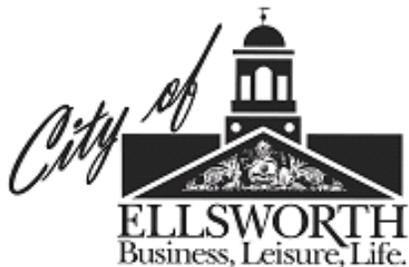


Housing Opportunities for the Age 55 & Older Markets: Ellsworth, Maine

Summary Report to:



October 2015

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Summary Report

Ellsworth, the principal center for Hancock County retail trade and health care services, can play a larger role as a location for new housing products for the age 55 and older markets. Particular gaps in the local inventory include: appropriately designed ownership units for the “active adult” market, quality rental housing in market rate apartments or in mixed income developments, and independent living with optional support services.

While there remains a need among low income senior households for affordable rental housing, market rate ownership and rental options are also supportable. The area housing survey that was conducted as part of this study indicates that senior households of all income levels are actively looking for alternatives in the Greater Ellsworth area that are not currently available. The survey results and demographic analysis indicate that the City of Ellsworth will become increasingly attractive to the senior market, particularly as more of the area population reaches age 75 or older.

The scope of this study, which was commissioned by the City of Ellsworth, included a regional housing analysis; an inventory of area housing resources; demographics and projections; review of national data on occupancy and preferences in active adult and senior communities; consideration of Ellsworth attraction factors for the senior marketplace; and a large scale mail survey (July 2015) of households age 55 and older in Ellsworth and other communities in the area.

Senior Housing and Resource Inventory

- Ellsworth’s senior housing inventory (other than assisted living) comprises 218 lower income rental units. The maximum household income served by these apartments is typically not more than \$25,000 to \$35,000.

- Even with this inventory in place, there are about 300 Ellsworth households age 65 or older who have a high housing cost burden (30%-35% or more of their income).

HOUSING COST BURDEN - HOUSEHOLDS AGE 65 OR OLDER - 2013 ESTIMATES						
Households Age 65 or Older With High Housing Cost Burden	Ellsworth			Hancock County		
	Homeowners	Renters	Total	Homeowners	Renters	Total
Households Age 65+	729	263	992	5,441	1,241	6,682
With Cost Burden 30%+	155	173	328	1,450	544	1,994
With Cost Burden 35%+	146	155	301	1,203	450	1,653
Percent Spend 30%+	21%	66%	33%	27%	44%	30%
Percent Spend 35%+	20%	59%	30%	22%	36%	25%

Source: Derived by BCM Planning from ACS 2009-2013 Five Year Sample Data (adjusted to 2013 dollar values)

- Other than lower income rental apartments, there are no “age qualified” ownership or rental housing developments in the City for income levels above the \$25,000-\$35,000 range.
- The City of Ellsworth has a relatively high share of Hancock County senior households of age 65 or older with incomes of \$50,000-\$75,000.

HOUSEHOLD INCOME DISTRIBUTION - AGE 65 OR OLDER - 2013					
Household Income	Ellsworth		Hancock County		City Share of County Total
	Number	Percent	Number	Percent	
Under \$25,000	388	39.1%	2,302	34.5%	16.9%
\$25,000 - \$50,000	205	20.7%	1,895	28.4%	10.8%
\$50,000-\$75,000	223	22.5%	1,033	15.5%	21.6%
\$75,000 or More	176	17.7%	1,452	21.7%	12.1%
Total	992	100.0%	6,682	100.0%	14.8%
Median Income:	\$39,833		\$37,266		

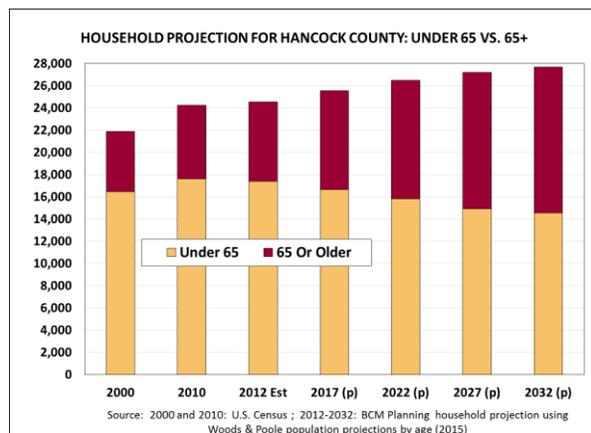
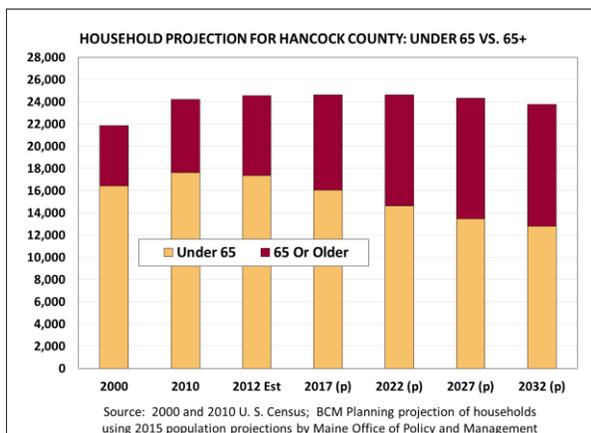
Source: American Community Survey - 5 year sample 2009-2013

- The majority of senior households in the City have incomes too high to qualify for occupancy in lower income senior apartments (61% of households age 65+ have incomes above \$25,000.)

- In the City and in Hancock County, there are few independent living units (apartments with meals and housekeeping services). The few “active adult” ownership units in the County are located on campuses that also include independent and assisted living.

Demographic Profile and Projected Growth

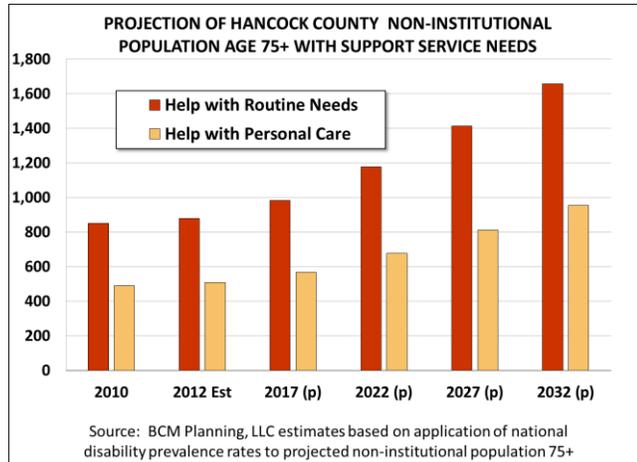
- About half of all Hancock County households are age 55 or older. The age 55-64 cohort, driven by the leading edge of the Baby Boom, has now peaked. Over the next two decades this group will mature and drive significant increases in the age 65-74 and 75+ population groups.
- Many older households who want to make a transition to alternative forms of housing will need to sell their current home. But long term projections indicate that as the number of older households grows, there will be a *decline* in labor force households (under 65).
- This shift could result in a market with too many prospective older sellers and not enough younger buyers to fully sustain the housing transitions that seniors want to make.
- Growth in senior households is fairly predictable, but the overall need for new housing will depend on whether the region attracts enough net in-migration to sustain growth in *total households*.



- Using State population projections in our household model (graph to left), Hancock County would see a static to declining total number of households. With stronger in-migration of the labor force (graph to right) there would be a more dynamic market that would permit more seniors to sell their homes and make a transition to alternative housing products.

Aging, Disability and Increased Demand for Support Services

- There is a higher prevalence of disability among seniors who are 75 or older that is associated with a need for more accessible and maintenance-free rental and ownership housing, and life expectancy is continuing to increase.
- To meet the housing needs of the future, solutions will need to include housing designs and adaptations better suited to an older population, specialized housing products, and expansion of support services.
- Over the next 20 years, the number of people age 75 or older who need help with routine needs, or with personal care, will grow by over 80% in Hancock County.
- Corresponding needs for in-home support services such as housekeeping, the need for transportation services, and for personal care will increase proportionately.

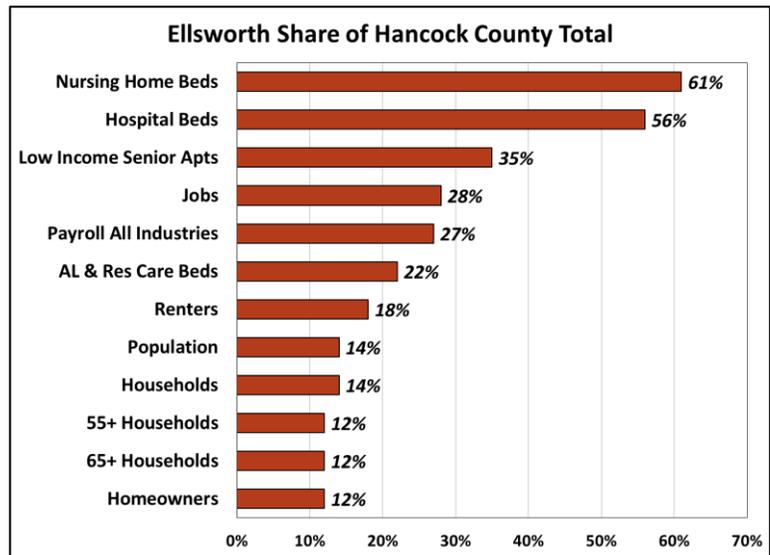


Active Adult and Senior Housing Occupancy and Preferences

- Nationally, only about 3% of all homeowners who are 55 or older live in an age-qualified developments. About 20% of renter households age 55+ live in an age-restricted unit, which includes subsidized and market rate apartments. In combination, about 7% of all households age 55 or older (owners and renters) live in some type of age-restricted development.
- In the United States, the age 55-64 year old segment represents about 24% of occupancy in active adult ownership communities, and about 19% within age-restricted rental units.
- In contrast to this national average, our interviews with area providers indicates that few residents in active adult cottage-type ownership units are younger than 75. The units in the area, however, are located within campuses that also provide independent and assisted living, which may appeal to the oldest buyers.
- Our housing survey indicated that the youngest part of the target market (55-64) is more likely to be attracted to single family housing developments.
- The survey results showed that about the same proportions of households age 55 and older would be interested in an active adult (age restricted) community or a single family home (no age restriction specified).
- Of all Maine counties, Hancock County has the lowest ratio of multifamily and attached units as a share of its housing stock (only about 5%). The region's high reliance on single family homes may make it difficult to introduce the senior market to attached housing options.

Ellsworth Attraction Factors

- Ellsworth absorbed about 23% of Hancock County's household growth from 2000-2010, compared to only 10% in the prior decade 1990-2000.
- While Ellsworth is home to about 14% of Hancock County households, employment in the City represents 28% of Hancock County jobs and 27% of its payroll.
- The City is particularly strong as a retail center, providing a diversity of goods and services for prospective retirees.



- Ellsworth has an estimated 2.5 million square feet of commercial-industrial space, over half of which is in retail, restaurant, or lodging uses. About 900,000 square feet of this space (over one third) has been built since 2000.
- The Jackson Laboratory, one of Maine's larger employers, plans to add 365 jobs in the City over the next 10 years, which may support up to 725 additional related jobs.
- The City has a low equalized property tax rate relative to other Maine cities (tied with South Portland as the lowest rate of Maine cities in 2013).
- The rate of violent crime in Ellsworth (2013) was far below that of other Maine cities, including the smaller cities of under 20,000 population.
- Older residents have access to a number of transportation services, including low or no cost rides for seniors. Area shuttle transportation links principal centers in Hancock County with one another, and to Bangor.
- AARP ratings of community livability indicate that Ellsworth and Hancock County have very high scores relating to civic and social engagement. This indicates a strong level of community involvement that is important in keeping older residents connected to their community.

Home Prices and Market Rents

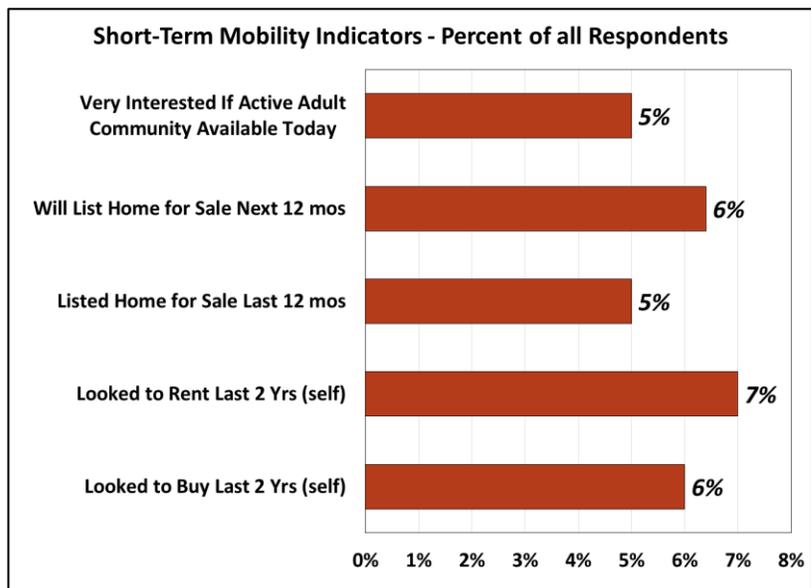
- National data indicates that buyers in active adult communities tend to purchase units similar in size to the homes they already own, but in more suitable floor area configurations offering one-level living and home maintenance services. The median size single family home in Ellsworth is about 1,500 square feet.
- The proportion of senior households capable of affording an alternative product will depend principally on the proceeds of sale of their existing homes.
- In 2014, the median sale price of a single family home in the Ellsworth Labor Market area was \$185,000. Single family listings in Ellsworth (mid-June 2015) had a median asking

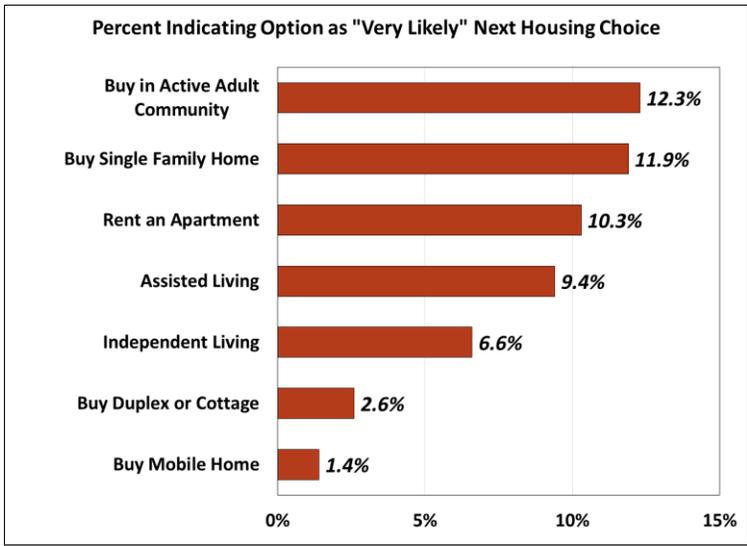
price of \$175,000 for non-waterfront units. The median sales price in Hancock County was \$198,250 for the 3rd quarter of 2015 (up from \$185,000 for the same quarter in 2014).

- About 30% of Ellsworth single family home listings (excluding those on large lots) in June 2015 had asking prices of \$250,000 or more. For listings of homes built in 2000 or later, the median list price in Ellsworth is about \$309,000 and the average \$285,000.
- The average market rent in the Ellsworth area is about 10% higher than the Maine average. Average market rent in the Ellsworth Labor Market increased by 11% from 2010-2014. The median gross rent for a two bedroom apartment in 2014 was about \$955 per month.
- Most rental housing development for seniors in Ellsworth and the area serves very low income households. But with average market rents approaching \$1,000 per month (generally for relatively old and less accessible housing stock) opportunities for market rate rental housing may be emerging.

Interest in Alternative Housing Products: Results of Household Survey

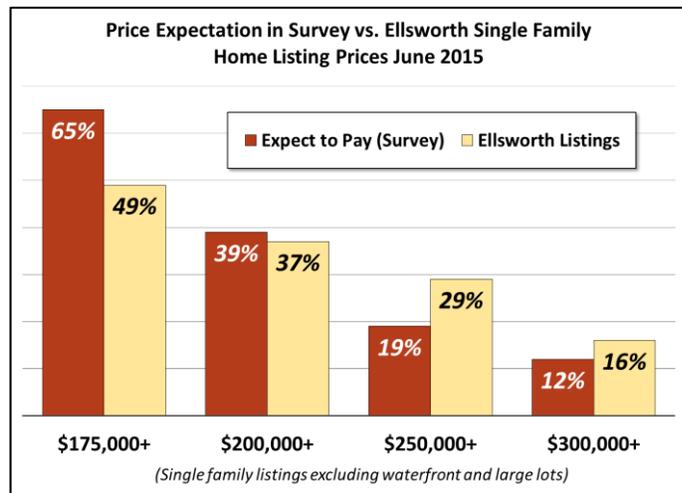
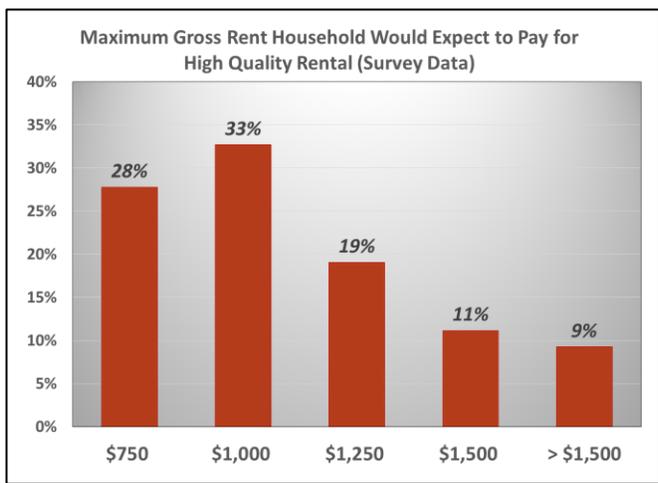
- In July 2015, a comprehensive housing survey was administered via mail to area residents age 55 or older who do not already live in an age-restricted development. The survey achieved a very strong response rate of 23%, producing 800 completed surveys for analysis. About 47% of the returns were from Ellsworth and 53% were from other towns in the region.
- Based on the survey results, as greater proportions of the Hancock County population reach age 75, a higher share of the region’s senior households are likely to be attracted to Ellsworth.
- The youngest portion of the sample (age 55-64) is not likely to comprise a significant share of the total occupancy in an active adult community, independent or assisted living. This portion of the age 55+ market is more likely to be attracted to single family homes (with or without an age restriction) and to quality rental units.
- About 5%-6% of homeowners age 55 or older were actively engaged in trying to sell their current home. About 6% to 7% have actively searched for an alternative senior housing product over the past two years.
- For the Greater Ellsworth area, this means that there may be up to 300 households age 55 or older actively seeking rental or ownership housing alternatives in a given year.





- When area households age 55+ were polled about the probability of the next type of housing they would consider living in, the interest was evenly split between a single family home (no age restriction specified), or owning a unit in an active adult community.
- There was a similar level of interest in either assisted living or independent living (but there was significant overlap between those interested in these options).

- Interest in rental units was not limited to lower income households. About 40% of the interest in rentals was from households expecting to pay over \$1,000 per month in rent for a high quality rental unit.
- The median listing price of homes in Ellsworth is about \$175,000. Ideal pricing for active adult ownership units affordable to most homeowners would be in the \$175,000-\$200,000 range if that sales price were achievable in new construction.



- A reasonable share (39% of households with a potential interest in purchasing) indicated that they would expect to pay \$200,000 or more for a unit with the features they want.
- That level of interest drops to only 19% of interested households at pricing of \$250,000 or more.
- The maximum practical price point for the local market may be somewhere between \$200,000 and \$250,000.

- The overall response to the survey, projected to the entire Greater Ellsworth area, indicates an interest in various products that are not currently available in Ellsworth including:
 - New single family homes designed to accommodate older home owners (1st floor bath and bedroom, or all rooms on one floor), or with “universal design” features intended for all age groups;
 - Active adult ownership units with maintenance services provided. The size of such units should probably be 1,500 square feet or less (at or below the median size of existing Ellsworth single family homes);
 - Quality market rate rental apartments (including market rate units incorporated within mixed income developments); and
 - Independent living apartments (with meals, housekeeping, and transportation) in which residents may also purchase additional services as needed for personal care.

More documentation of the survey process and tabulation of results may be found in the main report. A full description of the housing survey and detailed tabulations are contained in a separate report prepared by Pan Atlantic Research, Inc. which served as a subcontractor for this study.

This report has been prepared for a broad audience of users including local residents, City of Ellsworth officials and administrative staff, area health and human service providers, prospective housing developers, and funding agencies. Users of this information are encouraged to read the report in its entirety.

The study is intended to provide a better understanding of market opportunities in the age 55 and older housing markets based on literature review of national data, area demographic analysis, and evaluation of consumer preferences through a comprehensive area household survey.

This report should not be construed or represented as a feasibility study in support of any individual project or development. The study is not intended as a substitute for a project-specific market study and financial analysis of a particular location, project size, unit design, pricing or rent structure.

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Prepared For:



October 2015

Prepared by:



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Acknowledgements

Housing Committee

An informal committee was assembled by the City of Ellsworth Planning Department to provide guidance and feedback to the consultants in meetings or via email to help focus the housing study and to review the housing survey questionnaire. We gratefully acknowledge the contributions of the staff members and other participants on the Committee in this effort:

City Staff:

David Cole, City Manager

Michele Gagnon, City Planner

Micki Sumpter, Economic Development Director

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John Moore

Teri Sargent

Sara Sherwood

Rebecca Sinford

Audi Tunney

Wayne Wright

City Assessors Office

City Assessor Larry Garner and Assistant Assessor Valerie Moon provided a database of selected property characteristics for all parcels in Ellsworth and recent home sales price data for the analysis.

Mail Survey Participants

We wish to thank the over 800 area households who took the time to complete the housing survey that was distributed to a large sample of households of age 55 or older by mail. The survey produced an unexpectedly high rate of return of 23%. The robust response to the questionnaire yielded a low margin of error for overall results, and enabled a more detailed analysis of housing preferences to be developed for several age groups within the sample. The full detail of the mail survey process and results are published in a separate report to the City of Ellsworth dated August 2015, prepared by Pan Atlantic Research, Inc. as part of the overall study.

Consultant Team:

BCM Planning, LLC - Yarmouth, Maine: Prime consultant; study management.

Bruce C. Mayberry, Principal

Pan Atlantic Research, Inc. – Portland, Maine: Subcontractor for the regional household survey

Patrick O. Murphy, President, and Jason Edes, Director of Research

Abbreviations for Sources Used and Definitions

ACS: American Community Survey. The ACS is a sample survey instrument of the U. S. Bureau of the Census, and is the primary source for the most current estimates of detailed demographic, income, and housing information. Only the decennial Census (most recently conducted in 2010) provides a 100% count of population and households by age and total housing units. For more detailed socioeconomic data such as income-based data and housing cost information, the ACS sample data is the only Census-based source for this information at the municipal level. The sample data from the ACS is subject to higher margins of error as the population in a geographic unit decreases. In Hancock County, municipal level ACS data is available only as adjusted averages for 5-year sampling periods. At the time of preparation of this report, the most recent ACS sample data for municipalities reflect the sampling period 2009-2013. For the income and housing cost data derived from this sample, the ACS adjusts the dollar values to 2013.

AMFI: Area Median Family Income. This term is also abbreviated in other sources as “AMI” for area median income or “HAMFI” for HUD Adjusted Median Family Income. The area median family income is computed by the U. S. Department of Housing and Urban Development (HUD) each year for regional geographies (metropolitan areas and/or counties) throughout the United States. It represents the estimated median income of families (related persons) by household size. For Ellsworth, the relevant AMFI income standard is defined by the income schedules for Hancock County. Most federal housing programs and many affordable housing policy guidelines use the AMFI by household size to define income levels such as “very low income” (under 50% of AMFI) or “lower income” (under 80% of AMFI) by number of persons in the household.

American Housing Survey (AHS): The AHS is sponsored by the Department of Housing and Urban Development (HUD) and conducted by the U.S. Census Bureau. National data are collected every other year and metropolitan area data are collected on a rotating basis. The AHS provides information on a wide range of housing subjects, including size and composition of the nation’s housing inventory, vacancies, fuel usage, physical condition of housing units, characteristics of occupants, equipment breakdowns, home improvements, mortgages and other housing costs, people eligible for and beneficiaries of subsidized housing, home values, and characteristics of recent movers.

CDC: Centers for Disease Control. The Centers for Disease Control are part of the U. S. Department of Health and Human Services. Data from the CDC includes annual national statistical sampling including the National Health Interview Survey, which estimates the prevalence of various types and levels of disability within the non-institutionalized population. CDC data in this report has been used to estimate the proportion of the non-institutionalized population in various age groups that have disability levels related to needs for assistance with mobility and/or a need for help with personal care.

HUD: U. S. Department of Housing and Urban Development. HUD is a cabinet-level department of the U. S. Government that provides a number of data resources and affordable housing programs. This report includes demographic and income data for Hancock County developed by HUD in cooperation with the U. S. Census Bureau including special tabulations of demographic and income data. HUD is the source of regional income standards (AMFI) and funds housing subsidies for many Public Housing

projects, developments that have Section 8 subsidy contracts, and the housing voucher subsidies that are allocated to the Maine State Housing Authority and local housing authorities.

LIHTC: Low Income Housing Tax Credit. The LIHTC program is operated in Maine through the Maine State Housing Authority and is currently the primary funding mechanism for the production of affordable rental housing. Rather than directly subsidizing rents, the program enables investors in such housing to obtain federal tax credits for their equity investment in qualifying developments. Under the program, a minimum percentage of units must be affordable to households earning up to 50% to 60% of the AMFI. While many projects contain 100% lower income units, it is possible to create mixed income housing that includes market rate units without income limitations.

MSHA: Maine State Housing Authority. Also known as MaineHousing, the MSHA is the state agency that administers HUD housing voucher subsidies, and provides financing programs for low to moderate income rental housing developments (including LIHTC). The MSHA also issues mortgage subsidy bonds to leverage affordable homeownership loans through participating lenders.

SOCDS – State of the Cities Data System. This source is maintained by HUD to provide access to various income, demographic, housing cost and building permit information compiled at the metropolitan, county, and municipal level. Special tabulations available through this source include CHAS data (for Comprehensive Housing Affordability Strategy preparation.) The CHAS tabulations combine ACS microdata with HUD adjusted median family income standards to create estimate the number of households that would qualify for HUD assistance.

Executive Summary

Ellsworth, the principal center for Hancock County retail trade and health care services, can play a larger role as a location for new housing products for the age 55 and older markets. Particular gaps in the local inventory include: appropriately designed ownership units for the “active adult” market, quality rental housing in market rate apartments or in mixed income developments, and independent living with optional support services.

While there are remaining unmet needs among low income senior households, new products that address other income levels will support a more balanced inventory of retirement housing options. The area housing survey of age 55+ households conducted for this study indicates that households of all income levels are actively looking for alternative housing in the Greater Ellsworth area, and that the City of Ellsworth can attract an increasing share of the senior housing market at all income levels.

This executive summary reviews the key components of this regional housing analysis: an inventory of area housing resources; demographics and projections; national data on occupancy and preferences in active adult and other senior communities; a review of Ellsworth attraction factors relative to the senior marketplace; and interpretation of the results of a July 2015 mail survey of households age 55 and older in Ellsworth and area towns.

Senior Housing and Resource Inventory

- Ellsworth has a strong position within Hancock County as a center for institutional facilities (hospital and nursing homes), and for supportive housing including assisted living.
- Ellsworth’s general housing resources for seniors are limited to lower income rental units. The maximum household incomes served by these apartments is \$25,000 to \$35,000. Most of the senior apartments in Ellsworth and Hancock County are one-bedroom units.
- The median income of Ellsworth households age 65 or older is nearly \$40,000. Thus, the majority of senior households in the City have incomes too high to qualify for occupancy in these apartments.
- Regionally and locally, there are few independent living units (apartments with meals and housekeeping services). The few active adult ownership developments in the region are located within campuses that include independent and assisted living.
- Ellsworth has a relatively high concentration of Hancock County households age 65 or older with incomes in the \$50,000-\$75,000 income range.

Demographic Profile and Projected Growth

- About 50% of all Hancock County households are age 55 or older. The size of the age 55-64 cohort, driven by the leading edge of the Baby Boom, has now peaked. Over the next decade this group will mature to drive an increased in the 65-74 year old group.
- This ripple effect will continue to influence the age distribution of households over time, and an increase in the need for support services will evolve as this population ages. One

solution is better housing design that supports aging in place, rather than reliance on a new housing product for each life stage.

- Ellsworth captured an increased share of the County's housing stock growth (8% during the 1990s; 18% of the total from 2000-2010).
- Hancock County supported non-seasonal housing stock growth of about 300 units per year in the 1990s and 378 per year during the 2000-2010 period. But since 2010, the new housing development in the County has declined to about half of those volumes.
- Using the State projections of population by age in our household model for Hancock County, the number of senior households is projected to grow rapidly (due to aging of the existing population) but will be accompanied by a decline in younger households, and a net loss in total households. Under this scenario the overall regional demand for housing production would be low, and could diminish the capacity of seniors to sell and move to alternative housing.
- A second model is presented in the report that is based on modest growth within the County, which may be more appropriate to estimating Ellsworth's market potential. Ellsworth has been experiencing net in-migration and has been capturing an increased share of Hancock County households. The City may attract in-migration even if the region does not. This alternative scenario is based on balancing the need to attract a larger labor force to support potential job growth in the County.
- As more senior households age into the 75-84 year old age group over the next 10 to 20 years, there should be stronger demand for rental housing products. There is a higher prevalence of disability at age 75 or older that is associated with a need for more accessible and maintenance-free housing. While a portion of these needs have been met in the past by apartments, some of the needs might also be met by one-floor, maintenance free ownership units.
- Over the next 20 years, the number of people age 75 or older who need help with routine needs, or with personal care, will grow by over 80% in Hancock County. Corresponding needs for in-home support services such as housekeeping, the need for transportation services, and for personal care will increase proportionately.

Active Adult and Senior Housing Occupancy and Preferences

- Nationally, only about 3% of all homeowners who are 55 or older live in an age-qualified development. About 20% of renter households age 55+ live in an age-restricted unit, which includes subsidized and market rate apartments. In combination, about 7% of all households age 55 or older (owners and renters) live in some type of age-restricted development.
- In the United States, the age 55-64 year old segment represents about 24% of occupancy in active adult ownership communities, and about 19% within age-restricted rental units. These proportions incorporate all types of age-restricted communities, with and without support services.
- In contrast, our interviews with area providers indicates that few residents in ownership units located in within "campus" developments with support services are younger than 75.

- The youngest part of the target market (55-64) will be more interested in single family homes that are in freestanding developments.
- Of all Maine counties, Hancock County has the lowest ratio of multifamily and attached units as a share of its housing stock (only about 5%). There region's high reliance on single family homes may make it difficult to introduce the senior market to higher density housing options including attached units.
- In a national survey of 55+ households, about 63% of age 55+ households planned to stay in their current home as they age, 26% were unsure, and about 12% planned to buy another home at some point in the future. About 8% expressed an interest in buying another home within a three-year period, while 4% had no specific time horizon.

Ellsworth Attraction Factors

- Ellsworth absorbed about 23% of Hancock County's household growth from 2000-2010, compared to only 10% in the prior decade 1990-2000.
- The City is known as a gateway to Acadia National Park, which hosted about 2.6 million visitors in 2013, but it is a strong economic center in its own right. While Ellsworth is home to about 14% of Hancock County households, employment in the City represents 28% of Hancock County jobs and 27% of its payroll.
- The City is particularly strong as a retail center, providing a diversity of goods and services for prospective retirees.
- Jackson Laboratory, one of Maine's larger employers, plans to add 365 jobs in the City over the next 10 years, which may support up to 725 additional related jobs.
- Ellsworth has an estimated 2.5 million square feet of commercial-industrial space, over half of which is in retail, restaurant, or lodging uses. About 900,000 square feet of this space (over one third) has been built since 2000.
- The City has a low equalized property tax rate relative to other Maine cities (tied with South Portland as the lowest rate of Maine cities in 2013).
- The rate of violent crime in Ellsworth (2013) is far below that of other Maine cities, including the smaller cities of under 20,000 population.
- The area is served by a number of transportation services, including low or no cost rides for seniors. Area shuttle transportation links principal centers in Hancock County with one another, and to Bangor.
- AARP ratings of community livability indicate that Ellsworth and Hancock County have very high scores relating to civic and social engagement. This indicates a strong level of community involvement and that is important to ensure that seniors remain connected to their community.
- Recently completed senior developments indicate that Ellsworth is capable of attracting resident inflow from outside the region. It would not be unreasonable to assume that 20% to 30% of prospective residents in a new senior development could be attracted from outside the area.
- The City's concentration of economic activity and its role as a gateway to Acadia and Downeast Maine comes with the downside of heavy traffic during part of the year. Traffic

noise and congestion are significant negatives relative to neighborhood quality. Site locations for potential senior developments will need to offer proximity to essential services and shopping, but in locations offering some insulation from the main traffic corridors.

Home Prices and Market Rents

- National data indicates that buyers in active adult communities tend to purchase units similar in size to the homes they already own, but in configurations better suited to older buyers, such as one-level living in developments that include maintenance services.
- The median size single family home in Ellsworth is about 1,500 square feet, and the median size of new homes in the City has not been increasing as much as it has nationally. The proportion of senior households capable of affording an alternative product will depend principally on the proceeds of sale of their existing homes, which are modest in size and selling price.
- Median prices in Hancock County declined steeply during the Great Recession, but began to rise again in 2011. Median prices have not yet returned to their 2005 peak, but sales volume in 2014 surpassed that of the years on record since 2000. In 2014, the median sale price of a single family home in the Ellsworth Labor Market area was \$185,000. The median sales prices in Hancock County during the 3rd quarter of 2015 was \$198,250, up from \$189,000 for the 3rd quarter of 2014.
- Single family listings in Ellsworth (mid-June 2015) had a median asking price of \$175,000 for non-waterfront units. About 30% of listings (excluding those on large lots) have asking prices of \$250,000 or more. For listings of homes built in 2000 or later, the median list price in Ellsworth is about \$309,000 and the average \$285,000.
- The average market rent in the Ellsworth area is about 10% higher than the Maine average. Average market rent in the Ellsworth Labor Market increased by 11% from 2010-2014. The median gross rent for a two bedroom apartment in 2014 was about \$955 per month.
- Most rental housing development for seniors in Ellsworth and the area serves very low income households. But with average market rents approaching \$1,000 per month (generally for relatively old and less accessible housing stock) opportunities for market rate rental housing may be emerging.
- Rents have been rising in part due to a reduced capacity of younger households to enter the ownership market, lower expectations of ownership as an investment opportunity, and high student loan burdens.
- Provision of more opportunities for seniors may hinge in part on in-migration of a younger labor force into Ellsworth and the region. A growing labor force will help support general housing demand, in turn enabling seniors to more easily sell their homes if they wish to purchase or rent alternative housing. The capacity to attract this labor force will depend not only on job opportunities, but on sufficient housing diversity and availability.

Interest in Alternative Housing Products Based on Survey

- In July 2015, a comprehensive housing survey was administered via mail to area residents age 55 or older who do not already live in an age-restricted development. A very strong response rate of 23% produced a return of 800 completed surveys for analysis. About 47% of the returns were from Ellsworth and 53% were from other towns in the region.

