industrial space and 6.9 million SF of flex space exist in the submarket.
- Overall, the industrial vacancy rate is 2.5%, up slightly over the last 12 months. Vacancy is highest for flex space, at 5.1%. Logistics space has a very low vacancy rate, at 0.5%.
- Net absorption is negative but averaged +210,000 SF annually in the last five years.
- Rents have risen by 7.5% over the last year, well above the 5.9% average in the last decade.
- Currently, there is 160,000 SF underway in Salem, in addition to the 360,000 SF delivered in the submarket over the last three years. Additionally, about 760,000 SF are proposed across several projects in the County.

NET ABSORPTION, NET DELIVERIES & VACANCY



## KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Logistics	13,309,546	0.5%	\$12.12	2.1%	(11,200)	0	0
Specialized Industrial	8,164,471	3.5%	\$10.95	4.5%	0	0	0
Flex	6,857,986	5.1%	\$13.82	10.2%	0	0	155,000
<b>Submarket</b>	<b>28,332,003</b>	<b>2.5%</b>	<b>\$12.20</b>	<b>4.8%</b>	<b>(11,200)</b>	<b>0</b>	<b>155,000</b>

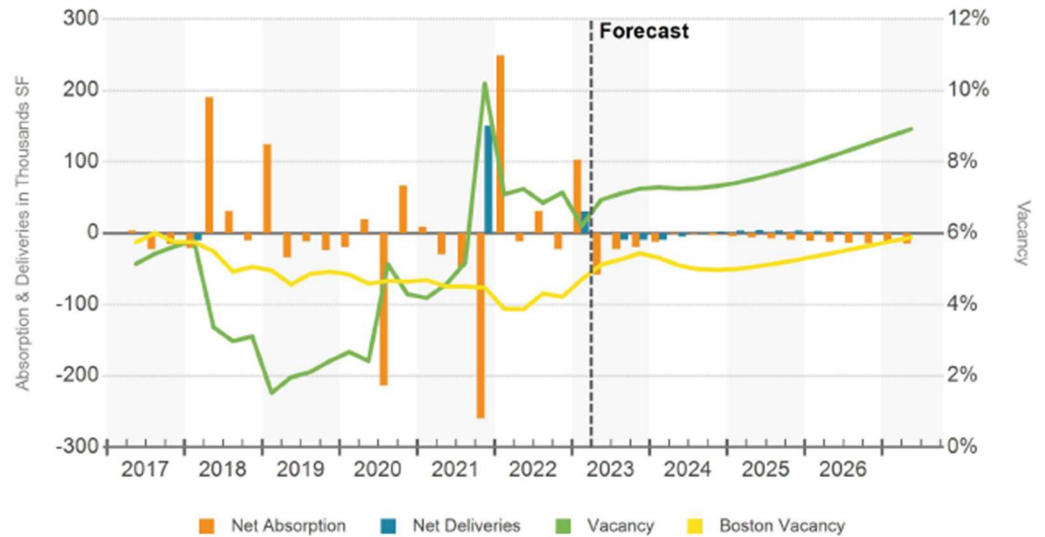


# INDUSTRIAL MARKET: REGIONAL CONTEXT (STRAFFORD COUNTY, NH SUBMARKET)

Strafford County is a midsized submarket with 8.1 million SF of industrial real estate.

- Logistics space accounts for the largest share of inventory, with about 3.5 million SF. Another 2.8 million SF of specialized industrial space and 1.8 million SF of flex space exist in the submarket.
- Overall, the industrial vacancy rate is 6.3%, down slightly over the last 12 months. Vacancy is highest for logistics space, at 13.4%. Specialized Industrial space has no vacancy (0%).
- Net absorption in the last 12 months is 95,000 SF but has been flat over the past five years.
- Rents have risen by 9.0% over the last year, well above the 5.7% average in the last decade.
- Currently, there is no construction underway in the submarket, though roughly 180,000 SF has been delivered in the last three years. An additional 204,000 SF has been proposed across three projects in Somersworth and Rochester.

NET ABSORPTION, NET DELIVERIES & VACANCY



## KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Logistics	3,485,504	13.4%	\$10.10	15.6%	0	0	0
Specialized Industrial	2,774,244	0%	\$8.07	0%	0	0	0
Flex	1,797,940	2.2%	\$11.29	5.8%	(4,800)	0	0
<b>Submarket</b>	<b>8,057,688</b>	<b>6.3%</b>	<b>\$9.67</b>	<b>8.0%</b>	<b>(4,800)</b>	<b>0</b>	<b>0</b>





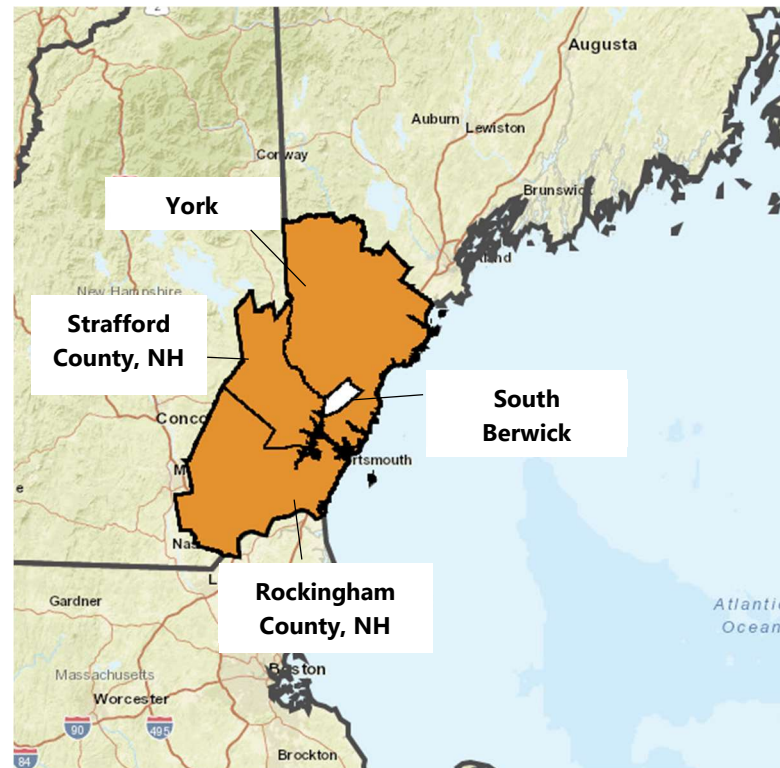
# APPENDIX A: DEMOGRAPHIC & SOCIOECONOMIC PROFILE



## AREAS OF STUDY

In addition to data specific to South Berwick<sup>1</sup>, data was also collected and analyzed for the surrounding 3-county region including York County, ME; Rockingham County, NH; and Strafford County, NH (3-county region or the region); as well as for the State of Maine. In some cases, South Berwick is compared to the neighboring communities of Berwick<sup>2</sup>, North Berwick<sup>3</sup>, and Eliot<sup>4</sup>.

*Map: 3-County Comparison Region*



<sup>1</sup> Industry data from Lightcast is available at the ZIP code level. Therefore, "South Berwick" refers to ZIP Code 03908 when Lightcast data is used.

<sup>2</sup> In Lightcast, ZIP code 03901

<sup>3</sup> In Lightcast, ZIP code 03906

<sup>4</sup> In Lightcast, ZIP code 03903

## METHODOLOGY

The data used in the following section is sourced from both Esri and the U.S. Census Bureau. Combined, these sources provide a complete picture of the socioeconomic and demographic context in the Town of South Berwick and surrounding areas.



**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.](#)



The **American Community Survey (ACS)** is an ongoing statistical survey by the US Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. Mandatory to fill out, the survey is sent to a small sample of the population on a rotating basis. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. [Click 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.](#)



## POPULATION AND HOUSEHOLDS

- South Berwick's population was 7,474 as of the 2020 Census, having increased 3.4% over the previous decade. South Berwick's population grew at a lower rate than neighboring towns of Berwick, North Berwick, and Eliot as well as the 3-county region, but faster than the state.
- Based on projections from Esri, the population of South Berwick is projected to decline slightly from 2022-2027, by 1.6%. This translates to population loss of about 117 people. Despite population growth in the last decade, South Berwick faces some key constraints to population growth, including aging households, declining school enrollment, and minimal development of new housing. In particular, lack of new housing stock supply is driving constraints to housing, which will lead to population decline. If rural land becomes available for development, regional demand may drive increases in housing stock and therefore population growth. Data on housing permits points to a rising trend in housing with 2021 having the highest level of permits for new housing in the town in the past decade. This suggests that population may in fact grow and will indeed grow if housing demand continues and supply is made available.
- The number of households in South Berwick grew by 5.2% from 2010-2020, slower than all surrounding areas except for the state. The number of households is projected to decline by less than 1% from 2022-2027.

### Population and Households Summary

	South Berwick	Berwick	North Berwick	Eliot	3-County Region	Maine
2010 Population	7,220	7,246	4,576	6,204	615,497	1,328,361
2020 Population	7,467	7,950	4,978	6,717	657,037	1,362,359
<b>Change, 2010-2020</b>	<b>3.4%</b>	<b>9.7%</b>	<b>8.8%</b>	<b>8.3%</b>	<b>6.7%</b>	<b>2.6%</b>
2022 Population	7,414	7,896	5,191	6,693	666,088	1,370,382
2027 Population (Projected)	7,297	7,777	5,513	6,645	678,039	1,382,353
<b>Projected Change, 2022-2027</b>	<b>-1.6%</b>	<b>-1.5%</b>	<b>6.2%</b>	<b>-0.7%</b>	<b>1.8%</b>	<b>0.9%</b>
2010 Households	2,729	2,749	1,773	2,509	243,142	557,219
2020 Households	2,871	3,082	1,958	2,792	266,165	582,437
<b>Change, 2010-2020</b>	<b>5.2%</b>	<b>12.1%</b>	<b>10.4%</b>	<b>11.3%</b>	<b>9.5%</b>	<b>4.5%</b>
2022 Households	2,869	3,082	2,057	2,800	270,912	587,939
2027 Households	2,845	3,059	2,205	2,798	277,472	596,387
<b>Projected Change, 2022-2027</b>	<b>-0.8%</b>	<b>-0.7%</b>	<b>7.2%</b>	<b>-0.1%</b>	<b>2.4%</b>	<b>1.4%</b>
<b>2022 Average Household Size</b>	<b>2.57</b>	<b>2.56</b>	<b>2.49</b>	<b>2.39</b>	<b>2.41</b>	<b>2.27</b>

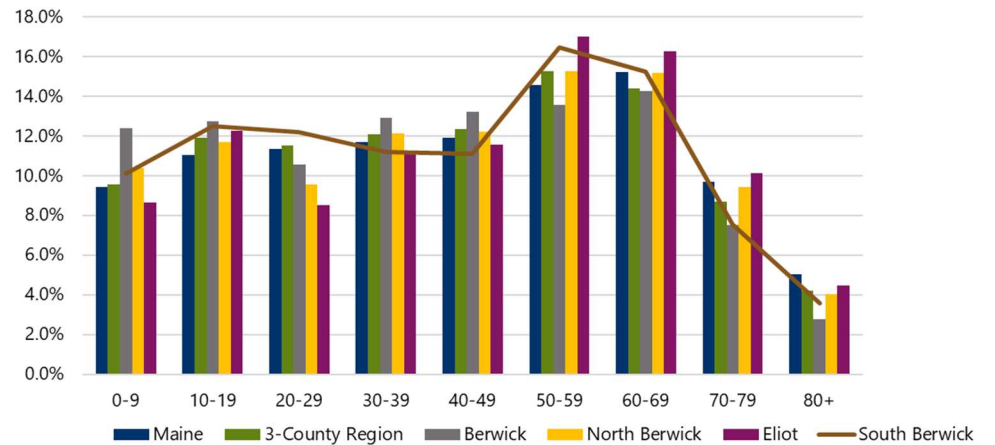
Source: Esri



## AGE DISTRIBUTION

- In 2022, South Berwick’s median age was 44.0. This is lower than surrounding towns of North Berwick and Eliot as well as the state, and on par with the 3-County region.
- Just over a quarter (26.4%) of South Berwick’s population is age 60 or older. Meanwhile, the cohort of those aged 50-59 is the largest in the town, meaning another 16.5% will be aged 60+ within the next decade.
- South Berwick’s population aged 18 and under has declined significantly from 2010-2022, falling by about 400 (-21.4%). This is a much faster rate of decline compared to the 3-county region and the state. Over the next five years, this population is expected to decline by an additional 5.6%.
- South Berwick has a relatively high share of the population aged 20-29 compared to the surrounding areas; conversely, it has a low share of the population in the subsequent age cohorts of 30-39 and 49-49 as well as those aged 70-79.

Age Distribution, 2022



Source: Esri

### Population Under 18 Years Old

	South Berwick	3-county	Maine
2010	1,919	134,949	274,533
2022	1,509	125,343	247,355
2027	1,424	123,055	244,571
2010-2022 % Change	-21.4%	-7.1%	-9.9%
2022-2027 Projected % Change	-5.6%	-1.8%	-1.1%

Source: Esri

### Median Age (2022)

Site	Median Age
Town of South Berwick	44.0
Town of Berwick	41.0
Town of North Berwick	45.4
Town of Eliot	48.2
Maine	45.5
3-County Region	44.1

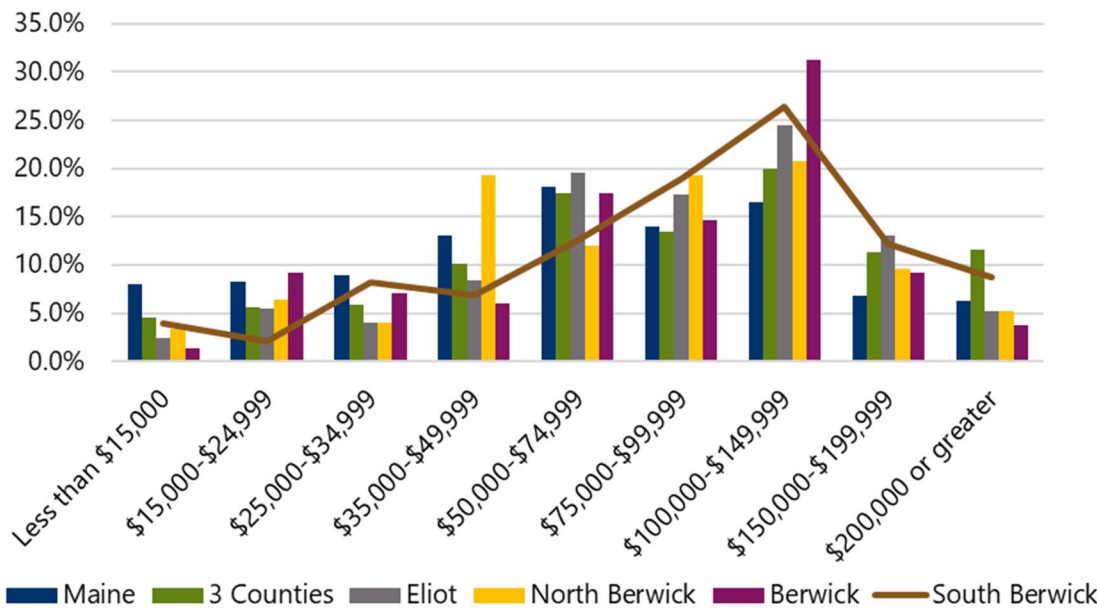
Source: Esri



## HOUSEHOLD INCOME

- In 2022, South Berwick’s median household income was \$95,442. South Berwick has relatively high-income, with a median that is about \$10,500 higher than the 3-county region and almost \$32,000 higher than the State.
- From 2022-2027, South Berwick’s median income is projected to grow 14.5% to \$109,291.
- South Berwick has a relatively high share of households making \$100,000 or more. Almost half of households (47.4%) fall into this category, compared to 42.8% in the region and 29.5% in the state. On the other end of the income spectrum, 14.3% of households have income less than \$35,000, compared to 16.1% in the region and 25.3% in the state.

Household Income Distribution, 2022



Source: Esri

Median Household Income Comparison

Site	2022	2027	Projected Change
South Berwick	\$95,442	\$109,291	14.5%
Berwick	\$88,459	\$104,471	18.1%
North Berwick	\$79,721	\$89,709	12.5%
Eliot	\$87,571	\$102,015	16.5%
3 Counties	\$84,946	\$100,261	18.0%
Maine	\$63,833	\$75,625	18.5%

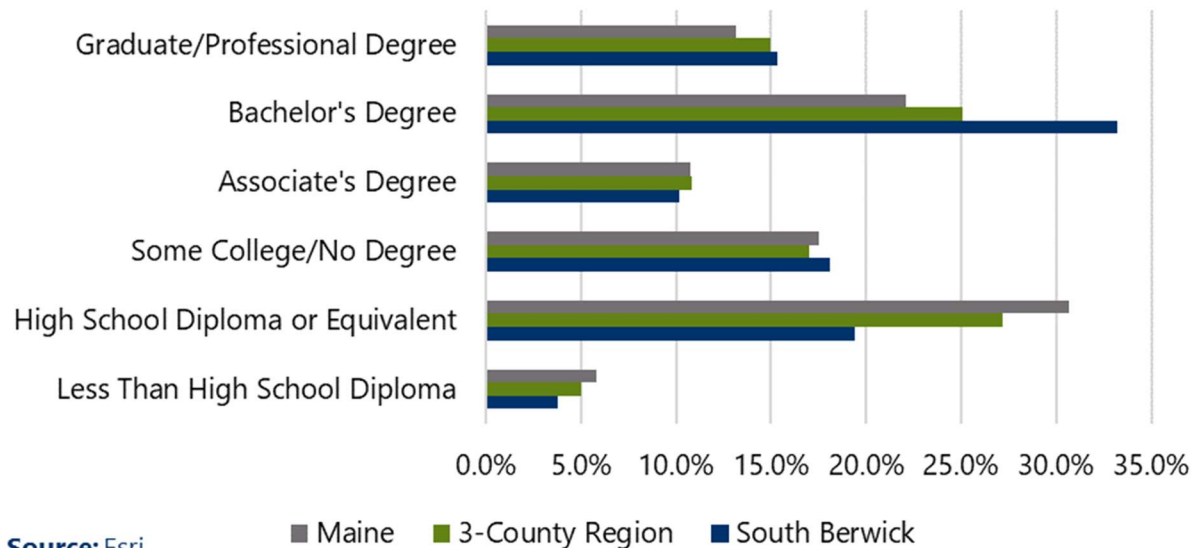
Source: Esri



## EDUCATIONAL ATTAINMENT

- South Berwick has a relatively high educated population. 48.5% of the town's population aged 25 or over has a bachelor's degree or higher, significantly higher than Berwick, North Berwick, Eliot, the 3-county region, and the state.
- Compared to the 3-county region and the state, South Berwick has significantly more of its population that has a bachelor's degree and significantly fewer whose highest level of education is high school. Other education levels have similar rates to the surrounding regions, such as Some College/No Degree, Associate's Degree, and Graduate/Professional Degree.

### Educational Attainment for the Population 25 and Over (2022)



### Population 25+ with a Bachelor's Degree or Higher

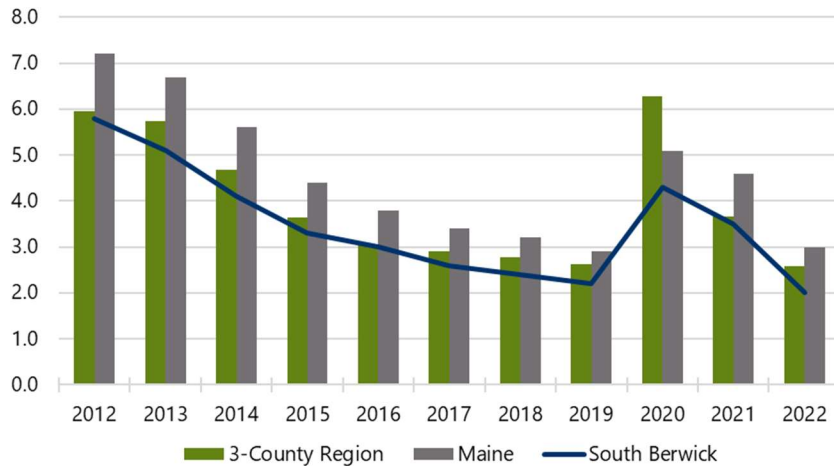
	Number	Percent
South Berwick	2,579	48.5%
Berwick	2,151	38.7%
North Berwick	963	25.2%
Eliot	2,254	44.9%
3-County Region	193,845	40.0%
Maine	357,667	35.3%

Source: Esri



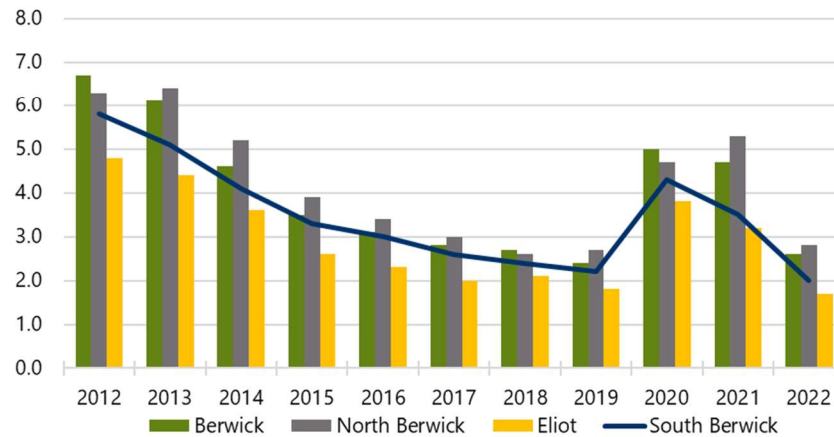
## UNEMPLOYMENT RATE

**Unemployment Rate: South Berwick Compared to Larger Region**



Source: US Bureau of Labor Statistics

**Unemployment Rate: South Berwick Compared to Surrounding Towns**



Source: US Bureau of Labor Statistics

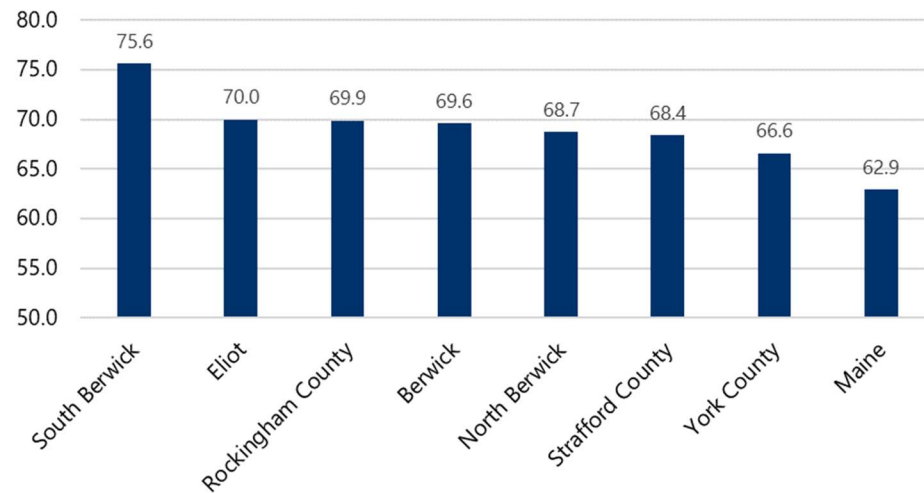
- South Berwick's unemployment rate in 2022 was 2.0%, lower than the 3-County Region (2.6%) Maine (3.0%), Berwick (2.6%), and North Berwick (2.8%), but slightly higher than Eliot (1.7%).
- Over the last decade, South Berwick's unemployment rate has remained very similar to the overall 3-county region and has tended to be much lower than the state. That said, South Berwick's unemployment rate was less impacted in 2020 at the first phases of COVID-19 compared to surrounding towns and region.
- Compared to surrounding towns, South Berwick tended to have a similar unemployment rate as Berwick and North Berwick during the period of 2015-2019. However, South Berwick had slightly lower unemployment in 2012-2014 and during the pandemic years, signaling that the town tends to do better than surrounding areas in time of economic downturn.