- About 5%-6% of homeowners per year in this age group are actively engaged in trying to sell their current home. About 6% to 7% have actively searched for an alternative senior housing product over the past two years. For the Greater Ellsworth area, this means that there may be up to 300 households per year age 55 or older actively seeking rental or ownership housing alternatives.
- The survey confirms the locational importance of proximity to health care resources, shopping, recreation opportunities, and walkable locations. The survey also shows that a significant portion of the area market could be attracted to Ellsworth, particularly among older residents. This would suggest that as the area population continues to age, a higher share of total senior households could be attracted to the City.
- When polled regarding their next likely choice for a residence, the strongest interest in ownership was oriented to either a single family home (no age restriction specified), or owning a unit in an active adult community. The responses to the alternatives of a duplex/cottage type residence or a mobile home were comparatively very low.
- Rental units are also in demand, and interest in this option is not limited to lower income households. About 40% of the interest in rentals is estimated to come from households capable of affording over \$1,000 per month in rent.
- There was a similar level of interest in either assisted living or independent living (but there was significant overlap between those interested in these options).
- The youngest portion of the sample (age 55-64) comprises only a minor share of likely occupants in active adult communities, independent or assisted living, and cottage or duplex style units. This portion of the age 55+ market is more likely to be attracted to single family homes (with or without an age restriction) and to quality rental units.
- The overall response to the survey, projected to the entire Greater Ellsworth area, indicate an interest in various products that are not currently available in Ellsworth including:
 - New single family homes designed for an older market (1st floor bath and bedroom, or all rooms on one floor), or with “universal design” features;
 - Active adult ownership units with maintenance services provided, likely centering on single family units of 1,500 square feet (the median size of existing Ellsworth single family homes) or less;
 - Quality market rate rental apartments (including market rate units incorporated within mixed income developments); and
 - Independent living apartments (with meals, housekeeping, and transportation) in which residents may purchase additional services as needed for personal care.
- The survey provided a general test of sensitivity to the pricing of ownership options in this market. The median sales price of homes in Ellsworth is about \$175,000. Ideal pricing to maximize the market would be in the \$175,000-\$200,000 range. A reasonable share (39% of households with a potential interest in purchasing) indicated that they would expect to pay \$200,000 or more for a unit with the features they want. However, that level of interest drops to only 19% of interested households at pricing of \$250,000 or more.

Housing Opportunities for the 55 & Older Markets: Ellsworth, Maine

A. Introduction

1. Goals of the study

The primary goal of the study to be performed is to research the housing needs of senior households in the City of Ellsworth and the surrounding area, and to compare the City's current role in the senior market and its capacity to address projected demand.

Most studies of senior households indicate an overwhelming preference to "age in place" rather than move, but it is not clear whether other preferences would emerge if more alternatives were available.



The Ellsworth study explores questions such as:

- Does the Ellsworth housing stock include a full range of alternatives to "aging in place" for its existing and future senior population?
- What housing alternatives and related service levels are desirable and what levels of pricing would be acceptable?
- Can the City provide a more diverse range of retirement housing alternatives serving all income levels?
- Will current development regulations enable the City to support these options?

Components of the study included:

- Detailed demographic analysis and household projections by age.
- Profile of household income and housing costs by age group.

- An inventory of existing senior housing products in the area.
- Review of national data on active adult and senior housing preferences.
- Estimates and projections of seniors in need of supportive services.
- A housing survey targeted to Ellsworth area households age 55 or older.

2. Age-Restricted Housing Defined

The data in this study focuses principally on households age 55 and older. The concept of a “55+ housing market” has evolved principally from civil rights laws that protect against discrimination in housing under the U. S. Fair Housing Act of 1988. Exceptions in the Act allow age limitations to be imposed for projects that meet certain standards. The related statutory provisions in Maine allow age discrimination in housing developments that qualify as “housing for older persons.” Age restrictions can be applied to housing that is:

- Provided under any state or federal program that the United States Secretary of Housing and Urban Development determines is specifically designed and operated to assist elderly persons as defined in the state or federal program;
- Intended for, and solely occupied by, persons 62 years of age or older; or
- Intended and operated for occupancy by at least one person 55 years of age or older per unit. In determining whether housing qualifies as housing for older persons under this paragraph, the housing must meet at least the following factors:
 - That at least 80% of the dwellings are occupied by at least one person 55 years of age or older per unit; and
 - The publication of, and adherence to, policies and procedures that demonstrate an intent by the owner or manager to provide housing for persons 55 years of age or older.

Age-restricted developments are generally created with deed covenants that establish occupancy restrictions. In some developments the covenants may limit 100% of the units in such a development to occupancy by persons age 55 or older.

3. Diversity and Challenges of the Senior Market

Based on 2013 estimates, about 50% of all households in Hancock County are headed by a person age 55 or older. In studying the needs across a group this broad, with an age span of about 40 years, we need to recognize that “55+” is not a single monolithic demand group. The range in specialized housing products serving this age spectrum ranges from single family subdivisions with deed covenants limiting occupancy to age 55 or older, on up to assisted living with supportive services for the oldest households with disabilities.

Life expectancy has continued to increase over the years in the United States, compounding the need for a diversity of housing alternatives and to assess the network of community and personal support services available to the older population.

Average Life Expectancy in the United States			
Year	At Birth	At Age 65	At Age 75
1980	73.7	81.4	85.4
1990	75.4	82.2	85.9
2000	76.8	82.6	86.0
2010	78.7	84.1	87.1
2013	78.8	84.3	87.2

Source: U. S. Department of Health, Centers for Disease Control, National Center for Health Statistics

Based on data from the National Center for Health Statistics, someone born in 2013 in the United States can expect to live to nearly age 79.

A person who was already age 65 in 2013 could expect to live to 84, and a person already age 75 could expect to live to 87.

Between 1980 and 2013, average life expectancy at birth increased by about 5 additional years, or by nearly 7%.

It is well known that Maine’s population is not only aging; the State also has the oldest median age in the nation. The rapid growth in the older population does not necessarily trigger a need for a new or different type of housing unit at any specific age.

But the aging trend does require a recognition that the age distribution within the housing stock will shift toward an older profile. With this shift it has become more apparent that much of the existing housing stock is not well suited to accommodating the physical limitations of the oldest households even though they may prefer to “age in place” within their existing home or community.

Older households who do want to move to a different housing unit will need to sell their current home to finance the transition. Demographic projections for Maine indicate that there will be a shrinking pool of potential buyers following the rising tide of an aging population. The capacity of the market to support new alternatives for the oldest households may therefore depend on success of the Ellsworth area in attracting jobs and supporting the in-migration of a younger labor force.

B. Geographic Areas of Analysis

Since housing markets are regional, the study area included the City of Ellsworth and an economically related region. Hancock County was chosen as a reasonable geographic unit for evaluating regional demographics and housing characteristics. In a 2004 workforce housing study for the City of Ellsworth, BCM Planning used the Ellsworth Labor Market Area to define the housing market. Since that time, the labor market definition has expanded to include towns throughout Hancock County and beyond based on changes in workplace orientations.

Based on the most recently available commuting data, there were just under 6,900 persons reported to be working in Ellsworth, of which 69% commute into the City from another community. Only 31% of the people who work in Ellsworth also live there.

Ellsworth is the workplace for 55% of its employed residents, while 45% commute out to another community. Commuter origins and destinations are shown in more detail in the Data Appendix.

Ellsworth is the hub of the Hancock County highway network, and is the County's principal

Greater Ellsworth	Blue Hill Peninsula
Amherst	Blue Hill
Aurora	Brooklin
Central Hancock UT	Brooksville
Dedham	Castine
Eastbrook	Deer Isle
East Hancock UT	Penobscot
Ellsworth	Sedgwick
Great Pond	Stonington
Hancock	Surry
Lamoine	
Mariaville	Schoodic Area
Northwest Hancock UT	Franklin
Osborn	Gouldsboro
Otis	Sorrento
Trenton	Sullivan
Waltham	Winter Harbor
Mount Desert Island	Bucksport-Orland-Verona
Bar Harbor	Bucksport
Cranberry Isles	Orland
Frenchboro	Verona Island
Marshall Island UT	
Mount Desert	
Southwest Harbor	
Swans Island	
Tremont	
<i>Subregions as defined by Hancock County Planning Commission for March 2004 <u>Summary Report of Conditions in Hancock County - Planning for Prosperity</u></i>	

economic center. In this study, Hancock County data has been used to define long term demographic trends for the region, and some of the demographic data has been segmented for comparison of sub-regions including:

- City of Ellsworth
- Greater Ellsworth Area
- Blue Hill Peninsula
- Schoodic Area
- Mount Desert Island
- Bucksport-Orland-Verona Island

Existing concentrations of senior housing are found in Ellsworth, Bar Harbor and Blue Hill. Between 2000 and 2010, growth in population and households within Hancock County was highest in the City of Ellsworth and the Greater Ellsworth Area. The second center of growth was the Blue Hill peninsula. The Schoodic area lost population and households, and the gains within the Mt. Desert Island and Bucksport-Orland-Verona subareas were modest.

C. Senior Housing Resources in Ellsworth and the Region

This section reviews senior housing resources available in Ellsworth and Hancock County, including supportive and institutional situations. One of the City’s objectives is to work toward more diversity in senior housing options available locally, depending on evidence of market demand.

1. Low to Moderate Income Apartments for Seniors

a. Hancock County Inventory

Hancock County has an estimated 622 senior apartments with both age and income restrictions, many with housing subsidies. About 35% of these units are located in Ellsworth, another 35% are in Bar Harbor and other Mount Desert Island towns, and the remaining 30% are found in other outlying locations in Hancock County. Eighty nine percent (89%) of these units are studio or one-bedroom apartments, and 11% are two-bedroom.

LOW TO MODERATE INCOME SENIOR APARTMENTS - HANCOCK COUNTY								
Project Name	Location	Age Min	Total Apts	Studio	1BR	2BR	Units With Project Based Subsidy	Funding Source
Leonard Lake Senior Housing	Ellsworth	55+	26	0	22	4	0	MSHA - LIHTC
Meadow View Apartments	Ellsworth	62+	86	10	60	16	79	USDA
River View Apartments	Ellsworth	62+	24	0	24	0	13	USDA
The Meadows	Ellsworth	55+	32	0	28	4	0	MSHA - LIHTC
Union River Estates	Ellsworth	62+	50	0	48	2	50	PHA-HUD
Harbor Hill Estates	Bar Harbor	62+	25	0	16	9	0	USDA
Malvern Belmont Estates	Bar Harbor	62+	74	0	74	0	74	PHA-HUD-MSHA
Rodick-Lorraine	Bar Harbor	62+	48	0	40	8	48	PHA-HUD
Harborview Apartments	Blue Hill	62+	40	0	30	10	38	USDA
Bucksport Square	Bucksport	62+	25	0	16	9	25	USDA
Gardner Commons	Bucksport	62+	26	0	24	2	26	HUD 202
Deer Run Apartments	Deer Isle	62+	40	0	38	2	40	MSHA-HUD
Pinebrook Apartments	Franklin	62+	18	0	18	0	18	MSHA-HUD
Maple Lane Apartments	Mount Desert	62+	18	0	18	0	18	PHA-HUD
Benjamin River Apartments	Sedgwick	62+	16	0	14	2	16	HUD 202
Norwood Cove Apartments	Southwest Harbor	62+	18	0	18	0	18	PHA - HUD
Ridge Apartments	Southwest Harbor	62+	32	0	32	0	32	PHA - HUD
Atlantic Apts	Swans Island	62+	8	0	7	1	8	MSHA-HUD
Mill Stream Heights	Winter Harbor	62+	16	0	14	2	16	USDA
Hancock County Total			622	10	541	71	519	
Percent of Hancock County Total				2%	87%	11%	83%	
Units by Location as % of County Total								
Ellsworth			35%	100%	34%	37%	27%	
Bar Harbor & MDI Towns			35%	0%	37%	24%	37%	
All Other Locations			30%	0%	30%	39%	36%	
Hancock County Total			100%	100%	100%	100%	100%	
Sources: MSHA project listings, USDA and HUD inventories, and BCM Planning surveys of project managers of Ellsworth developments								

Of the total units in the inventory, 83% are estimated to have project-based subsidies or special contracts for housing assistance. A number of the senior projects are offering service coordination including meals delivery, van transportation, housekeeping and personal care assistance for residents.

Many of the older rental developments have project-based subsidies that allow even the lowest income tenant to afford an apartment. In these units, the rent is set at 30% of resident income, no matter how low that income may be. Most apartments built under today's federal housing programs do not incorporate these subsidies and cannot reach the lowest income households.

Opportunities to develop affordable rental housing now rely on the Low-Income Housing Tax Credit program (LIHTC) administered through the Maine State Housing Authority. These projects do not generally include apartments with dedicated rent subsidies.

Tenants in newer LIHTC apartments such as the Leonard Lake development in Ellsworth must have enough income to afford the rent level for the apartment, but their income cannot exceed an established ceiling (maximum 60% of area median family income or AMFI).

b. Detailed Inventory for Ellsworth

A more detailed project inventory was assembled for Ellsworth developments. Within the City, there are 218 apartments with income restrictions that limit occupancy to age 62 or older (and in a few cases 55 or older). Exceptions to the age minimum are made in some projects that are intended to also serve disabled individuals who are under the normal age minimum.

The average age of residents in the most recently developed Ellsworth projects (Leonard Lake and The Meadows) are 74 and age 70 respectively. At the oldest project, Meadowview, the estimated average age is 82. The youngest average age is found at Union River Estates, a public housing project, where an increasing percentage of residents are non-elderly disabled tenants.

The average income for senior households in these developments ranges from about \$11,000 to \$16,000, and the highest incomes from about \$25,000 up to \$38,000. Typically for a one to two person household, a new apartment developed under the LIHTC program will not be able to serve households with incomes over \$30,000.

Within the Ellsworth inventory, only about 65% of the units have project based subsidies compared to 83% across Hancock County. For units that do not have direct subsidies, the rents range from about \$600 to just under \$800 in most cases. This provides a source of below-market rate apartments in comparison to a typical market rent for Ellsworth and Hancock County (average of about \$950 per month in 2014).

ELLSWORTH SENIOR APARTMENTS FOR LOW TO MODERATE INCOME HOUSEHOLDS					
Project Name:	Leonard Lake	The Meadows	Union River Estates	River View	Meadow View
Location	Wood Street	Edgewood Way	Water Street	Main Street	Tweedie Lane
Year Built	2014	2003	1986	1986	1977
Total Apartments	26	32	50	24	86
Project-Based Subsidies	0	0	50	13	79
Parcel Size (Assessment Data)	2.83	3.16	5.01	1.3	13.92
Ratio Units Per Acre	9	10	10	18	6
Principal Financing Source	Maine Housing & LIHTC	Maine Housing & LIHTC	Public Housing (HUD)	USDA Rural Development	USDA Rural Development
Building Characteristics					
Levels	2	2 + ground	3	2	1
Elevator	Yes	Yes	Yes	Yes	n.a. - 1 story
Efficiency Units	0	0	0	0	10
1-Bedroom Apartments	22	28	48	24	60
2-Bedroom Apartments	4	4	2	0	16
Rent Including Heat/Hot Water					
Unsubsidized One Bedroom	\$589-\$667	\$600-\$646	n.a. - all units	\$605	\$555
Unsubsidized Two Bedroom	\$667-\$780	\$725	subsidized	n.a.	\$820
Occupancy and Waiting List					
Available Units May 2015	0	2	0	3	0
Occupancy May 2015	100%	94%	100%	88%	100%
Waiting List	42	25	61	12	65-80
Average Turnover/Year	Unknown - in	---	18%	12%-20%	6% - 9%
Typical Wait Time	1st Yr of Operation	18 months	1-BR: 7 mos.; 2-BR: 16 mos.	6-12 months	6 - 36 months
Age Distribution of Households					
Age Eligibility (1)	55 or older	55 or older	62 or older	62 or older	62 or older
Estimated Average Age	74	70	56	64	82
Resident Age Distribution			(2)		
Under 65	13%	30%	75%	57%	10%
65 - 74	40%	33%	17%	19%	35%
75 or Older	47%	36%	8%	24%	55%
Units by Maximum Qualifying Income					
Up to 50% AMFI	23	7	---	13	79
Up to 60% AMFI	3	25	---	---	---
Up to 80% of AMFI	0	0	50	11	7
Residents by Actual Income					
Under 50% AMFI	23	32	47	20	79
50-80% AMFI	3	0	3	1	7
Over 80% AMFI	0	0	0	0	0
Actual Resident Income Distribution					
Under 50% AMFI	88%	100%	94%	83%	92%
50-80% AMFI	12%	0%	6%	4%	8%
Over 80% AMFI	0%	0%	0%	0%	0%
Average Income Households	\$16,534	\$11,000-\$15,000	\$13,328	\$12,336	\$ 9,000-\$31,000
Highest Income Household	\$26,770	\$24,625	\$34,493	\$28,020	\$32,000-\$38,000
Resident Origin (estimates) (2)					
From Ellsworth	38%		31%	90%	40%
From Other Adjacent Towns	35%	no estimate	38%	8%	50%
From Outside Ellsworth Area	27%		31%	2%	10%
<i>(1) Priority to accept non-elderly disabled tenants may vary by source of project financing and year built (may affect age mix).</i>					
<i>(2) Estimates of age distribution and tenant origin for Union River based on current waiting list households</i>					

In the Ellsworth developments, 93% of residents in the apartments have incomes at or below the HUD “very low income” maximum of 50% of area median family income (AMFI). Only about 7% of the residents have incomes above 50% of AMFI even though maximum allowable income is higher.

Of the total apartments available in the five Ellsworth sites (218 units), only 58 were placed in service from 1990 to 2015. Over this 25-year period the City inventory grew by an average of only 2 units per year.

As of May 2015, the vacancy rate in these apartments was 2%, indicating demand for additional units. (A vacancy rate of about 5% is considered to represent a more reasonable level of availability and housing choice.) The number of households on waiting lists for Ellsworth senior projects is estimated at between 205-220 households (there may be overlap in the lists between projects). Waiting time for these apartments can range from 6 months to 3 years.

c. Percent of Senior Households Income-Qualified for Tax Credit (LIHTC) Rental Housing

ESTIMATE OF INCOME-QUALIFIED SENIOR HOUSEHOLDS FOR LIHTC RENTAL HOUSING - HANCOCK COUNTY			
Age Group:	Age 62+	Age 65-74	Age 75+
<i>Tax Credit Qualifying Income Range (No Subsidy)</i>			
40%-60% AMFI	16%	15%	18%
35%-60% AMFI	21%	18%	25%
<i>Potentially Eligible with Rent Subsidy Available</i>			
Under 50% AMFI	30%	24%	40%
<small>Source: BCM Planning, LLC estimates (including homeowners and renters) by income range based on interpolation of HUD 2008-2012 special tabulations</small>			

Experience with LIHTC market studies by BCM Planning shows that the qualifying income range for the program tends to be 40-60% of AMFI where maximum program rents are used, and as low as 35-60% of AMFI for some non-profit developments (assuming no project based subsidies are available).

Project-based subsidies have now become rare, and therefore a smaller share of senior households are likely to qualify for the types of rental housing that can be built under current incentive programs. Among households age 62 or older in Hancock County about 16% to 21% fall within the qualifying income range for LIHTC units. If rent subsidies were available, however, about 30% of all age 62+ households would be income-eligible.

d. Housing Cost Burden of Age 65+ Households

The general need gap for more affordable senior housing (for all income levels) can be roughly estimated based on the number of households age 65 or older who have housing costs that consume 30% to 35% or more of their household income.

In Ellsworth, there over 300 households age 65 or older who pay 30% or more of their income for housing. Despite the existence of over 200 lower income senior rental units, one third of the City’s senior households have a high housing cost burden relative to these affordability

standards. Ratios are only slightly lower in Hancock County, with 25% to 30% of senior households having a high housing cost burden.

HOUSING COST BURDEN - HOUSEHOLDS AGE 65 OR OLDER - 2013 ESTIMATES						
Households Age 65 or Older With High Housing Cost Burden	Ellsworth			Hancock County		
	Homeowners	Renters	Total	Homeowners	Renters	Total
Households Age 65+	729	263	992	5,441	1,241	6,682
With Cost Burden 30%+	155	173	328	1,450	544	1,994
With Cost Burden 35%+	146	155	301	1,203	450	1,653
Percent Spend 30%+	21%	66%	33%	27%	44%	30%
Percent Spend 35%+	20%	59%	30%	22%	36%	25%

Source: Derived by BCM Planning from ACS 2009-2013 Five Year Sample Data (adjusted to 2013 dollar values)

In comparison to Hancock County, a smaller share of Ellsworth’s senior homeowners have a problem with high housing cost relative to income. About 21% of senior homeowners in Ellsworth spend 30% or more of their income on total monthly costs compared to 27% in Hancock County. Ellsworth’s senior renter households have a comparatively high housing cost burden (66% spend 30% or more of their income on gross rent). This difference is partly attributable to the higher concentration lower income senior rental units in Ellsworth.

2. Licensed Facilities and Institutional Resources

An important component in attracting new forms of retirement housing is the capacity of the City and the area to offer supportive housing and health care facilities for senior residents as their disability level increases with age. The children of parents who have these disabilities or service needs may also look to these facilities as an important resource when considering their own choice of a housing location with respect to staying close to older family members.

SUMMARY OF LICENSED CARE FACILITIES			
Type of Licensed Facility	Ellsworth	Hancock County	Ellsworth % of County
Hospital Beds	64	114	56%
Nursing Home Beds	115	188	61%
Assisted Living & Residential Care Beds	53	236	22%
Adult Day Care Slots	25	79	32%
<i>Total Selected Facilities</i>	<i>257</i>	<i>617</i>	42%

Ellsworth hosts 42% of the licensed care resources of Hancock County, and 61% of its total nursing home beds. The Ellsworth share of the County’s licensed care resources is much higher than its share of Hancock County population or households. A more detailed inventory of the licensed care facilities by location within the County follows.

LICENSED CARE FACILITIES: ELLSWORTH AND HANCOCK COUNTY

Facility Type and Name	City - Town	Beds	State Facility Classification
Hospitals			
Maine Coast Memorial Hospital	Ellsworth	64	Short-Term Hospital ACU
Mount Desert Island Hospital	Bar Harbor	25	Critical Access Hospital
Blue Hill Memorial Hospital	Blue Hill	25	Critical Access Hospital
Total Hospital Beds		114	
Ellsworth Subtotal	56%	64	
Nursing Homes			
Courtland Rehab and Living Center	Ellsworth	54	Nursing Home
Seaport Village Healthcare	Ellsworth	61	Nursing Home
Sonogee Rehabilitation and Living Center	Bar Harbor	35	Nursing Home
Island Nursing Home and Care Center	Deer Isle	38	Nursing Home
Total Nursing Beds		188	
Ellsworth Subtotal	61%	115	
Assisted Living and Residential Care			
Inn at Seaport Village Healthcare	Ellsworth	30	Level IV PNMI Residential Care Facility
Foster Street Home	Ellsworth	6	Level III Residential Care Facility
Ida W. Lockhart Residence	Ellsworth	6	Level III Residential Care Facility
Ellsworth Group Home	Ellsworth	4	Level III PNMI Residential Care Facility
Forest Avenue Home	Ellsworth	4	Level III Residential Care Facility
Brae Drive Home	Ellsworth	3	Level III Residential Care Facility
Birch Bay Village Inn	Bar Harbor	32	Level IV PNMI Residential Care Facility
Birch Bay Retirement Village	Bar Harbor	23	Assisted Living Program
Knox Road House	Bar Harbor	6	Level III Residential Care Facility
Parker Ridge	Blue Hill	44	Assisted Living Program
Thistle Hill Boarding Home	Bucksport	no data	Level III Residential Care Facility
Jed Prouty Residential Care Home-First Floor	Bucksport	8	Level IV Residential Care Facility
Jed Prouty Residential Care Home-Second Fl.	Bucksport	8	Level IV Residential Care Facility
Friendship House	Bucksport	6	Level III PNMI Residential Care Facility
Franklin-Golden Acres	Franklin	8	Level IV Residential Care Facility
Mountain Vista Manor	Franklin	8	Level IV Residential Care Facility
South Bay Manor	Franklin	8	Level IV Residential Care Facility
The Franklin House	Franklin	8	Level IV Residential Care Facility
Hancock Golden Acres	Hancock	8	Level IV Residential Care Facility
The Hancock House	Hancock	8	Level IV Residential Care Facility
Patten Pond House	Surry	8	Level IV Residential Care Facility
Total Assisted Living/Residential Care Beds		236	
Ellsworth Subtotal	22%	53	
Adult Day Services			
Robert and Mary's Place	Ellsworth	25	Adult Day Services Program
Friendship Cottage	Blue Hill	30	Adult Day Services Program
Island Nursing Home Adult Day Services	Deer Isle	6	Adult Day Services Program
Don and Beth Straus Center-Adult Day Services	Southwest Harbor	18	Adult Day Services Program
Total Adult Day Service Slots		79	
Ellsworth Subtotal	32%	25	

Source: Compiled by BCM Planning, LLC from licensing data base of the Maine Department of Health & Human Services

3. Active Adult Communities, Independent and Assisted Living

a. Active Adult, Independent and Assisted Living Campuses

There are two facilities located in Hancock County that have a mix of active adult ownership units, independent living, and assisted living: Birch Bay Village in Bar Harbor and Parker Ridge in Blue Hill. There are no similar facilities in Ellsworth.

At both sites, the active adult ownership units are limited in number and are located in a retirement center campus that includes other units offering supportive services in independent and assisted living arrangements. Both developments were initiated by the hospitals in their respective locations. The units available for ownership in both projects are set up as cooperatives. In a cooperative, owners purchase a share of stock in the development and pay monthly maintenance fees to cover operating costs, maintenance, reserves for replacement, and property taxes.

(1) Birch Bay Village (Bar Harbor). The site includes 17 (plus 3 potential) active adult cottage ownership units, 23 apartments for independent living (with additional care available), 16 single room occupancy assisted living units and 16 memory care units. Development was initiated in 2000-2001. The total site is approximately 55 acres in size, or a gross density of about 1.4 units per acre.

Active Adult Cottages (Cooperative Ownership)

Typical units: Two bedroom, two bath units of 1,119 square feet to 1,880 square feet.

Pricing: \$289,000 to \$325,000 with some in the \$400,000 to \$450,000 range.

Monthly maintenance fees: \$1,227 to \$1,428 depending on unit size

Typical Age of Buyers: 75 to 85

The Inn (Apartments for Independent Living with Support Services Available)

Typical units: One bedroom, one bath and two bedroom, 1.5 to 2 bath units ranging in size from 650 to 1,200 square feet.

Standard services: evening meal, weekly housekeeping

Monthly costs: From \$3,000 to \$5,500 per month depending on whether the resident receives additional services.

Typical Entry Age: Age 70 to 85

Pleasant Cove (Assisted Living)

Typical units: small studios with kitchenettes that range in size from 230 to 423 square

Standard services: Three meals per day and personal care assistance available 24/7.

Costs: Rates range from \$225 to \$275 per day depending on resident assessment relative to four tiers of service. Special memory care units are also available on site which have higher daily costs.

Observations by management:

- More independent living units (with optional tiers of additional services) might have been sustained at the site.
- About one third of residents are from the area, another third were attracted from outside based on family or other prior exposure to the Bar Harbor area, and another third who discovered the project from on-line searches or other advertising.

(2) Parker Ridge (Blue Hill). Parker Ridge contains 34 independent living apartments and 13 assisted living apartments in the Parker Inn portion of the project. There are also 24 separate cottage units on the campus. The total property comprises about 28 acres, indicating a gross density of about 2.5 units per acre. The development originally opened in 1992 with all of its units (cottage as well as multifamily unit) pre-sold. Over time, market preferences shifted toward ownership of cottage-style units, but rental rather than ownership of multifamily units. The shift led to challenges for owners wishing to sell their units, and a rise in vacancies. From 2005-2008 the project was restructured so that multifamily units could be rented, and cottage units would be individually owned.¹

Active Adult Cottages (Cooperative Ownership):

Typical units: 1,050 to 1,750 square feet, 2 bedrooms with 1.5-2 baths and garage

Pricing: recent sales: \$145,000 to \$160,000 for 1,050-1,250 sq. ft.

Monthly fees: \$ 1,381 - \$ 1,975 depending on living area; includes property taxes

Typical Age of Buyers: youngest 65; typical buyer between 65 and 80

Independent Living Apartments

Typical units: One bedroom 1 bath units: 625 to 640 square feet. Two bedroom units with 1.5 to 2 baths, 1,000 to 1,420 square feet.

Standard services: Weekly housekeeping, dinner meal, transportation

Monthly costs: \$3,000 to \$5,000 depending on size of unit, location and views

Typical Entry Age: 70 to 90; typical entry age 80 or older

¹ Description based on articles from the Bangor Daily News April 25, 2005 and June 18, 2008.

Assisted Living Suites:

Typical units: One bedroom one bath, 460 square feet

Standard services: Three meals, housekeeping, laundry, personal care.

Monthly costs: \$219 to \$289 per day

Observations from marketing: A local connection to Blue Hill and the presence of a hospital were central to marketing. A profile of residents conducted by Parker Ridge showed that most residents moved from another location, but nearly all residents have some prior connection to Blue Hill specifically. Many occupants are former summer residents, have adult children living in town, or even have retired children who live in the area.

b. Assisted Living Not within a Retirement Campus: Inn at Seaport Village (Ellsworth)²

The opening of this project in downtown Ellsworth in December 2014 added 30 new assisted living units to the inventory of senior resources, along with a consolidation and expansion of nursing home beds. The median age of residents in assisted living is 84.

AGE DISTRIBUTION - INN AT SEAPORT VILLAGE ASSISTED LIVING	
Under 65	0%
65-74	14%
75-84	48%
85 +	38%
Total	100%
Age 75+	86%
Average Age	83
Median Age	84

All of the units are studio style with private bedrooms and options of private versus shared bathrooms. The base rate, which includes three meals per day ranges from \$3,300 to \$3,500 per month. Additional personal care services are made available at four levels depending on resident health assessment, from \$425 per month to \$1,275 per month in service costs.

Not more than 5 of the 30 units are occupied by private-pay residents; most enter the Maine Care program after spending down on available assets.

Most of the residents moved in directly from their home rather than from a transitional type of facility. The development generated an estimated 200 inquiries from across a broad geography. Absorption was rapid, with 21 move-ins in the first month of availability.

Of those who moved in, about 56% were from the greater Ellsworth area, 12% from the Blue Hill peninsula, 9% from Mount Desert Island towns, and 3% from the Schoodic area. The remaining 20% came from other parts of Maine or out of state. As of mid-June of 2015, there was a waiting list of nine persons, 40% of whom were living outside of Hancock County.

² The former Collier’s Nursing Home was vacated by the owners (the developers of Seaport Village), and the building was given to the City in exchange for land. The land has since been sold to another party that plans to use it for assisted living.

4. Local and County Resource Summary

HOUSING AND SUPPORTIVE FACILITIES SUMMARY			
Senior Housing and Health Care Support Facilities	Ellsworth	Hancock County	Ellsworth % of County
Active Adult Ownership Units (55+) (Known Developments)	0	44	0%
Independent Living Rental Units with Access to Support Services *	0	57	0%
Low-Mod Income Senior Apartments With Project-Based Subsidies	218	622	35%
	142	519	27%
Residential with Supportive Services Assisted Living and Res. Care Beds *	53	236	22%
Institutional Facilities Nursing Home Beds Hospital Beds	115	188	61%
	64	114	56%
Adult Day Service Slots	25	79	32%
* Some independent living units are also licensed to provide supportive care. There is some overlap between these categories.			

The existing senior housing product inventory exhibits the following gaps:

1. Virtually all of the Ellsworth rental units for seniors are in subsidized, low to moderate income housing units that predominantly serve very low income households (incomes under 50% of AMFI).
2. There are no age-restricted rental developments in Ellsworth for seniors who wish to rent market rate apartments, and have incomes above the eligibility limits of the low to moderate income units.
3. There are no independent living rental units with access to meals and housekeeping services in Ellsworth, and relatively few across the County.
4. The Inn at Seaport Village has demonstrated that a centrally located assisted living project in Ellsworth can draw from a broad market area.
5. There are no known “active adult” ownership developments or age restricted single family subdivisions or condos in Ellsworth. A small number of cooperative units are available at Bay Ridge in Bar Harbor and Parker Ridge in Blue Hill, but are located on sites that also provide independent living and assisted living apartments.

5. Estimate and Projection of Support Service Needs

a. American Community Survey Estimates

The American Community Survey provides sample data on the number of non-institutional persons by age group who have support service needs consistent with those provided in assisted living and independent living facilities. The information represents a sample of the non-institutional population (not living in nursing homes).

About 5% of the non-institutional population age 65-74, and 21% of the population age 75 or older in Hancock County has a potential need for an independent living setting (or comparable levels of service). This represents about 1,185 people age 65+ with service needs, including about 300 in Greater Ellsworth (25% of the County total). A portion of this need is being met by existing facilities.

NON INSTITUTIONAL POPULATION WITH INDEPENDENT LIVING NEEDS - HANCOCK COUNTY ESTIMATES									
County Sub-Area	Age 65-74 Non-Inst. Pop.			Age 75 or Older Non-Inst. Pop.			Total Age 65+ Non-Inst. Pop.		
	Total	With Ind. Living Need	% With IL Need	Total	With Ind. Living Need	% With IL Need	Total	With Ind. Living Need	% With IL Need
City of Ellsworth	898	63	7.0%	606	74	12.2%	1,504	137	9.1%
Greater Ellsworth	1,920	119	6.2%	1,253	181	14.4%	3,173	300	9.5%
Schoodic Area	577	46	8.0%	418	90	21.5%	995	136	13.7%
Mount Desert Island	1,016	53	5.2%	1,060	295	27.8%	2,076	348	16.8%
Blue Hill Peninsula	1,579	54	3.4%	1,167	209	17.9%	2,746	263	9.6%
Bucksport-Orland-Verona	711	31	4.4%	338	107	31.7%	1,049	138	13.2%
County Total	5,803	303	5.2%	4,236	882	20.8%	10,039	1,185	11.8%

Source: Analysis of American Community Survey 5-year sample data 2009-2013 (municipal and County level)

The population with self-care needs (potentially in need of assisted living or similar level in-home care services) is likely a *subtotal* of the larger number with need of independent living services. Self-care issues include difficulty with bathing or dressing without help from another person. Only about 2% of the regional population age 65-74, and 10% of the population age 75 or older is estimated to need help with personal care. This totals 543 people age 65+ with self-care needs, including 141 in Greater Ellsworth (26% of the County total).

NON INSTITUTIONAL POPULATION WITH SELF-CARE NEEDS - HANCOCK COUNTY ESTIMATES									
County Sub-Area	Age 65-74 Non-Inst. Pop.			Age 75 or Older Non-Inst. Pop.			Total Age 65+ Non-Inst. Pop.		
	Total	With Self Care Need	% With Care Need	Total	With Self Care Need	% With Care Need	Total	With Self Care Need	% With Care Need
City of Ellsworth	898	20	2.2%	606	58	9.6%	1,504	78	5.2%
Greater Ellsworth	1,920	39	2.0%	1,253	102	8.1%	3,173	141	4.4%
Schoodic Area	577	25	4.3%	418	46	11.0%	995	71	7.1%
Mount Desert Island	1,016	18	1.8%	1,060	91	8.6%	2,076	109	5.3%
Blue Hill Peninsula	1,579	31	2.0%	1,167	126	10.8%	2,746	157	5.7%
Bucksport-Orland-Verona	711	11	1.5%	338	54	16.0%	1,049	65	6.2%
County Total	5,803	124	2.1%	4,236	419	9.9%	10,039	543	5.4%

Source: Analysis of American Community Survey 5-year sample data 2009-2013 (municipal and County level)

b. Estimates Based on National CDC Data (National Health Interview Survey)

In its National Health Interview Survey, the U. S. Centers for Disease Control (U. S. Department of Health) measures the prevalence rate for many health and disability indicators. These rates are computed as a percentage of the non-institutional population. Prevalence rates for two selected indicators are shown below based on three-year averages from the National Health Interview Survey data for 2011 to 2013.

	<u>Help With Routine Needs</u>	<u>Help with Personal Care Need</u>
Age 55-64	4.4 %	2.3 %
Age 65-74	6.3 %	3.5 %
Age 75-84	14.1 %	8.0 %
Age 85+	35.5 %	20.8 %

A need for help with *routine needs* means that the individual has difficulty handling every day household chores, doing necessary business, shopping, or getting around for other purposes without the help of another person. This level of need can be addressed by independent living with lighter support services such as meals, housekeeping, and transportation services.

A higher level of disability is indicated by the need for help with *personal care* such as bathing, dressing, eating, or getting around inside one's home. This level of disability may indicate a need for assisted living services. Users of this data should note that *these categories of support service needs overlap*. The personal care levels of need are best viewed as a *subtotal* of the larger figure based on the need for help with routine needs. (If you need help with personal care, you also need help with more basic activities).

This chart projects the non-institutionalized population of Hancock County for ages 75 and older who are likely to need support services based on the CDC indicators.

In this projection, the institutionalized percentage of the population in each age group was held at the 2010 level by age group. The balance of the population in age groups 75-84 and 85 or older were assigned the CDC disability prevalence rates identified earlier. There is a higher prevalence of disability among the oldest residents. Demand for independent and assisted living is usually measured as a function of the non-institutional population age 75 or older. (This excludes the institutional portion of the population with the most acute needs who will require nursing home care).

The need for help with routine needs or help with personal care is sometimes provided by a spouse or relative, a home health or housekeeping agency, or a service that is provided as part of an independent or assisted living housing situation. An estimate of the support service needs by income group is made in the chart below, by applying the household income distribution for the 75+ age group to the total number with related disabilities.

PROJECTION OF HANCOCK COUNTY NON-INSTITUTIONAL POPULATION AGE 75+ WITH SUPPORT SERVICE NEEDS						
Year	Total Need Help with Routine Needs	Subtotal With Income \$35,000+	Subtotal with Income \$50,000+	Total Need Help with Personal Care	Subtotal With Income \$35,000+	Subtotal with Income \$50,000+
2010	852	349	238	491	201	137
2012 Est	880	361	246	507	208	142
2017 (p)	983	403	275	567	232	159
2022 (p)	1,176	482	329	677	278	190
2027 (p)	1,413	580	396	813	333	228
2032 (p)	1,658	680	464	955	391	267
Change by Period						
2012-2017	103	42	29	59	24	17
2017-2022	193	79	54	110	45	31
2022-2027	237	97	66	136	56	38
2027-2032	245	100	68	142	58	40
<i>Subtotals by income estimated based on data for households age 75 or older in HUD special tabulations of American Community Survey data for 2008-2012. In Hancock County, about 41% of households age 75+ had an income of \$35,000 or more; 28% had an income of \$50,000 or more.</i>						

The two income benchmarks shown in the chart provide a rough estimate of the portion of the Hancock County population with needs that might be able to afford the cost of independent living or assisted living at market rates (without subsidy). Precise estimates are more difficult, since home equity and other assets play a role in affordability. Households often rely on the “spend down” of these assets as well as income to afford housing with support services.

Comparison of the two methods used to estimate the current levels of need within the age 75+ non-institutional population of Hancock County indicate about the same baseline number of persons needing support for routine needs (or independent living support) at about 880 persons. The subtotal needing personal care or assisted living levels of service ranges from 419-507 persons depending on which approach is applied.

D. Demographic Profile

1. Decennial Census Profile 1990-2010

Ellsworth was the fastest-growing city in Maine between 2000 and 2010 period, sustaining a 20% increase in both population and households. The City added 798 housing units between those years compared to only 240 units in the prior decade. The City was able to add significantly to the renter household population in nearly all age groups during the 2000 to 2010 period.

As with the regional pattern, the City's household growth was dominated by the 45 to 54-year-old age group during the 1990s, and by the 55 to 64-year-old age group in the 2000 to 2010 period. The next decade from 2010 to 2020 should evidence a strong net change in the 65 to 74-year-old population. This shift parallels the maturation of the Baby Boom population as it moves through the age cohorts.

In all of the Census comparison years, Ellsworth maintained a lower rental vacancy rate than the County. This was particularly significant in the 2010 Census when the City's rental vacancy rate stood at 6.8% during a recession, while the Hancock County rate rose to nearly 12%. Based on data in the 2013 American Community Survey 5-year sample, the rental vacancy rate has since tightened to about 6.6% in Hancock County and 4.4% in Ellsworth. A rental vacancy rate that is between 5% to 6% is generally considered to provide an adequate range of housing choice, but this also depends on whether the vacancies are in quality rental units or substandard apartments.

In Hancock County, the 1990s were a period of stronger growth than in 2000 to 2010. But for Ellsworth, the more recent period of 2000-2010 brought higher growth. The County added just over 3,500 households from 1990 to 2000, but only 2,357 from 2000 to 2010 (volume of growth down by 33%). But in more recent years, a greater share of County growth was absorbed in Ellsworth. The City added 339 households 1990 to 2000 compared to 550 from 2000 to 2010 (volume of growth up 62%).

The Great Recession beginning in 2008 did not cause significant losses of local jobs in Ellsworth. The City was able to maintain relative stability in jobs and employment during a challenging economic period.

2. Hancock County Households Age 55+ (2013) by Subregion³

As of 2013, there were an estimated 12,000 households in Hancock County headed by a person age 55 or older, comprising about 50% of total households. In Hancock County, about 83% of

³ The small Hancock County towns of Aurora and Amherst were assigned to the Greater Ellsworth Area in order to maintain a constant County total. Otherwise, the groupings of communities used reflect areas defined in the December 2002 report Summary of Conditions in Hancock County - Planning for Prosperity by the Hancock County Regional Planning Commission.

all households 55+ are homeowners and only 17% are renters. In Ellsworth and Greater Ellsworth the population is somewhat younger, with only 43% and 45% of households, respectively, in the age 55 or older group.

2013 ESTIMATE- HANCOCK COUNTY HOUSEHOLDS AGE 55+						
Location	Owners	Renters	Total	Age 55+ % of All Households	% of Age 55+ Who Own	% of Age 55+ Who Rent
City of Ellsworth	1,114	341	1,455	43%	77%	23%
Greater Ellsworth Area	2,881	616	3,497	45%	82%	18%
Schoodic Area	1,093	121	1,214	55%	90%	10%
Mount Desert Island	2,141	665	2,806	53%	76%	24%
Blue Hill Peninsula	2,861	401	3,262	56%	88%	12%
Bucksport-Orland-Verona	1,187	231	1,418	44%	84%	16%
Hancock County Total	10,163	2,034	12,197	50%	83%	17%

Source: BCM Planning, LLC compilation of data by municipality from 2013 ACS five year sample data

3. Household Size Distribution by Age Group

Senior households are predominantly in smaller household configurations. For households under the age of 62, an estimated 59% have only one to two persons, compared to 95% of households aged 62 or older.

HOUSEHOLD SIZE DISTRIBUTION BY AGE - HANCOCK COUNTY 2012					
Persons In Household	All Ages	Under Age 62	Age 62+	Age 62-74	Age 75+
1	29.7%	22.9%	44.2%	40.3%	50.4%
2	40.6%	35.7%	51.0%	53.2%	47.6%
3	15.9%	21.4%	4.1%	5.6%	1.6%
4	9.6%	13.9%	0.6%	0.8%	0.1%
5+	4.2%	6.1%	0.2%	0.1%	0.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
1-2 Persons	70.3%	58.6%	95.1%	93.5%	98.0%

Source: Derived by BCM Planning LLC from special tabulations by HUD, Economic and Market Analysis Division, from the 2008-2012 ACS sample

As the senior population continues to age, small households will become a greater share of the total. In northern New England, this trend is causing a mismatch between the size of typical single-family homes and the actual living area needs of an aging population.

4. Household Income Distribution by Age

Among households age 62 or older, an estimated 53% of Hancock County households have an income of \$35,000 or more. This is above the typical qualifying income level for low to moderate income rental housing. There may be opportunities for market rate rental units or mixed income developments to serve those with incomes above the LIHTC ceiling.

PERCENT OF COUNTY HOUSEHOLDS BY INCOME TIER BY AGE - 2012				
Household Income 2012	Age of Head of Household			
	< 62	62+	62-74	75+
Income \$35,000+	68%	53%	60%	41%
Income \$50,000+	52%	39%	45%	28%
Income \$75,000+	31%	23%	28%	15%
Income \$100,000+	16%	14%	17%	10%

Source: BCM Planning analysis of special tabulations of 2008-2012 ACS sample on income by age and households size, Hancock County, by HUD Economic and Market Analysis Division

Age-restricted rental housing is not the only way to address this need. A one or two bedroom apartment *with no age restriction* is a resource that serve some seniors while also accommodating younger households moving to the area to join the labor force.

HOUSEHOLD INCOME DISTRIBUTION - AGE 65 OR OLDER - 2013					
Household Income	Ellsworth		Hancock County		City Share of County Total
	Number	Percent	Number	Percent	
Under \$25,000	388	39.1%	2,302	34.5%	16.9%
\$25,000 - \$50,000	205	20.7%	1,895	28.4%	10.8%
\$50,000-\$75,000	223	22.5%	1,033	15.5%	21.6%
\$75,000 or More	176	17.7%	1,452	21.7%	12.1%
Total	992	100.0%	6,682	100.0%	14.8%
<i>Median Income:</i>	\$39,833		\$37,266		

Source: American Community Survey - 5 year sample 2009-2013

The median household income of households age 65+ in Ellsworth is higher than that of the County. Ellsworth has a relatively high concentration of Hancock County households with incomes in the \$50,000-\$75,000 range.

ESTIMATED HOUSEHOLD INCOME DISTRIBUTION IN 2013: AGES 45-64 - HANCOCK COUNTY BY SUBREGION

Location	Total in Age Group	Number of Households Age 45-64						Percent of Households Age 45-64					
		Under \$25,000	\$25,000+	\$35,000+	\$50,000+	\$75,000+	\$100,000+	Under \$25,000	\$25,000+	\$35,000+	\$50,000+	\$75,000+	\$100,000+
City of Ellsworth	1,364	345	1,019	881	754	436	246	25%	75%	65%	55%	32%	18%
Greater Ellsworth Area	3,418	731	2,687	2,290	1,845	1,181	697	21%	79%	67%	54%	35%	20%
Schoodic Area	947	222	725	642	461	244	122	23%	77%	68%	49%	26%	13%
Mount Desert Island	2,421	449	1,972	1,850	1,515	879	592	19%	81%	76%	63%	36%	24%
Blue Hill Peninsula	2,470	556	1,914	1,568	1,278	753	513	23%	77%	63%	52%	30%	21%
Bucksport-Orland-Verona	1,481	448	1,033	962	784	526	252	30%	70%	65%	53%	36%	17%
Hancock County Total	10,737	2,406	8,331	7,312	5,883	3,583	2,176	22%	78%	68%	55%	33%	20%

Source: American Community Survey (ACS) five-year sample adjusted to 2013 dollars

ESTIMATED HOUSEHOLD INCOME DISTRIBUTION IN 2013: AGE 65+ - HANCOCK COUNTY BY SUBREGION

Location	Total in Age Group	Number of Households Age 65 or Older						Percent of Households Age 65 or Older					
		Under \$25,000	\$25,000+	\$35,000+	\$50,000+	\$75,000+	\$100,000+	Under \$25,000	\$25,000+	\$35,000+	\$50,000+	\$75,000+	\$100,000+
City of Ellsworth	992	388	604	519	399	176	126	39%	61%	52%	40%	18%	13%
Greater Ellsworth	2,031	722	1,309	1,033	791	403	265	36%	64%	51%	39%	20%	13%
Schoodic Peninsula	660	211	449	366	216	121	56	32%	68%	55%	33%	18%	8%
Mount Desert Island	1,479	523	956	822	602	359	209	35%	65%	56%	41%	24%	14%
Blue Hill Peninsula	1,829	657	1,172	877	675	461	290	36%	64%	48%	37%	25%	16%
Bucksport-Orland-Verona	683	189	494	398	201	108	69	28%	72%	58%	29%	16%	10%
County Total	6,682	2,302	4,380	3,496	2,485	1,452	889	34%	66%	52%	37%	22%	13%

Source: American Community Survey (ACS) five-year sample adjusted to 2013 dollars

5. Resident Mobility by Age

PERCENT OF RESIDENT POPULATION THAT MOVED IN PRIOR YEAR		
Age Group	Ellsworth	Hancock County
18 - 24	36%	34%
25 - 34	31%	24%
35 - 44	21%	12%
45 - 54	6%	6%
55 - 64	12%	6%
65 - 74	14%	5%
75 or Older	7%	5%
All Age Groups	15%	11%
55 or Older	11%	5%

Source: BCM Planning analysis of American Community Survey 2009-2013 Sample Data

Household mobility was higher in Ellsworth than in Hancock County based on ACS 2009-2013 data.

This difference is probably related to the City's absorption of an increased share of regional housing construction, and a housing stock with a higher concentration of rental units.

An estimated 11% of Ellsworth population age 55 or older moved to their residence within a year compared to only 5% for Hancock County. Higher senior mobility rates in Ellsworth were most evident within the age 55-64 and age 65-74 groups.

E. Household Projections by Age Group

1. Baseline Population Projections

To understand the “55+ markets” we need to look at the anticipated age shifts that will occur *within* several of its component age cohorts. BCM Planning developed household projections by age group using two sources of long term population projections by age for Hancock County:

a. Maine Office of Policy and Management. The State’s most recent population projection model uses assumptions regarding birth and death rates, rate of natural increase, and projections of net migration rates to project population by age group from 2012 to the year 2032.

b. Woods & Poole Economics. This firm specializes in long term economic and population projections for all counties and metropolitan areas of the U. S. using its own proprietary “export base” approach which relies on assumptions centering on the interaction of all counties across the United States, and the estimated job growth potential of an area.

The long term projections from the Maine Office of Policy and Management forecast a long term decline in total population. Even with anticipated decline in average household size, the related household projections by BCM Planning using this population forecast results in very little net change in *total households* across Hancock County from now to 2032, although the number of older households will continue to increase as a percent of the total.

The Woods & Poole projections indicate a potential for continuation of a modest rate of total population growth and related growth in total households. The difference between the two projections reflects alternative assumptions about the future pattern of net migration.

In general, Maine is showing an excess of annual deaths over annual births; there is no projected “natural increase”. In places that are unable to attract net in-migration, the total

population will decline. Sustaining a net increase in total population will be wholly dependent on the capacity of a region to achieve net in-migration of households.

Census Bureau estimates of the components of population change in Hancock show modest net growth in total population for 2010-2014 with positive net migration modestly outpacing the losses from natural decrease.

COMPONENTS OF HANCOCK COUNTY POPULATION CHANGE 2000-2014 ESTIMATE		
Component	April 1, 2010- July 1, 2014	Avg Annualized Change
Total Population Change	276	65
Natural Increase (Decrease)	(484)	(114)
Net Migration	764	180
International	356	84
Domestic	408	96
<i>Bureau of the Census, Estimates of the Components of Resident Population Change: April 1, 2010 to July 1, 2014</i>		

2. Household Projection Models: Assumptions

BCM Planning has applied a model to convert Hancock population projections by age to households by age.⁴ The model applies 2010 Census ratios (households to total persons by age) and owner versus rental tenure ratios to project future household formation.

HANCOCK COUNTY HOUSEHOLD PROJECTION MODEL: 2010 BASELINE				
Household Age Group - Hancock County	Group Quarters % of Total Population 2010	Headship Ratio to Population by Age 2010	Ownership Tenure by Age 2010	Rental Tenure by Age 2010
15 to 24	12.0%	0.1353	22.6%	77.4%
25 to 34	1.1%	0.4687	49.4%	50.6%
35 to 44	0.5%	0.5441	71.5%	28.5%
45 to 54	0.6%	0.5707	79.7%	20.3%
55 to 64	0.4%	0.6006	84.8%	15.2%
65 to 74	0.5%	0.6343	84.9%	15.1%
75 to 84	2.2%	0.6996	77.1%	22.9%
85 & Older	10.4%	0.7059	61.3%	38.7%

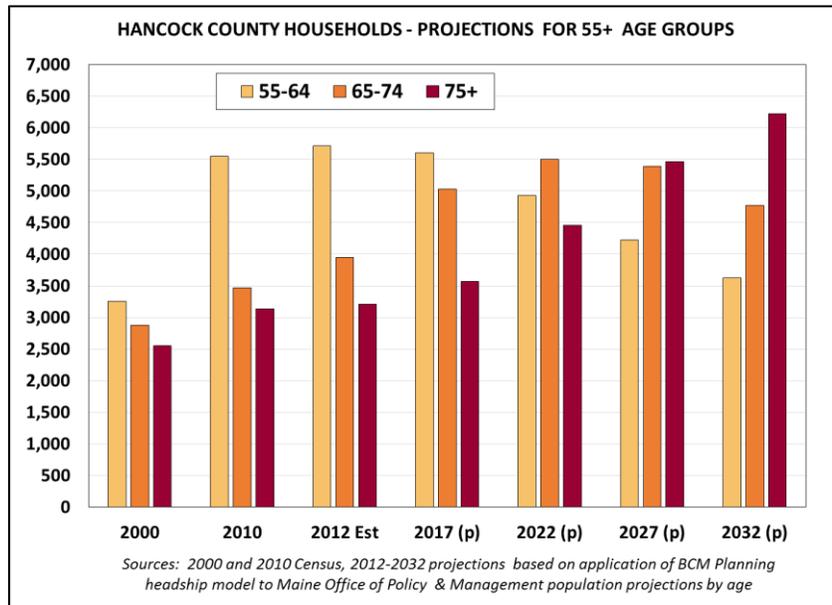
Source: BCM Planning, LLC analysis of 2010 Census data (100% count)

In the model, the group quarters population is separated from the population living in households. The youngest part of the group quarters population includes college students in dormitory housing, such as the Maine Maritime Academy or the College of the Atlantic in Bar Harbor. The oldest residents in group quarters (age 85 and older) are primarily in nursing homes or group homes.

The 2010 ratio of the group quarters population to total population by age group are held constant in the projections. The rest of the population by age group is assumed to be living in households.

⁴ This "headship" projection model was first developed for the NH Housing Finance Authority by BCM Planning in 2008 to project households by age by county. The model was recently updated (2014) for the NHHFA by the New Hampshire Center for Public Policy Studies.

3. Projected Households Using State Population Projection



Based on the household projection period 2012-2032, the number of households age 55 to 64 has peaked and will now decline.

For the next 10 years, the dominant senior household growth segment will be in the 65 to 74-year-old group, projected to peak by 2022.

This will be followed by the rapid growth in households age 75 and older from 2017 to 2032 as baby boom

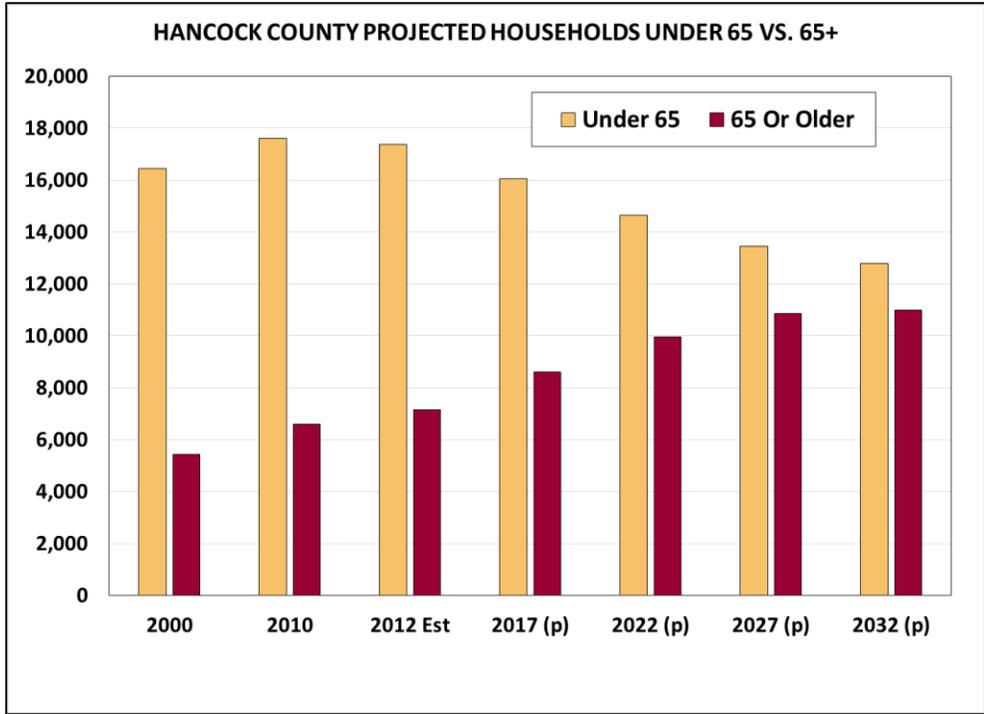
population continues to mature. The challenge will be to adapt existing housing and new production to accommodate a population with evolving needs. Special needs related to physical disability will grow more rapidly as the population ages into the 75+ and 85+ cohorts.

Based on the projections, the total number of 65+ households will continue to grow through the end of the projection period, but this will be accompanied by a decline in the number of households under age 65 during the same period. The “under 65” household population is generally associated with the labor force.

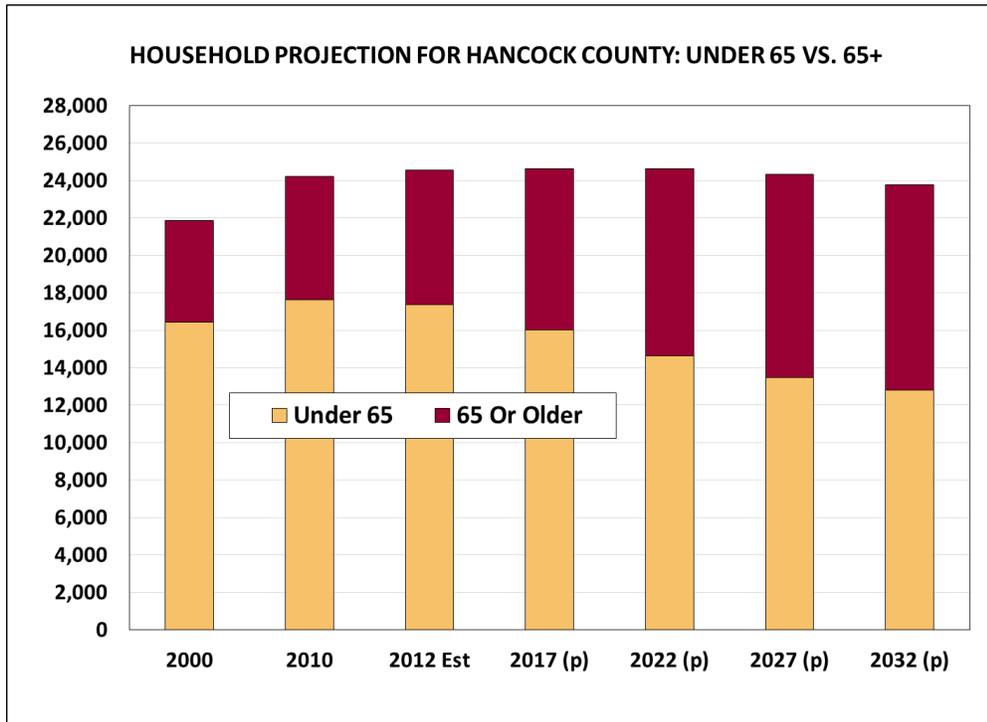
These forecasts raise the question of how to provide an adequate labor for commercial and industrial expansion. To maintain the labor force, the market will need to replace retiring workers with younger personnel while the number of households under age 65 (the traditional source for the labor force) will be declining.

Using the State’s 2015 population forecast to drive the household model, there will be a significant increase in senior households, but a long term *decline in total households* in Hancock County. Under this scenario, the County would have declining overall demand for housing, which would mean that fewer new housing units could be supported regionally without driving up vacancy rates.

The other question raised by the projection is whether the area can supply enough buyers to enable older households to sell if they want to move to more appropriate housing as they age.



These household projections by age use the 2015 population forecasts by age from Maine Office of Policy and Management for 2012-2032



**HANCOCK HOUSEHOLDS BY AGE GROUP - PROJECTION A - HEADSHIP MODEL APPLIED TO STATE
POPULATION PROJECTION BY AGE**

Year	Under 55	55-64	65-74	75-84	85+	Total	Age 55+	Age 65+	Age 75+
Total									
2012	11,664	5,716	3,947	2,255	954	24,536	12,872	7,156	3,209
2017	10,437	5,600	5,025	2,495	1,076	24,633	14,196	8,596	3,571
2022	9,720	4,929	5,504	3,311	1,147	24,611	14,891	9,962	4,458
2027	9,233	4,227	5,392	4,169	1,296	24,317	15,084	10,857	5,465
2032	9,161	3,625	4,772	4,549	1,668	23,775	14,614	10,989	6,217
Owner									
2012	7,777	4,850	3,352	1,739	585	18,303	10,526	5,676	2,324
2017	6,849	4,751	4,268	1,924	660	18,452	11,603	6,852	2,584
2022	6,302	4,182	4,675	2,554	703	18,416	12,114	7,932	3,257
2027	5,939	3,586	4,580	3,215	795	18,115	12,176	8,590	4,010
2032	5,903	3,076	4,053	3,508	1,023	17,563	11,660	8,584	4,531
Renter									
2012	3,887	866	595	516	369	6,233	2,346	1,480	885
2017	3,588	849	757	571	416	6,181	2,593	1,744	987
2022	3,418	747	829	757	444	6,195	2,777	2,030	1,201
2027	3,294	641	812	954	501	6,202	2,908	2,267	1,455
2032	3,258	549	719	1,041	645	6,212	2,954	2,405	1,686
GQ Population									
2012	n.c.	35	31	70	140	n.c.	276	241	210
2017	n.c.	34	39	77	158	n.c.	308	274	235
2022	n.c.	30	43	102	168	n.c.	343	313	270
2027	n.c.	26	42	129	190	n.c.	387	361	319
2032	n.c.	22	37	140	245	n.c.	444	422	385
Projected Change									
Total									
2012-2022	-1,944	-787	1,557	1,056	193	75	2,019	2,806	1,249
2022-2032	-559	-1,304	-732	1,238	521	-836	-277	1,027	1,759
Homeowners									
2012-2022	-1,475	-668	1,323	815	118	113	1,588	2,256	933
2022-2032	-399	-1,106	-622	954	320	-853	-454	652	1,274
Renters									
2012-2022	-469	-119	234	241	75	-38	431	550	316
2022-2032	-160	-198	-110	284	201	17	177	375	485
Group Quarters Population									
2012-2022	n.c.	-5	12	32	28	n.c.	67	72	60
2022-2032	n.c.	-8	-6	38	77	n.c.	101	109	115

Source: BCM Planning LLC headship model with State Population Projection by age input

SENIOR HOUSEHOLDS AS PERCENT OF TOTAL HANCOCK COUNTY - HISTORIC AND PROJECTED			
Year	Age 55+	Age 65+	Age 75+
2000	40%	25%	12%
2010	50%	27%	13%
2012 Est	52%	29%	13%
2017 (p)	58%	35%	14%
2022 (p)	61%	40%	18%
2027 (p)	62%	45%	22%
2032 (p)	61%	46%	26%

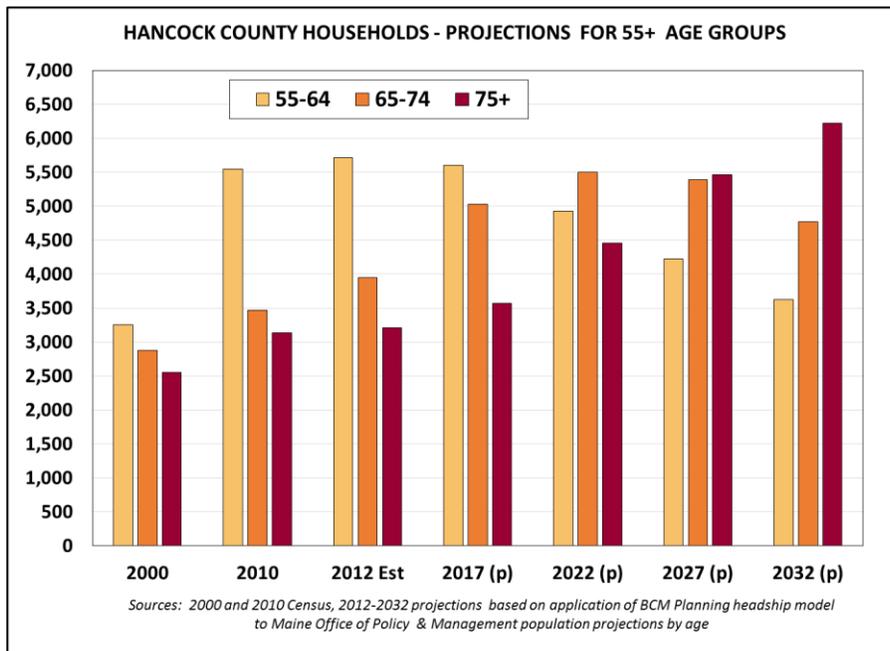
Source: BCM Planning headship model applied to population projections by age from Maine Office of Policy & Management

Assuming that the State’s population growth assumptions play out, the proportion of Hancock County households age 55 or older (now about 50% of all households) could rise to over 60% during the next 20 years.

During the same period, households age 65 or older could increase from 27% to 46% of all households, and the 75 or older cohort could increase from 13% to 26% of all Hancock County households by 2032.

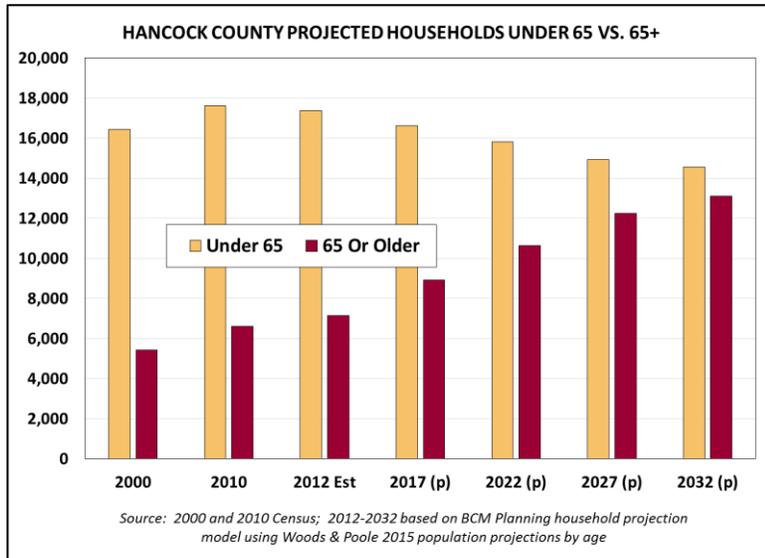
The changing age distribution should create demand for alternative forms of senior housing and the need to adapt existing housing units to an aging population. At the same time, the full exercise of this demand may also depend on whether the City and the region can realize sufficient growth in the labor force population. Such a balance is needed to enable older households to sell their homes so they can make a transition to different ownership or rental situations.

4. Projected Households Using Woods & Poole Population Projection

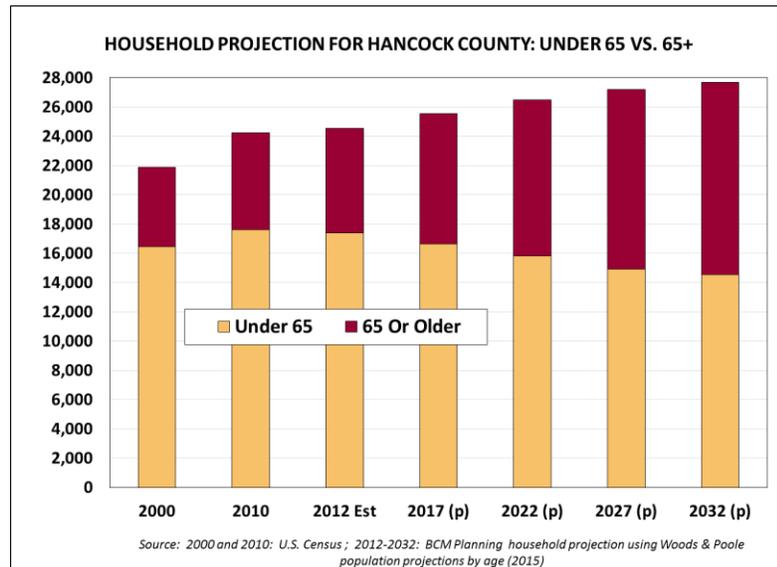


A second source of long term population forecasts by Woods & Poole Economics, Inc. was substituted in the household projection model. The company’s proprietary model is based on national projections, with County and metropolitan areas projected on the basis of their economic inter-relationships with one another and related job creation potential.

Under this model, the potential for job growth is estimated, and the labor force is projected to change to the extent needed to support that growth. Since the population projections are tied to the estimate of economic potential, net migration becomes a function of estimated employment opportunities, rather than a factor that reflects a purely historical pattern.



While the same general patterns of demographic change are projected for households using this source, the long term scenario indicated by this model is *modest net growth in total households* through 2032, rather than an overall decline as predicted by the first model.



SENIOR HOUSEHOLDS AS PERCENT OF TOTAL HANCOCK COUNTY - HISTORIC AND PROJECTED			
Year	Age 55+	Age 65+	Age 75+
2000	40%	25%	12%
2010	50%	27%	13%
2012 Est	52%	29%	13%
2017 (p)	57%	35%	14%
2022 (p)	61%	40%	17%
2027 (p)	63%	45%	22%
2032 (p)	63%	47%	26%

Source: BCM Planning headship model applied to population projections by age from Woods & Poole Economics, Inc.

**HANCOCK COUNTY HOUSEHOLDS BY AGE GROUP - PROJECTION B - HEADSHIP MODEL APPLIED TO
WOODS & POOLE 2015 POPULATION PROJECTION BY AGE**

Year	Under 55	55-64	65-74	75-84	85+	Total	Age 55+	Age 65+	Age 75+
Total									
2012	11,664	5,716	3,947	2,255	954	24,536	12,872	7,156	3,209
2017	10,873	5,756	5,355	2,555	1,013	25,552	14,679	8,923	3,568
2022	10,368	5,443	6,030	3,604	1,021	26,466	16,098	10,655	4,625
2027	10,023	4,903	6,178	4,950	1,124	27,178	17,155	12,252	6,074
2032	10,184	4,369	6,002	5,702	1,404	27,661	17,477	13,108	7,106
Owner									
2012	7,777	4,850	3,352	1,739	585	18,303	10,526	5,676	2,324
2017	7,179	4,884	4,548	1,970	621	19,202	12,023	7,139	2,591
2022	6,802	4,618	5,122	2,779	626	19,947	13,145	8,527	3,405
2027	6,594	4,160	5,247	3,818	689	20,508	13,914	9,754	4,507
2032	6,744	3,707	5,098	4,398	861	20,808	14,064	10,357	5,259
Renter									
2012	3,887	866	595	516	369	6,233	2,346	1,480	885
2017	3,694	872	807	585	392	6,350	2,656	1,784	977
2022	3,566	825	908	825	395	6,519	2,953	2,128	1,220
2027	3,429	743	931	1,132	435	6,670	3,241	2,498	1,567
2032	3,440	662	904	1,304	543	6,853	3,413	2,751	1,847
GQ Population									
2012	n.c.	35	31	70	140	n.c.	276	241	210
2017	n.c.	35	42	79	149	n.c.	305	270	228
2022	n.c.	33	47	111	150	n.c.	341	308	261
2027	n.c.	30	48	153	165	n.c.	396	366	318
2032	n.c.	27	47	176	206	n.c.	456	429	382
Projected Change									
Total Households									
2012-2022	-1,296	-273	2,083	1,349	67	1,930	3,226	3,499	1,416
2022-2032	-184	-1,074	-28	2,098	383	1,195	1,379	2,453	2,481
Homeowners									
2012-2022	-975	-232	1,770	1,040	41	1,644	2,619	2,851	1,081
2022-2032	-58	-911	-24	1,619	235	861	919	1,830	1,854
Renters									
2012-2022	-321	-41	313	309	26	286	607	648	335
2022-2032	-126	-163	-4	479	148	334	460	623	627
Group Quarters Population									
2012-2022	n.c.	-2	16	41	10	n.c.	65	67	51
2022-2032	n.c.	-6	0	65	56	n.c.	115	121	121

Source: BCM Planning LLC headship model with Woods & Poole 2015 population projection by age input

F. Senior Housing Occupancy and Preferences

1. Types of Senior Housing Communities

A review of available research disclosed a number of larger-scale analyses of the age and income distribution of households living in senior housing developments of various types, as well as data on the preferences of the active adult market. In most of the literature developed on this topic, senior housing products tend to be grouped as:

- Age-qualified active adult communities. This category includes **ownership** communities in which there is a specific deeded restriction with a specified minimum age requirement of 55 or older for at least one adult in 80% of the units.
- Age-restricted rental units. Age-restricted **rental** units include both subsidized and unsubsidized rental developments subject to an age restriction, often 62 or older and sometimes age 55 or older.
- Independent (congregate) and assisted living. These units are not always age restricted, but are typically occupied by the oldest residents in need of some supportive services. Congregate developments (independent living) typically provide a meal or meals in a dining room, housekeeping services, and transportation. Assisted living units also have available personal care services for those with higher levels of disability.