## LABOR FORCE PARTICIPATION

- South Berwick’s labor force participation rate is significantly higher than the surrounding towns and larger surrounding region. In 2021, South Berwick’s labor force participation rate was 75.6% compared to 66.6% in York County and 62.9% in Maine.
- Compared to five years prior, labor force participation in South Berwick has remained stable. This is notable given the larger trend of declining labor force participation nationally and in Maine, which also took place in neighboring Rockingham and Strafford counties.

**Labor Force Participation Rate, 2021**



Source: American Community Survey 5-Year Estimates

**Labor Force Participation Rate**

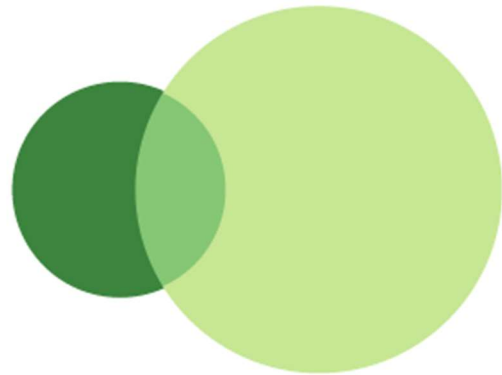
	2016	2021	Change (Percentage Points)
South Berwick	75.4	75.6	+0.2
Berwick	70.1	69.6	-0.5
North Berwick	66.0	68.7	+2.7
Eliot	71.2	70.0	-1.2
York County	66.5	66.6	+0.1
Rockingham County	72.3	69.9	-2.4
Strafford County	69.1	68.4	-0.7
Maine	63.2	62.9	-0.3

Source: American Community Survey 5-Year Estimates



## COMMUTING PATTERNS

Inflow/Outflow Job Counts in 2019



■ 760 - Employed in Selection Area, Live Outside  
■ 2,866 - Live In Selection Area, Employed Outside  
■ 338 - Employed and Live in Selection Area

- South Berwick is a net exporter of workers, meaning that more people commute to other towns to work compared to those who live in other towns but work in South Berwick.
- In 2019, South Berwick “imported” 760 workers – those who live in other towns but work in South Berwick. It “exported” almost 2,900 workers, while 338 both live and work in the town.
- Outside of South Berwick itself, the most common commuting destinations were Portsmouth, Dover, York, and Kittery.
- Meanwhile, Eliot, Sanford, Dover, and Berwick were the most common towns that South Berwick workers live in.

### Jobs Counts - Where South Berwick Residents Work (2019)

	Count	Share
Portsmouth city (Rockingham, NH)	435	13.6%
South Berwick town (York, ME)	338	10.5%
Dover city (Strafford, NH)	268	8.4%
York town (York, ME)	243	7.6%
Kittery town (York, ME)	180	5.6%
Eliot town (York, ME)	158	4.9%
North Berwick town (York, ME)	94	2.9%
Portland city (Cumberland, ME)	85	2.7%
Rochester city (Strafford, NH)	79	2.5%
Somersworth city (Strafford, NH)	70	2.2%
All Other Towns & Cities	1,254	39.1%
<b>Total Resident Workers</b>	<b>3,204</b>	<b>100.0%</b>

Source: US Census OnTheMap

### Jobs Counts - Where South Berwick Workers Live (2019)

	Count	Share
South Berwick town (York, ME)	338	30.8%
Eliot town (York, ME)	72	6.6%
Sanford city (York, ME)	54	4.9%
Dover city (Strafford, NH)	50	4.6%
Berwick town (York, ME)	40	3.6%
Kittery town (York, ME)	39	3.6%
York town (York, ME)	38	3.5%
Wells town (York, ME)	37	3.4%
North Berwick town (York, ME)	36	3.3%
Rochester city (Strafford, NH)	34	3.1%
All Other Towns & Cities	360	32.8%
<b>All County Subdivisions</b>	<b>1,098</b>	<b>100.0%</b>

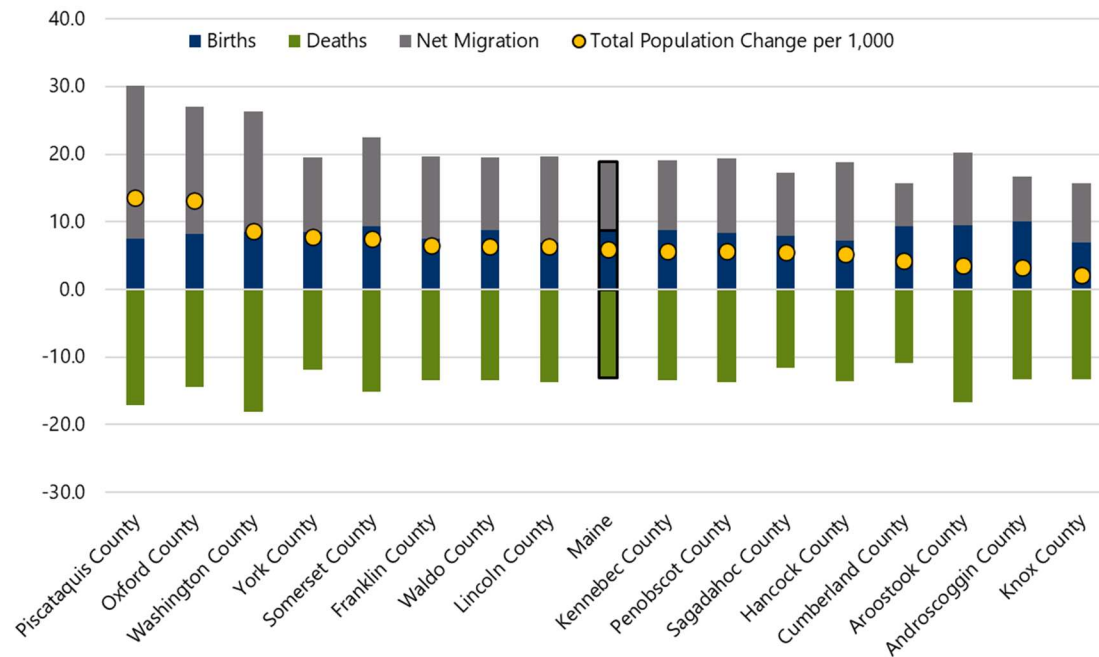
Source: US Census OnTheMap



## MIGRATION AND COMPONENTS OF POPULATION CHANGE

- In 2022, York County outpaced the state and other Southern Maine counties in both overall population growth as well as net migration.
- York County gained 1,666 in population in the year from July 1, 2021 to July 1, 2022. In total, the county has gained almost 2,500 in population from 2020-2022.
- Because York County experienced natural population decline (more deaths than births in a year), all population growth can be attributed to net in-migration. In 2022, York County had a total net migration rate (both international and national) of 11 per thousand population, higher than Maine as well as all other metropolitan counties (Cumberland, Sagadahoc, Androscoggin, and Penobscot). It was the only metropolitan county that had a higher rate of net migration than the state.

2022 Rate of Population Change by Component in Maine (Change per 1,000 population)



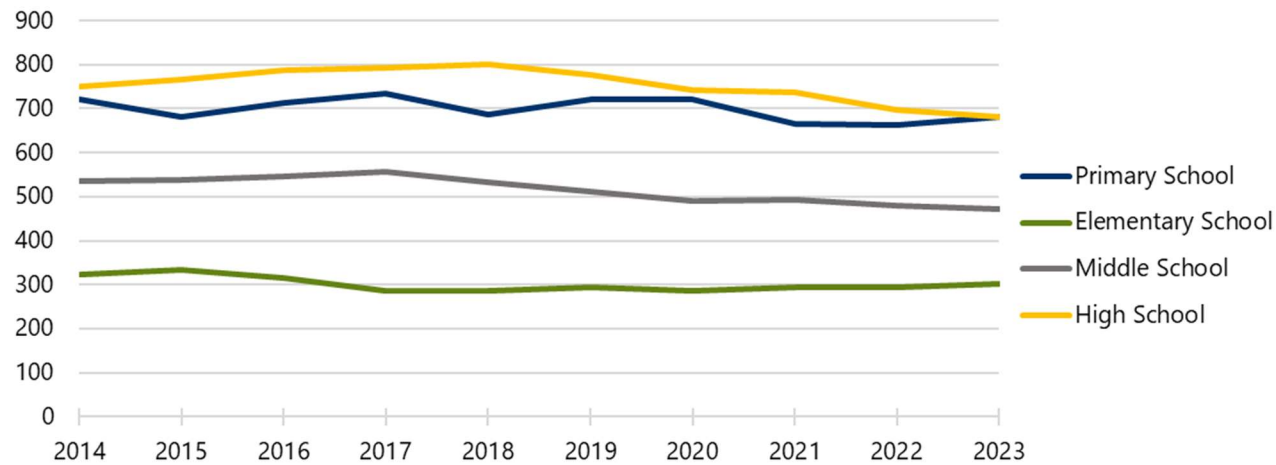
Source: US Census Bureau Population Estimates Program



## SCHOOL ENROLLMENT

- MSAD 35 had 2,136 students enrolled across all grade levels in 2023. MSAD 35 includes the towns of South Berwick and Eliot as well as Rollinsford, New Hampshire.
- Over the ten school years from 2014-2023, enrollment in the district has trended downwards. Marshwood High School saw its enrollment peak at 801 students in 2018, but enrollment has declined consistently since then, reaching 682 students in 2023.