2. Age Distribution by Product Type

a. MetLife and National Association of Homebuilders Studies: Active Adult Communities

AGE DISTRIBUTION IN SENIOR HOUSING (55 & OLDER)		
Age of Residents	Age Qualified Active Adult (Owner)	Age Restricted Rental
Under 55	2%	1%
55-64	24%	19%
65-74	39%	25%
75-84	25%	33%
85 & Older	10%	23%
Total	100%	100%
Age 65 +	74%	80%
Age 75+	35%	56%

MetLife Mature Market Institute and National Association of Homebuilders, January 2011, Housing Trends Update for the 55+ Market (analysis of American Housing Survey 2009 Data)

The MetLife Mature Market Institute has issued a number of studies of the 55 and older market, some in cooperation with the National Association of Home Builders. These studies have involved detailed analyses of the American Housing Survey.

Based on the MetLife and NAHB analysis, about 26% of residents of active adult ownership communities are under the age of 65, and about 74% are age 65 or older. About 35% of active adult community residents are age 75 or older.

An even older age profile is found in age-restricted *rental* developments. For these projects, about 20% of residents were under 65, and 80% were 65 or older. About 56% of occupancy was found to be age 75 or older.

A 2011 MetLife study also estimated that about 7% of all households age 55 or older live in some form of age-restricted housing based on 2009 American Housing Survey data. Of that group, approximately 59% of this housing stock is in age-restricted rental developments and 41% in age-qualified active adult ownership communities.

Based on the study, only 3% of all United States *homeowners* age 55 or older reside within an age-qualified active adult community. Among *renters* age 55 or older, an estimated 20% live within an age-restricted rental. Much of the age-restricted rental stock is in subsidized rental housing. The overall ratio of 55+ households in age-restricted housing is estimated to be 7%.

b. Michigan Housing Development Agency Survey

A very detailed large-scale survey and inventory was conducted by the Michigan Housing and Redevelopment Authority in 2011. This analysis generated a significant amount of information on the age distribution of residents in multifamily housing products within the state, as well as household preferences. This study is of interest because of the very large scale of the survey sample that was conducted, with over 12,000 recipients, and because it was located in a climate that is similar to that of Maine. The analysis focused on multifamily rental housing products rather than the ownership side of housing demand.

AGE DISTRIBUTION COMPARISON - MICHIGAN MULTIFAMILY SENIOR RENTAL HOUSING DEVELOPMENTS						
Resident Age	Michigan Housing Survey for MHDA - 2011					
	New Multifamily Senior Projects			All Multifamily Senior Projects		
	Independent	Congregate	Assisted	Independent	Congregate	Assisted
55 to 64	18%	5%	6%	9%	6%	4%
65 to 74	46%	40%	8%	35%	13%	23%
75 to 84	19%	40%	33%	38%	28%	31%
85 & Older	18%	15%	55%	16%	53%	42%
65+	83%	95%	96%	89%	94%	96%
75+	37%	55%	88%	54%	81%	73%

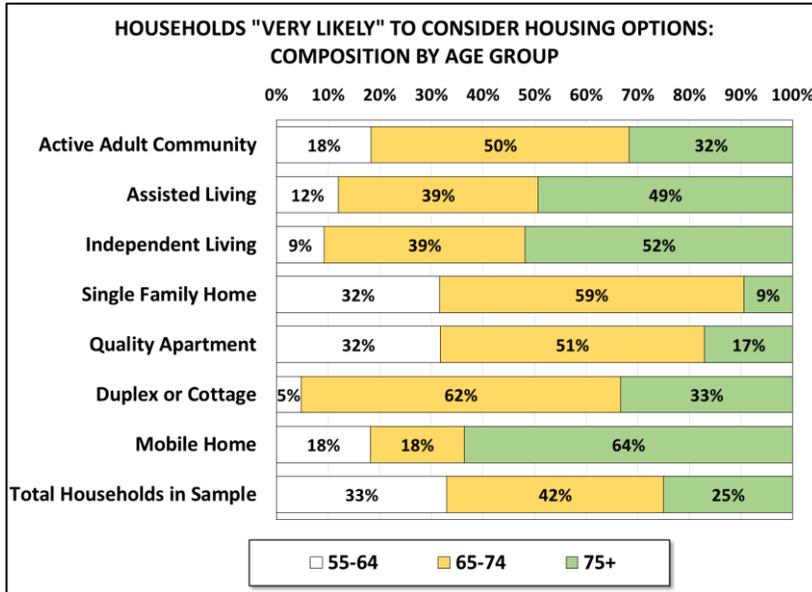
Note: not all percentages will add to 100% due to rounded data in source material

Independent Living Units. In independent living units, 9% of residents were in the 55 to 64-year-old group compared to 18% within newer units five years old or less. Eighty-nine percent (89%) of residents in the independent multifamily units were 65 or older, and 54% were age 75 or older. In the newest projects, 83% were 65 and older, and 37% were 75 or older. Seniors 65 and older dominate the occupancy ratios for independent living, with only minor participation by the 55 to 64 year old age group.

Congregate and Assisted Living. Among the congregate and assisted housing projects, 94% to 96% of residents of the projects were 65 or older. Age 55-64 has very limited role (4% to 6% of

residents) in these developments as they are oriented toward levels of service needed more frequently by older residents.

c. Ellsworth Area Housing Survey



The Ellsworth area housing survey of age 55+ households provided an indication of the potential age composition of various housing products.

The youngest part of the senior market (55-64) would have the highest representation in a single family detached homes or in a quality apartment project. While about 1/3 of the survey respondents in the 55-64 year old group were “very likely” to

consider a single family home as their next housing choice, only 18% of this age group was as interested in an age-restricted active adult community. (The data shown are not adjusted for the likely *time horizon* of these choices.)

While studies of senior housing needs tend to focus on *age-restricted* housing solutions, appropriate design can accommodate the needs of multiple age groups in developments without age limits. For example, a multifamily development with units served either by an elevator, or which has essential living area on one floor could meet the needs of older residents whether the project is age restricted or not.

The age restriction is a legal tool to ensure that certain units are reserved for the senior market, and to assure interested owners or renters that there will be few if any children living in the development. While age restricted housing will be attractive to part of the market, an age restriction will also limit the size of the renter or buyer pool available to a project.

3. Characteristics of Movers to Age-Qualified Housing

a. Income and Price

The 2011 MetLife-NAHB analysis of American Housing Survey data showed that nearly all the buyers in active adult communities previously owned a single-family home. Most households

INCOME IN 2009 FOR MOVERS TO AGE QUALIFIED COMMUNITIES		
Household Income	Age Qualified Active Adult (Owner)	Age Restricted Rental
Under \$20,000	22%	62%
\$20,000-\$39,999	15%	30%
\$40,000-\$59,999	14%	5%
\$60,000-\$79,999	17%	1%
\$80,000-\$99,999	6%	0%
\$100,000-\$149,999	17%	2%
\$150,000 or more	11%	1%
Total	100%	100%
<i>Average</i>	<i>\$80,772</i>	<i>\$20,662</i>
<i>Median Home Value</i>	<i>\$300,000</i>	<i>n.a.</i>
<i>Avg Number of Units Looked at Before Moving</i>	<i>12</i>	<i>3</i>
<i>MetLife Mature Market Institute and National Association of Homebuilders, January 2011, <u>Housing Trends Update for the 55+ Market</u> (analysis of American Housing Survey 2009 Data)</i>		

traded up in quality but not in price compared to the value of their prior residence. About 43% financed their purchase with a mortgage. Down payments came primarily from sale of a previous home, in 55% of the cases, or from savings and cash on hand, 45%.

The average household that moved to an age-qualified active adult ownership community had an income of just under \$81,000. Those who purchased in a qualified adult community looked at an average of 12 units before moving to their current location.

Owing to the large proportion of age-restricted rental units that are subsidized, the average income for movers to rental units was just under \$21,000. Those who moved

to an age restricted rental unit looked at only 3 alternatives before leasing their unit.

b. Location and Housing Preference

In a September 2009 report, the MetLife Institute, in cooperation with the National Association of Home Builders (NAHB) surveyed both potential consumers (age 55+ households) as well as builders involved in this market.

The consumer survey indicated that about 63% of respondents plan to stay and age in their current home, 26% were not sure of their future plans, and 12% planned to buy another home sometime in the future. About 8% expressed an interest in buying another home within a three-year period, while 4% had no specific time horizon.

The survey indicated that about 79% of consumers would prefer one-level living, and 75% preferred a master bedroom located on the first floor. The home size preference for most households was approximately equivalent to the unit they now live in, but prospective buyers wanted a better-designed unit. The preferred size of the home increased with income level.

Community Amenities (Percent of Consumers Rating Feature as Somewhat to Very Important)	
Proximity to Shopping Center	57%
Proximity to Hospital/Doctors Office	55%
Drug Store	49%
Proximity to Public Transportation	34%
Proximity to Church	35%
Convenience Store	33%
Walking/Jogging Trails	31%
Proximity to Library	31%
Exercise Room	27%
Rec. or Community Center/Clubhouse	22%
Bike Trail	12%
Golf Course	8%
<i>Source: 55+ Housing: Builders, Buyers and Beyond, September 2009, MetLife Mature Market Institute consumer survey results</i>	

While proximity to shopping and medical services, public transit, and other features have high preference ratings, consumers tend to prefer locations outside a center city.⁵

Reasons for Moving to 55+ Housing (Builders Opinions)	
Desire for Maintenance Free Lifestyle	63%
Move Closer to Children / Family	46%
Lower Living Costs	32%
Desire to Change Neighborhood	24%
Desire for Increased Personal Security	20%
Move to Warmer Climate	18%
Be Closer to Amenities and Local Activities	17%
Be Farther Away from Crowded Cities	14%
Other	13%

Source: 55+ Housing: Builders, Buyers and Beyond, September 2009, MetLife Mature Market Institute consumer survey results

As part of the same study, homebuilders were asked about their perception of buyer motivations to purchase a new unit in their 55+ community. The most important reasons cited by the builders' survey were the desire for a maintenance free lifestyle, moving closer to friends or family, and lower living costs.

Writing for the MetLife Mature Market Institute, demographer Peter Francese has observed that the leading edge Baby Boomers (born 1946-1955) differ from their predecessors in the same age range. They are more likely to have college degrees and more likely to remain in the workforce compared with prior generations who became fully retired at age 65. Francese speculates that the recent recession and decline in home values may mean that these "leading edge" baby boomers will want low debt-to-income ratios and will prefer to trade up in quality but not so much in price.

The same indicators are present in other research of the active adult ownership market. Profiles of movers indicate a preference for homes of the same size they now occupy. However, downsizing may be necessary in order to achieve a reasonable price point for Ellsworth area households to afford a new housing unit.

Downsizing to a smaller single family detached residence may have more appeal in the Ellsworth area than a multifamily or attached housing unit. American Community Survey (ACS) data for Maine counties shows that Hancock County has the lowest percentage of its total housing stock in attached, duplex or multifamily units (about 5% of the total). Relatively few area residents have lived within these types of structures.

⁵ In national samples, a "center city" represents is a place much larger than northern New England cities, of higher density, and a more extensive urbanized area than Ellsworth or its surroundings.

4. MaineHousing Focus Groups (2014)

A series of focus groups were conducted by MaineHousing⁶ in 2014 with Realtors, lenders, and older adult counselor groups. An October 2014 summary report⁷ includes some observations on the issues of aging in place and housing preferences of older consumers in Maine, paraphrased below:

- Younger baby boomers are looking to downsize to two bedroom units near good transportation, essential services, and be near children or grandchildren.
- Older baby boomers want to downsize and eliminate maintenance, and to be closer to essential services including assisted living programs.
- Older residents want to remain at home as they age.
- Maine residents occupy a very old housing stock, for which maintenance costs are high.
- Homes are no longer accessible for many older homeowners.
- Finding reliable contractors for affordable repairs or improvements is a problem.
- The net gain from sale of an existing home is often quite low, making it difficult to afford the cost of a home with design features that seniors need.
- Few new smaller homes are available to move into.
- Rental and multifamily units are scarce in rural areas, particularly in Hancock and Washington Counties.
- Modifications to local zoning could open up more alternatives for older adults such as in-law apartments.
- Many older adults did not think about retirement, Social Security, and other issues when they were younger. They are now facing financial challenges, and their home is now their principal asset.
- Communities need age-friendly adaptations including wheelchair friendly sidewalks and crosswalks, proximity to essential services, capacity to use services such as Meals on Wheels, and transportation.

⁶ MaineHousing is the informal name for the Maine State Housing Authority (MSHA)

⁷ Housing in Maine: Preferences, Perceptions, and MaineHousing's Role, October 2014, by Richard Taylor, Communications and Research Manager, MSHA.

G. Ellsworth Attraction Factors

National studies have shown that most residents of senior communities will tend to move within a 25-mile radius. But another component of market potential is the capacity of a site or community to attract inflow from outside a primary market area. Inflow potential includes people who left the area to pursue a career but now want to move back, seasonal residents and vacation travelers familiar with the area, and households that want to be closer to other family members.

In the national profiles of active adult community residents, higher consumer satisfaction levels are generally associated with good access to *neighborhood shopping, public safety, and public transportation*. Particular neighborhood nuisance factors include roads in need of repair, heavy street noise, community crime, visible trash in the neighborhood or abandoned buildings in the vicinity.

1. AARP Livability Initiatives

The American Association of Retired Persons (AARP) has developed a nationwide initiative to promote livable communities with age-friendly characteristics. Ellsworth became a member of the AARP network of age-friendly communities in December 2014. The City was accepted into the program based on its active involvement in retaining and attracting seniors. Ellsworth was cited as having a strategic planning process and community and economic development policies that actively support senior living. Specific actions the City took that were recognized in its designation included:

- Construction of sidewalks to make the City more pedestrian friendly;
- Renovation of the Moore School Building into a community/senior center;
- Partnering with the non-profit Friends in Action to manage the new senior center;
- Conversion of a school property into a community park (Knowlton Park)

As a member of this network of age-friendly communities, community leaders commit to an ongoing cycle of community improvement across the eight domains of livability that are based on the World Health Organization components of livability which influence health and quality of life among older adults, including:

- Outdoor spaces and buildings that are accessible
- Transportation (alternatives to driving)
- Housing (design and options for various life stages)
- Social participation (interaction with others)
- Respect and social inclusion (intergenerational activity)
- Civic participation and employment (working and/or volunteering)
- Information and communication (variety of media)
- Community and health services (access to services and affordability)

In 2015 the AARP introduced an online tool to help individuals rate a community or neighborhood with respect to various livability index ratings. These ratings come from an array of statistical indicators, some of which are available only at the County or regional level, and some of which reflect municipal or neighborhood data. Details of the rating system and related sources are available online.

Using the rating tool, we compared Ellsworth to a number of other Maine locations and to overall scores for other states. The Ellsworth overall livability score was 54. (Note that climate is not a rating factor in the livability score, and the general livability rating for Florida is 47.)

COMPARISON OF AARP LIVABILITY RATINGS 2015											
Category:	Rating Basis	Ellsworth	Hancock County	Bar Harbor	Blue Hill	Bangor	Portland	ME	NH	MA	FL
Housing	Availability, Accessibility	53	52	51	52	58	60	56	48	56	46
Neighborhood	Access to Life, Work, Play	35	29	48	29	45	57	37	44	59	46
Transportation	Safe, Convenient Options	47	44	67	44	68	63	48	48	56	48
Environment	Clean Air, Water	49	54	56	44	58	58	64	50	53	53
Health	Prevention, Access, Quality	52	54	59	54	41	61	50	56	57	47
Engagement	Civil, Social	92	92	94	92	65	84	74	62	61	55
Opportunity	Inclusion, Possibilities	51	46	47	46	57	52	57	53	51	37
Overall Rating		54	53	60	53	56	62	55	52	56	47
<small>Source: AARP on-line livability rating tool. Each factor potential score is 100. Highest local overall rating is 78 according to AARP. Some factors reflect County-level rather than local data. Some scoring criteria based on data such as American Community Survey (ACS) small samples with relatively high margin of error at local levels. Climate is not part of the rating system.</small>											

Many of Ellsworth’s ratings are affected by Hancock County characteristics. While an ideal score would be 100 based on all the factors, the highest community score in the system nationwide is a 78 according to the AARP.

The most outstanding rating for Ellsworth and Hancock County in general are their high rankings for *civic and social engagement*. While this is not part of the physical infrastructure of the City or area, it is evidence of an important social cohesion within the region.

The City’s lowest ranking category (and that of the County) ranking was in the “neighborhood” category. A detailed analysis of all 40 statistical components of the rating system is beyond the scope of this report, but we did note that one of the factors of “neighborhood quality” is the presence of “vacant housing units.” Unfortunately the current AARP vacancy measure counts *all vacant units*, which includes the *seasonal* housing stock. The vacancy data in the AARP ratings, based on ACS data, show Hancock County with 36% vacancy and Ellsworth at 21% vacancy, largely because of the presence of seasonal housing units in the total inventory.

A ranking based on more traditional measures of the vacancy rates in housing available for year round occupancy would be more indicative of neighborhood desirability. Any place with a high proportion of seasonal housing units will get a high vacancy score under the current livability rating system, even though it may be a very attractive community.

2. Ellsworth Role as an Economic Center

Population, Household or Economic Factor	Ellsworth as Percent of County
Share of Hancock County Total:	
Jobs in 2013	28%
Total Wages Paid by Employers 2013	27%
Population 2010	14%
Group Quarters Population 2010	20%
Institutional (including Nursing Homes)	57%
Other Group Quarters	6%
Households 2010	14%
Homeowners	12%
Renters	18%
Housing Units 2010	11%
Seasonal Units	5%
Year Round Units	13%
Share of Hancock County Growth:	
Population Growth 1990-2000	10%
Population Growth 2000-2010	49%
Household Growth 1990-2000	10%
Household Growth 2000-2010	23%

Ellsworth is not only the gateway to Downeast Maine and Acadia National Park, but also the principal commercial and residential center of Hancock County. In 2013, jobs in Ellsworth represented 28% of the Hancock County total, and total wages paid by Ellsworth employers comprised 27% of total payroll.

The City's role as a job center will be significantly enhanced by the Jackson Laboratory which will add an estimated 365 jobs in Ellsworth base, and up to 725 related jobs in the community.⁸

In 2010, Ellsworth was home to 14% of the County's population and households, but its share of total housing activity has been increasing. Ellsworth captured only about 10% of the County's population and household growth

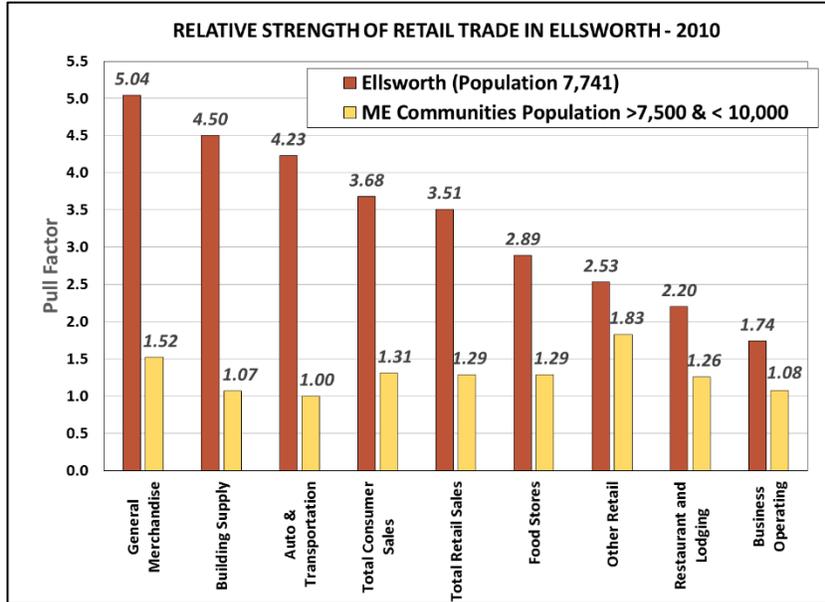
from 1990-2000. But between 2000 and 2010, growth in the City represented 49% of County population growth and 23% of its household growth.

The Ellsworth role as a center of commerce is even more prominent within the region than its residential base would suggest. The economic draw of Ellsworth was measured in a study conducted by the University of Maine's Cooperative Extension School of Economics in April 2012.

In this analysis of retail sales, the authors compute a "pull factor" for Ellsworth that compares per capita retail trade generated in the City to that of other communities. Essentially, the

⁸ Jackson Laboratory press release, May 1, 2015 regarding its long term plan for a 143,000 square foot building and 17 acre site purchased by the company in November 2012.

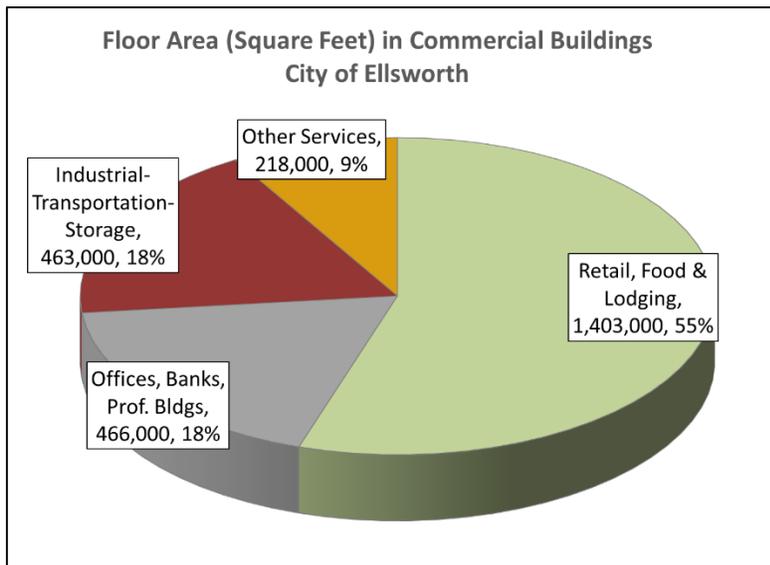
measure indicates the relative strength of retail trade based on “expected” gross sales per capita based on population versus actual gross sales receipts. The concentration of retail activity in Ellsworth is high relative to its population, and the pull factor illustrates the relative strength of inflow of trade to the City.



Ellsworth’s retail sector is particularly strong in relation to its resident population. The City is the region’s principal economic center for trade.

The concentration of retail uses provides an important source of taxable valuation for the City, and the diversity of retail opportunities is an important convenience for attracting a retirement market.

Source: *Trade Area Analysis of Retail Sales - Ellsworth, Maine*
 April 2012, University of Maine School of Economics and Cooperative Extension

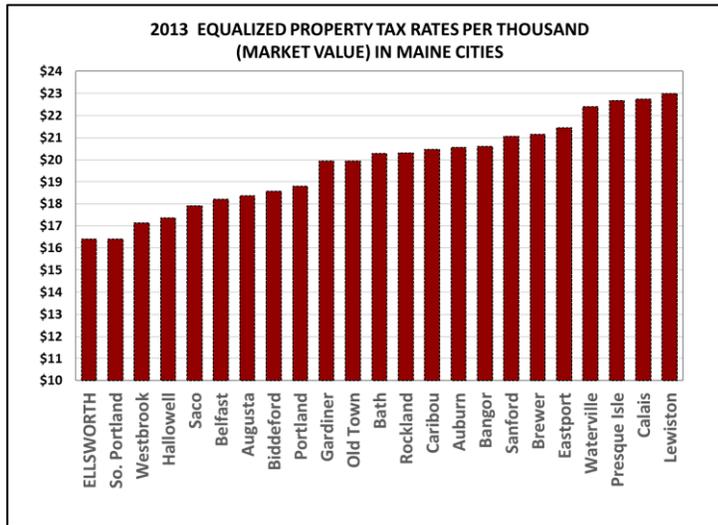


The floor area of commercial and industrial buildings in Ellsworth totals just over 2.5 million square feet, over half of which is in retail and lodging uses.

Over a third of this space (about 900,000 square feet) is in buildings that were constructed since the year 2000.

Source: *BCM Planning, LLC analysis of 2015 Ellsworth property assessment data*

3. Comparison of Equalized Property Tax Rate of Maine Cities



A comparison of the 2013 equalized property tax rates of Maine cities indicates that Ellsworth and South Portland, Maine are tied for the lowest city tax rates in the state.

City tax rates are appropriate for comparison because of the higher level and diversity of services that are provided in cities than in most suburban or rural towns.

Source: Maine Revenue Services, Estimated Full Value Tax Rates for 2013

These tax rates are measured relative to *equalized* or estimated market value, rather than local assessed value. While overall taxation in Maine may be higher than in other states, the local tax rate should be a positive factor for retiree homeowners.

4. Public Safety in Ellsworth

Violent Crime Offenses Per 1000 Population - 2013	
All Maine Cities	2.37
Maine Cities < 20,000 Population	1.81
City of Ellsworth	0.64

Source: Ratios computed based on data on offenses known to law enforcement, FBI Uniform Crime Reports for 2013

Based on a comparison of data from the FBI Uniform Crime Reports for 2013, Ellsworth had a very low rate of violent crime at 0.64 offenses per 1,000 persons. This compares very favorably to other Maine cities and even smaller Maine cities under 20,000 persons.

The size of the Ellsworth police force is comparable to other small Maine cities, but higher per 1,000 persons than other Maine municipalities of similar population. This is likely related to the City's relatively high concentration of economic activity and traffic levels relative to its resident population.

Maine Municipal Government	Police Officers Per Thousand Persons
City of Ellsworth	2.04
Other Maine Municipalities 7,500 to < 10,000 Pop.	1.69
Small Maine Cities < 20,000 Population	2.01
All Maine Cities	2.15
All Maine Cities and Towns Reporting	1.83

Source: Ratios computed based on law enforcement personnel data, FBI Uniform Crime Reports for 2013. Ratio based on number of sworn officers, excluding civilian personnel.

Other public safety services include:

- The Ellsworth Fire Department, staffed by 12 full time career personnel and 15 paid call personnel.
- County Ambulance, Inc. which provides the region with Emergency Medical services, is based on Ellsworth.
- The Hancock County Emergency Management Agency and the District Court, both located in Ellsworth.

5. Local Transportation Services

Bus transportation is available through a private provider (Downeast Transportation, Inc. based in Ellsworth). This provider offers regular shuttle bus connections throughout Hancock County and beyond, including linkages between Bar Harbor, Ellsworth and Bangor.

Local transit services for seniors include Ellsworth's Friends in Action volunteer drivers and van transport for shopping and appointments. For lower income seniors needing transportation to medical appointments, MaineCare clients can schedule rides provided by Washington Hancock Community Action (WHCA). The WHCA can also help seniors who are not MaineCare qualified to determine eligibility for other transportation services in the area.

6. Social and Recreational Opportunities

a. New Senior Center

A new downtown senior center has been established at the Moore Community Center, adjacent to the Seaport Village assisted living and nursing home complex that opened in 2014. Operated by Friends in Action, a local non-profit, the Center has launched a meals program and received a donated van to augment its growing transportation program. In the past the rides service relied exclusively on volunteer drivers using their own cars. The new Senior Center has opened up new opportunities for social interaction, exercise programs, and general health and wellness support. The Friends in Action program also provides housekeeping support services.

b. Recreation Opportunities

Ellsworth is well known as the "Gateway to Acadia National Park," which in 2013 attracted visitation exceeding 2.6 million persons. Most visitors traveling by car to this national destination center must access Mount Desert Island via Ellsworth.

**LARGER LAKES AND PONDS WITH ELLSWORTH FRONTAGE
(Over 100 Acres Surface Area)**

Lake Name	Surface Area Acreage	Avg Depth	Max Depth
Graham Lake	9,383	17 ft	47 ft
Green Lake	3,132	44 ft	170 ft
Branch Lake	2,942	39 ft	124 ft
Lower Patten Pond	849	24 ft	87 ft
Upper Patten Pond	338	13 ft	32 ft
Leonard Lake	118	25 ft	55 ft

There are several large lakes of about 3,000 acres or more that have frontage in Ellsworth: Branch Lake, Green Lake and Graham Lake and several smaller lakes and ponds providing boating and fishing opportunities. There is a public park and swimming area on Branch Lake, and the larger lakes have boat ramp access.

Ellsworth also fronts on the tidal portion of the Union River, where the City maintains a waterfront park and boat ramp. Small craft can navigate the river to reach Union River Bay and the ocean islands and peninsulas of the area.

Indoor recreation opportunities in the area include three YMCA facilities serving the region, with locations in Ellsworth, Blue Hill and Bar Harbor.

Within 20 miles of Ellsworth there are nine golf courses, most of which are public, including three 18-hole courses and six 9-hole courses.

GOLF COURSES WITHIN 20 MILES OF ELLSWORTH				
Course Name	Course Length	Type	Location	Distance from Ellsworth
White Birches Golf Course	9 holes	Public	Ellsworth	0 miles
Bar Harbor Golf Course	18 holes	Public	Trenton	5 miles
Blue Hill Country Club	9 holes	Private	Blue Hill	13 miles
Blink Bonnie Golf Links	9 holes	Public	Sorrento	13 miles
Kebo Valley Golf Club	18 holes	Public	Bar Harbor	15 miles
Bucksport Golf & Country Club	9 holes	Public	Bucksport	15 miles
Lucerne In Maine Golf Course	9 holes	Public	Dedham	17 miles
Causeway Club	9 holes	Public	Southwest Harbor	18 miles
Northeast Harbor Golf Club	18 holes	Public	Northeast Harbor	19 miles

The Downeast Sunrise Trail is an 85-mile off-road trail corridor that supports multiple recreational uses including walking, bicycling, ATV and snowmobile access, and equestrian use. The west end of the trail begins in Ellsworth and runs easterly, through small town centers to the in Washington County as far as Pembroke.

The combination of convenience to health care support services, transportation and the concentration of retail, social and recreational opportunities in Ellsworth reinforce its capacity to play a larger role in accommodating senior housing alternatives.

The anticipated job growth resulting from the expansion of Jackson Laboratory in Ellsworth, and related growth in support industries, will also generate a need for housing to support a larger labor force. A stronger overall housing market will help support the ability of senior homeowners who want to sell their home to move to a different type of housing unit or senior community.

H. Home Prices and Market Rent

Both the median gross rent and median sale price of homes in Hancock County and the Ellsworth Labor Market Area were about 10% higher than the Maine state average in 2014.

Location	2014 Median Sale Price	Ratio to Maine Median	2014 Avg Gross Rent (2 BR)	Ratio to Maine Average
Ellsworth City	\$151,750	0.89	\$947	1.09
Ellsworth LMA	\$185,000	1.09	\$955	1.10
Hancock County	\$189,100	1.11	\$955	1.10
Bangor LMA	\$134,000	0.79	\$954	1.09
Belfast LMA	\$132,000	0.78	\$936	1.07
Machias LMA	\$82,000	0.48	\$801	0.92
Maine	\$170,000	1.00	\$872	1.00

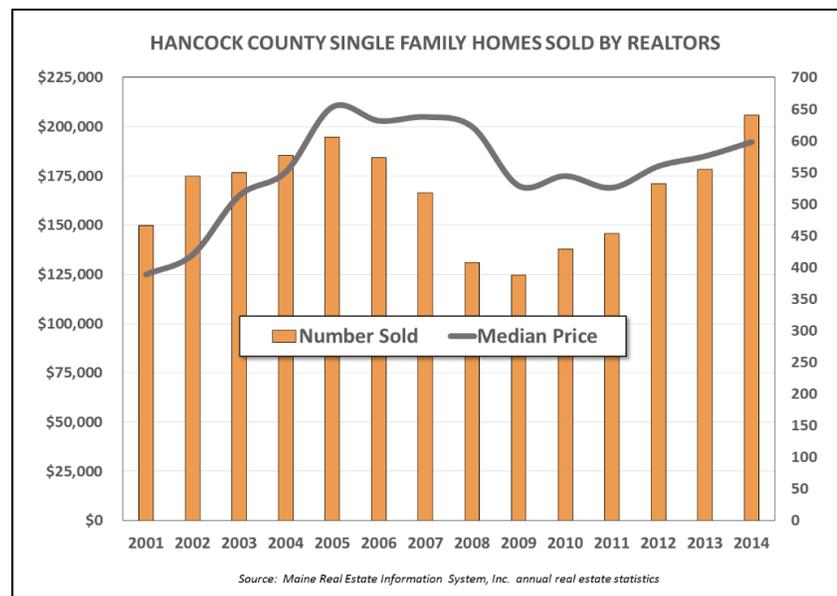
Source: Maine State Housing Authority, Housing Facts series

While home prices are higher in the Ellsworth area than in adjacent labor markets, average rents are about the same across the adjacent regions, with the exception of the much lower costs in the Machias area.

1. Home Purchase Prices

a. Single Family Home Prices – Hancock County

Based on national data reviewed earlier, buyers in an active adult community will seek products comparable in value to the sale price of their prior home, and will prefer to purchase a home with a similar amount of living area to their prior residence, but better designed for their needs.



The total number of sales of single family home sales in Hancock County during 2014 exceeded the sales volume of the pre-recession years.

The median price for the County began to rise after 2011, but at \$192,000 the median sales price for 2014 remained below its pre-recession peak.

The volume of single family home sales by Realtors in 2014 was equivalent to

about 2% of the total single family detached housing stock of Hancock County.

For the third quarter of 2015, the Maine Association of Realtors reports a median sale price of \$198,250 for Hancock County, up from \$185,000 for the same quarter in 2014. (This is partial year data.)

b. Single Family Prices by Labor Market

Sales data compiled by the Maine State Housing Authority indicates that the median sale price of homes in the Ellsworth labor market area was \$185,000 in 2014, higher than the average for Maine or for the three adjacent labor market areas.

MEDIAN SALE PRICE - PRIMARY HOMES - 2010 TO 2014					
Housing Market	2010	2011	2012	2013	2014
Ellsworth LMA	\$174,450	\$164,000	\$175,000	\$176,250	\$185,000
Bangor LMA	\$133,000	\$130,000	\$129,500	\$135,500	\$134,000
Belfast LMA	\$140,000	\$125,500	\$135,350	\$150,000	\$132,000
Machias LMA	\$125,500	\$94,000	\$106,000	\$105,000	\$82,000
Maine	\$165,000	\$162,000	\$165,000	\$169,900	\$170,000

Source: Maine State Housing Authority, Housing Facts series

c. Single Family Sales Prices in Ellsworth

ELLSWORTH SALES - SINGLE FAMILY NON-WATERFRONT HOMES			
Year	Average	Median	No of Sales
2012	\$168,761	\$158,000	29
2013	\$181,368	\$171,000	42
2014 to 9/25	\$186,550	\$163,750	24

Source: Computed from Ellsworth Assessor's Office sales data file

Sales data from the Ellsworth Assessors office shows that 2014 sales of single-family non-waterfront homes (through September) had an average of selling price of \$187,000 and a median of \$164,000.

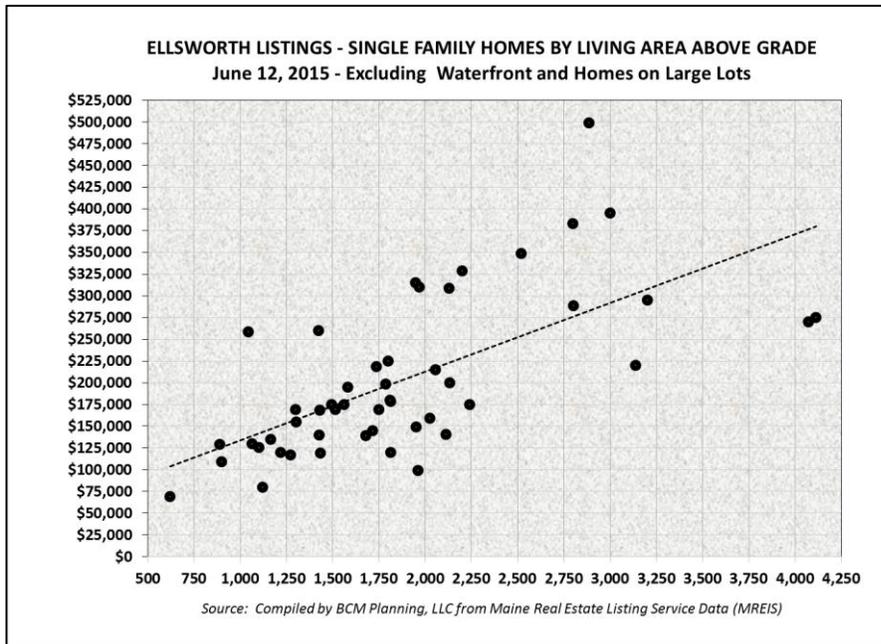
d. Ellsworth Single Family Listings

In mid-June, Ellsworth listings of non-waterfront single-family units (excluding those on very large lots) had an average list price of \$212,000 and a median of \$175,000.

Newer units (built 2000 later) had an average listing price of \$285,000 and a median of \$309,000. Roughly 30% of the listings were priced at \$250,000 or more.

DISTRIBUTION OF LISTING PRICES - ELLSWORTH		
Single Family	Average	Median
All Non-Waterfront	\$212,004	\$174,950
Excluding Large Lots	\$203,059	\$174,900
Built 2000 or Later	\$285,400	\$309,000
Listing Price Level	All Single Family	Excluding Large Lots
\$175,000+	50%	49%
\$200,000+	39%	37%
\$250,000+	32%	29%
\$300,000+	21%	16%

Source: Compiled from MREIS listings June 11, 2015



Local listings include housing of various ages, condition, and size.

This scatter diagram shows the relationship between listing price and living area (above grade) for single family homes in Ellsworth in June 2015.

This comparison excludes homes on large lots and waterfront homes.

2. Construction of New Homes

Available sales data tends to reflect the sales volume and pricing of existing homes, but may not reflect new home construction activity. New housing added to the Hancock County inventory includes both year round and seasonal dwelling units. Total average annual housing construction can be roughly estimated using building permit data.

NEW HOUSING UNITS AUTHORIZED BY BUILDING PERMITS IN HANCOCK COUNTY		
Period	Total	Avg Annual
1980-1989	2,414	241
1990-1999	2,959	296
2000-2009	4,003	400
2010-2014	791	158

Source: U. S. Census C-40 data, SOCDs data base

The average annual volume of permit authorized construction has been about 158 units per year since 2010, about 50% of the annual level of the 1990s and 40% of the volume of permit activity for the 2000-2009 period.

Our prior comparison of Census data showed a net change in the non-seasonal housing stock of Hancock County of about 300 units per year during the 1990s and an average of 378 units per year during the 2000-2010 period.

Ellsworth data for the same period showed a net gain of only 26 non-seasonal units per year during the 1990s, but an average of 70 units per year from 2000-2010. The Ellsworth share of County growth in the non-seasonal housing stock was only 8% during the 1990s, but increased to 18% of total County activity from 2000 to 2010. The City has been absorbing a higher share of Hancock County household growth and total housing activity.

3. Pricing of Cooperative Units in Retirement Campuses

Most ownership units within active adult communities are sold as shares in a cooperative. Residents retain the income tax deduction benefits that are available to owners of other forms of real estate. Units are typically in duplex cottage style construction, allowing developers to construct new buildings at the pace indicated by buyer interest.

Owners pay monthly fees for costs that include maintenance, reserves for replacement, property taxes and insurance. These monthly fees may vary by living area (with additional charges for a second resident) but are typically in the \$1,200-\$1,500 per month range, and sometimes higher. Other services may often be purchased if the unit is on a retirement campus offering independent living with meals, housekeeping and other services.

Typical adult community cooperative units in the region have one-level living areas (sometimes with basements and lofts) with two bedrooms, three-season porch, decks, laundry room and attached garages. The typical living area of the homes ranges from about 1,100 square feet to 1,700 square feet, but others may be larger with the addition of options.

The cost range of adult community cooperatives within Hancock County and in some nearby Maine communities is illustrated by the following examples:

Birch Bay Village – Bar Harbor:	\$289,000-\$385,000+	1,129 - 1,880 sq. ft.
Parker Ridge – Blue Hill:	\$145,000 - \$160,000	1,050 sq. ft.
Dirigo Pines – Orono:	\$229,000 - \$349,000	1,332 - 1,689 sq. ft.
Avalon Village – Hampden:	\$231,200 - \$305,000	2,000 - 2,184 sq. ft.
Quarry Hill – Camden:	\$253,000-\$257,000	1,100 sq. ft.
	\$345,000	1,674 sq. ft.
St. Andrews Village – Boothbay Hrbr:	\$230,000-\$257,000	1,332 sq. ft.

The above examples are based on a limited number of offerings and not necessarily representative of the full range of pricing for alternative floor areas with options, and prices shown primarily represent resales rather than new construction.

4. Market Rent for Apartments and Independent Living Costs

a. Apartment Rental Costs

The typical Ellsworth renter household who does not have a rent subsidy can expect to pay between \$950 to \$1,000 per month in rent and related costs for heat, hot water and electricity. Most of the newer rental housing in Ellsworth is in subsidized projects. Therefore the average *market rent* will tend to reflect older rental units. Many of these older units are less accessible, less energy efficient, and without elevators or project amenities that would be found in newer rental housing.

Average Gross Rent - Two Bedroom Units			
Area	2013	2014	2014 Ratio to Maine
Ellsworth City	\$895	\$947	1.09
Ellsworth LMA	\$936	\$955	1.10
Hancock County	\$936	\$955	1.10
Bangor LMA	\$884	\$954	1.09
Belfast LMA	\$851	\$936	1.07
Machias LMA	\$826	\$801	0.92
Maine	\$826	\$872	1.00

Source: Maine State Housing Authority, Housing Facts series

The Ellsworth Labor Market Area had an average gross rent (non-subsidized units) of \$955 per month for a 2-bedroom unit in 2014, well above the Maine average two bedroom rent of \$872. The average two bedroom rent in the City of Ellsworth and its labor market is about the same as the Bangor area average.

Nationally there has been a move toward rentals which has been influenced by a lower level of interest among younger households in owning a home, less confidence in ownership as an investment, a desire for greater mobility, and the increasing burden of long term student loan debt. A stronger rental market has been evident statewide in recent years.

The Ellsworth, Bangor and Belfast labor market areas all had significant increases in average gross rent from 2010 to 2014. Average gross rent in the Ellsworth and Bangor areas increased by over 11% from 2010-2014, and by nearly 17% in the Belfast area.

CHANGE IN AVERAGE GROSS RENT FOR TWO BEDROOM UNITS 2010-2014						
Housing Market	2010	2011	2012	2013	2014	% Change 2010-14
Ellsworth LMA	\$857	\$901	\$915	\$936	\$955	11.4%
Bangor LMA	\$856	\$863	\$874	\$994	\$954	11.4%
Belfast LMA	\$801	\$875	\$837	\$851	\$936	16.9%
Machias LMA	\$801	\$761	\$820	\$826	\$801	0.0%
Maine	\$814	\$810	\$800	\$826	\$872	7.1%

Source: Maine State Housing Authority, Housing Facts series

b. Monthly Cost of Independent Living

Independent living units are scarce in Hancock County, and their monthly costs incorporate not only shelter rent and utilities, but also one to two meals per day, weekly housekeeping, scheduled transportation, and access to other central services and activities provided in the development.

The cost of independent living units depends on the number of bedrooms, the size of the unit, location within the complex, number of meals per day provided, and individual unit features and views. The lowest cost independent living units at Birch Bay Village and Parker Ridge start at about \$3,000 per month. The lowest monthly costs identified in other developments in the region are in the \$2,100-\$2,572 per month range.

I. Interest in Alternative Housing Products in the Ellsworth Area

The preceding sections of this report illustrate the projected increase in senior households in Hancock County and related growth in the need for support services particularly as these households enter the 75 and older age cohort. Ellsworth is the region's hub for retail and health care services, and has been developing an improved social and transportation network. Residents of the City have good access to recreation amenities, a safe place to live, and the area has a high level of civic engagement and regional cooperation.

Yet the City's housing stock, including local market rate housing opportunities for seniors remains limited in relation to its large economic role in the region. But would enough area households be interested in new housing alternatives? To find out, a household survey was developed as part of this study to measure levels of interest in various housing options.

1. Purpose of Area Housing Survey

One of the most difficult variables in a housing analysis is to estimate the likelihood that a household would consider moving to a new residence if that product were available. Our study included a mail survey of area households, which was conducted by Pan Atlantic Research, Inc. in July 2015. The survey was designed to explore questions including:

- Are area residents in the target age groups thinking about housing alternatives?
- Would they choose a different housing product if it were available?
- Are people looking for ownership or rental units?
- Would they be interested in single family homes or smaller cottage units?
- What price or rent level would they expect to pay for new units?
- What community features are important in housing choice?
- How is Ellsworth viewed as a retirement location choice in this area?

2. Summary of Survey Method and Sample

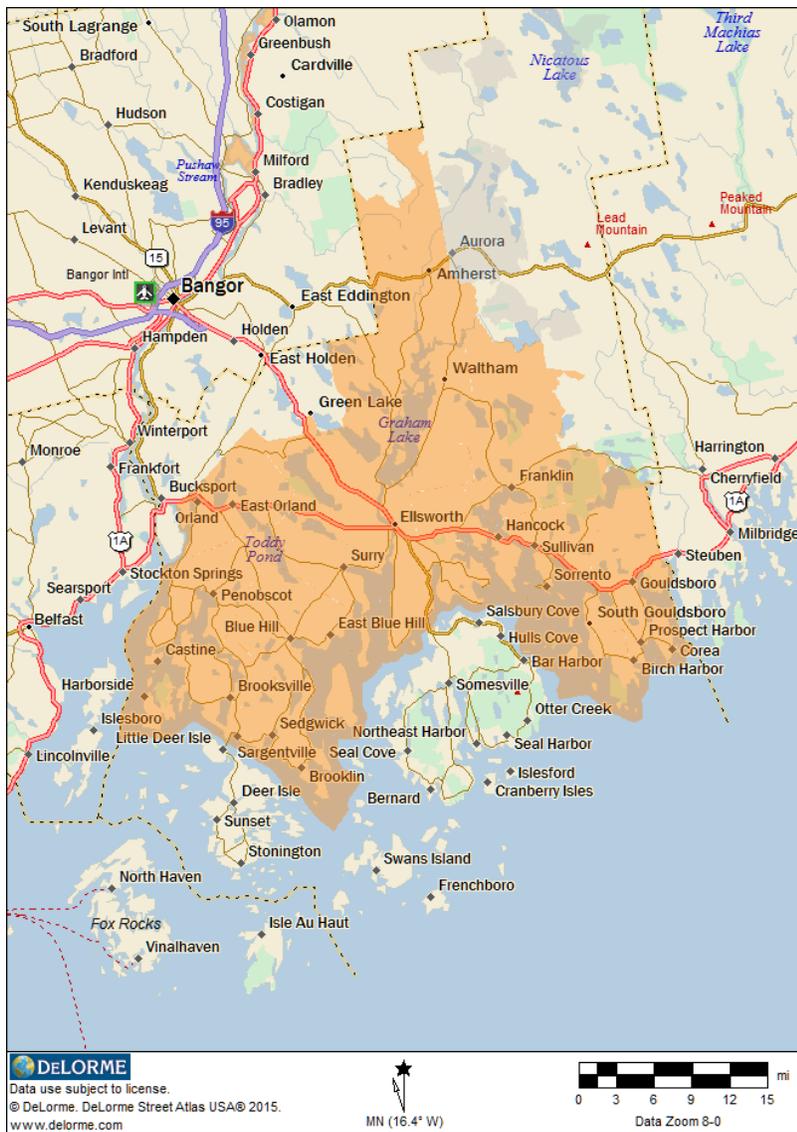
A housing questionnaire was mailed within a selected area to about 50% of all households age 55 or older who do not already live in an age-restricted housing unit. Many of the age restricted housing units in the area are in subsidized rental units. The sample may therefore be under-representative of low income renters. This has been accounted for in the application of survey results to the target market.

The response rate was very high at about 23%, generating 800 returns for analysis. The overall sample has an estimated margin of error of $\pm 3.3\%$ at the 95% confidence level.

Geographic Area	ACS Estimate of 2013 Households Age 55+		
	Homeowners	Renters	Total
Hancock County	10,163	2,034	12,197
Mail Survey Area	6,403	1,014	7,417
Greater Ellsworth	2,881	616	3,497
City of Ellsworth	1,114	341	1,455
Mail Survey Area as % of County	63%	50%	61%
Greater Ellsworth as % of Mail Survey Area	45%	61%	47%
City of Ellsworth as % of Greater Ellsworth	39%	55%	42%

Households age 55 or older living within the survey area comprise about 61% of all Hancock County households in the target age groups.

Senior households in Greater Ellsworth communities comprise 47% of the total in the mail survey area.



Mail Survey Area	
Greater Ellsworth	Other Communities
Dedham	Blue Hill
Eastbrook	Brooklin
Ellsworth	Brooksville
Hancock	Castine
Lamoine	Franklin
Mariaville	Gouldsboro
Otis	Orland
Trenton	Penobscot
Waltham	Sedgwick
	Sorrento
	Sullivan
	Surry
	Winter Harbor

About 70% of survey respondents moved to their current home from another home in Maine; 27% moved from another state or country (3% no response).

About 90% live in a single family home, and 91% of respondents live in a household of 1 or 2 persons.

Only 10% of the households had a member who was age 18 or younger.

Approximate Area of Mail Survey Distribution

About 9% of households indicated that someone in the household acted as a caregiver for a relative in the area.

The age distribution of the survey return was tabulated according to the age of the respondent to tabulate data by age of household. For summary tabulations, the age 75-84 and 85+ groups were combined.

Age of respondents:

55 to 64	32.6%
65 to 74	41.9%
75 to 84	19.5%
85 or Older	6.0%

The household income distribution of the sample is shown below as the percentage of households who provided income information (only 6.4% did not indicate income). For summary tabulations, the two highest income groups were combined into a \$75,000 or more category.

Income Distribution (excludes non-responses)

Under \$25,000	21.9%
\$25,000-\$49,999	26.6%
\$50,000-\$74,999	23.6%
\$75,000-\$99,999	15.1%
\$100,000 or more	12.8%

The survey tabulations report the residence of respondents in various groupings:

Residence of Respondents

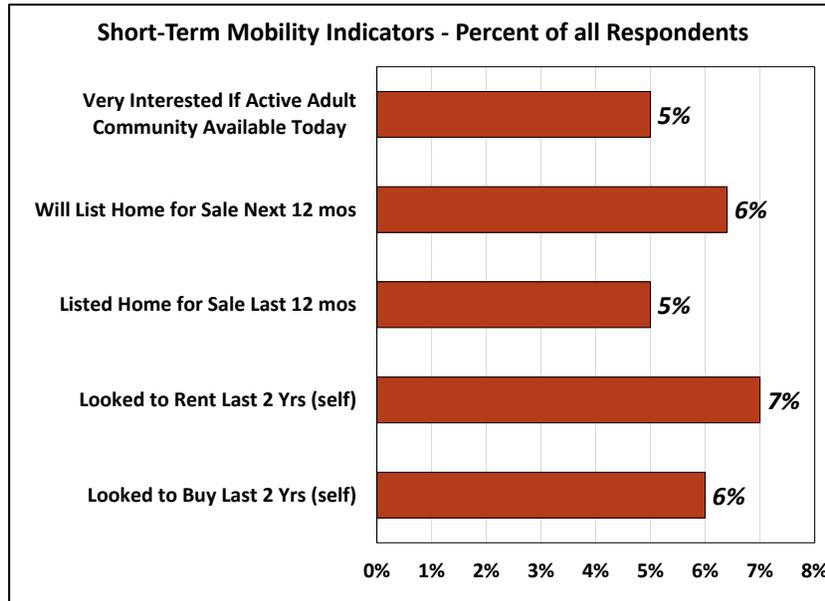
City of Ellsworth:	46.6%	Greater Ellsworth:	69.8%
All Other Towns:	<u>53.4%</u>	All Other Areas	<u>30.2%</u>
Total:	100.0%	Total:	100.0%

The results of the survey are fully detailed in a separate report prepared by Pan Atlantic Research, Inc., dated August 2015.

3. Interpretation of Survey Results

The housing survey helps explore variables relating to demand potential that cannot be quantified through secondary sources. These variables center on the number of households active in seeking housing alternatives, housing product preferences, percent of households that would consider a different housing choice if available in Greater Ellsworth at different points in time, and the potential for Ellsworth to accommodate part of that demand.

a. Age 55+ Households Active in the Market



About 6% of households looked for a unit to buy over the last two years, and 7% had looked for a rental unit. Another 2% had searched for an apartment on behalf of a parent or relative.

About 5% of households had listed their property for sale over the past year, while about 6% indicated that they might list their home for sale in the coming year.

The survey indicated a higher level of activity in home searches was occurring among households 65 or older, and with incomes of \$50,000 or more.

The table below applies the percentages derived from the survey for the total survey area, Greater Ellsworth, and the City of Ellsworth to the total households in the target age groups to estimate total potential activity in the respective areas.

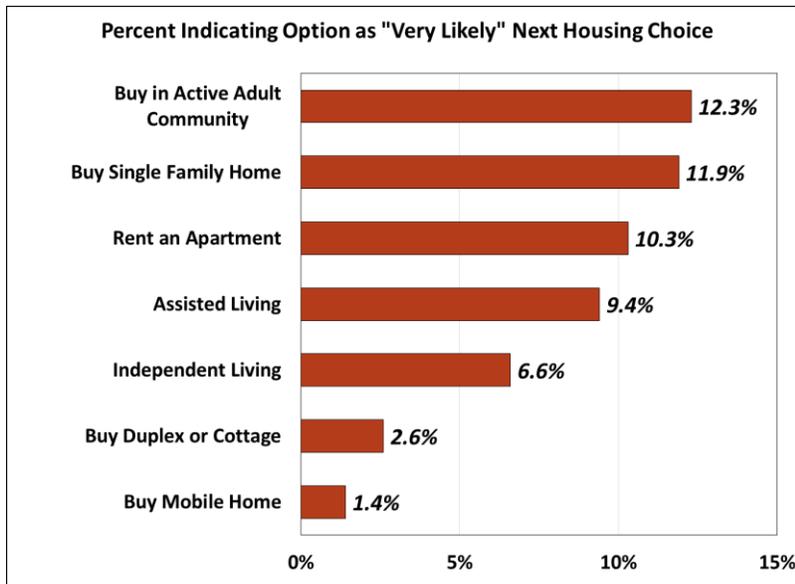
Active Interest in Purchase or Rental (Projected from Survey of Age 55+ Households)							
Place of Residence	Looked for Unit to Buy Last 2 Yrs (Survey)	Looked for Unit to Rent Last 2 Yrs (Survey)	Total Households Age 55+	Looking to Buy (Last 2 Yrs)	Looking to Rent (Last 2 Yrs)	Annual Looking to Buy	Annual Looking to Rent
Survey Area	6.2%	7.2%	7,417	460	534	230	267
Greater Ellsworth	7.3%	9.1%	3,497	255	318	128	159
City of Ellsworth	8.0%	7.5%	1,455	116	109	58	55

Potential Home Sales Activity (Projected from Survey of Age 55+ Households)							
Place of Residence	Listed Home Past 12 Mos. (Survey)	Intend to List Next 12 Mos. (Survey)	Total Homeowners Age 55+	Estimated Number of Age 55+ Owners Interested in Selling			Annual Looking to Buy (from above)
				Listed Home Past 12 Mos	Plan to List Next 12 Mos	Average Annual	
Survey Area	4.8%	6.4%	6,403	307	410	359	230
Greater Ellsworth	3.8%	6.0%	2,881	109	173	141	128
City of Ellsworth	3.6%	6.4%	1,114	40	71	56	58

For Greater Ellsworth, the estimates indicate that about 140 homeowners per year in the age 55+ group are interested in selling, and a similar number (about 130 per year) looking for some type of senior housing product.

About 160 per year are estimated to be seeking rental alternatives. Overall this suggests that up to 300 age 55+ households per year in Greater Ellsworth may be seeking an ownership or rental alternative.

b. Housing Product Preferences



The survey asked what type of home would area residents in the target age groups be most likely to choose if they were to move.

The percent of households who indicated that a choice would be "very likely" indicated about the same levels of interest in buying in an active adult community as there is in buying a different single family home (with no age restrictions or services specified).

While there was overlap between the types of ownership products respondents would consider, the active adult community was generally viewed as an option distinct from general single family ownership.

With respect to structure type, the relative interest in attached units (cottages or duplex units) and in mobile homes was comparatively weak. One reason for the light interest in cottages or duplexes may be that Hancock County has the lowest percentage of its housing stock in attached, duplex and multifamily housing units, and that these choices are less familiar to the local market.

Interest in renting an apartment included homeowners wishing to make a transition. Above an income of \$75,000 however, there was a lower level of interest in rental alternatives.

As expected, the highest interest in independent and assisted living was found among the oldest respondents, though these alternatives would also have appeal to younger respondents at some time in the future.

Overall, the highest general mobility (likelihood of moving or considering a transition) was in the 65-74 year old age segment of the senior market.

Percentage of Total Households in Survey with High Interest in Products

“Very Likely” Interest by Community Type (service level)

- 12.3% Active adult community (age restricted, with maintenance provided)
- 10.3% Rent an apartment
- 9.4% Assisted living (campus with personal care available)
- 6.6% Independent living (campus with dining and housekeeping services)

“Very Likely” Interest by Housing Unit Type

- 11.9% Different single family home (no restriction specified)
- 2.6% Buy a cottage or duplex unit
- 1.4% Buy a mobile home

In a separate question, 26% of households expressed some level of interest in an active adult community with maintenance services provided *if it were available today*. However only 5% indicated that they were “very interested” (probably more indicative of near-term demand).

In the 55-64 year old age group, 23% stated that they had some level of interest in such a community, but the percent who were “very interested” was only 1%. This suggests that, for the younger part of the market, such units will be of interest sometime in the future (when the respondent is older).

The highest ratings of selected design features desired in future residences included showed primary importance of:

- Bedroom and bath on first floor
- All living area on one floor
- Entry with minimal stairs
- Attached garage

c. Community and Neighborhood Preference

Ratings of selected community and neighborhood features with the highest importance to households if they were to move included:

- Near medical services and hospital
- Close to shopping
- Outdoor recreation/green space/trails nearby
- Walking distance to some services

The importance of being near medical services and close to shopping showed a significant increase in importance with age. Other open-ended responses contributed by respondents indicated the importance of a location that:

- Is near shops, services and church
- Offers privacy and good level of safety
- Allows pets

d. Greater Ellsworth Area as a Location Choice⁹

The survey asked respondents how likely it would be for them to choose Greater Ellsworth as a place of residence if they were to move within 2, 3-5 or 6-10 years from now. This helps estimate the proportion of households who would either remain in, or move to, a home in or near the City. The survey indicated that the likelihood of moving increases with the time horizon, as it is perceived by many to be a future rather than current need.

e. City of Ellsworth as Housing Choice

About half of the respondents indicate that they were either “somewhat likely” or “very likely” to consider Ellsworth itself as a place for their next residence.

The likelihood of choosing Ellsworth increased with age. As the region’s population continues to age, it is probable that Ellsworth will become an increasingly attractive location for senior housing products.

Uncertainty with respect to choosing Ellsworth as a residential location was expressed by 16.5% of respondents who indicated that their decision would depend on conditions, primarily relating to:

- Proximity to family
- Taxes in Ellsworth
- Personal health
- Cost of the housing

The detailed tables which follow summarize selected response frequencies to questions on housing preference, level of interest, and the likelihood that a next residence would be in Greater Ellsworth by time horizon. The response frequencies are also shown by age group and by income group, as these are seen at the key variables affecting the type of product and level of service needed as well as sensitivity to various price points.

⁹ In the survey, the meaning of “the Greater Ellsworth Area” was left to the judgment of the respondent. A list of particular communities was not specified for this question.

Responses are shown for those indicating a “likely” response (very or somewhat likely to consider the alternative), followed by a second data set for those who indicated that they were “very likely” to consider the alternative. The likelihood of choosing Greater Ellsworth for various time horizons was held constant for each of the two levels of interest.

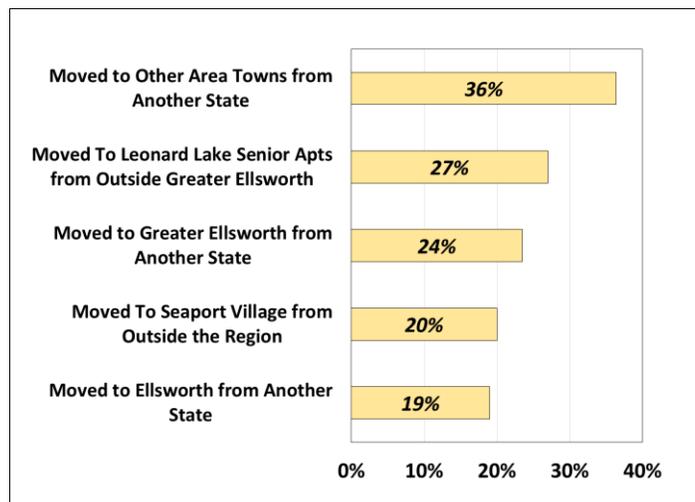
Based on other survey data, and under current conditions, we estimate that at least 55% of those who indicate an interest of making their next home in Greater Ellsworth would consider the City of Ellsworth as a residential location.

f. Inflow Potential

Respondents within the mail survey area comprise only part of the total potential market. Some reasonable level of inflow of other households can be expected from other parts of Hancock County, from other parts of Maine or from other states.

The inventory of local housing resources provides one indicator of inflow potential for the senior market. Ellsworth’s new Leonard Lake senior rental housing project, completed in 2014, reports that about 27% of its occupants moved in from outside the greater Ellsworth area. While the project has no project based rent subsidies, households must have incomes below 60% of AMFI.

The Inn at Seaport Village was completed in 2014, providing 30 new assisted living units in Ellsworth. About 20% of its current residents originated from outside the region. Of the project’s current waiting list (mid-June 2015) of nine, about 40% live outside the greater Ellsworth area. Part of the attraction of this facility is its Maine Care certification, which allows residents who could not afford private-pay costs to live there if they exhaust their assets.



The results of the mail survey showed that 19% of Ellsworth respondents first moved to the City from another state, compared to 36% of the respondents living in other towns in the survey area. About 24% of the respondents from Greater Ellsworth moved here from another state.

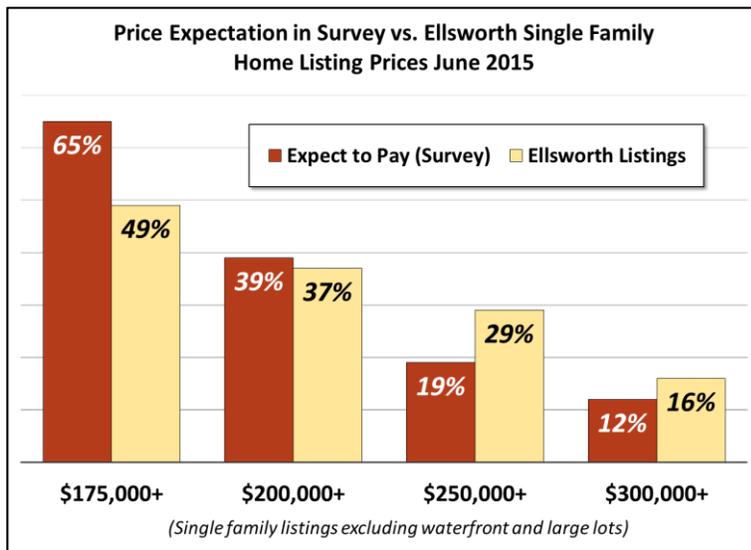
Based on these indicators, our projections of market potential use an inflow assumption of 25% to account for potential move-ins by non-resident households. This includes people wanting to be closer to their families, those moving back to the area because of product availability, and households who may have previously worked in or summered in the area.

g. Price Point Analysis of Rents and Home Prices



The charts on this page summarize the frequency of responses to questions on maximum rent or price that households would expect to pay.

Overall, about 39% of households in the survey indicated that they would expect to pay more than \$1,000 for a quality rental unit.



About two thirds of respondents with possible interest in ownership indicated that they would expect to pay at least \$175,000 or more for a home that meets their needs. (This price point is equivalent to the median sales price of a single family home in Ellsworth).

About 39% of target market households would expect to pay \$200,000 or more for ownership units that meet their needs.

This is very close to the actual percentage of listings of \$200,000 or more in Ellsworth (June 2015). But at a price of \$250,000, *only half as many households* would be comfortable with product pricing as would be the case if the unit were priced at \$200,000.

Detailed tables follow that show the percentage of survey respondents who indicated various maximum rent and price levels they would expect to pay for housing that meets their needs. These tables exclude households that were not interested in renting or purchasing, and those who did not respond to the question at all. Responses on rent levels are shown as *cumulative percentages* by ascending rent levels. Purchase price expectations are shown as percentages of the total *for selected price ranges*.

Rent and Price Expectations from the Housing Survey by Age Group

Maximum Rent Would Expect to Pay for Quality Rental Housing	55-64	65-74	75+	Total Sample
Up to \$750	25.0%	26.1%	36.0%	27.8%
Up to \$1,000	31.9%	36.4%	25.3%	32.7%
Up to \$1,250	19.0%	20.5%	16.0%	19.1%
Up to \$1,500	15.5%	7.4%	13.3%	11.2%
\$1,500 or More	8.6%	9.7%	9.3%	9.3%
Over \$1,000 For Rent	43.1%	37.5%	38.7%	39.5%
Maximum Price Range Would Expect to Pay for Ownership Product	55-64	65-74	75+	Total Sample
Up to \$175,000	37.5%	36.8%	32.9%	36.3%
\$175,000-\$199,999	33.3%	17.6%	30.6%	25.8%
\$200,000-\$249,999	14.3%	24.0%	20.0%	19.7%
\$250,000-\$299,999	7.1%	8.8%	5.9%	7.7%
\$300,000-\$349,999	2.4%	4.9%	4.7%	3.9%
\$350,000 or More	5.4%	10.3%	5.9%	7.7%
\$175,000 or More	62.5%	65.7%	67.1%	64.8%
\$200,000 or More	29.2%	48.0%	36.5%	38.9%
\$250,000 or More	14.9%	24.0%	16.5%	19.3%

Rent and Price Expectations from the Housing Survey by Income Range

Maximum Rent Would Expect to Pay for Quality Rental Housing	< \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	Total Sample
Up to \$750	80.4%	26.4%	17.3%	11.7%	28.0%
Up to \$1,000	7.1%	46.2%	36.0%	32.5%	33.3%
Up to \$1,250	8.9%	15.1%	33.3%	15.8%	18.2%
Up to \$1,500	3.6%	4.7%	10.7%	21.7%	11.5%
\$1,500 or More	0.0%	7.5%	2.7%	18.3%	9.0%
Over \$1,000 For Rent	12.5%	27.4%	46.7%	55.8%	38.7%
Maximum Price Range Would Expect to Pay for Ownership	< \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	Total Sample
Up to \$175,000	74.5%	52.8%	25.4%	22.4%	36.3%
\$175,000-\$199,999	15.7%	23.1%	40.4%	19.9%	25.8%
\$200,000-\$249,999	9.8%	16.7%	23.7%	19.3%	19.7%
\$250,000-\$299,999	0.0%	1.9%	4.4%	16.8%	7.7%
\$300,000-\$349,999	0.0%	1.9%	3.5%	6.2%	3.9%
\$350,000 or More	0.0%	3.7%	2.6%	16.1%	7.7%
\$175,000 or More	25.5%	47.2%	74.6%	78.3%	64.8%
\$200,000 or More	9.8%	24.1%	34.2%	58.4%	38.9%
\$250,000 or More	0.0%	7.4%	10.5%	39.1%	19.3%

h. Summary of Preference Indicators by Level of Interest

The tables which follow summarize the factors used to project levels of interest in various housing products based on survey results by age and by income. One series relies on the percentage of households that indicated a “very likely” interest in various housing products listed in the survey. A second series is based on the percentage of respondents who indicated that the housing choice was either “very likely or somewhat likely” to be their next housing choice.