**MSAD 35 Enrollment Counts by School Level**



Source: Maine Department of Education

**MSAD 35 School Enrollment Counts**

	Grades	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10 Yr Avg
Central School	PK-3	426	390	389	389	349	375	394	362	370	372	<b>383</b>
Eliot Elementary School	PK-3	295	290	323	345	338	346	327	303	294	309	<b>318</b>
Marshwood Great Works School	4-5	324	333	314	287	286	295	286	295	294	301	<b>302</b>
Marshwood Middle School	6-8	535	539	547	557	533	512	489	492	479	472	<b>520</b>
Marshwood High School	9-12	749	767	787	794	801	776	742	736	696	682	<b>761</b>
<b>RSU 35/MSAD 35</b>		<b>2,329</b>	<b>2,319</b>	<b>2,360</b>	<b>2,372</b>	<b>2,307</b>	<b>2,304</b>	<b>2,238</b>	<b>2,188</b>	<b>2,133</b>	<b>2,136</b>	<b>2,283</b>

Source: Maine Department of Education



# APPENDIX B: INDUSTRY PROFILE



## EMPLOYMENT SUMMARY

- Government is the largest major sector in South Berwick, with 374 jobs. Government accounts for 19% of jobs in South Berwick. This typically is driven by local government and schools, but can also include jails, public hospitals, federal and state offices.
- Outside of Government, the three largest sectors by employment are Accommodation and Food Services, Educational Services (which excludes public education), and Construction. Note that while public education employment is counted in the Government sector, employment at private educational institutions is counted within the Educational Services sector.
- Compared to the 3-county region and Maine, South Berwick has relatively high concentrations of jobs in the sectors of Government, Educational Services, and Accommodation and Food Services. Conversely, the town has relatively low concentrations of jobs in sectors like Manufacturing, Retail Trade, and Health Care and Social Assistance.

### Jobs by Sector, 2022

NAICS	South Berwick		3-County Region		Maine	
	#	%	#	%	#	%
11 Agriculture, Forestry, Fishing and Hunting	21	1%	2,317	1%	17,548	2%
21 Mining, Quarrying, and Oil and Gas Extraction	0	0%	243	0%	274	0%
22 Utilities	8	0%	890	0%	1,731	0%
23 Construction	186	9%	19,633	6%	48,355	7%
31 Manufacturing	43	2%	31,171	10%	56,881	8%
42 Wholesale Trade	12	1%	10,155	3%	19,917	3%
44 Retail Trade	116	6%	43,277	14%	85,143	12%
48 Transportation and Warehousing	30	2%	9,072	3%	19,753	3%
51 Information	4	0%	3,851	1%	8,213	1%
52 Finance and Insurance	16	1%	10,939	3%	26,258	4%
53 Real Estate and Rental and Leasing	16	1%	4,725	1%	9,554	1%
54 Professional, Scientific, and Technical Services	156	8%	20,303	6%	38,070	5%
55 Management of Companies and Enterprises	0	0%	3,293	1%	14,935	2%
56 Administrative and Support and Waste Management and Remediation Services	84	4%	17,847	6%	34,304	5%
61 Educational Services	255	13%	7,789	2%	21,746	3%
62 Health Care and Social Assistance	164	8%	35,810	11%	108,548	15%
71 Arts, Entertainment, and Recreation	44	2%	6,015	2%	11,433	2%
72 Accommodation and Food Services	324	16%	29,954	9%	56,271	8%
81 Other Services (except Public Administration)	151	8%	15,157	5%	31,552	4%
90 Government	374	19%	43,115	14%	103,179	14%
99 Unclassified	0	0%	291	0%	3,191	0%
<b>Total</b>	<b>2,004</b>	<b>100%</b>	<b>315,847</b>	<b>100%</b>	<b>716,855</b>	<b>100%</b>

Source: Lightcast

Note: South Berwick's employment numbers have been adjusted to reflect more accurate government jobs figures.



## EMPLOYMENT GROWTH & PROJECTIONS (2-DIGIT NAICS): SOUTH BERWICK

- South Berwick’s employment grew by 54 jobs, adding 3% from 2017-2022 and outpacing the region (1%) and state (2%).
- Construction added the most jobs from 2017-2022 (+48), followed by Professional, Scientific, and Technical Services (+46).
- The sectors that are projected to grow the most from 2022-2027 are Accommodation and Food Services (+28) and Professional, Scientific, and Technical Services. (+27).

### Town of South Berwick Job Change

NAICS	Description	Historic		Projected	
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change
11	Agriculture, Forestry, Fishing and Hunting	14	214%	9	43%
21	Mining, Quarrying, and Oil and Gas Extraction			0	
22	Utilities	2	31%	0	2%
23	Construction	48	34%	19	10%
31	Manufacturing	4	11%	2	5%
42	Wholesale Trade	(13)	(52%)	(0)	(0%)
44	Retail Trade	(6)	(5%)	(4)	(3%)
48	Transportation and Warehousing	1	3%	2	6%
51	Information	(4)	(52%)	1	38%
52	Finance and Insurance	0	0%	(0)	(0%)
53	Real Estate and Rental and Leasing	1	8%	0	0%
54	Professional, Scientific, and Technical Services	46	41%	20	13%
55	Management of Companies and Enterprises				
56	Administrative and Support and Waste Management and Remediation Services	8	10%	4	5%
61	Educational Services	(35)	(12%)	3	1%
62	Health Care and Social Assistance	(18)	(10%)	(8)	(5%)
71	Arts, Entertainment, and Recreation	2	4%	4	9%
72	Accommodation and Food Services	(5)	(2%)	28	9%
81	Other Services (except Public Administration)	(9)	(6%)	(1)	(1%)
90	Government	20	15%	4	3%
<b>Total</b>		<b>54</b>	<b>3%</b>	<b>84</b>	<b>4%</b>

Source: Lightcast

Note: South Berwick’s employment numbers have been adjusted to reflect more accurate government jobs figures.



## EMPLOYMENT GROWTH & PROJECTIONS (2-DIGIT NAICS): 3-COUNTY REGION

- The region added 3,422 jobs from 2017-2022, growing by 1%.
- The sectors that grew the most from 2017-2022 in the region are Construction (+2,375) and Manufacturing (+1,321).
- The sectors that are projected to grow the most from 2017-2022 are Accommodation and Food Services (+3,109), Health Care and Social Assistance (+1,810), and Professional, Scientific, and Technical Services (+1,737).

### Regional Job Change

NAICS	Description	Historic		Projected	
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change
11	Agriculture, Forestry, Fishing and Hunting	776	50%	566	24%
21	Mining, Quarrying, and Oil and Gas Extraction	(10)	(4%)	38	16%
22	Utilities	(134)	(13%)	(84)	(9%)
23	Construction	2,374	14%	878	4%
31	Manufacturing	1,321	4%	1,441	5%
42	Wholesale Trade	394	4%	593	6%
44	Retail Trade	(1,800)	(4%)	(820)	(2%)
48	Transportation and Warehousing	812	10%	498	5%
51	Information	(1,263)	(25%)	(404)	(10%)
52	Finance and Insurance	199	2%	(111)	(1%)
53	Real Estate and Rental and Leasing	238	5%	237	5%
54	Professional, Scientific, and Technical Services	878	5%	1,737	9%
55	Management of Companies and Enterprises	863	36%	281	9%
56	Administrative and Support and Waste Management and Remediation Services	(118)	(1%)	430	2%
61	Educational Services	633	9%	486	6%
62	Health Care and Social Assistance	(75)	(0%)	1,810	5%
71	Arts, Entertainment, and Recreation	(46)	(1%)	677	11%
72	Accommodation and Food Services	(486)	(2%)	3,109	10%
81	Other Services (except Public Administration)	(338)	(2%)	634	4%
90	Government	(1,017)	(2%)	(134)	(0%)
99	Unclassified Industry	220	309%	165	57%
<b>Total</b>		<b>3,422</b>	<b>1%</b>	<b>12,029</b>	<b>4%</b>

Source: Lightcast



## SECTOR CHARACTERISTICS (2-DIG NAICS): SOUTH BERWICK

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

- Educational Services is the most concentrated sector in South Berwick (LQ of 3.80), driven by South Berwick's two private schools. This is followed by Government (LQ of 2.53). Accommodation and Food Services and Construction also have above average concentration.
- Average earnings per job across all sectors is \$72,801. This is on par with the region and higher than the state. Several sectors have above average earnings in town, including Finance and Insurance, Government, and Professional and Scientific Services.
- Although it does not have a high concentration, Professional, Scientific, and Technical Services had competitive growth in South Berwick but not the overall region, which may indicate that South Berwick could find opportunities within this sector.

**Town of South Berwick Sector Characteristics**

NAICS	Description	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job	GRP
11	Agriculture, Forestry, Fishing and Hunting	0.68	14	\$50,986	\$1,869,339
21	Mining, Quarrying, and Oil and Gas Extraction	0.00	0	\$0	\$0
22	Utilities	0.88	2	Insf. Data	\$4,349,834
23	Construction	1.26	36	\$65,286	\$20,030,477
31	Manufacturing	0.22	4	\$57,822	\$3,878,043
42	Wholesale Trade	0.13	(13)	\$72,424	\$8,430,060
44	Retail Trade	0.46	(3)	\$41,655	\$9,066,029
48	Transportation and Warehousing	0.27	(6)	\$73,254	\$2,877,305
51	Information	0.08	(5)	Insf. Data	\$1,509,632
52	Finance and Insurance	0.15	(1)	\$108,705	\$4,721,648
53	Real Estate and Rental and Leasing	0.36	0	\$73,746	\$3,389,714
54	Professional, Scientific, and Technical Services	0.86	31	\$76,896	\$18,793,344
55	Management of Companies and Enterprises	0.00	0	\$0	\$0
56	Administrative and Support and Waste Management and Remediation Services	0.52	5	\$52,507	\$10,214,986
61	Educational Services	3.80	(55)	\$63,881	\$17,286,344
62	Health Care and Social Assistance	0.50	(25)	\$70,931	\$13,017,432
71	Arts, Entertainment, and Recreation	1.07	4	\$37,639	\$3,886,867
72	Accommodation and Food Services	1.58	9	\$32,021	\$20,389,453
81	Other Services (except Public Administration)	1.17	(4)	\$41,892	\$8,585,532
90	Government	1.29	21	\$69,945	\$27,333,361
			<b>134</b>	<b>\$72,801</b>	<b>\$179,629,401</b>

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.

**Note:** The government sector (NAICS 90) includes Federal, State, and Local government, including hospitals and public education. Private educational institutions are included in the Educational Services sector.



## SECTOR CHARACTERISTICS (2-DIG NAICS): REGIONAL COMPARISON

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

- Retail Trade is the most concentrated sector in the region (LQ of 1.40). This is followed by Manufacturing (LQ of 1.28). Of the two, the region only holds a competitive advantage in Manufacturing.
- Unlike South Berwick, the region does not have competitive growth overall. Some sectors are an exception, like Construction, Manufacturing, and Accommodation and Food Services, among others.
- Average earnings per job across all sectors was \$73,080 in 2022, very similar to South Berwick.