Product "Very Likely" as Next Housing Choice, by Age Group

"Very Likely" Next Housing Choice	55-64	65-74	75+	Total Sample
By Type of Housing Unit				
Rent Apt or Home	10.0%	12.5%	6.9%	10.3%
Buy a Single Family Home	11.5%	16.7%	4.4%	11.9%
Buy Duplex or Cottage	0.4%	3.9%	3.4%	2.6%
Buy a Mobile Home	0.8%	0.6%	3.4%	1.4%
By Type of Community & Service Level				
Buy in Active Adult Community	6.9%	14.6%	15.2%	12.3%
Independent Living	1.5%	6.3%	13.7%	6.6%
Assisted Living	3.4%	8.7%	18.1%	9.4%
Interest in Active Adult Community if Available Now				
VeryInterested	1.1%	7.8%	5.9%	5.1%
Likely to Move to Product Choice if Available in Greater Ellsworth Within:				
Next Two Years	6.1%	17.3%	14.2%	12.9%
Three to Five Years	12.6%	26.0%	21.1%	20.4%
Six to Ten Years	45.6%	45.4%	23.0%	39.8%
Cumulative	64.3%	88.7%	58.3%	73.1%

Product "Very Likely" as Next Housing Choice, by Income Group

"Very Likely" Next Housing Choice	< \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	Total
By Type of Housing Unit					
Rent Apt or Home	11.0%	13.6%	14.1%	4.8%	10.7%
Buy a Single Family Home	9.1%	14.1%	4.0%	16.7%	11.3%
Buy Duplex or Cottage	3.7%	0.0%	6.8%	1.0%	2.7%
Buy a Mobile Home	3.7%	2.0%	0.0%	0.0%	1.3%
By Type of Community & Service Level					
Buy in Active Adult Community	24.4%	11.1%	9.6%	5.3%	12.0%
Independent Living	11.6%	5.0%	4.0%	4.8%	6.1%
Assisted Living	15.9%	5.5%	9.3%	7.2%	9.1%
Interest in Active Adult Community if Available Now					
Very Interested	7.3%	5.5%	5.1%	3.8%	5.3%
Likely to Move to Product Choice if Available in Greater Ellsworth					
Next Two Years	14.6%	16.6%	10.2%	10.0%	12.9%
Three to Five Years	23.8%	19.6%	25.4%	17.2%	20.4%
Six to Ten Years	32.0%	41.2%	49.7%	40.2%	39.8%
Cumulative total	70.4%	77.4%	85.3%	67.4%	73.1%

Product "Very or Somewhat Likely" Next Housing Choice by Age

"Likely" Next Housing Choice	55-64	65-74	75+	Total Sample
By Type of Housing Unit				
Rent Apt or Home	21.8%	30.1%	23.5%	25.8%
Buy a Single Family Home	39.1%	40.6%	15.7%	33.8%
Buy Duplex or Cottage	13.4%	17.3%	11.3%	14.5%
Buy a Mobile Home	6.1%	8.1%	6.4%	7.0%
By Type of Community & Service Level				
Buy in Active Adult Community	28.7%	40.6%	42.2%	37.1%
Independent Living	19.2%	33.1%	38.7%	30.0%
Assisted Living	21.8%	39.4%	47.5%	35.8%
Interest in Active Adult Community if Available Now				
Very or Somewhat Interested	23.4%	40.9%	26.5%	31.5%
Likely to Move to Product Choice if Available in Greater Ellsworth Within:				
Next Two Years	6.1%	17.3%	14.2%	12.9%
Three to Five Years	12.6%	26.0%	21.1%	20.4%
Six to Ten Years	45.6%	45.4%	23.0%	39.8%
Cumulative Total	64.3%	88.7%	58.3%	73.1%

Product "Very or Somewhat Likely" Next Housing Choice by Income Range

"Likely" Next Housing Choice	< \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	Total
By Type of Housing Unit					
Rent Apt or Home	28.7%	29.6%	31.6%	16.7%	26.3%
Buy a Single Family Home	19.5%	33.7%	36.7%	45.0%	34.4%
Buy Duplex or Cottage	12.2%	13.6%	20.9%	12.9%	14.8%
Buy a Mobile Home	6.1%	13.1%	6.8%	2.4%	7.1%
By Type of Community & Service Level					
Buy in Active Adult Community	50.0%	34.2%	38.4%	27.8%	36.8%
Independent Living	36.0%	23.6%	34.5%	28.2%	30.2%
Assisted Living	45.1%	28.6%	33.3%	36.4%	31.8%
Interest in Active Adult Community if Available Now					
Very or Somewhat Interested	32.9%	27.6%	32.8%	34.0%	31.5%
Likely to Move to Product Choice if Available in Greater Ellsworth					
Next Two Years	14.6%	16.6%	10.2%	10.0%	12.9%
Three to Five Years	23.8%	19.6%	25.4%	17.2%	20.4%
Six to Ten Years	32.0%	41.2%	49.7%	40.2%	39.8%
Cumulative total	70.4%	77.4%	85.3%	67.4%	73.1%

4. Projected Market Interest in Housing Products

The level of interest in various housing options was projected by BCM Planning, LLC using applying proportionate indicators from the survey sample to total households of the same age groups residing in the mail survey area. The objective was to estimate the number of households that would be interested in various housing products if they were available in Greater Ellsworth or in the City. The estimates incorporate an assumption of 25% inflow of other households from outside the Greater Ellsworth area. The components of these estimates included the following steps:

- Estimate total households by age and by income for entire survey area who are not already living in a senior development.
- Apply survey responses by age or by income to total households to estimate:
 - Number interested in Greater Ellsworth (2 yrs, 3-5 yrs, 6-10 yrs)
 - Households by age or by income for each product who would be “very interested”
 - Annualized estimates based on time horizon of likely movers
 - [Repeat for products at “very or somewhat likely” level of interest]
- Interest by price range or rent level estimated by applying income-specific responses to:
 - Purchase price range household would expect to pay; or
 - Maximum rent household would expect to pay for a quality apartment
- Add 25% to account for inflow (households moving in from outside the survey area)
- Estimate minimum City of Ellsworth potential at 55% of Greater Ellsworth projection

The indicated annual levels of interest from this model are summarized in the chart below. The more reliable figures for estimating those likely to buy or rent different housing are the columns based on households that were “very interested” in the various products. The projections of households who may be “very or somewhat interested” reflect a larger pool of prospects, but many are not as ready to move, nor are their preferences as clear. These households represent those *willing to consider* the various products, and who may have a less immediate interest in a new home or apartment.

The table below is an estimate of the number of buyers or renters expected to be active in the age 55+ housing markets, seeking ownership or rental options in typical year. It is not necessarily a guide to supportable project size, which much be evaluated according to financial feasibility criteria for individual sites and projects.

Projected Annual Household Interest in Selected Products for the 55+ Markets

Projected Annual Interest in 55+ Housing Products	Based on "Very Interested" Survey Responses		Based on "Very or Somewhat Interested" Survey Responses	
	Greater Ellsworth	City of Ellsworth	Greater Ellsworth	City of Ellsworth
Ownership Options (55+ Portion of Market)				
Single Family Home	52	29	160	88
Active Adult Community	60	33	184	99
Duplex or Cottage	13	7	71	39
Mobile Home	7	4	37	20
Home Priced at \$175,000+	36	20	110	61
Home Priced at \$200,000+	22	12	67	36
Home Priced at \$250,000+	11	6	35	18
Rental Options (55+ Portion of Market)				
Rent Apartment	54	30	171	74
<i>Market Rent > \$1,000</i>	21	12	53	28
Independent and Assisted Living*	46	28	226	120
<i>Market Rate or Private Pay</i>	22	14	114	61
Total Rental Options	100	58	397	194
<i>Subtotal "Market Rate"</i>	43	26	167	89
* There was considerable overlap between those who were very likely to choose assisted or independent living in the survey responses. This line is an adjusted estimate for a combined category that assumes a 70% overlap in response between the two options.				

For this summary table, the interest in independent and assisted living has been combined. Review of the survey results suggest that there is high overlap between those likely or very likely to consider these two options, suggesting that respondents may not recognize major distinctions between the two levels of service. For this reason, a combined category is shown and responses adjusted to 70% of the combined survey response for the two levels.

The subtotal of households who could afford “market rate” rental units or units with support services is estimated using a minimum income of \$35,000 for independent living and \$50,000 for assisted living.

Detailed worksheets follow, estimating the annual average demand estimates for various product types based on level of interest by age and by income. (Note that these detailed worksheets do not contain an adjustment for overlap between assisted and independent living choices).

Detail for Average Annual Households by "Very Likely" Product Choice

AVERAGE ANNUAL HOUSEHOLDS IN AGE 55+ PRODUCTS: "VERY INTERESTED" PLUS 25% INFLOW: AGE BASED ESTIMATE								
Time Horizon:	GREATER ELLSWORTH			CITY OF ELLSWORTH			LONG TERM AVERAGE ANNUAL	
	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	Greater Ellsworth	City of Ellsworth
Buy a Single Family Home	63	51	56	35	28	31	57	31
Buy Duplex or Cottage	15	12	9	8	7	5	12	7
Buy a Mobile Home	7	6	5	4	3	3	6	3
Buy in Active Adult Community	67	53	49	37	29	27	56	31
Independent Living	37	28	22	20	15	12	29	16
Assisted Living	52	40	33	29	22	18	42	23
Ownership Unit \$175,000+	42	34	34	23	19	19	37	20
Ownership Unit \$200,000+	25	20	20	14	11	11	22	12
Ownership Unit \$250,000+	12	10	10	7	5	5	11	6
Rent Apartment or Home	54	44	47	30	24	26	48	27
Would Pay Rent Over \$1,000	22	18	19	12	10	10	19	11

AVERAGE ANNUAL HOUSEHOLDS IN AGE 55+ PRODUCTS: "VERY INTERESTED" PLUS 25% INFLOW: INCOME BASED ESTIMATE								
Time Horizon:	GREATER ELLSWORTH			CITY OF ELLSWORTH			LONG TERM AVERAGE ANNUAL	
	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	Greater Ellsworth	City of Ellsworth
Buy a Single Family Home	62	47	47	34	26	26	52	29
Buy Duplex or Cottage	13	14	13	7	8	7	13	7
Buy a Mobile Home	9	7	5	5	4	3	7	4
Buy in Active Adult Community	72	58	50	40	32	28	60	33
Independent Living	35	29	25	19	16	14	30	16
Assisted Living	51	43	38	28	24	21	44	24
Ownership Unit \$175,000+	44	34	32	24	19	17	36	20
Ownership Unit \$200,000+	26	20	19	14	11	10	22	12
Ownership Unit \$250,000+	13	10	9	7	5	5	11	6
Rent Apartment or Home	62	51	48	34	28	26	54	30
Would Pay Rent Over \$1,000	25	20	19	14	11	11	21	12

Detail for Average Annual Households by "Very or Somewhat Likely" Product Choice

AVERAGE ANNUAL INTEREST IN AGE 55+ PRODUCTS: "VERY OR SOMEWHAT INTERESTED" PLUS 25% INFLOW: AGE BASED ESTIMATE								
Time Horizon:	GREATER ELLSWORTH			CITY OF ELLSWORTH			LONG TERM AVERAGE ANNUAL	
	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	Greater Ellsworth	City of Ellsworth
Buy a Single Family Home	174	143	164	96	79	90	160	88
Buy Duplex or Cottage	77	62	65	42	34	36	68	37
Buy a Mobile Home	37	30	31	20	17	17	33	18
Buy in Active Adult Community	198	158	156	109	87	86	171	94
Ownership Unit \$175,000+	121	98	104	66	54	57	108	59
Ownership Unit \$200,000+	73	59	62	40	32	34	65	35
Ownership Unit \$250,000+	35	29	30	19	16	17	31	17
Rent Apartment or Home	137	110	113	75	61	62	120	66
Would Pay Rent Over \$1,000	55	44	45	30	24	25	48	26
Independent Living	163	128	121	90	70	67	137	76
Assisted Living	194	153	142	107	84	78	163	90

AVERAGE ANNUAL INTEREST IN AGE 55+ PRODUCTS: "VERY OR SOMEWHAT INTERESTED" PLUS 25% INFLOW: INCOME BASED ESTIMATE								
Time Horizon:	GREATER ELLSWORTH			CITY OF ELLSWORTH			LONG TERM AVERAGE ANNUAL	
	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	2-Yr Avg	3-5 Yr Avg	6-10 Yr Avg	Greater Ellsworth	City of Ellsworth
Buy a Single Family Home	180	150	150	99	83	83	160	88
Buy Duplex or Cottage	79	69	66	43	38	36	71	39
Buy a Mobile Home	44	33	32	24	18	18	36	20
Buy in Active Adult Community	207	172	159	114	95	87	179	99
Ownership Unit \$175,000+	126	105	100	69	58	55	110	61
Ownership Unit \$200,000+	75	63	60	42	35	33	66	36
Ownership Unit \$250,000+	37	31	29	20	17	16	32	18
Rent Apartment or Home	149	124	116	82	68	64	130	71
Would Pay Rent Over \$1,000	58	48	45	32	27	25	51	28
Independent Living	163	139	130	90	76	72	144	79
Assisted Living	193	161	151	106	89	83	168	93

a. Ownership Units

Consumer interest within the age 55+ markets is clearly centered on a preference for a single family housing, or housing within an active adult community. Average annual interest in a single family home is estimated at 29 per year in Ellsworth and 52 per year in Greater Ellsworth based on “very interested” households.

The level of interest in active adult community ownership units is about the same at 33 per year for Ellsworth and 60 per year in Greater Ellsworth. These numbers decline with increasing price levels.

The level of interest in attached cottage or duplex style housing is much more limited. The survey results indicate that consumer interest in new ownership housing for this market should be addressed either in a single family development with appropriate home design features or within an active adult community of single family homes with maintenance services provided by an association.¹⁰

Other research conducted for this study indicates that where active adult ownership units are located on a campus that also offers independent and assisted living support, the ownership units are rarely occupied by households under the age of 75.

Therefore, freestanding single family developments may be more attractive to the younger part of the market (age 55 to 74). It would be possible to reach prospective buyers either with an age-restricted development or in a development that is not age restricted, but which provides floor plans appropriate to older buyers.

One advantage to developing active adult ownership units, particularly as single family detached homes, is that the pace of construction can respond to the actual level of consumer demand as it matures. Multifamily projects must generally be scaled to a one year absorption time for each major building or phase of development.

The average single family home in Ellsworth has about 1,500 square feet of living area. New units that are downsized to about 1,100 square feet (most or all living area on one floor) with options available up to 1,500 square feet should be appropriate to the Ellsworth market.

If it were possible to provide a new unit at a price of about \$175,000 it would have a strong attraction to local households, since the purchase prices would be about the same as the

¹⁰ Single family development of this type could be developed as a standard subdivision on individual lots with services provided by an association, or as a condominium or cooperative development. Senior cooperative ownership within this region is found within developments that include active adult attached cottages in a campus setting. Purchasers in a cooperative will own a stock certificate rather than real estate, but will still enjoy the tax advantages of mortgage interest and property tax deductions. Additional consumer education may be required to attract buyers to this form of ownership in Ellsworth.

median sale price of an existing single family home in Ellsworth. This would allow the household to trade even on their existing equity.

Pricing at \$200,000 should also support a strong buyer pool, but the survey indicates that a price level of \$250,000 may yield only half as many interested buyers as a unit priced at \$200,000.

b. Apartments (No Support Services Specified)

Annual interest in quality (luxury) rental apartments is also indicated at about 30 units per year in Ellsworth, or about 54 for Greater Ellsworth. Based on the survey results, we estimate that about 40% of interested households would be willing to pay a gross rent of over \$1,000 per month for a high quality or “luxury” rental unit. Most of this demand would be the result of homeowners choosing to move to an apartment, but interest in rental housing is not strong among those with incomes of \$75,000 or more.

It may be possible to leverage market rental units within a larger campus style development that includes apartments with support services (independent and assisted living), or to build new Low Income Housing Tax Credit (LIHTC) developments that include *market rate* units (with no upper limits on income) within the project.

Still another alternative for rental housing is to develop accessible apartments (with elevators) that are one and two bedroom units without any age restrictions on occupancy. This broadens the market to all age groups, and enables such developments to serve both older residents as well as to support the expansion of the younger labor force.

c. Apartments with Supportive Services

Because there was a high degree of overlap between those indicating interest in independent versus assisted living, this category has been estimated at the combined total for the two options times an adjustment of 70%.

Apartments with supportive services (independent and assisted living) are most often provided within multifamily developments that include both levels of service. Interest in apartments with these supportive services is estimated at about 28 units per year in Ellsworth, and 46 units for the Greater Ellsworth region.

If all units with support services were available only at full market rates, only about half as many households may be able to afford them. This reflects an assumption that households would need an annual income of about \$35,000 per year to support independent living or \$50,000 per year for private-pay assisted living. Actual ability to afford such units will depend not only on income, but also on the potential for asset spend-down.

c. Housing Campus with Mix of Units

A larger campus that incorporates all of the above unit types may also be considered. A combined development could include general rental units and rental housing with support services.

Total annual interest in these combined options would be about 58 units for Ellsworth, or 100 units across Greater Ellsworth. If the units were all *market rate*, then the indicated scale would be about 26 for Ellsworth and 43 across Greater Ellsworth. The number of active adult ownership units that could be incorporated would depend on the price points achievable by a particular development.

In a campus development that includes central buildings with supported living apartments, we would expect the annual market to be somewhat smaller than the above estimates. Actual experience in the region indicates that mixed developments tend to attract only the oldest purchasers (75+) to their active adult cottage units.

Alternatives that might capture the younger parts of the market may include:

- Greater separation between the active adult ownership sites and the supportive living components of the campus, or
- Freestanding active adult ownership condos, cooperatives, or subdivisions that are not within a campus that includes supportive care units.

5. Alternatives to Age Restricted Housing

Much of the senior population will need to rely on the sale of an existing home to support a move to a different home. The demographic projections show the potential for a declining number of labor force households (under age 65) in Hancock County. This age shift may limit the level of demand for the purchase of existing homes that seniors will want to sell.

Ellsworth is in a position to capture an increased share of the County's population and households, particularly with an aging regional population. To accomplish this, Ellsworth and the Greater Ellsworth area will need to provide a housing stock that is sufficiently balanced to support in-migration for all age groups that will support a demand for the homes that older residents want to sell.

Developers and policymakers should be aware that with the exception of independent and assisted living developments, other ownership or rental housing that is designed to accommodate an older population will also be appropriate to meet many of the housing needs of labor force households as well.

For example, a quality rental housing development of predominantly one and two bedroom units, served by an elevator, can serve a portion of the needs of the senior market without any age restrictions on occupancy.

Many of the “aging in place” and “age friendly community” initiatives across the country are aimed at the need to provide opportunities for intergenerational socialization and connection to the community at large. To some degree, reliance on age-restricted developments to serve senior housing needs can work contrary to these goals.

For the many senior households who are not interested in moving to a different housing unit, there is both a need and opportunity for provide for adaptive improvements to existing homes that will lengthen their useful life for older occupants. These may include the installation of grab bars, handrails, ramps or other home improvements that make it easier for those with increasing disability to remain in their homes longer.

Local housing initiatives seeking expansion of age-restricted or retirement housing options should therefore be balanced with adequate opportunities for the labor force. In-migration of the labor force is needed to retain and attract jobs, and to help drive market activity that is sufficient to enable older residents to sell their homes and pursue more suitable housing alternatives.

J. Use and Limitations of this Study

This report has been prepared for a broad audience of users including local residents, City of Ellsworth officials and administrative staff, area health and human service providers, prospective housing developers, and funding agencies.

The study is intended to provide a better understanding of market opportunities in the age 55 and older housing markets based on literature review of national data, area demographic analysis, and evaluation of consumer preferences through a comprehensive area household survey.

This report should not be construed or represented as a feasibility study in support of any individual project or development. The study is not intended as a substitute for a project-specific market study and financial analysis of a particular location, project size, unit design, pricing or rent structure.

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APPENDIX

1. DECENNIAL CENSUS DEMOGRAPHICS – ELLSWORTH 1990-2010

ELLSWORTH POPULATION, HOUSING AND HOUSEHOLDS	1990	2000	2010	Change 1990 to 2000	Change 2000 to 2010
Total Population	5,975	6,456	7,741	481	1,285
In Group Quarters	193	235	230	42	-5
Institutionalized	173	178	180	5	2
Other Group Quarters	20	57	50	37	-7
Median Age	36.3	40.5	41.9	4.2	1.4
Population Age 55+	1,534	1,732	2,374	198	642
Population Age 65+	976	1,110	1,249	134	139
Population Age 75+	508	517	623	9	106
Population Age 85+	185	163	187	-22	24
Persons in Households	5,782	6,221	7,511	439	1,290
Households	2,416	2,755	3,305	339	550
Average Household Size	2.39	2.26	2.27	-0.14	0.01
Total Housing Units	3,202	3,442	4,240	240	798
Non-Seasonal Units	2,636	2,899	3,594	263	695
Seasonal/Recreational Units	566	543	646	-23	103
% of Total Housing Units	18%	16%	15%		
Ownership Vacancy Rate	1.6%	1.5%	3.5%		
Rental Vacancy Rate	5.8%	4.7%	6.8%		
Occupied Housing Units	2,416	2,755	3,305	339	550
Owner Occupied	1,612	1,880	2,166	268	286
Renter Occupied	804	875	1,139	71	264
Percent Own	67%	68%	66%		
Percent Rent	33%	32%	34%		

Note: The decennial Census provides the only 100% count of population, households and housing.

All other interim estimates issued by the Census Bureau such as the American Community Survey are averaged from periodic statistical surveys.

ELLSWORTH HOUSEHOLDS BY AGE AND TENURE	1990	2000	2010	Change 1990 to 2000	Change 2000 to 2010
Owner occupied					
Under 25	29	18	25	-11	7
25 to 34 years	237	205	195	-32	-10
35 to 44 years	387	401	392	14	-9
45 to 54 years	298	466	488	168	22
55 to 64 years	277	300	521	23	221
65 to 74 years	213	294	293	81	-1
75 years and over	171	196	252	25	56
Total Homeowners	1,612	1,880	2,166	268	286
Age 65+	384	490	545	106	55
% of All Owners	24%	26%	25%		
Renter occupied					
Under 25	132	103	120	-29	17
25 to 34 years	221	216	245	-5	29
35 to 44 years	112	184	180	72	-4
45 to 54 years	68	120	190	52	70
55 to 64 years	52	64	161	12	97
65 to 74 years	90	72	93	-18	21
75 years and over	129	116	150	-13	34
Total Renters	804	875	1,139	71	264
Age 65+	219	188	243	-31	55
% of All Renters	27%	21%	21%		
Total Households					
Under 25	161	121	145	-40	24
25 to 34 years	458	421	440	-37	19
35 to 44 years	499	585	572	86	-13
45 to 54 years	366	586	678	220	92
55 to 64 years	329	364	682	35	318
65 to 74 years	303	366	386	63	20
75 years and over	300	312	402	12	90
Total Households	2,416	2,755	3,305	339	550
Age 65+	603	678	788	75	110
% of All Households	25%	25%	24%		
Percent Rent by Age Group					
Under 25	82%	85%	83%		
25 to 34 years	48%	51%	56%		
35 to 44 years	22%	31%	31%		
45 to 54 years	19%	20%	28%		
55 to 64 years	16%	18%	24%		
65 to 74 years	30%	20%	24%		
75 years and over	43%	37%	37%		
Age 65+	36%	28%	31%		

2. DECENNIAL CENSUS DEMOGRAPHICS – HANCOCK COUNTY 1990-2010

HANCOCK COUNTY POPULATION, HOUSING AND HOUSEHOLDS	1990	2000	2010	Change 1990 to 2000	Change 2000 to 2010
Total Population	46,948	51,791	54,418	4,843	2,627
In Group Quarters	1,499	1,307	1,176	-192	-131
Institutionalized	502	415	318	-87	-97
Other Group Quarters	997	892	858	-105	-34
Median Age	35.8	40.7	46.3	4.9	5.6
Population Age 55+	10,657	13,747	19,176	3,090	5,429
Population Age 65+	6,155	8,285	9,937	2,130	1,652
Population Age 75+	3,320	3,844	4,474	524	630
Population Age 85+	885	1,067	1,275	182	208
Persons in Households	45,449	50,484	53,242	5,035	2,758
Households	18,342	21,864	24,221	3,522	2,357
Average Household Size	2.48	2.31	2.20	-0.17	-0.11
Total Housing Units	30,396	33,945	40,184	3,549	6,239
Non-Seasonal Units	20,260	23,273	27,050	3,013	3,777
Seasonal/Recreational Units	10,136	10,672	13,134	536	2,462
% of Total Housing Units	33%	31%	33%		
Ownership Vacancy Rate	2.1%	1.9%	3.6%		
Rental Vacancy Rate	8.6%	5.9%	11.8%		
Occupied Housing Units	18,342	21,864	24,221	3,522	2,357
Owner Occupied	13,876	16,550	18,019	2,674	1,469
Renter Occupied	4,466	5,314	6,202	848	888
Percent Own	76%	76%	74%		
Percent Rent	24%	24%	26%		

HANCOCK COUNTY HOUSEHOLDS BY AGE AND TENURE	1990	2000	2010	Change 1990 to 2000	Change 2000 to 2010
Owner occupied					
Under 25	234	193	192	-41	-1
25 to 34 years	2,078	1,607	1,226	-471	-381
35 to 44 years	3,242	3,471	2,530	229	-941
45 to 54 years	2,350	4,014	4,142	1,664	128
55 to 64 years	2,355	2,837	4,708	482	1,871
65 to 74 years	2,082	2,455	2,943	373	488
75 years and over	1,535	1,973	2,278	438	305
Total Homeowners	13,876	16,550	18,019	2,674	1,469
Age 65+	3,617	4,428	5,221	811	793
% of All Owners	26%	27%	29%		
Renter occupied					
Under 25	616	604	658	-12	54
25 to 34 years	1,403	1,294	1,256	-109	-38
35 to 44 years	795	1,164	1,007	369	-157
45 to 54 years	365	832	1,058	467	226
55 to 64 years	300	417	841	117	424
65 to 74 years	395	422	522	27	100
75 years and over	592	581	860	-11	279
Total Renters	4,466	5,314	6,202	848	888
Age 65+	987	1,003	1,382	16	379
% of All Renters	22%	19%	22%		
Total Households					
Under 25	850	797	850	-53	53
25 to 34 years	3,481	2,901	2,482	-580	-419
35 to 44 years	4,037	4,635	3,537	598	-1,098
45 to 54 years	2,715	4,846	5,200	2,131	354
55 to 64 years	2,655	3,254	5,549	599	2,295
65 to 74 years	2,477	2,877	3,465	400	588
75 years and over	2,127	2,554	3,138	427	584
Total Households	18,342	21,864	24,221	3,522	2,357
Age 65+	4,604	5,431	6,603	827	1,172
% of All Households	25%	25%	27%		
Percent Rent by Age Group					
Under 25	72%	76%	77%		
25 to 34 years	40%	45%	51%		
35 to 44 years	20%	25%	28%		
45 to 54 years	13%	17%	20%		
55 to 64 years	11%	13%	15%		
65 to 74 years	16%	15%	15%		
75 years and over	28%	23%	27%		
Age 65+	21%	18%	21%		

3. COMMUTING PATTERN - MUNICIPAL LEVEL ESTIMATES BASED ON A SAMPLE

ELLSWORTH RESIDENTS BY PLACE OF WORK (2006-2010 ACS Workflow Data, Based on a Sample)			
Place of Work	Ellsworth Residents Who Work in this Place	% of Ellsworth Working Residents	Cumulative Percentage
Ellsworth	2,117	55.0%	55.0%
Bar Harbor	505	13.1%	68.2%
Bangor	232	6.0%	74.2%
Mount Desert	178	4.6%	78.8%
Bucksport	165	4.3%	83.1%
Southwest Habor	82	2.1%	85.2%
Blue Hill	70	1.8%	87.1%
Trenton	66	1.7%	88.8%
Brewer	60	1.6%	90.3%
Tremont	54	1.4%	91.7%
Stonington	41	1.1%	92.8%
Hancock	30	0.8%	93.6%
Surry	28	0.7%	94.3%
Orland	27	0.7%	95.0%
Hampden	24	0.6%	95.6%
Cranberry Isles	22	0.6%	96.2%
Orono	22	0.6%	96.8%
Deer Isle	20	0.5%	97.3%
Camden	15	0.4%	97.7%
Holden	15	0.4%	98.1%
Gouldsboro	14	0.4%	98.4%
Waltham	13	0.3%	98.8%
Otis	11	0.3%	99.1%
Veazie	11	0.3%	99.4%
Lamoine	9	0.2%	99.6%
Brooklin	8	0.2%	99.8%
Belfast	8	0.2%	100.0%
TOTAL WORKING RESIDENTS	3,847		

PERSONS WORKING IN ELLSWORTH BY PLACE OF RESIDENCE (2006-2010 ACS Workflow Sample Data)

Place of Residence	Work in Ellsworth	% of Persons Working in Ellsworth	Cumulative Percentage
Ellsworth	2,117	30.8%	30.8%
Lamoine	366	5.3%	36.1%
Surry	348	5.1%	41.1%
Bar Harbor	306	4.4%	45.6%
Hancock	282	4.1%	49.7%
Bucksport	270	3.9%	53.6%
Sullivan	253	3.7%	57.3%
Franklin	247	3.6%	60.9%
Blue Hill	230	3.3%	64.2%
Trenton	211	3.1%	67.3%
Gouldsboro	174	2.5%	69.8%
Brewer	142	2.1%	71.9%
Dedham	122	1.8%	73.6%
Mariaville	122	1.8%	75.4%
Orland	113	1.6%	77.0%
Bangor	110	1.6%	78.6%
Mount Desert	109	1.6%	80.2%
Eastbrook	98	1.4%	81.7%
Sedgwick	75	1.1%	82.7%
Penobscot	70	1.0%	83.8%
Holden	65	0.9%	84.7%
Glenburn	57	0.8%	85.5%
Waltham	55	0.8%	86.3%
Cherryfield	52	0.8%	87.1%
Orrington	51	0.7%	87.8%
Otis	48	0.7%	88.5%
Winter Harbor	47	0.7%	89.2%
Milbridge	46	0.7%	89.9%
Steuben	39	0.6%	90.4%
Prospect	33	0.5%	90.9%
Southwest Harbor	32	0.5%	91.4%
Brooklin	30	0.4%	91.8%
Deer Isle	29	0.4%	92.2%
Brooksville	28	0.4%	92.6%
Sorrento	27	0.4%	93.0%
Augusta	24	0.3%	93.4%
Winterport	24	0.3%	93.7%
Harrington	23	0.3%	94.1%
Tremont	22	0.3%	94.4%
Newport	22	0.3%	94.7%
Sanford	21	0.3%	95.0%
Stockton Springs	20	0.3%	95.3%
All Other Places (<20 ea.)	323	4.7%	100.0%
Total Working in Ellsworth	6,883	100.0%	

**4. HUD SPECIAL TABULATIONS FOR HANCOCK COUNTY
(HOUSEHOLDS BY AGE, INCOME, TENURE AND HOUSEHOLD SIZE)**

HANCOCK COUNTY HOUSEHOLD INCOME BY HOUSEHOLD SIZE - 2012 - TOTAL						
ALL HOUSEHOLDS	Persons In Household					
	Total	1	2	3	4	5+
TOTAL	23,650	7,035	9,600	3,750	2,265	1,000
Less than \$9,999	1,660	1,160	275	125	60	50
\$10,000 - \$14,999	1,430	985	330	80	14	25
\$15,000 - \$19,999	1,610	970	415	75	105	45
\$20,000 - \$24,999	1,450	760	440	80	145	25
\$25,000 - \$29,999	1,345	480	510	180	150	19
\$30,000 - \$34,999	1,230	510	455	200	39	29
\$35,000 - \$39,999	1,430	490	550	205	145	39
\$40,000 - \$44,999	1,075	205	475	280	95	29
\$45,000 - \$49,999	1,055	260	480	190	85	40
\$50,000 - \$59,999	2,050	385	975	370	185	140
\$60,000 - \$74,999	2,570	335	1,330	460	325	120
\$75,000 - \$99,999	3,060	260	1,490	710	440	160
\$100,000 - \$124,999	1,530	70	815	309	230	115
\$125,000 - \$149,999	1,065	100	475	235	139	105
\$150,000 - \$199,999	610	40	274	170	80	44
\$200,000 or more	485	30	320	80	30	20

HANCOCK COUNTY HOUSEHOLD INCOME BY HOUSEHOLD SIZE - 2012 - AGE UNDER 62						
HOUSEHOLDS UNDER AGE 62	Persons In Household					
	Total	1	2	3	4	5+
TOTAL	16,055	3,680	5,725	3,440	2,225	985
Less than \$9,999	1,145	720	195	125	60	50
\$10,000 - \$14,999	805	395	285	80	14	25
\$15,000 - \$19,999	840	430	195	70	105	45
\$20,000 - \$24,999	845	320	270	80	145	25
\$25,000 - \$29,999	800	195	265	175	145	19
\$30,000 - \$34,999	705	245	225	170	39	29
\$35,000 - \$39,999	1,040	375	280	200	145	39
\$40,000 - \$44,999	725	85	285	235	95	29
\$45,000 - \$49,999	740	160	290	185	80	30
\$50,000 - \$59,999	1,475	315	505	340	175	140
\$60,000 - \$74,999	1,920	180	910	395	320	115
\$75,000 - \$99,999	2,405	155	985	670	435	160
\$100,000 - \$124,999	1,150	50	500	264	230	115
\$125,000 - \$149,999	775	45	259	220	134	105
\$150,000 - \$199,999	435	15	129	170	75	44
\$200,000 or more	260	4	130	75	30	20

HANCOCK COUNTY HOUSEHOLD INCOME BY HOUSEHOLD SIZE - 2012 - AGE 62 +						
HOUSEHOLDS AGE 62 OR OLDER	Persons In Household					
	Total	1	2	3	4	5+
TOTAL	7,599	3,355	3,875	310	44	15
Less than \$9,999	510	440	75	0	0	0
\$10,000 - \$14,999	625	585	40	0	0	0
\$15,000 - \$19,999	770	545	215	10	0	0
\$20,000 - \$24,999	610	440	169	0	0	0
\$25,000 - \$29,999	545	285	245	4	4	0
\$30,000 - \$34,999	520	265	225	30	0	0
\$35,000 - \$39,999	385	114	265	4	0	0
\$40,000 - \$44,999	350	115	189	45	0	0
\$45,000 - \$49,999	315	105	190	4	4	10
\$50,000 - \$59,999	575	65	470	30	10	0
\$60,000 - \$74,999	650	155	420	65	4	4
\$75,000 - \$99,999	655	105	505	40	8	0
\$100,000 - \$124,999	385	20	315	54	0	4
\$125,000 - \$149,999	290	55	215	15	4	0
\$150,000 - \$199,999	175	30	145	4	4	0
\$200,000 or more	225	25	190	4	0	0

HANCOCK COUNTY HOUSEHOLD INCOME BY HOUSEHOLD SIZE - 2012 - AGE 62-74						
HOUSEHOLDS AGE 62 TO 74	Persons In Household					
	Total	1	2	3	4	5+
TOTAL	4,713	1,900	2,505	265	39	4
Less than \$9,999	245	200	50	0	0	0
\$10,000 - \$14,999	330	320	4	0	0	0
\$15,000 - \$19,999	350	245	94	4	0	0
\$20,000 - \$24,999	365	275	90	0	0	0
\$25,000 - \$29,999	330	180	135	4	4	0
\$30,000 - \$34,999	280	165	90	30	0	0
\$35,000 - \$39,999	264	99	165	0	0	0
\$40,000 - \$44,999	220	75	99	45	0	0
\$45,000 - \$49,999	200	50	145	4	4	0
\$50,000 - \$59,999	350	45	270	30	4	0
\$60,000 - \$74,999	489	99	330	50	4	4
\$75,000 - \$99,999	520	80	400	35	8	0
\$100,000 - \$124,999	319	10	265	44	0	4
\$125,000 - \$149,999	195	35	145	15	4	0
\$150,000 - \$199,999	115	10	100	0	4	0
\$200,000 or more	155	25	125	4	0	0

HANCOCK COUNTY HOUSEHOLD INCOME BY HOUSEHOLD SIZE - 2012 - AGE 75+						
HOUSEHOLDS AGE 75 OR OLDER	Persons In Household					
	Total	1	2	3	4	5+
TOTAL	2,879	1,450	1,370	45	4	10
Less than \$9,999	270	240	25	0	0	0
\$10,000 - \$14,999	300	265	35	0	0	0
\$15,000 - \$19,999	420	295	120	4	0	0
\$20,000 - \$24,999	245	165	79	0	0	0
\$25,000 - \$29,999	215	105	110	0	0	0
\$30,000 - \$34,999	245	100	140	4	0	0
\$35,000 - \$39,999	120	15	100	4	0	0
\$40,000 - \$44,999	135	45	90	0	0	0
\$45,000 - \$49,999	115	55	50	0	0	10
\$50,000 - \$59,999	225	25	195	4	4	0
\$60,000 - \$74,999	160	60	90	15	0	0
\$75,000 - \$99,999	130	25	100	4	0	0
\$100,000 - \$124,999	70	10	50	4	0	0
\$125,000 - \$149,999	95	25	70	0	0	0
\$150,000 - \$199,999	65	14	45	4	0	0
\$200,000 or more	70	4	65	0	0	0

10. Does anyone in your household act as a caregiver for a relative in the area?

- Yes, in my home Yes, in their home No

11. How do you get to work, shopping, services, medical appointments, etc.? *Check all that apply.*

- Drive myself Taxi or paid driver
 Get a ride from friends or family Use MaineCare transportation service
 Use the bus / shuttle Other (please specify): _____
 Get a ride from a volunteer driving organization (Friends in Action, WHCA, Island Connection, etc.)

PREFERRED LOCATION AND HOME FEATURES

12. If you were to move to another residence, how important would each of the following community or neighborhood features be to you? *Please tick one box for each part of the question (A through G).*

	1 Not important at all	2 Not very important	3 Neutral	4 Somewhat important	5 Very important
A. Close to shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Near cinemas, entertainment & cultural activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Educational opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Near medical services and hospital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Outdoor recreation/green space/trails nearby	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Walking distance to some services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. How important would these housing unit features be if you were to move to another residence?

Please tick one box for each part of the question (A through F).