**Region Sector Characteristics**

NAICS	Description	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job	GRP
11	Agriculture, Forestry, Fishing and Hunting	0.62	792	\$41,612	\$216,171,994
21	Mining, Quarrying, and Oil and Gas Extraction	0.24	28	\$77,734	\$60,825,444
22	Utilities	0.84	(128)	\$185,267	\$706,102,851
23	Construction	1.08	964	\$72,154	\$2,292,719,497
31	Manufacturing	1.28	915	\$92,421	\$5,709,448,620
42	Wholesale Trade	0.90	526	\$105,564	\$3,580,349,184
44	Retail Trade	1.40	(881)	\$48,400	\$3,787,990,628
48	Transportation and Warehousing	0.67	(1,162)	\$66,702	\$839,048,042
51	Information	0.65	(1,554)	\$120,325	\$1,420,014,804
52	Finance and Insurance	0.84	(434)	\$133,437	\$3,530,333,860
53	Real Estate and Rental and Leasing	0.86	(25)	\$83,390	\$1,620,791,534
54	Professional, Scientific, and Technical Services	0.92	(1,667)	\$105,776	\$3,645,858,873
55	Management of Companies and Enterprises	0.72	718	\$167,112	\$1,397,463,463
56	Administrative and Support and Waste	0.90	(741)	\$64,938	\$2,082,686,790
61	Educational Services	0.94	151	\$50,083	\$455,894,908
62	Health Care and Social Assistance	0.89	(1,455)	\$75,185	\$3,210,902,999
71	Arts, Entertainment, and Recreation	1.19	264	\$33,329	\$463,059,090
72	Accommodation and Food Services	1.19	871	\$33,393	\$1,842,356,608
81	Other Services (except Public Administration)	0.96	123	\$39,859	\$849,341,792
90	Government	0.94	(237)	\$84,715	\$4,439,152,030
99	Unclassified Industry	0.56	202	\$65,439	Insf. Data
			<b>(2,730)</b>	<b>\$73,080</b>	<b>\$42,150,513,012</b>

Source: Lightcast



## SECTOR CHARACTERISTICS (2-DIG NAICS): STATE COMPARISON

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

- Agriculture, Forestry, Fishing and Hunting is the most concentrated sector in the region (LQ of 2.05). This is followed by Management of Companies and Enterprises (LQ of 1.44). The region has strong competitive advantage in both sectors.
- Average earnings per job is lower than in South Berwick and the region, at \$66,730.

### Maine Sector Characteristics

NAICS	Description	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job	GRP
11	Agriculture, Forestry, Fishing and Hunting	2.05	1,995	\$53,064	\$1,756,485,373
21	Mining, Quarrying, and Oil and Gas Extraction	0.12	95	\$78,482	\$104,945,065
22	Utilities	0.72	58	\$140,251	\$1,059,582,476
23	Construction	1.17	1,565	\$63,845	\$4,388,177,784
31	Manufacturing	1.03	2,767	\$79,164	\$8,770,775,036
42	Wholesale Trade	0.77	(184)	\$94,671	\$5,078,797,715
44	Retail Trade	1.21	847	\$44,792	\$7,253,380,989
48	Transportation and Warehousing	0.64	(4,655)	\$66,027	\$1,751,680,600
51	Information	0.61	(435)	\$86,060	\$2,107,969,063
52	Finance and Insurance	0.89	(635)	\$109,744	\$6,207,588,628
53	Real Estate and Rental and Leasing	0.77	(34)	\$66,509	\$2,650,857,414
54	Professional, Scientific, and Technical Services	0.76	2,104	\$94,762	\$5,018,416,500
55	Management of Companies and Enterprises	1.44	3,832	\$124,025	\$2,090,458,279
56	Administrative and Support and Waste Management and Remediation Services	0.76	(2,515)	\$55,616	\$2,584,557,801
61	Educational Services	1.16	166	\$44,319	\$1,134,064,556
62	Health Care and Social Assistance	1.19	(7,178)	\$73,131	\$9,353,063,470
71	Arts, Entertainment, and Recreation	1.00	(106)	\$36,078	\$784,371,077
72	Accommodation and Food Services	0.98	(766)	\$33,611	\$3,533,158,739
81	Other Services (except Public Administration)	0.88	(113)	\$37,387	\$1,652,138,341
90	Government	1.00	(1,050)	\$75,109	\$9,284,954,986
99	Unclassified Industry	2.71	1,918	\$100,281	Insf. Data
			<b>(2,324)</b>	<b>\$66,730</b>	<b>\$83,948,246,187</b>

Source: Lightcast



## TOP 10 SUB-INDUSTRIES (4-DIGIT NAICS): SOUTH BERWICK

- Local Government Education and Hospitals was the largest sub-industry in South Berwick in 2022, with 251 jobs. This was followed by Private Elementary and Secondary Schools (211 jobs).
- Of the top 10 sub-industries by employment, five have grown in the five years from 2017-2022, while five have seen decreasing employment.
- Special Food Services has the highest Location Quotient, at 16.86.

**Town of South Berwick, Top 10 Sub-Industries**

NAICS	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job
9036	Education and Hospitals (Local Government)	235	251	16	7%	1.94	21	\$68,258
6111	Elementary and Secondary Schools	230	211	(19)	(8%)	10.92	(40)	\$66,839
7223	Special Food Services	224	205	(19)	(9%)	16.86	(19)	\$30,502
7225	Restaurants and Other Eating Places	100	113	13	13%	0.70	16	\$33,938
9039	Local Government, Excluding Education and Hospitals	108	111	3	3%	1.29	5	\$73,116
6211	Offices of Physicians	83	72	(11)	(13%)	1.64	(17)	\$100,264
2382	Building Equipment Contractors	47	59	12	26%	1.34	8	\$63,644
5413	Architectural, Engineering, and Related Services	57	57	(0)	(0%)	2.19	(5)	\$103,058
6244	Child Day Care Services	59	53	(6)	(10%)	3.04	(2)	\$34,315
2371	Utility System Construction	12	52	40	343%	4.89	39	\$70,645

**Source:** Lightcast

**Note:** South Berwick's employment numbers have been adjusted to reflect more accurate government jobs figures.



## TOP 10 SUB-INDUSTRIES (4-DIGIT NAICS): REGION

- Restaurants and Other Eating Places was the largest sub-industry in the region in 2022, with about 24,000 jobs. This was followed by Local Government Education and Hospitals (15,000 jobs).
- Of the top 10 sub-industries by employment, six have grown in the five years from 2017-2022, while four have seen decreasing employment.
- Grocery Stores has the highest Location Quotient, at 1.87.

### 3-County Region, Top 10 Sub-Industries

NAICS	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job
7225	Restaurants and Other Eating Places	23,513	23,917	404	2%	1.21	1,064	\$31,238
9036	Education and Hospitals (Local Government)	15,452	14,977	(475)	(3%)	0.94	(133)	\$77,149
4451	Grocery Stores	10,316	9,832	(484)	(5%)	1.87	(513)	\$31,727
9011	Federal Government, Civilian	7,984	9,502	1,518	19%	1.68	1,259	\$121,073
9039	Local Government, Excluding Education and Hospitals	9,375	9,234	(141)	(2%)	0.88	14	\$78,895
5617	Services to Buildings and Dwellings	6,754	7,922	1,168	17%	1.39	828	\$41,985
6221	General Medical and Surgical Hospitals	7,304	7,765	461	6%	0.86	424	\$85,504
2382	Building Equipment Contractors	4,941	6,139	1,198	24%	1.13	744	\$71,924
6211	Offices of Physicians	5,630	5,981	351	6%	1.11	(84)	\$130,761
5415	Computer Systems Design and Related Services	6,209	5,405	(804)	(13%)	1.11	(1,860)	\$140,640

Source: Lightcast



## EXISTING JOB TRENDS (4-DIGIT NAICS): SOUTH BERWICK

- Utility System Construction (+40), and Local Government Education and Hospitals (+16) added the most jobs from 2017-2022.
- Of the top-growing industries, Utility System Construction is the most concentrated (LQ of 4.89), followed by Local Government Education and Hospitals (LQ of 1.94)
- Of the top fastest-growing sub-industries, two have average earnings higher than the overall average for all sectors in the town (\$72,801).

**Town of South Berwick, 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
2371	Utility System Construction	12	52	40	343%	4.89	39	\$70,645
9036	Education and Hospitals (Local Government)	235	251	16	7%	1.94	21	\$68,258
7225	Restaurants and Other Eating Places	100	113	13	13%	0.70	16	\$33,938
2382	Building Equipment Contractors	47	59	12	26%	1.34	8	\$63,644
5416	Management, Scientific, and Technical Consulting Services	15	24	9	59%	0.76	6	\$78,419
8111	Automotive Repair and Maintenance	43	48	5	12%	2.56	4	\$56,989
9039	Local Government, Excluding Education and Hospitals	108	111	3	3%	1.29	5	\$73,116
8121	Personal Care Services	20	23	3	15%	1.14	3	\$32,673
5419	Other Professional, Scientific, and Technical Services	17	20	3	17%	1.29	(0)	\$53,491
7115	Independent Artists, Writers, and Performers	11	14	3	23%	2.94	(0)	\$33,040

**Source:** Lightcast

**Note:** South Berwick's employment numbers have been adjusted to reflect more accurate government jobs figures.



## EXISTING JOB TRENDS (4-DIGIT NAICS): 3-COUNTY REGION

- Federal Civilian Government (+1,518), Building Equipment Contractors (+1,198), and Services to Buildings and Dwellings (+1,168) added the most jobs from 2017-2022.
- Of the top-growing industries, Commercial and Service Industry Machinery Manufacturing is the most concentrated, with an LQ of 9.52. This is followed by Pharmaceutical and Medicine Manufacturing, with an LQ of 2.60.
- Of the top fastest-growing sub-industries, six have average earnings higher than the overall average for all sectors in the region (\$73,080).

### 3-County Region, 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
9011	Federal Government, Civilian	7,984	9,502	1,518	19%	1.68	1,259	\$121,073
2382	Building Equipment Contractors	4,941	6,139	1,198	24%	1.13	744	\$71,924
5617	Services to Buildings and Dwellings	6,754	7,922	1,168	17%	1.39	828	\$41,985
5511	Management of Companies and Enterprises	2,430	3,293	863	36%	0.72	718	\$167,112
1110	Crop Production	735	1,456	721	98%	0.89	721	\$40,862
4921	Couriers and Express Delivery Services	1,353	2,058	704	52%	1.06	(145)	\$50,546
5416	Management, Scientific, and Technical Consulting Services	2,762	3,442	680	25%	0.88	107	\$111,213
3254	Pharmaceutical and Medicine Manufacturing	1,111	1,693	582	52%	2.60	398	\$137,959
5413	Architectural, Engineering, and Related Services	3,339	3,863	523	16%	1.22	229	\$107,350
3333	Commercial and Service Industry Machinery Manufacturing	1,151	1,621	469	41%	9.52	485	\$98,781

Source: Lightcast



## EXISTING JOB TRENDS (4-DIGIT NAICS): SOUTH BERWICK

- Special Food Services (-19), Elementary and Secondary Schools (-19), and Private Households (-14) have seen the most job loss from 2017-2022.
- The industries experiencing the most job decline in South Berwick tend to be lower-wage industries. Eight of the ten fastest-declining industries in South Berwick have average earnings per job less than that state average for all industries (\$72,801)

### Town of South Berwick, 10 Fastest-Declining Sub-Industries

NAICS	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job
7223	Special Food Services	224	205	(19)	(9%)	16.86	(19)	\$30,502
6111	Elementary and Secondary Schools	230	211	(19)	(8%)	10.92	(40)	\$66,839
8141	Private Households	42	28	(14)	(34%)	1.18	(10)	\$19,543
6211	Offices of Physicians	83	72	(11)	(13%)	1.64	(17)	\$100,264
5617	Services to Buildings and Dwellings	53	45	(8)	(15%)	0.96	(10)	\$42,818
6244	Child Day Care Services	59	53	(6)	(10%)	3.04	(2)	\$34,315
6116	Other Schools and Instruction	33	28	(5)	(14%)	2.80	(8)	\$28,293
2362	Nonresidential Building Construction	13	10	(3)	(25%)	0.65	(3)	\$77,402
2361	Residential Building Construction	20	17	(3)	(15%)	0.84	(9)	\$65,338
4441	Building Material and Supplies Dealers	17	14	(2)	(14%)	0.74	(4)	\$46,298

Source: Lightcast



## EXISTING JOB TRENDS (4-DIGIT NAICS): REGION

- State Government Education and Hospitals (-970), Traveler Accommodation (-807), and Computer Systems Design & Related Services (-804) have seen the most job loss from 2017-2022.
- The industries that are declining the most in the region tend to have high average earnings. Six of the ten fastest-declining industries in South Berwick have average earnings per job greater than that state average for all industries (\$73,080)

### 3-County Region, 10 Fastest-Declining Sub-Industries

NAICS	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient	Competitive Effect	Avg. Earnings Per Job
9026	Education and Hospitals (State Government)	6,294	5,324	(970)	(15%)	0.93	(735)	\$78,212
7211	Traveler Accommodation	4,576	3,770	(807)	(18%)	1.24	(48)	\$45,849
5415	Computer Systems Design and Related Services	6,209	5,405	(804)	(13%)	1.11	(1,860)	\$140,640
9012	Federal Government, Military	3,279	2,487	(792)	(24%)	0.68	(705)	\$38,996
5613	Employment Services	4,499	3,708	(791)	(18%)	0.51	(1,094)	\$82,094
4251	Wholesale Electronic Markets and Agents and Brokers	2,132	1,414	(718)	(34%)	1.45	204	\$156,352
5173	Wired and Wireless Telecommunications Carriers	1,397	692	(706)	(51%)	0.62	(470)	\$108,318
4522	Department Stores	3,510	2,849	(661)	(19%)	1.56	(31)	\$30,099
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	911	254	(657)	(72%)	0.56	(689)	\$98,555
4481	Clothing Stores	2,089	1,562	(527)	(25%)	0.98	(59)	\$30,374

Source: Lightcast



## MOST CONCENTRATED INDUSTRIES (4-DIGIT NAICS): SOUTH BERWICK

- South Berwick has several industries that have high concentrations, as measured by the location quotient. Special Food Services is the most concentrated industry, with an LQ of almost 17.
- Other highly concentrated industries are Timber Tract Operations and Elementary and Secondary Schools, which both have an LQ greater than 10.
- The top 20 most concentrated industries appear over a wide spectrum of sectors, meaning that South Berwick is specialized in a wide array of activities throughout the economy.

### Top 20 Most Concentrated Industries, South Berwick

NAICS	Description	2022 Location Quotient
1131	Timber Tract Operations	12.08
6111	Elementary and Secondary Schools	10.92
5414	Specialized Design Services	8.38
7121	Museums, Historical Sites, and Similar Institutions	5.99
2371	Utility System Construction	4.89
8122	Death Care Services	4.62
1153	Support Activities for Forestry	3.82
4842	Specialized Freight Trucking	3.76
4442	Lawn and Garden Equipment and Supplies Stores	3.37
1141	Fishing	3.23
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	3.18
6244	Child Day Care Services	3.04
3219	Other Wood Product Manufacturing	2.98
7115	Independent Artists, Writers, and Performers	2.94
6239	Other Residential Care Facilities	2.94
6116	Other Schools and Instruction	2.80
1152	Support Activities for Animal Production	2.66
8111	Automotive Repair and Maintenance	2.56
6112	Junior Colleges	2.32
5413	Architectural, Engineering, and Related Services	2.19

Source: Lightcast



## MOST CONCENTRATED INDUSTRIES (4-DIGIT NAICS): REGION

- Commercial and Service Industry Manufacturing is the most concentrated industry in the region. This industry is engaged in manufacturing items like optical instruments, lenses, photographic equipment, and other commercial or service industry machinery.
- Other highly concentrated industries are Fabric Mills, Lime and Gypsum Product Manufacturing, and Fishing, all of which have LQs greater than 5.0.
- Many of the region's most concentrated industries are in the Manufacturing sector, highlighting the strength of the sector in the regional economy.

### Top 20 Most Concentrated Industries, 3-County Region

NAICS	Description	2022 Location Quotient
3333	Commercial and Service Industry Machinery Manufacturing	9.52
3132	Fabric Mills	9.05
3274	Lime and Gypsum Product Manufacturing	5.91
1141	Fishing	5.46
3113	Sugar and Confectionery Product Manufacturing	4.88
7212	RV (Recreational Vehicle) Parks and Recreational Camps	4.55
3359	Other Electrical Equipment and Component Manufacturing	4.46
7213	Rooming and Boarding Houses, Dormitories, and Workers' Camps	3.93
3162	Footwear Manufacturing	3.56
4543	Direct Selling Establishments	3.48
3159	Apparel Accessories and Other Apparel Manufacturing	3.09
3329	Other Fabricated Metal Product Manufacturing	3.05
3149	Other Textile Product Mills	3.03
4812	Nonscheduled Air Transportation	2.96
3117	Seafood Product Preparation and Packaging	2.81
3272	Glass and Glass Product Manufacturing	2.77
3133	Textile and Fabric Finishing and Fabric Coating Mills	2.76
3254	Pharmaceutical and Medicine Manufacturing	2.60
4852	Interurban and Rural Bus Transportation	2.50
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	2.49

Source: Lightcast



# APPENDIX C: WORKFORCE PROFILE



## OCCUPATION SNAPSHOT

### Jobs by Occupation, 2022

SOC	Description	South Berwick		3-County Region	
		#	%	#	%
11-0000	Management Occupations	132	7%	21,968	7%
13-0000	Business and Financial Operations Occupations	64	3%	17,544	6%
15-0000	Computer and Mathematical Occupations	17	1%	7,995	3%
17-0000	Architecture and Engineering Occupations	38	2%	6,032	2%
19-0000	Life, Physical, and Social Science Occupations	10	1%	2,686	1%
21-0000	Community and Social Service Occupations	28	1%	4,401	1%
23-0000	Legal Occupations	3	0%	1,585	1%
25-0000	Educational Instruction and Library Occupations	336	17%	19,635	6%
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	73	4%	5,350	2%
29-0000	Healthcare Practitioners and Technical Occupations	71	4%	16,082	5%
31-0000	Healthcare Support Occupations	45	2%	10,116	3%
33-0000	Protective Service Occupations	39	2%	5,115	2%
35-0000	Food Preparation and Serving Related Occupations	275	14%	28,073	9%
37-0000	Building and Grounds Cleaning and Maintenance Occupations	93	5%	13,062	4%
39-0000	Personal Care and Service Occupations	94	5%	9,905	3%
41-0000	Sales and Related Occupations	99	5%	34,540	11%
43-0000	Office and Administrative Support Occupations	176	9%	36,834	12%
45-0000	Farming, Fishing, and Forestry Occupations	13	1%	1,385	0%
47-0000	Construction and Extraction Occupations	140	7%	15,071	5%
49-0000	Installation, Maintenance, and Repair Occupations	90	4%	12,455	4%
51-0000	Production Occupations	65	3%	19,802	6%
53-0000	Transportation and Material Moving Occupations	101	5%	24,901	8%
55-0000	Military-only occupations	0	0%	1,308	0%
<b>Total</b>		<b>2,004</b>	<b>100%</b>	<b>315,847</b>	<b>100%</b>

Source: Lightcast

Note: South Berwick's employment numbers have been adjusted to reflect more accurate government jobs figures.

This table shows details of the occupational breakdown in South Berwick and the surrounding region. While the previous section showed details of jobs by economic sector, the Occupation snapshot gives context to the more specific types of jobs that people have.

- Educational Instruction & Library Occupation is the largest major occupation group in South Berwick, with 336 jobs, representing about 17% of the total.
- Compared to the region, South Berwick has relatively low concentrations of jobs in Sales & Related Occupations, Office & Administrative Support Occupations, and Production Occupations. Conversely, it has more jobs in Educational Instruction and Food Preparation & Serving Occupations.



## OCCUPATION GROWTH & PROJECTIONS (2-DIGIT SOC): SOUTH BERWICK

- The occupations that grew the most from 2017-2022 are Construction (+25) and Management (+24).
- The occupations that are projected to grow the most from 2022-2027 are Food Preparation & Serving Related (+21), Management (+12), and Arts, Design, Entertainment, Sports, and Media Occupations (+12).

### South Berwick Occupation Change

iOC	Description	Historic		Projected	
		2017-2022 Change	2017-2022 % Change	2022-2027 Change	2022-2027 % Change
1-0000	Management Occupations	24	22%	12	9%
3-0000	Business and Financial Operations Occupations	18	39%	6	9%
5-0000	Computer and Mathematical Occupations	1	9%	2	9%
7-0000	Architecture and Engineering Occupations	0	1%	1	2%
9-0000	Life, Physical, and Social Science Occupations	2	25%	1	10%
!1-0000	Community and Social Service Occupations	3	11%	1	2%
!3-0000	Legal Occupations	(0)	(3%)	0	9%
!5-0000	Educational Instruction and Library Occupations	(30)	(8%)	7	2%
!7-0000	Arts, Design, Entertainment, Sports, and Media Occupations	23	47%	12	17%
!9-0000	Healthcare Practitioners and Technical Occupations	(2)	(2%)	1	1%
!1-0000	Healthcare Support Occupations	(3)	(6%)	(2)	(5%)
!3-0000	Protective Service Occupations	2	4%	1	2%
!5-0000	Food Preparation and Serving Related Occupations	(27)	(9%)	21	8%
!7-0000	Building and Grounds Cleaning and Maintenance Occupations	(11)	(11%)	(2)	(2%)
!9-0000	Personal Care and Service Occupations	3	3%	(2)	(2%)
!1-0000	Sales and Related Occupations	(15)	(13%)	(0)	(0%)
!3-0000	Office and Administrative Support Occupations	(1)	(1%)	(3)	(2%)
!5-0000	Farming, Fishing, and Forestry Occupations	Insf. Data	Insf. Data	5	37%
!7-0000	Construction and Extraction Occupations	25	22%	11	8%
!9-0000	Installation, Maintenance, and Repair Occupations	13	17%	6	6%
!1-0000	Production Occupations	6	10%	3	5%
!3-0000	Transportation and Material Moving Occupations	14	15%	7	7%
!5-0000	Military-only occupations	0	0%	0	0%
<b>Total</b>		<b>58</b>	<b>3%</b>	<b>84</b>	<b>4%</b>

Source: Lightcast

Note: South Berwick's employment numbers have been adjusted to reflect more accurate government jobs figures.



## OCCUPATION CHARACTERISTICS

- Educational Instruction & Library Occupations is the most concentrated occupation group in South Berwick, with a LQ of 2.93. This is followed by Arts, Entertainment, Design, Sports, and Media Occupations (LQ of 2.02).
- Architecture and Engineering as well as Management Occupations are the highest-paid occupations in South Berwick, both with median hourly earnings at almost \$40. Median hourly earnings in South Berwick are generally on par with the Region.