	1 Not important at all	2 Not very important	3 Neutral	4 Somewhat important	5 Very important
A. Entry with minimal stairs or at grade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. All living area on one floor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Bedroom and bath on 1 st floor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Home office space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Attached garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Detached garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Over the past two years, have you searched for and / or visited any type of active adult (55+) community, retirement community or senior housing developments...
- A. For yourself? Yes, for a unit to buy Yes, for a unit to rent No
- B. For a parent or other relative? Yes, for a unit to buy Yes, for a unit to rent No

15. If you are a homeowner:

- A. Have you listed your home for sale during the past 12 months? Yes No
- B. If “no,” do you intend to offer it for sale during the next 12 months? Yes No

16. Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence. *Please tick one box for each part of the question (A through G).*

	1 Not at all likely	2 Not very likely	3 Neutral	4 Somewhat likely	5 Very likely
A. Rent an apartment or home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Buy a different single family home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Buy a duplex or attached “cottage” unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Buy a mobile home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Live within an active adult community limited to people 55 or older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Live in a retirement housing campus that offers dining and housekeeping services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Live in a retirement housing campus that offers personal care services that you may need as you get older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. If a new home were available today in an active adult community (ages 55 and over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?

	1 Not interested at all	2 Not very interested	3 Neutral	4 Somewhat interested	5 Very interested
A. As a year-round home?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. As a summer residence only?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. If you were to buy a different home, what is the maximum *you would expect to pay* for a new housing unit if it had all of the features you would like to have?

- Up to \$175,000 \$175,000-\$199,999 \$200,000-\$249,999 \$250,000-\$299,999
 300,000-\$349,999 \$350,000 or more No interest in new home

19. If new rental housing with luxury features were available today in a good location, what is the maximum *you would expect to pay* in monthly rent (including heat and hot water)?

- Up to \$750 Up to \$1,000 Up to \$1,250 Up to \$1,500 \$1,500 or more
 No interest in renting

20. If new housing had the features you want and was affordable and available, how likely is it that you would move to a new home in the *Greater Ellsworth area* in the coming years? Please tick one box for each part of the question (A through C).

	1 Not at all likely	2 Not very likely	3 Neutral	4 Somewhat likely	5 Very likely
A. In the next 2 years?	<input type="checkbox"/>				
B. In the next 3-5 years?	<input type="checkbox"/>				
C. In the next 6-10 years?	<input type="checkbox"/>				

D. If it is unlikely you would consider moving within 10 years, why is that?

21. A. If housing with the features you are looking for were affordable to you, how likely is it that you would consider *Ellsworth* as a place for your next residence?

1 – Not likely at all 2 - Not very likely 3 – It depends 4 - Somewhat likely 5 -Very likely

B. If you answered “it depends,” what would the choice depend on?

C. If you answered “not likely” or “not very likely,” what is the principal reason?

22. For tabulation purposes, which of the following income ranges best approximates your annual household income for 2014 from all sources?

Under \$25,000 \$25,000-\$49,999 \$50,000-\$74,999 \$75,000-\$99,999 \$100,000 or more

DRAWING FOR HANNAFORD GIFT CARDS

If you would like to be entered in the drawing to win one of three Hannaford \$75 gift cards, please enter your name, telephone number, and mailing address below:

Name: _____ Phone #: (____) ____ - ____
 Mailing Address Street: _____ City/Town: _____ State: ____ Zip Code: _____

Please return your completed survey as soon as possible and no later than July 17th.



P. O. Box 723 Yarmouth, Maine 04096
(207) 749-5217 bmayber1@maine.rr.com

October 15, 2015

Ms. Michele Gagnon, City Planner
City of Ellsworth
One City Hall Plaza
Ellsworth, Maine 04605

Re: Senior Housing Study – Review of Unified Development Ordinance Provisions

Dear Michele:

As part of the above study, I've reviewed selected portions of the Ellsworth unified development ordinance with respect to possible impediments to development of various forms of senior housing. This review does not include a review of land availability or site suitability, but centers on selected ordinance sections:

- Definitions and related regulations
- Principal buildings on one lot
- Permitted uses, density and dimensional standards
- Parking requirements

In the housing analysis and survey, we found potential demand for active adult community developments, single family housing including those with maintenance services, as well as rental housing and congregate/assisted living. Some senior communities contain a mix of structure types including single family, attached, and multifamily units. Others may include age-restricted housing units within a traditional single family subdivision, or in single family or attached condominium or cooperative units on a single parcel.

1. Definitions and Related Regulations

Age-restricted housing is generally created using familiar types of structures, but which are developed with deed covenants that restrict occupancy by age. Ownership options may include condominium or cooperative units, or single family units on individual lots.

In my opinion, it is neither necessary nor desirable to create special definitions of age restricted housing, active adult communities or other forms of senior housing to create special land use categories. Special overlay districts have been created in some communities to enable multifamily senior housing in areas in which multifamily housing that is not age-restricted is not a permitted use. My view is that such districts are inappropriate as land use controls, because they seek to regulate the age of occupants who may live in a particular type of structure or in select areas of the community.

Questions pertaining to the relationship between ordinance definitions and existing regulations are discussed below.

a. Congregate and Assisted Living

The definition of “Boarding House, Congregate, Assisted Living” also comprises a use classification within the table of uses. Such units are allowed in the Downtown, Urban, Neighborhood and Rural districts, but not in the Commercial district where other forms of multifamily housing *are* permitted. Consideration might be given to allowing these uses in a commercial district to be consistent with the provisions for multifamily housing in general.

The ordinance contains a requirement that any new dwelling unit have at least 500 square feet of living area. A dwelling unit is defined to include living, cooking, sleeping, bathing and sanitary facilities. While some assisted living units are rooms without kitchens, others are full dwelling units with kitchen facilities. Assisted living units are sometimes only *300 square feet or less* in size, which would not meet the City’s minimum living area standard for a dwelling unit.¹

Neither the table of uses nor the definitions reference “nursing home”, although nursing homes are included in the parking standards that pertain various senior housing uses. Nursing homes or nursing beds sometimes comprise part of a continuum of care retirement community or an independent/assisted living development.² It may be advisable to incorporate nursing homes or beds into the definitions and use table to specify it as a permitted use rather than rely on administrative interpretation.

b. Accessory Dwelling Units

While the *definition* of accessory dwelling includes units created *within* a single family dwelling, or in a freestanding unit on the lot, the *performance standards* in section 805 address only the

¹ In the case of Seaport Village assisted living, your discussion with Code Enforcement indicates that common areas may be considered in meeting the living area standard for these units. The City may wish to clarify this policy within the regulations, and define which residential uses are allowed to include common areas in meeting the required minimum living area for a dwelling unit.

² By administrative interpretation under Section 305.02, the City has considered a nursing home to be permitted in the same districts as a use that is materially similar to another permitted use (assisted living).

freestanding accessory unit option. If there are parallel standards for accessory units that are *created within the single family home*, these do not appear to be set forth in the ordinance.

Under the ordinance, single family detached or attached units are exempt from the parking space per unit standards. This exemption would apparently apply to the creation of an accessory unit. Some clarification may be needed regarding standards for accessory units that are created *within* the single family home.

Specific performance standards are stated in Article 8, Section 805 to allow detached accessory units of at least 500 square feet (and not more than 50% of the principal structure floor area) without having to meet the minimum lot area requirement.

This seems to suggest that an *attached accessory unit or one created within the existing floor area* of a single family residence *are subject* to the minimum lot area requirements. If so, this provision would appear to allow more flexibility where a *detached* rather than an *internal* accessory unit is created.

There does not seem to be a maximum living area applicable to accessory units within a single family home, while a maximum is specified for detached accessory units.

2. Number of Principal Buildings on Single Lot

Housing options for the senior market identified in the study include single family as well as detached and multifamily housing in an active adult community of single family homes, or a combination of structure types that could have multiple principal buildings on a single lot. This may include single family condominiums or cooperative developments that do not designate individually owned lots for each building.

The current regulations under Section 305.4 provides:

305. 4 More than one principal building on a lot. Except for cluster subdivisions, if there is more than one principal building on a lot, the area, yard, height and density requirements of the applicable district shall apply separately to each building, but the combined area occupied by the total number of buildings on the lot shall not exceed the maximum lot coverage requirement of the district.

The City should verify whether current regulations will allow for the creation of single family detached, attached, or multifamily components on a single lot (as with condominium or cooperative ownership), and whether/how the various dimensional (road frontage, setbacks, etc.) would apply to the buildings within.

3. Permitted Uses, Density and Dimensional Standards

In the housing study we found that the average actual density for lower income senior apartments in Ellsworth is 8 units per acre, with the two most recent projects (Leonard Lake and The Meadows) at 9 and 10 units per acre respectively. The mixed campus style developments I reviewed in the region that include congregate and assisted living, along with cottage ownership units, have gross densities of about 2-3 units per acre. These developments include ownership units (cooperative) and may include more land area to provide for internal open space and buffers. The existing permitted densities in Ellsworth should be able to accommodate a variety of senior ownership or rental alternatives.

Single family, attached, and multifamily structures are already defined and provided for in the ordinance at a sufficient density level, and with sufficient building heights to accommodate comparable active adult communities, rental, and congregate/assisted living.

Summary of Permitted Uses and Dimensional Standards in Key Districts (Y = permitted; N = not permitted)

Use Description and Where Permitted	Selected Districts				
	Growth Areas				Rural
	Downtown	Urban	Neighborhood	Commercial	
Use Description in Schedule of Off Street Parking Requirements (Section 1105)					
Single Family Detached or Attached	Y	Y	Y	N	Y
Accessory Dwelling	Y	Y	Y	Y	Y
Multifamily 7 more Units	Y	Y	Y	Y	N
Congregate or Assisted Living	Y	Y	Y	N	Y
Special Uses (Includes Hospital)	Y	Y	Y	Y	Y
Nursing Home	Not listed in table of uses but is listed in parking standards				
Senior Housing	Not listed in table of uses but is listed in parking standards				
Condominiums	Not listed in table of uses but is listed in parking standards				
Dimensional Requirements	Growth Areas				Rural
	Downtown	Urban	Neighborhood	Commercial	
Minimum Lot Size	NA	10,000	20,000	20,000	40,000
Minimum Road Frontage (Feet)	NA	18	50	100	50
Maximum Density Units Per Acre	NA	NA	10	NA	6
Maximum Height (Feet)	48-60 varies	60	"NA" in ordinance table	65	35

Note: In the ordinance dimensional table (section 308), the maximum height within the Neighborhood District is shown as "NA". Is there no building height limitation in this district?

Congregate and assisted living units, as well as attached or multifamily are permitted in the Downtown, Urban, Neighborhood and Rural Districts but not in the Commercial district. However, other forms of multifamily housing are permitted in the Commercial district. The City should review this distinction and whether it would be appropriate to allow congregate and assisted living units in the Commercial district.

“Nursing home” is not mentioned in either the definitions or the table of use regulations, but is included in the parking standards. Nursing beds are often included as part of a “campus” retirement housing development. At present this use is interpreted as a “materially similar use” such as assisted living, and would be allowed in the same districts as assisted living under an administrative interpretation. The City may want to clarify this by including the use specifically in the table of permitted uses and within the definitions.

4. Parking Requirements (Spaces per Unit)

Parking for most new development would appear to be governed by the schedule of off-street parking requirements in section 1105 of the ordinance.

Under the standards, single family detached and attached units are exempt from the parking space requirements. But the parking standard for multifamily units is 1.5 spaces per unit and 1.2 spaces per unit for the senior housing, congregate housing and assisted living category.

Parking Requirements (based on Section 1105.1)

Use Description in Schedule of Off Street Parking Requirements (Section 1105)	Standard Parking Spaces Per Unit
Single Family Detached or Attached	Exempt
Accessory Dwelling	Exempt as 2-family (?)
Multifamily 3 or More Units	1.5
Congregate or Assisted Living	1.2
Special Uses (Includes Hospital)	Depends on specific use
Nursing Home	1.2
Senior Housing	1.2
Condominiums	2.0

Given that the number of vehicles per household is higher for owned units than for rental or multifamily units, the rationale for exempting single family and attached units from parking space requirements while requiring a specific standard for multifamily and senior housing units is unclear.

In the actual parking table, the space requirements are stated “per unit” for a group of uses that includes senior housing, congregate, assisted living, and nursing home facilities.

The nursing home “unit” is typically a bed rather than a housing unit, and most parking demand comes from staff and visitor needs. Another way of applying

parking standards for nursing homes would be to assign parking space requirements per bed

(such as 1 for every 3 beds). Sometimes the parking standard is based on an allowance per employee per shift or an overall parking requirement per 1,000 square feet of facility space.

The highest residential parking standard (2 spaces per unit) is assigned to “condominiums”. This standard makes a distinction based on ownership status rather than by structure type. Under the parking standards, a single family home would be exempt from the standard, but if it were owned as a condominium, two spaces per unit would be required.

What standard would control if the use is a detached single family home or an attached unit that is part of a condominium or cooperative development that is also a senior housing development?

Unless there is evidence that units owned as condominiums have higher parking space demands per unit than the standards applicable by structure type, the City may want to remove “condominium” as a category from the parking table and rely instead on the space requirements by structure type.

Another point of clarification may be whether or not a garage bay is counted as a space in meeting the parking space standard per dwelling unit.

Single family detached and attached units are listed in the ordinance provisions as exempt from the parking space per unit standards. It would seem that the intent of the ordinance is that accessory units (either internal to a single family home, or in a detached accessory unit on the lot) are also exempt from the parking space per unit standard. If this is not the case, the applicable standard should be specified for the accessory unit.

Available data on the distribution of the number of vehicles per household by age and tenure are shown in the charts below (based on data from the 2009-2013 American Community Survey sample). The average number of vehicles per household in the area is 1.7 to 1.8. For owner occupied units the range is 1.9 to 2.0 vehicles per household.

Average Number of Vehicles per Household by Tenure

Estimated Vehicles Per Household Based on 2009-2013 ACS Sample	Hancock County	City Of Ellsworth
Average Vehicles Per Household	1.8	1.7
Owner occupied	2.0	1.9
Renter occupied	1.3	1.2

Renter occupied units have about 1.2 to 1.3 vehicles per household. Renters, particularly renters age 65 or older, are more likely to have no vehicle. About 6%-7% of homeowners age 65 or older have no vehicle, compared to 30%-34% of renters age 65 or older.

Percent of Households with No Vehicle by Age and Tenure

Percent of Households with No Vehicle by Tenure (Based on 2009-2013 ACS Sample)	Hancock County	City of Ellsworth
Householder Under 65	4.9%	6.5%
Homeowner	1.8%	1.1%
Renter	12.7%	15.5%
Householder Age 65 or Older	10.1%	13.9%
Homeowner	5.6%	6.9%
Renter	30.2%	33.5%
All Households	6.3%	8.6%
Homeowner	2.9%	3.0%
Renter	16.2%	19.6%

Vehicles per Household by Housing Tenure

Number of Vehicles Available to Household by Housing Tenure (Based on 2009-2013 ACS Sample)	Hancock County	City of Ellsworth
Owner Occupied		
No vehicle	2.9%	3.0%
1 vehicle	27.1%	30.2%
2 vehicles	48.7%	47.2%
3 or more vehicles	21.3%	19.6%
Renter Occupied		
No vehicle	16.2%	19.6%
1 vehicle	49.8%	49.6%
2 vehicles	26.7%	21.4%
3 or more vehicles	7.3%	9.4%
All Households		
No vehicle	6.3%	8.6%
1 vehicle	32.9%	36.8%
2 vehicles	43.0%	38.4%
3 or more vehicles	17.7%	16.1%

The purpose of this review is to identify potential areas within the current ordinance language that could pose limitations on forms of senior housing development that could occur in the future. Depending on the City’s historical interpretation of various ordinance provisions, the issues raised here may or may not represent impediments to these alternatives.

It is beyond the scope of this analysis to evaluate all of the possible interactions among the provisions of the unified development ordinance, and with site plan and subdivision review regulations. However, the questions raised here might be used as a checklist to verify how existing ordinance language might apply to a variety of possible types of senior housing

developments. These could take various forms ranging from single family detached condominiums to campus style developments that contain a mix of structure types.

Additional selected excerpts from the Ellsworth Unified Development Ordinance are attached for reference.

Sincerely yours,

A handwritten signature in black ink, appearing to read "Bruce C. Mayberry". The signature is fluid and cursive, with a large initial "B" and "M".

Bruce C. Mayberry, Principal
BCM Planning, LLC

EXCERPTS FROM ELLSWORTH UNIFIED DEVELOPMENT ORDINANCE

Selected Relevant Definitions from Ordinance Article 14

Accessory Dwelling: A separate residential dwelling unit, but not a mobile home, which is located within a single-family dwelling unit or in a detached building and is clearly subordinate to the primary use.

Boarding House, Congregate Housing, Assisted Living: Any dwelling in which three or more rooms are offered for compensation to persons either individually or as families with or without meals for more than three consecutive days.

Cluster Subdivision: A subdivision in which the lot sizes are reduced below those normally required in the zoning district in which the development is located in return for the provision of permanent open space owned in common by lot/unit owners, the City, or a land conservation organization.

Dwelling Unit: A room or suite of rooms used as a habitation which is separate from other such rooms or suites of rooms, and which contains independent living, cooking, sleeping, bathing, and sanitary facilities; includes single-family houses, and the units in a duplex, apartment house, multi-family dwellings, and residential condominiums. Dwelling units created after June 19, 1989, must contain a minimum of 500 square feet of living space.

Dwelling, Multi-Family: A building designed or intended to be used, or used exclusively for residential occupancy by three or more families living independently of one another including apartment buildings and condominiums, but excluding single-family and two-family dwellings. Ellsworth has two types of multi-family dwelling: a) the 3- to 6-unit complex; and b) the 7-unit and more.

Dwelling, Single - Family Detached: A building designed or intended to be used exclusively for residential occupancy by one family only and containing only one dwelling unit.

Dwelling, Single Family Attached: A building designed or intended to be used exclusively for residential occupancy by no more than two families and containing two separate dwelling units in one structure.

Dwelling: Any building or structure or portion thereof containing one or more dwelling units, but not including a motel, hotel, inn, or similar use.

Institutional: A non-profit or quasi-public use, or institution such as a church, library, public or private school, hospital, or City-owned or operated building, structure or land used for public purposes.

Multi-unit residential: A residential structure containing three or more residential dwelling units.

Principal Structure: A building other than one which is used for purposes wholly incidental or accessory to the use of another building or use on the same premises.

Principal Use: A use other than one which is wholly incidental or accessory to another use on the same premises.

Residential Dwelling Unit: A room or group of rooms designed and equipped exclusively for use as permanent, seasonal, or temporary living quarters for only one family at a time, and containing cooking, sleeping and toilet facilities. The term shall include mobile homes and rental units that contain cooking, sleeping, and toilet facilities regardless of the time-period rented. Recreational vehicles are not residential dwelling units.

Special Use: A governmental or public service use providing public health, safety, comfort, convenience, or the general welfare for the general benefit of the citizens funded in whole or in part by the City of Ellsworth or a quasi-municipal organization, including by way of illustration, municipal buildings, schools, public parks and recreational facilities, cemetery, public art, museum, interpretation center, public parking, fire stations, ambulance services, highway garage, distribution and transmission of essential services ; essential facilities, hospital, Federal Aviation Administration –designated commercial service airport, heliport.

Excerpt of Performance Standards for Accessory Dwelling:

805 ACCESSORY DWELLING

805.1 Purpose. To provide the opportunity for owners of single family detached dwellings to develop a small detached dwelling unit without having to meet the minimum lot area requirement.

805.2 Applicability. This Article applies to any accessory dwelling unit that is located in a building that is not attached to the principal dwelling.

805.3 Number Permitted. Only one accessory dwelling unit is permitted per lot.

805.4 Size.

- A. The gross floor areas of an accessory dwelling unit shall not exceed 50% of the principal building's floor area.
- B. Each dwelling unit shall be a minimum of 500 square feet.

Excerpt from Ordinance Parking Section:

ARTICLE 11 PARKING STANDARDS

1100 PURPOSE AND APPLICABILITY

1100.1 Purpose. The purpose of this Article is to ensure a minimum level of off-street parking to avoid congestion on surrounding streets while avoiding excessive parking and driving up the cost of development. This article also regulates loading space, traffic circulation, and pedestrian access.

1100.2 Applicability. This Article shall apply to new and existing development as follows:

- A. Single and Two-Family Dwellings** are exempt from this Article with the exception of mobile homes in mobile home parks per Article 8 Performance Standards 819.18.
- B. Existing Developments** are exempt from this Article unless the development is physically expanded or changed resulting in more intensive parking needs per Section 1105.1 or unless the existing parking supply is reduced per section E below.

C. Development Expansion. When a development, with a non-compliant number of parking spaces is expanded, additional parking spaces shall be provided only for the area of expansion in conformance with Table 1105.1, except as specifically noted in Section 1102.1 for Downtown Parking.

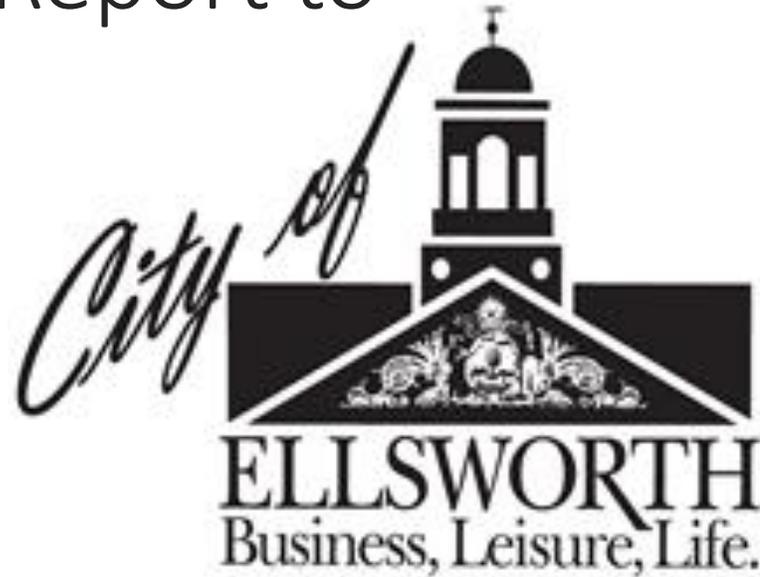
D. Change of Use Requiring More Parking Spaces. When the use of a development is changed to another use that requires more parking spaces or, if the development is vacant, the use that existed immediately prior to such vacancy, parking spaces shall be provided for the proposed use in the amount necessary to conform to this Article, except as specifically noted in Section 1102.1 for Downtown Parking.

E. Change of Use Requiring Fewer Parking Spaces. When the use of a development is changed to another use that requires fewer parking spaces per Section 1106, the proposed change of use is a permissible change to a non-conforming parking situation provided that parking space requirements will be met to the greatest extent possible.

F. Parking Lot Expansion. If an off-street parking lot is being expanded, only the new portion of the parking lot must conform to this Article unless there are safety issues related to, queuing, egress/ingress, internal vehicular circulation, and loading. In such case, the Administrator may require that part of or the entire existing parking lot be brought into compliance with this Article.

(Remainder of parking standards in ordinance not included here)

Pan Atlantic Research, Inc. Report to



QUANTITATIVE RESEARCH REGARDING HOUSING NEEDS AND
PREFERENCES

AUGUST, 2015

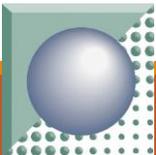


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Background, Objectives and Methodology



Background, Objectives, and Methodology

BACKGROUND

- The City of Ellsworth, working with BCM Planning, LLC of Yarmouth, Maine is in the process of conducting a comprehensive housing analysis of the 55-and-older market.
- The City and BCM Planning commissioned Pan Atlantic Research, Inc. of Portland to conduct a survey of residents 55 or older who are not already living in a senior housing development.
- This housing survey is one component of a wider study that will include demographic and statistical analysis of age groups within the 55+ market and future housing demand in the City of Ellsworth and Hancock County.



Background, Objectives, and Methodology

SURVEY OBJECTIVES

- The key objective of this survey is to gather data and information which will assist the City in evaluating how well its housing stock can accommodate the future housing needs of the area.
- Specific project objectives include gathering information on:
 - ✓ Household composition and current housing situation
 - ✓ Level of importance of housing location and home features (if respondent were to move to another residence).
 - ✓ Importance level of a variety of housing unit features
 - ✓ Degree to which respondents have searched for and/or visited any type of active adult community



Background, Objectives, and Methodology

SURVEY OBJECTIVES

- Specific Project Objectives (cont.):
 - ✓ Types of housing options which would be considered for respondents' next residence
 - ✓ Interest level in purchasing a home in an active adult community
 - ✓ Purchase or rental cost expectations for a "different home"
 - ✓ Likelihood to choose Ellsworth or Greater Ellsworth as a place to move to for a new home.



Background, Objectives, and Methodology

SURVEY OBJECTIVES

- Demographic questions:
 - ✓ Age of respondent
 - ✓ Household income level
 - ✓ Own or rent current residence
 - ✓ Current residence (type)
 - ✓ Employment status of respondent and of spouse or partner (as applicable)
 - ✓ City or town currently lived in



Background, Objectives, and Methodology

METHODOLOGY

- In order to achieve the objectives of this research project, a mail survey methodology was used. This approach was determined to be the most cost-effective and also the best methodology to use.
- The survey instrument was designed by Pan Atlantic Research in conjunction with BCM Planning and approved by the City of Ellsworth prior to being mailed (please see copy in Appendix A).
- It was administered to residents in households aged 55 and over in the City of Ellsworth and 21 other towns in Hancock County. (Please see list in Appendix C.)
- The survey was mailed to 3,500 of the estimated 7,417 (55+) households in the region. These were randomly selected and in proportion to population densities for each city/town in the sampling geography.
- It was mailed in the later half of June and respondents were allowed three weeks to complete it (closing date was July 17th).



Background, Objectives, and Methodology

METHODOLOGY

- The response rate of 800 completed surveys was extremely high at 22.9% (800 of 3,500 surveys mailed).
- The margin of error for this study is $\pm 3.3\%$ at the 95 percent confidence level for the total sample. However, the margin of error for specific demographic sub-segments will be higher as the sample size decreases.
 - ✓ For respondents residing in the City of Ellsworth, the margin of error is $\pm 4.4\%$ at the 95 percent confidence level.
 - ✓ For all other respondents, the margin of error is $\pm 4.6\%$ at the 95 percent confidence level.
- ✓ Please note that figures may not always add up to 100.0% due to the rounding of decimals, and, in some cases, the ability to provide multiple responses to an individual question.
- ✓ Statistical differences between specific segments are noted throughout the report where appropriate. (A complete set of statistical cross-tabulations is attached in Appendix B.)



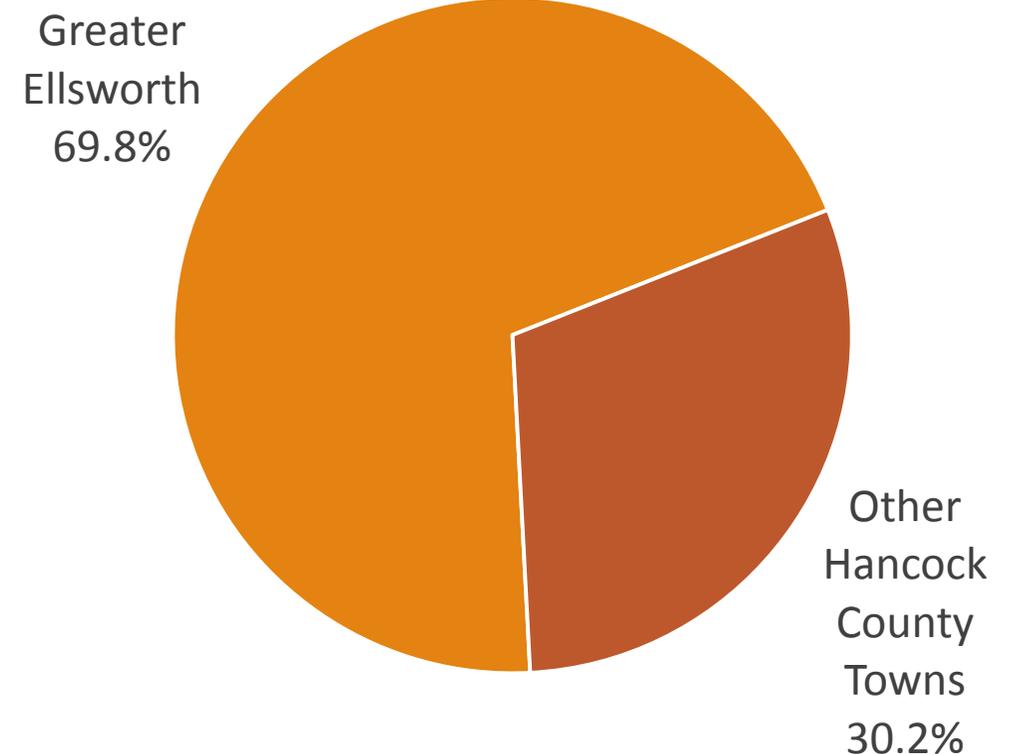
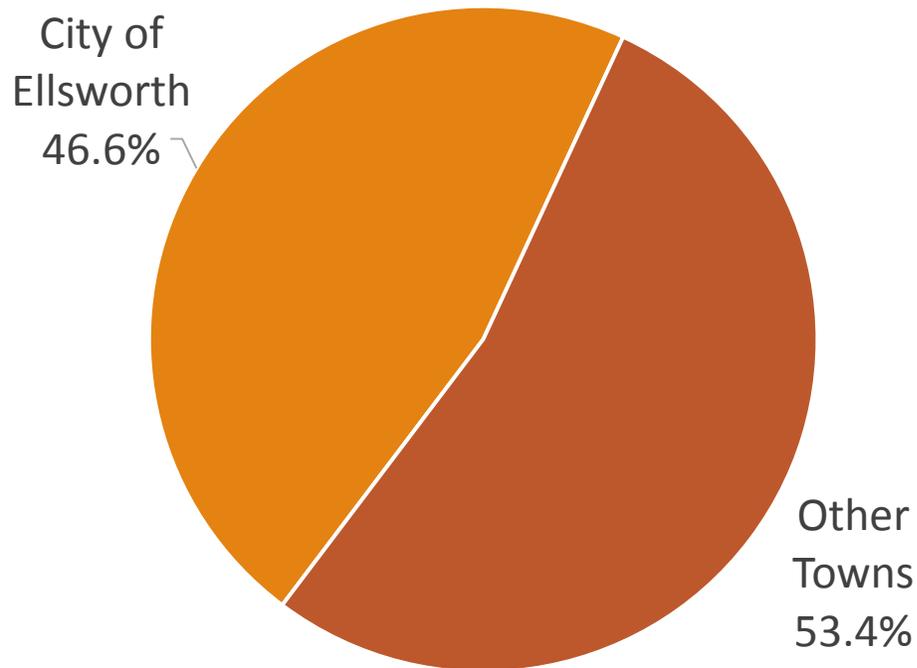
Research Findings

CURRENT LIVING SITUATION



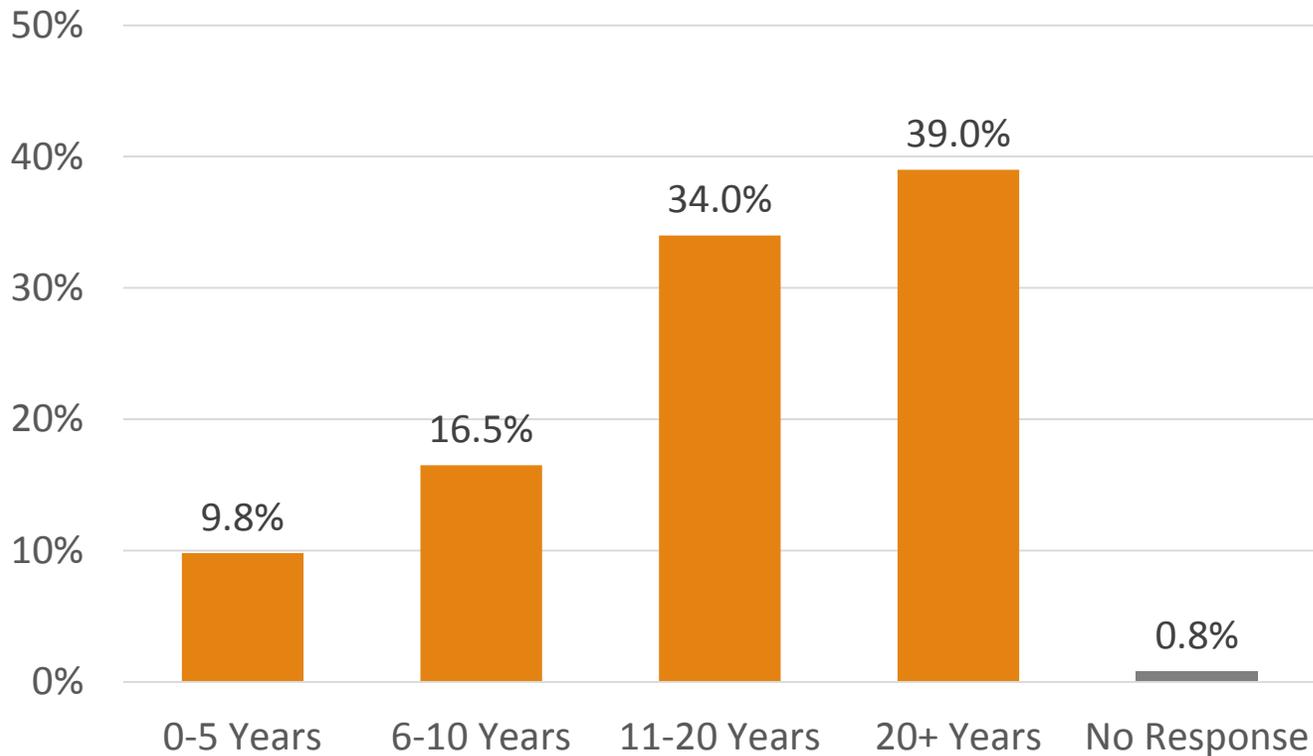
About half of the total respondent sample (46.6%) comprises residents of the City of Ellsworth proper, while 53.4% are residents of other towns in Hancock County.

Q1: Name of city or town in which your residence is located. [Open response]



Nearly three quarters of respondents (73.0%) have lived at their current residence for more than 10 years.

Q2: How long have you lived at this residence?

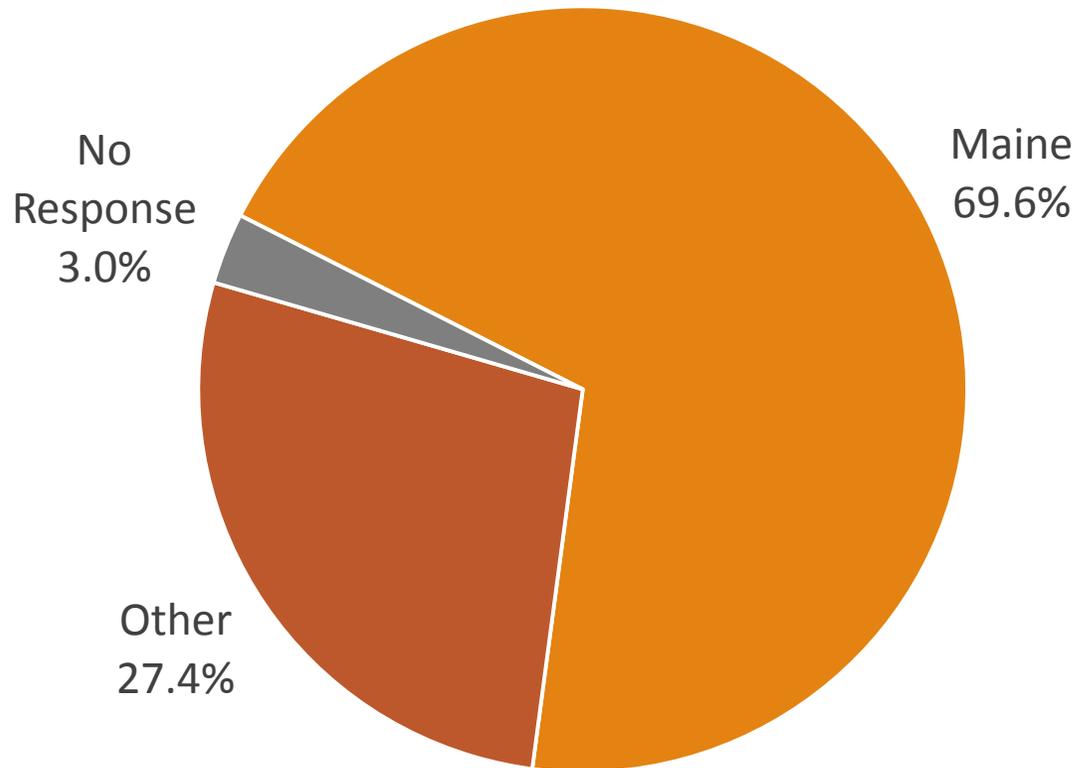


- Residents of Greater Ellsworth have lived at their current residence for somewhat less time than other respondents:
 - 36.2% of Greater Ellsworth residents have lived at their current residence for at least 20 years, compared to 45.5% of all other respondents.