### Occupation Characteristics, 2022

SOC	Description	South Berwick		Region	
		Location Quotient	Median Hourly Earnings	Location Quotient	Median Hourly Earnings
11-0000	Management Occupations	0.96	\$39.47	1.01	\$45.05
13-0000	Business and Financial Operations Occupations	0.51	\$32.00	0.88	\$32.75
15-0000	Computer and Mathematical Occupations	0.28	\$36.99	0.81	\$38.80
17-0000	Architecture and Engineering Occupations	1.19	\$39.62	1.18	\$39.04
19-0000	Life, Physical, and Social Science Occupations	0.56	\$30.69	0.93	\$33.33
21-0000	Community and Social Service Occupations	0.81	\$23.23	0.79	\$23.14
23-0000	Legal Occupations	0.18	\$30.81	0.58	\$30.77
25-0000	Educational Instruction and Library Occupations	2.93	\$24.07	1.09	\$24.99
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	2.02	\$20.52	0.94	\$22.01
29-0000	Healthcare Practitioners and Technical Occupations	0.63	\$35.23	0.90	\$35.31
31-0000	Healthcare Support Occupations	0.50	\$16.52	0.71	\$16.47
33-0000	Protective Service Occupations	0.89	\$22.22	0.75	\$24.14
35-0000	Food Preparation and Serving Related Occupations	1.82	\$14.39	1.18	\$14.36
37-0000	Building and Grounds Cleaning and Maintenance Occupations	1.32	\$14.81	1.18	\$16.08
39-0000	Personal Care and Service Occupations	1.78	\$14.29	1.19	\$14.18
41-0000	Sales and Related Occupations	0.54	\$15.21	1.19	\$15.57
43-0000	Office and Administrative Support Occupations	0.73	\$18.43	0.97	\$19.09
45-0000	Farming, Fishing, and Forestry Occupations	0.95	\$16.37	0.62	\$14.88
47-0000	Construction and Extraction Occupations	1.55	\$22.24	1.06	\$23.53
49-0000	Installation, Maintenance, and Repair Occupations	1.14	\$22.68	1.01	\$24.40
51-0000	Production Occupations	0.59	\$19.11	1.14	\$19.73
53-0000	Transportation and Material Moving Occupations	0.59	\$17.30	0.92	\$16.62
55-0000	Military-only occupations	0.00	\$19.86	0.68	\$17.82

**Source:** Lightcast

**Note:** South Berwick's data has been adjusted to reflect more accurate government jobs figures.



## TOP OCCUPATIONS (4-DIG SOC): SOUTH BERWICK

- Elementary and Middle School Teachers was the largest sub-occupation in South Berwick in 2022, with 92 jobs. This was followed by Fast Food and Counter Workers (75 jobs).
- Of the top 20 sub-industries by employment, nine have grown in the five years from 2017-2022, while eleven have seen decreasing employment.
- Secondary School Teachers has the highest Location Quotient, at 4.59.

### Top 20 Occupations in South Berwick by Job Counts

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient
25-2020	Elementary and Middle School Teachers	102	92	(10)	(10%)	4.21
35-3020	Fast Food and Counter Workers	84	75	(9)	(11%)	2.09
25-9040	Teaching Assistants	74	74	(0)	(0%)	4.37
25-2030	Secondary School Teachers	64	69	4	7%	4.59
35-2010	Cooks	59	60	1	2%	1.72
39-9010	Childcare Workers	54	54	(0)	(0%)	3.72
37-2010	Building Cleaning Workers	56	50	(6)	(10%)	1.17
43-6010	Secretaries and Administrative Assistants	52	47	(4)	(9%)	1.23
35-2020	Food Preparation Workers	43	43	0	1%	4.20
53-3030	Driver/Sales Workers and Truck Drivers	35	39	5	14%	0.73
53-7060	Laborers and Material Movers	30	37	8	25%	0.37
35-1010	Supervisors of Food Preparation and Serving Workers	27	37	10	38%	1.67
43-9060	Office Clerks, General	34	36	2	6%	0.98
37-3010	Grounds Maintenance Workers	41	36	(6)	(14%)	2.46
41-2030	Retail Salespersons	36	32	(3)	(9%)	0.74
35-3030	Waiters and Waitresses	52	30	(22)	(43%)	2.09
27-1020	Designers	7	30	23	315%	0.82
31-9090	Miscellaneous Healthcare Support Occupations	30	30	(0)	(0%)	1.47
11-1020	General and Operations Managers	23	27	4	15%	0.59
25-2010	Preschool and Kindergarten Teachers	32	25	(7)	(22%)	4.30

**Source:** Lightcast

**Note:** South Berwick's data has been adjusted to reflect more accurate government jobs figures.



## TOP OCCUPATIONS (4-DIG SOC): REGION

- Laborers and Material Movers was the largest sub-occupation in the region in 2022, with almost 11,900 jobs. This was followed by Retail Salespersons (10,207 jobs).
- Of the top 20 sub-industries by employment, twelve have grown in the five years from 2017-2022, while eight have seen decreasing employment.
- Grounds Maintenance Workers has the highest Location Quotient, at 1.84.

### Top 20 Occupations in The Region by Job Counts

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient
53-7060	Laborers and Material Movers	11,278	11,889	885	8%	0.94
41-2030	Retail Salespersons	11,636	10,207	(1,466)	(13%)	1.34
41-2010	Cashiers	9,367	7,958	(1,845)	(20%)	1.22
35-3020	Fast Food and Counter Workers	7,176	7,608	817	11%	1.21
53-3030	Driver/Sales Workers and Truck Drivers	6,378	7,313	1,303	20%	0.98
37-2010	Building Cleaning Workers	7,655	6,849	(538)	(7%)	0.92
11-1020	General and Operations Managers	5,243	6,322	1,379	26%	1.02
43-9060	Office Clerks, General	6,313	6,121	(274)	(4%)	1.12
43-6010	Secretaries and Administrative Assistants	7,022	6,044	(1,109)	(16%)	0.91
35-2010	Cooks	5,318	5,704	1,081	20%	1.06
41-1010	First-Line Supervisors of Sales Workers	5,007	5,133	138	3%	1.52
37-3010	Grounds Maintenance Workers	4,160	4,880	1,086	26%	1.84
43-4050	Customer Service Representatives	4,583	4,690	8	0%	0.84
25-2020	Elementary and Middle School Teachers	4,469	4,500	53	1%	1.18
35-3030	Waiters and Waitresses	6,407	4,477	(1,464)	(23%)	1.14
29-1140	Registered Nurses	4,448	4,434	104	2%	0.74
25-9040	Teaching Assistants	4,179	4,081	(49)	(1%)	1.52
31-1120	Home Health and Personal Care Aides	3,887	3,910	233	6%	0.51
43-3030	Bookkeeping, Accounting, and Auditing Clerks	3,518	3,591	78	2%	1.09
15-1250	Software and Web Developers, Programmers, and Testers	3,919	3,306	(328)	(8%)	0.82

Source: Lightcast



## EXISTING OCCUPATION TRENDS (4-DIG SOC): SOUTH BERWICK

- Supervisors of Food Preparation and Serving Workers have seen the most job growth from 2017-2022, adding 10 jobs in South Berwick. This is followed by Laborers and Material Movers (+8).
- Of the top-growing occupations, Secondary School Teachers has the highest Location Quotient, at 4.59. This is followed by Firefighters (2.90) and Food Service Managers (2.71).
- 19 Occupations in South Berwick saw decline from 2017-2022. Waiters and Waitresses saw the most decline (-22 jobs), followed by Elementary and Middle School Teachers (-9).

### Top 20 Occupations in South Berwick by Job Growth

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient
35-1010	Supervisors of Food Preparation and Serving Workers	27	37	10	38%	1.67
53-7060	Laborers and Material Movers	30	37	8	25%	0.37
47-2060	Construction Laborers	16	23	7	42%	0.96
47-2110	Electricians	11	16	5	51%	1.16
11-9190	Miscellaneous Managers	13	18	5	42%	0.98
53-3030	Driver/Sales Workers and Truck Drivers	35	39	5	14%	0.73
25-2030	Secondary School Teachers	64	69	4	7%	4.59
11-9050	Food Service Managers	10	15	4	40%	2.71
49-9070	Maintenance and Repair Workers, General	13	16	4	29%	0.63
11-1020	General and Operations Managers	23	27	4	15%	0.59
47-2150	Pipelayers, Plumbers, Pipefitters, and Steamfitters	10	13	3	25%	1.59
43-9060	Office Clerks, General	34	36	2	6%	0.98
33-3050	Police Officers	10	12	2	19%	1.16
43-3030	Bookkeeping, Accounting, and Auditing Clerks	21	23	2	8%	1.01
47-2140	Painters and Paperhangers	11	13	2	15%	2.26
33-9090	Miscellaneous Protective Service Workers	12	13	1	12%	2.20
35-2010	Cooks	59	60	1	2%	1.72
47-2030	Carpenters	23	24	1	4%	1.82
53-3050	Passenger Vehicle Drivers	15	16	1	6%	1.36
33-2010	Firefighters	11	12	1	6%	2.90

**Source:** Lightcast

**Note:** South Berwick's data has been adjusted to reflect more accurate government jobs figures.



## EXISTING OCCUPATION TRENDS (4-DIG SOC): REGION

- General and Operations Managers have seen the most regional job growth from 2017-2022, adding 6,322 jobs in the region. This is followed by Driver/Sales Workers and Truck Drivers (+1,303).
- Of the top-growing occupations, Grounds Maintenance Workers has the highest Location Quotient, at 1.84.
- Of the occupations that saw decline in the region from 2022-2027, Cashiers saw the most job loss (-1,845 jobs), followed by Retail Salespersons (-1,466).

### Top 20 Occupations in the Region by Job Growth

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient
11-1020	General and Operations Managers	5,243	6,322	1,379	26%	1.02
53-3030	Driver/Sales Workers and Truck Drivers	6,378	7,313	1,303	20%	0.98
37-3010	Grounds Maintenance Workers	4,160	4,880	1,086	26%	1.84
35-2010	Cooks	5,318	5,704	1,081	20%	1.06
35-1010	Supervisors of Food Preparation and Serving Workers	2,319	3,064	1,046	45%	1.22
13-1080	Logisticians and Project Management Specialists	954	1,790	967	101%	0.89
53-7060	Laborers and Material Movers	11,278	11,889	885	8%	0.94
13-1190	Miscellaneous Business Operations Specialists	1,081	1,820	854	79%	0.82
35-3020	Fast Food and Counter Workers	7,176	7,608	817	11%	1.21
41-3090	Miscellaneous Sales Representatives, Services	1,716	2,475	810	47%	1.15
21-1010	Counselors	1,316	1,858	674	51%	1.04
39-2020	Animal Caretakers	718	1,103	589	82%	1.65
	First-Line Supervisors of Transportation and Material Moving					
53-1040	Workers	678	1,186	539	80%	1.06
11-9190	Miscellaneous Managers	1,970	2,274	528	27%	1.13
13-1160	Market Research Analysts and Marketing Specialists	832	1,221	523	63%	0.77
45-2090	Miscellaneous Agricultural Workers	586	894	522	89%	0.49
13-1110	Management Analysts	1,482	1,819	496	33%	0.94
31-9090	Miscellaneous Healthcare Support Occupations	2,685	2,903	461	17%	0.91
11-9010	Farmers, Ranchers, and Other Agricultural Managers	443	727	454	103%	0.66
47-2110	Electricians	1,195	1,503	432	36%	1.03

Source: Lightcast



## CONCENTRATED OCCUPATIONS (4-DIG SOC): SOUTH BERWICK

- Secondary School Teachers was the most concentrated occupation in 2022, with a Location Quotient of 4.59. This was followed by Teaching Assistants (LQ of 4.37) and Preschool and Kindergarten Teachers (LQ of 4.30). Of the top 20 most concentrated occupations, eight are directly education related.

### Top 20 Occupations in South Berwick by Location Quotient

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient
25-2030	Secondary School Teachers	64	69	4	7%	4.59
25-9040	Teaching Assistants	74	73	(0)	0%	4.37
25-2010	Preschool and Kindergarten Teachers	30	22	(7)	-22%	4.30
25-2020	Elementary and Middle School Teachers	100	89	(10)	-10%	4.21
35-2020	Food Preparation Workers	43	43	0	1%	4.20
25-3030	Substitute Teachers, Short-Term	13	7	(5)	-24%	4.04
27-2020	Athletes, Coaches, Umpires, and Related Workers	14	9	(4)	-30%	3.99
39-9010	Childcare Workers	54	54	(0)	0%	3.72
25-2050	Special Education Teachers	15	12	(2)	-11%	3.67
25-3020	Self-Enrichment Teachers	16	11	(4)	-25%	3.50
35-9020	Dishwashers	11	6	(4)	-27%	2.96
33-2010	Firefighters	12	13	1	6%	2.90
11-9030	Education and Childcare Administrators	23	23	(1)	-6%	2.57
37-3010	Grounds Maintenance Workers	38	32	(6)	-14%	2.46
29-1210	Physicians	20	16	(2)	-10%	2.41
49-9090	Workers	11	11	(0)	-3%	2.26
33-9090	Miscellaneous Protective Service Workers	12	13	1	12%	2.20
35-3020	Fast Food and Counter Workers	82	70	(9)	-11%	2.09
35-3030	Waiters and Waitresses	49	27	(22)	-43%	2.09
49-3020	Automotive Technicians and Repairers	23	22	(1)	-3%	1.92

**Source:** Lightcast

**Note:** South Berwick's data has been adjusted to reflect more accurate government jobs figures.



## CONCENTRATED OCCUPATIONS (4-DIG SOC): REGION

- Nuclear Engineers was the most concentrated occupation in the region in 2022, with a LQ of 5.23. This was followed by Agricultural Engineers (LQ of 4.95) and Fishing and Hunting Workers (LQ of 4.43).
- Of the 20 most concentrated occupations, 11 saw job growth from 2017-2022, while nine saw job loss.

### Top 20 Occupations in the Region by Location Quotient

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	2022 Location Quotient
17-2160	Nuclear Engineers	97	150	50	51%	5.23
17-2020	Agricultural Engineers	<10	13	Insf. Data	Insf. Data	4.95
45-3030	Fishing and Hunting Workers	288	269	24	8%	4.43
19-4050	Nuclear Technicians	<10	50	Insf. Data	Insf. Data	4.25
51-9160	Computer Numerically Controlled Tool Operators and Programmers	1,117	1,069	(27)	-2%	2.95
11-9080	Lodging Managers	377	291	(72)	-19%	2.92
51-6060	Textile Machine Setters, Operators, and Tenders	377	331	(43)	-11%	2.79
51-9040	Operators, and Tenders	297	307	26	9%	2.73
43-4020	Correspondence Clerks	18	36	16	91%	2.60
51-9150	Photographic Process Workers and Processing Machine Operators	40	42	3	6%	2.43
43-4140	New Accounts Clerks	180	184	(2)	-1%	2.38
51-4190	Miscellaneous Metal Workers and Plastic Workers	423	381	(45)	-11%	2.35
53-2020	Air Traffic Controllers and Airfield Operations Specialists	123	195	98	79%	2.22
51-6040	Shoe and Leather Workers	87	55	(35)	-41%	2.13
29-1130	Veterinarians	302	367	116	38%	2.09
47-5080	Helpers--Extraction Workers	36	27	(7)	-20%	2.06
29-1160	Nurse Midwives	25	34	11	44%	2.05
11-9130	Postmasters and Mail Superintendents	56	47	(12)	-21%	2.02
51-6050	Tailors, Dressmakers, and Sewers	177	167	(10)	-6%	1.96
11-9170	Personal Service Managers	97	133	43	45%	1.96

Source: Lightcast



## PROJECTED SKILL REQUIREMENTS (4-DIG SOC): REGION

- In the region, workers related to Food Services are expected to see the most growth. Restaurant cooks (+635), Waiters and Waitresses (+467), and Fast Food and Counter Workers (+385) are projected to see the most growth.
- Of the top 20 occupations for projected growth, most require either no formal education or a High School Diploma. These occupations generally require low levels of skills, with 13 requiring no prior work experience.

### Top 20 Occupations by Projected Growth in the Region

SOC	Description	2022-2027 Change	2022-2027 % Change	Typical Entry Level Education	Work Experience Required
35-2014	Cooks, Restaurant	635	21%	No formal educational credential	Less than 5 years
35-3031	Waiters and Waitresses	467	10%	No formal educational credential	None
35-3023	Fast Food and Counter Workers	385	5%	No formal educational credential	None
37-3011	Landscaping and Groundskeeping Workers	339	8%	No formal educational credential	None
11-1021	General and Operations Managers	300	5%	Bachelor's degree	5 years or more
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	238	10%	High school diploma or equivalent	Less than 5 years
15-1252	Software Developers	224	10%	Bachelor's degree	None
11-9199	Managers, All Other	223	10%	Bachelor's degree	Less than 5 years
31-1128	Home Health and Personal Care Aides	210	5%	High school diploma or equivalent	None
39-2021	Animal Caretakers	204	18%	High school diploma or equivalent	None
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	192	7%	No formal educational credential	None
35-3011	Bartenders	189	13%	No formal educational credential	None
11-9013	Farmers, Ranchers, and Other Agricultural Managers	169	23%	High school diploma or equivalent	5 years or more
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	164	6%	High school diploma or equivalent	None
13-1111	Management Analysts	159	9%	Bachelor's degree	Less than 5 years
25-3021	Self-Enrichment Teachers	156	14%	High school diploma or equivalent	Less than 5 years
53-3033	Light Truck Drivers	154	7%	High school diploma or equivalent	None
37-2012	Maids and Housekeeping Cleaners	153	6%	No formal educational credential	None
25-2011	Preschool Teachers, Except Special Education	147	10%	Associate's degree	None
49-9071	Maintenance and Repair Workers, General	138	6%	High school diploma or equivalent	None

Source: Lightcast



## APPENDIX D: 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 posting 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.](#)



The **American Community Survey (ACS)** is an ongoing statistical survey by the US Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. Mandatory to fill out, the survey is sent to a small sample of the population on a rotating basis. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. [Click to learn more.](#)



Conducted every ten years in years ending in zero, the **US Decennial Census of Population and Housing** is a complete count of each resident of the nation based on where they live on April 1<sup>st</sup> of the Census year. The Constitution mandates the enumeration to determine how to apportion the House of Representatives among the states. The latest release of the 2020 Census contains data for a limited number of variables, including: total population by race/ethnicity, population under 18, occupied and vacant housing units, and group quarters population. [Click 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.](#)



## APPENDIX E: GLOSSARY

**Location Quotient:** 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.

**Competitive Effect:** 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.

**Gross Regional Product (GRP):** This is simply GDP for the region of study. More commonly, GRP is GDP for any region smaller than the United States, such as a state, county, or ZIP code. GRP measures the final market value of all goods and services produced in the region, and is calculated as the sum of total industry earnings, taxes on production & imports, and profits, less subsidies.

**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:** Expressed as a percentage and refers to the amount of vacant units divided by the total number of units in the market.

**Local Trade Area:** This area delineates the draw area for “everyday” needs such as grocery, pharmacy, personal care services, bank, fitness, quick meals, etc. The local retail trade area serves a small geographic and is a 5 to 15-minute drive time that covers primarily South Berwick.

**Retail Trade Gap:** 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.” 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).



# 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.

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## Service Lines



Strategic and  
Organizational  
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Services



Lead Generation  
and Relationships



Business  
Attraction and  
Retention



Entrepreneurship  
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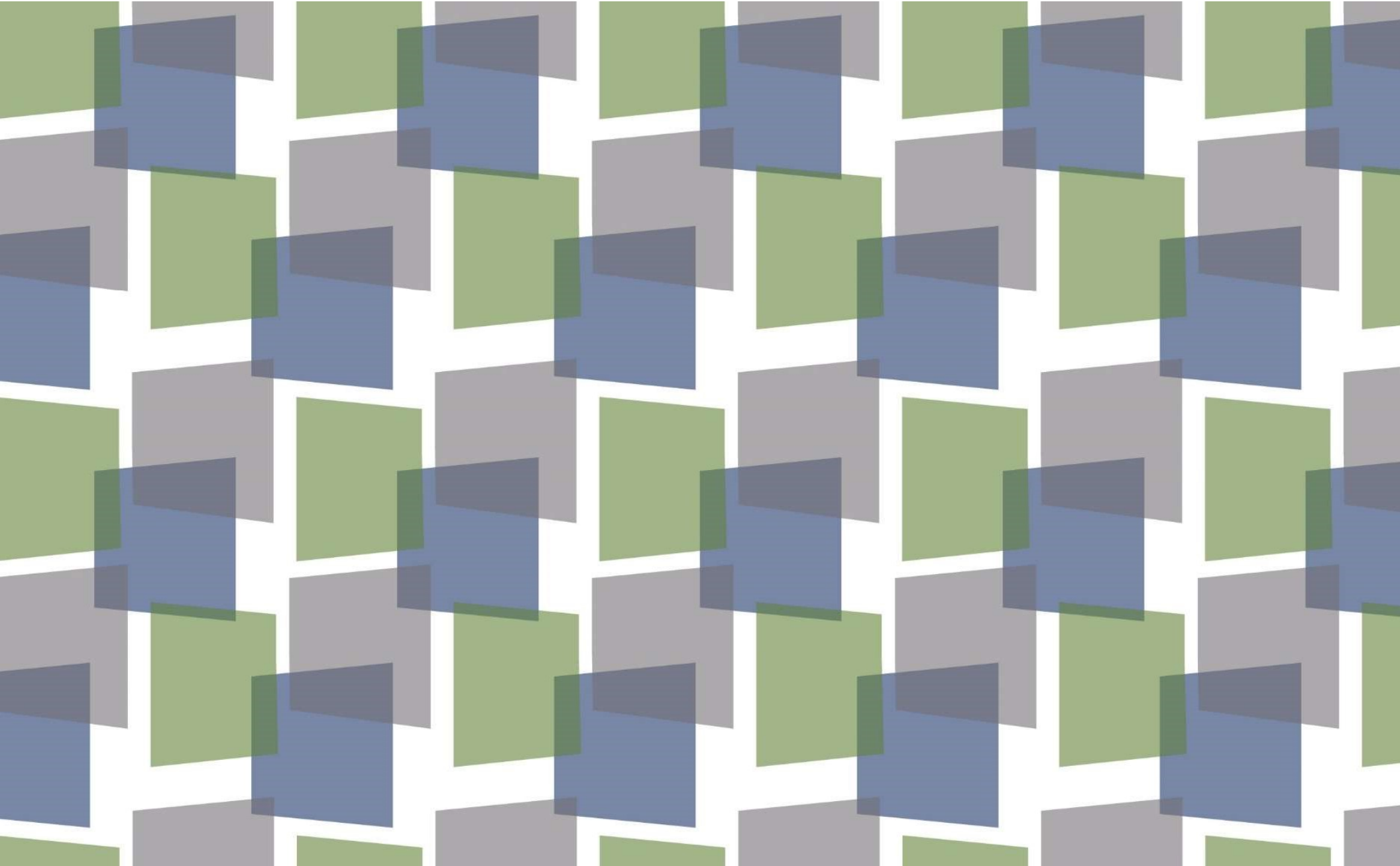


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