Nearly 7 in 10 respondents (69.6%) moved to their current home from another home in Maine. Only 27.4% moved from another state or country.

Q3: Prior to living in this home, where did you live?

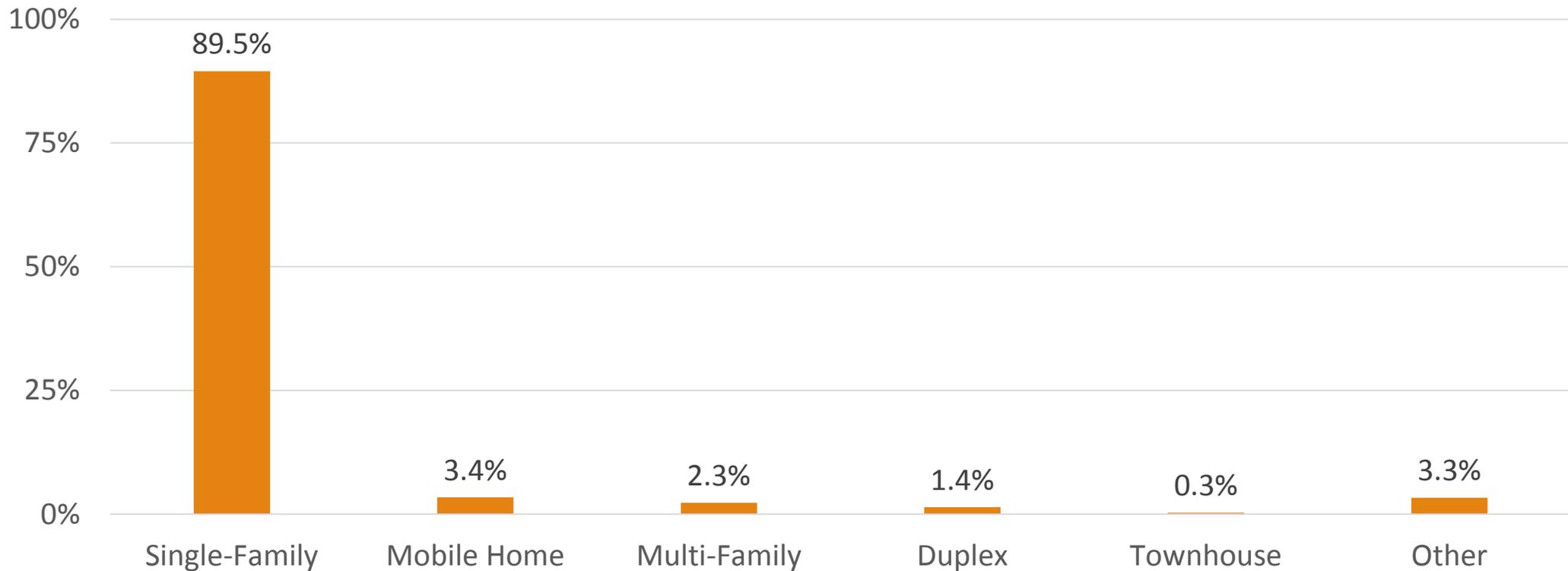


- Residents of the City of Ellsworth were significantly more likely to have lived in Maine prior to moving to their current residence:
 - 77.5% of Ellsworth residents had moved to their current residence from another place in Maine, compared to only 62.8% of those living outside of Ellsworth.



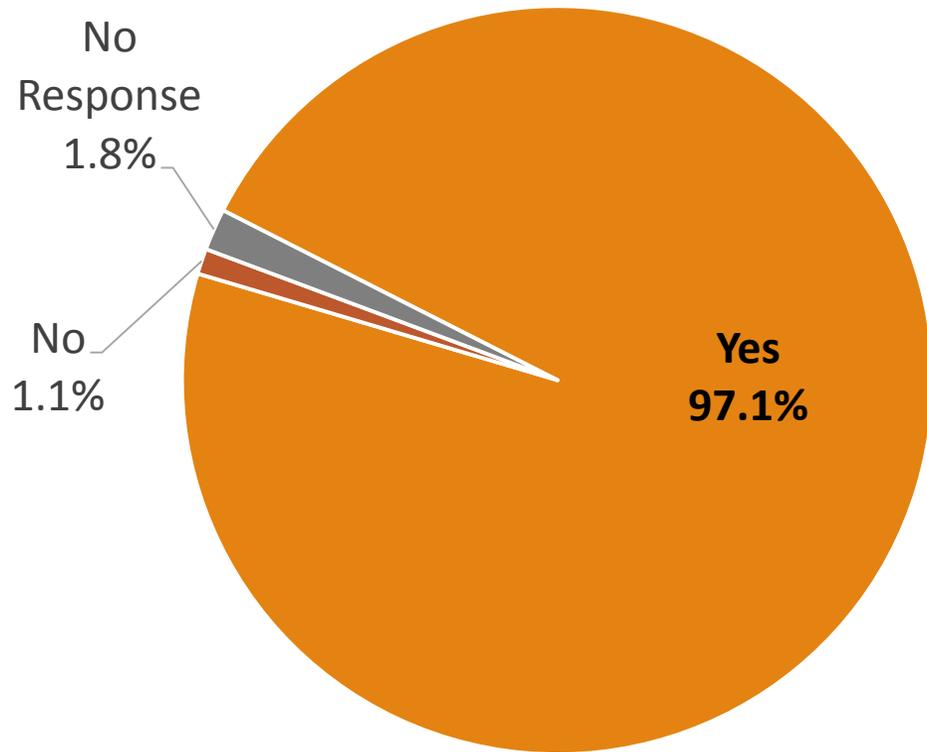
Nine in ten respondents (89.5%) reside in a single-family home.

Q4a: How would you describe your current residence?

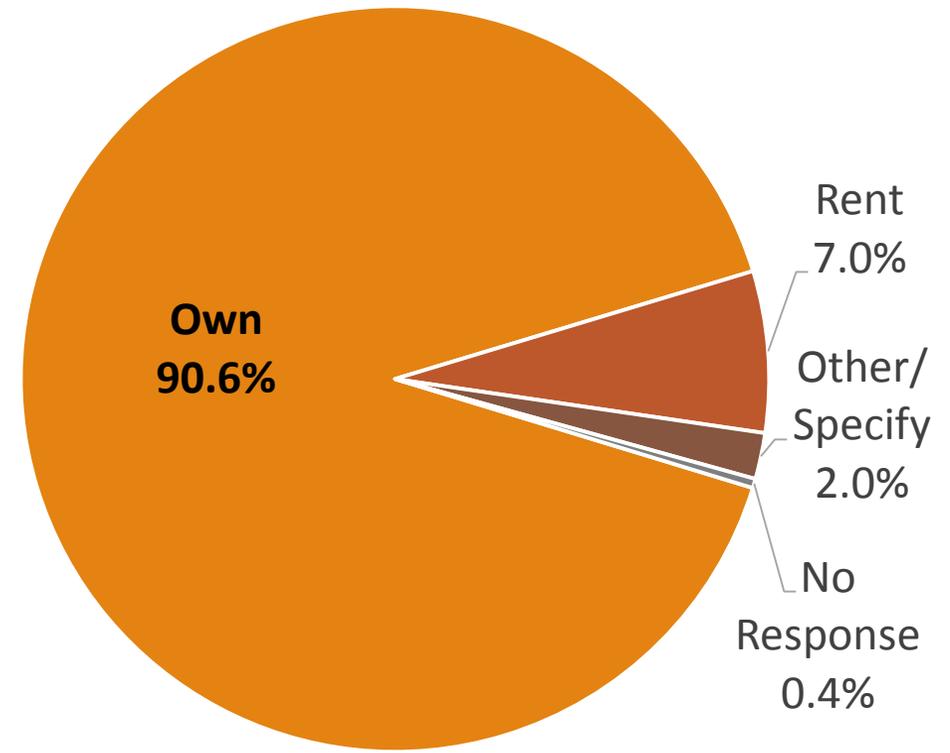


For nearly all respondents (97.1%), their Hancock County-area residence is their primary home. 90.6% of residents own their own homes, while 7.0% rent.

Q4b: Is this your primary home (your legal residence)



Q5: Do you own or rent this residence?



Older residents, those with lower incomes, and those residing in Ellsworth are most likely to rent, rather than own their homes.

Q5: Do you own or rent this residence?

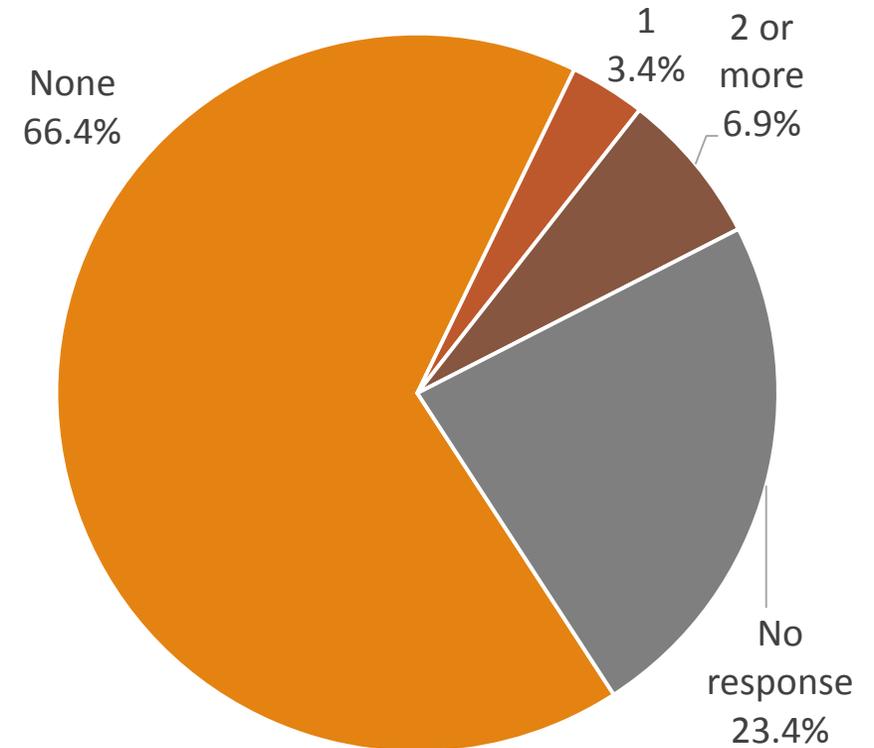
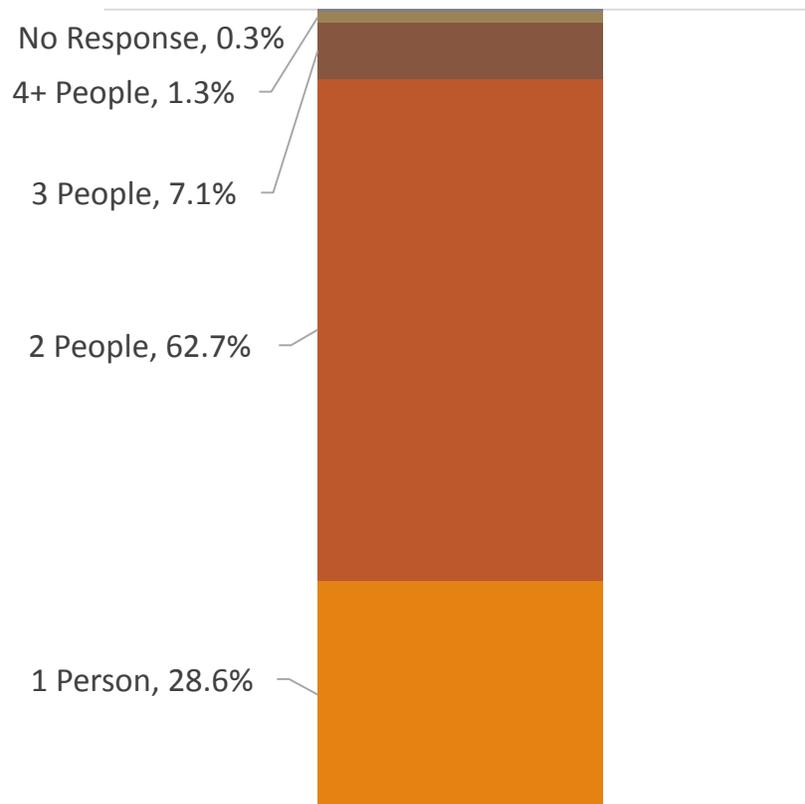
- 15.1% of respondents older than 75 rent their primary residence, compared to 4.2% of those aged 55-74.
- 25.0% of those with household incomes below \$25,000 rent their primary residence, compared to 5.5% of those with household incomes between \$25,000 and \$49,000, and 0.9% of all others.
- 9.7% of residents of the City of Ellsworth rent their primary residence, compared to 4.7% of all others.



About 9 in 10 households (91.3%) comprise one or two people. 10.4% of households include at least one person age 18 or younger.

Q6a: How many people are there in your household?

Q6b: How many of these people are age 18 or younger?



Younger respondents are significantly more likely to have at least 3 people in the household.

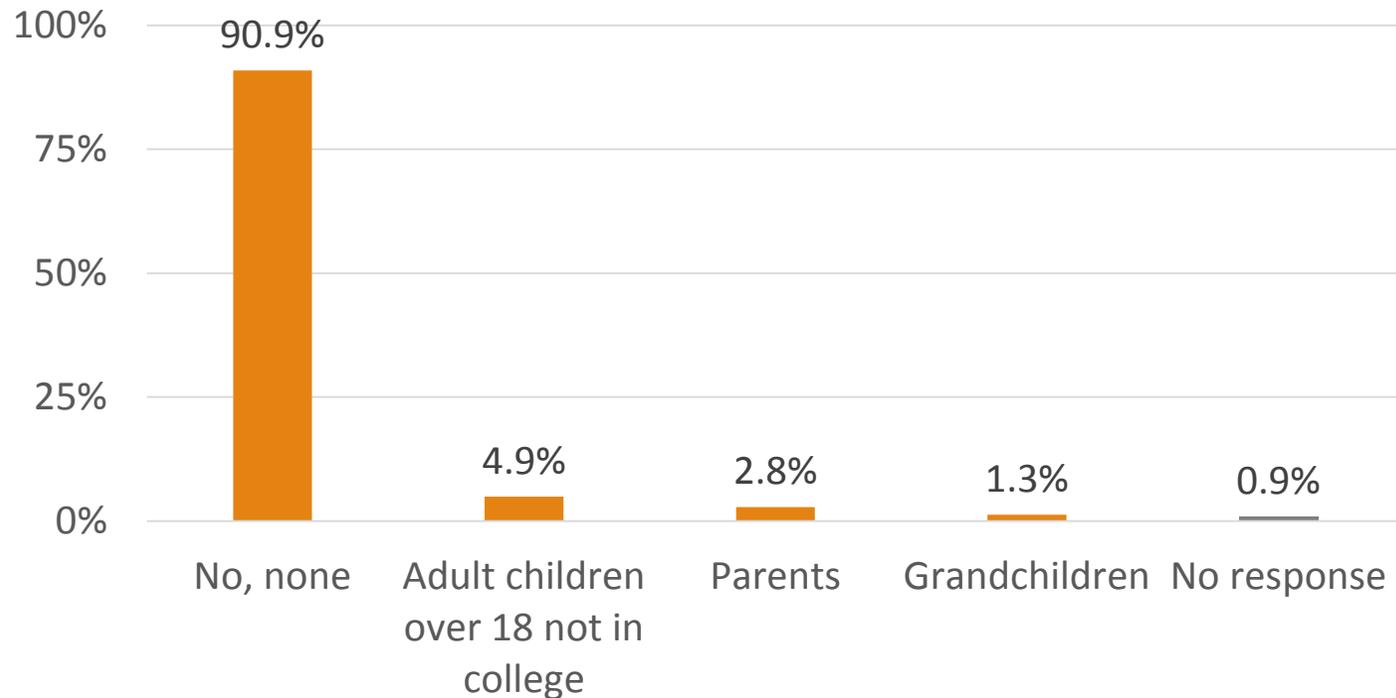
Q6a: How many people are there in your household? Q6b: How many of these people are age 18 or younger?

- 15.7% of respondents between the ages of 55 and 64 have at least 3 people in the household, while only 4.8% of older respondents do so.
- 11.2% of City of Ellsworth residents have at least 3 people in the household versus 5.9% of residents of other towns in the sample.
- However, residents of the City of Ellsworth are not significantly more likely to have members of the household age 18 or younger—10.8% of City of Ellsworth residents have at least one member of the household age 18 or younger compared to 9.8% of respondents living outside of Ellsworth.



90.9% of responding households include no relatives apart from the respondent and their spouse, if applicable.

Q9: Do any other relatives live with you? [Multiple responses accepted]

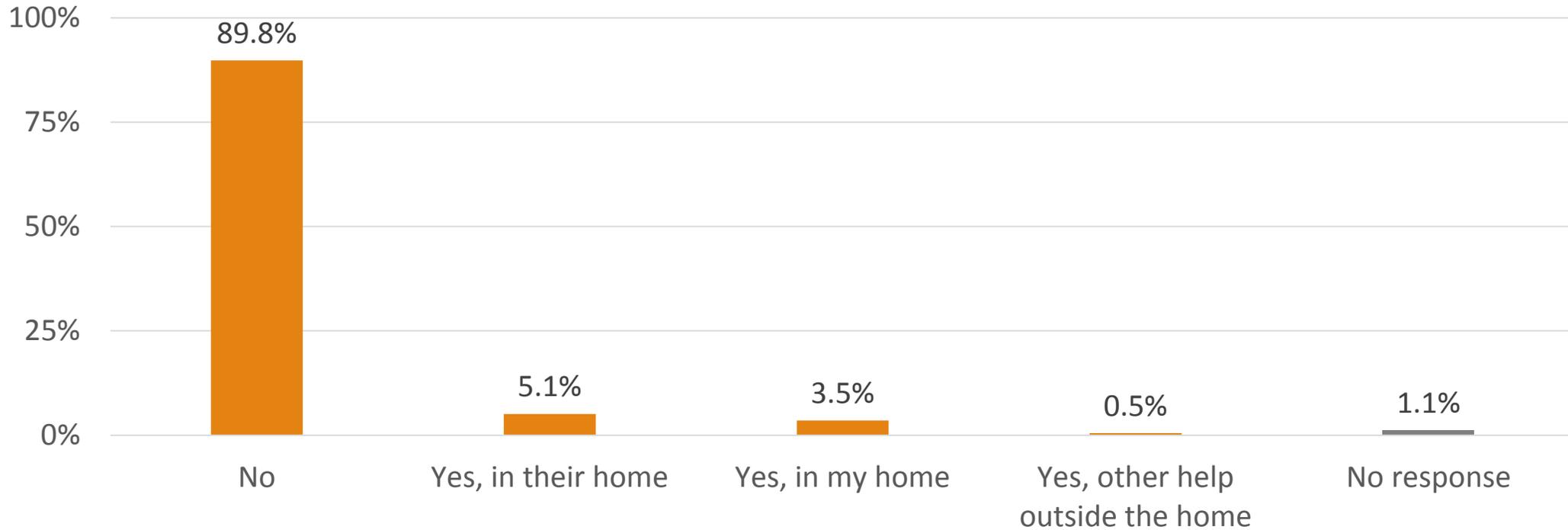


- Younger respondents are significantly more likely to have other relatives living with them.
- 95.2% of those older than 65 have no other relatives living with them, while this is the case for only 82.0% of those between the ages of 55 and 64.



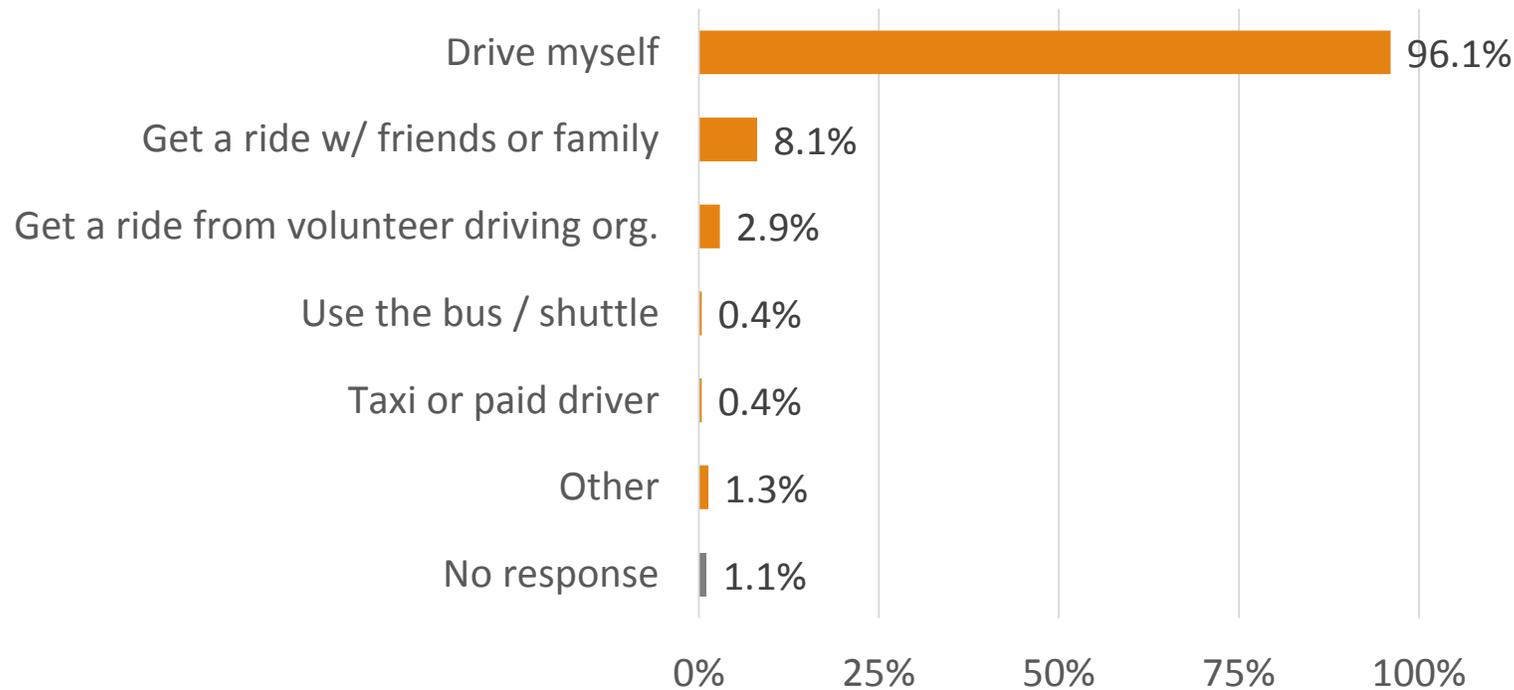
In 9.1% of responding households, someone in the household acts as a caregiver for a relative in the area.

Q10: Does anyone in your household act as a caregiver for a relative in the area?



Nearly all respondents (96.1%) drive themselves to work, shopping, medical appointments, etc. A small minority (8.1%) indicated that they get a ride with friends or family.

Q11: How do you get to work, shopping, services, medical appointments, etc.? [**Multiple responses accepted**]



- Older respondents are significantly more likely to get rides with friends and family.
- 17.2% of those older than 75 get rides with friends or family, compared to only 5.0% of those younger than 75.



Research Findings

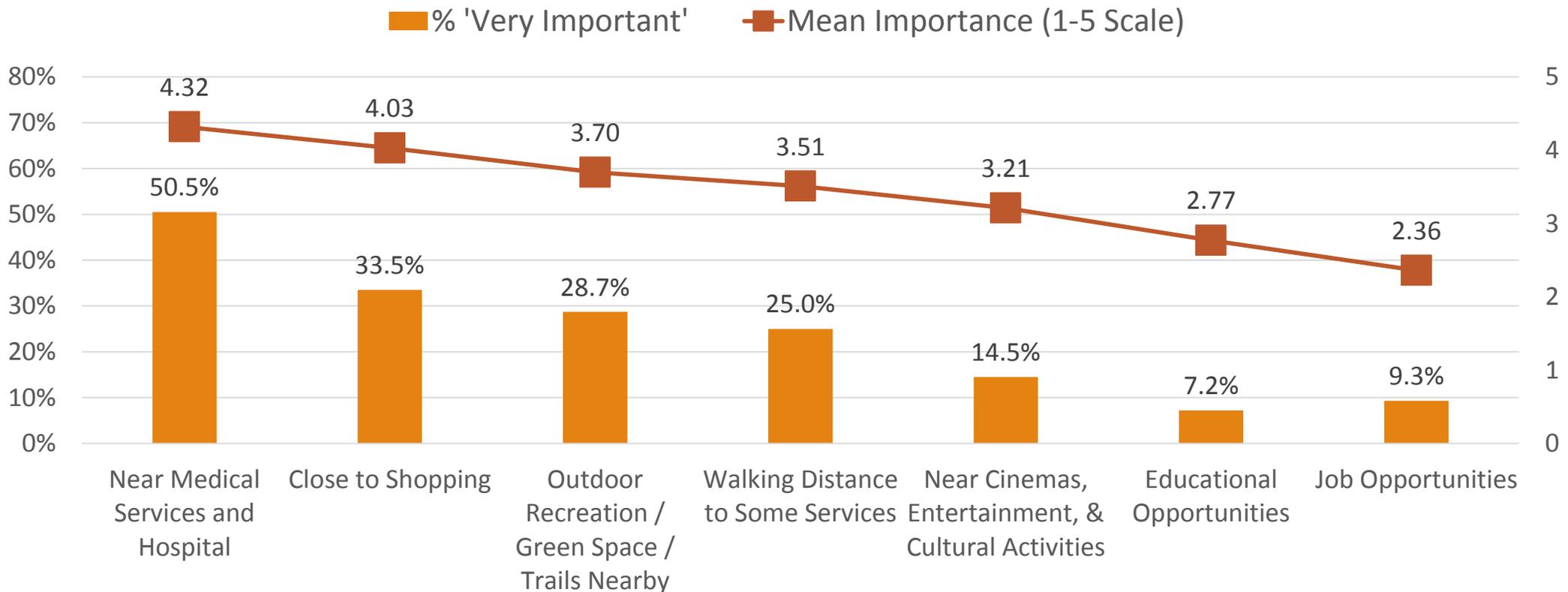
PREFERRED COMMUNITY AND RESIDENTIAL FEATURES



Importance of Community and Neighborhood Features

More than half of respondents (50.5%) consider proximity to medical services and hospital “very important” in choosing another residence.

Q12: If you were to move to another residence, how important would each of the following community or neighborhood features be to you?



Importance of Community and Neighborhood Features

Preferences varied significantly by age for several of the community or neighborhood features queried.

Q12: If you were to move to another residence, how important would each of the following community or neighborhood features be to you?

		Age	55-64	65-74	75+
Increasing importance with age	}	Medical services	4.00	4.47	4.47
		Close to shopping	3.75	4.16	4.17
Decreasing importance with age	}	Outdoor recreation / Green space nearby	3.85	3.83	3.27
		Job opportunities	3.22	2.17	1.49
		Educational opportunities	2.87	2.77	2.65



Importance of Community and Neighborhood Features

Among the 100 respondents who provided another suggestion (unaided) to this question, the most frequently cited was “near shops, services, and church” (14 respondents).

Q12: If you were to move to another residence, how important would each of the following community or neighborhood features be to you?

Top Answers Provided by Those Answering “Other” (N=100)*	
Near shops, services, and church	14.0%
Privacy and good level of safety	11.0%
Allow pets	8.0%
A senior center	7.0%
Quiet area	6.0%
Nature retreat, garden	6.0%

- Other common suggestions provided included “privacy and good level of safety” (11.0%), “allow pets” (8.0%), and “a senior center” (7.0%)

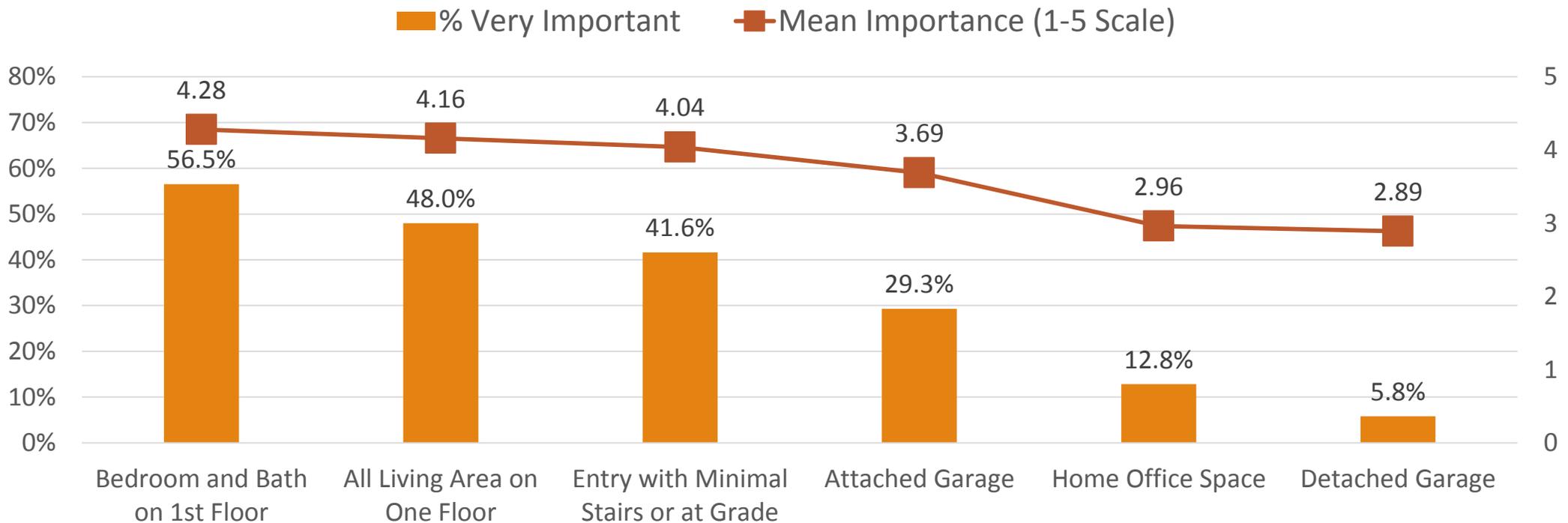
*Most common answers shown – for full set of answers, see tabulations attached in Appendix B.



Importance of Housing Features

About half of respondents cited “bedroom and bath on 1st floor” (56.5%) and “all living area on one floor” (48.0%) as “very important.”

Q13: How important would these housing unit features be if you were to move to another residence?



Importance of Housing Features

Preferences varied significantly by age for several of the residential features queried.

Q13: How important would these housing unit features be if you were to move to another residence?

		Age	55-64	65-74	75+
Increasing importance with age	}	Bedroom and bath on 1 st floor	3.92	4.43	4.50
		All living area on one floor	3.82	4.27	4.42
		Entry with minimal stairs on or at grade	3.72	4.15	4.27
Decreasing importance with age	}	Attached garage	3.83	3.80	3.30
		Detached garage	3.04	2.93	2.64



Importance of Housing Features

Other important features cited by the 79 respondents to this survey question included “laundry facilities” (11.4%), storage space (10.1%) and “small yard/ garden” (10.1%).

Q13: How important would these housing unit features be if you were to move to another residence?

Top Answers Provided by Those Answering “Other” (N=79)*	
Laundry facilities	11.4%
Storage space	10.1%
Small yard / Garden	10.1%
Pets allowed	7.6%

- 7.6% of respondents cited “pets allowed.” This feature was also cited by 8.0% of those answering the previous question.

*Most common answers shown – for full set of answers, see tabulations attached in Appendix B.



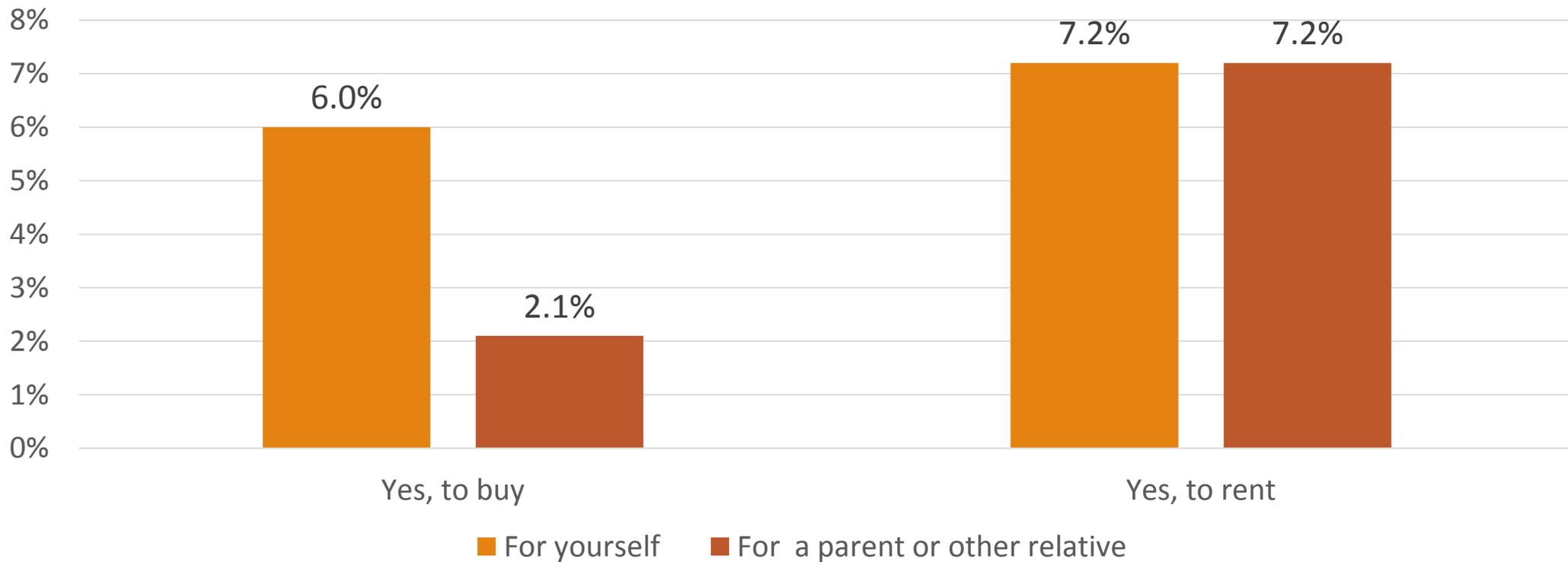
Research Findings

FUTURE PLANS FOR LIVING SITUATION



A small percentage of respondents have searched for an active adult community, retirement community, or senior housing development in which to buy (6.0%) or rent (7.2%) in the past two years.

Q14: Over the past two years, have you searched for and/or visited any type of active adult (55+) community, retirement community or senior housing developments?



People who have searched for or visited any type of active retirement community (“to buy”) are more likely to be over 65 years of age and have an annual household income of greater than \$50,000.

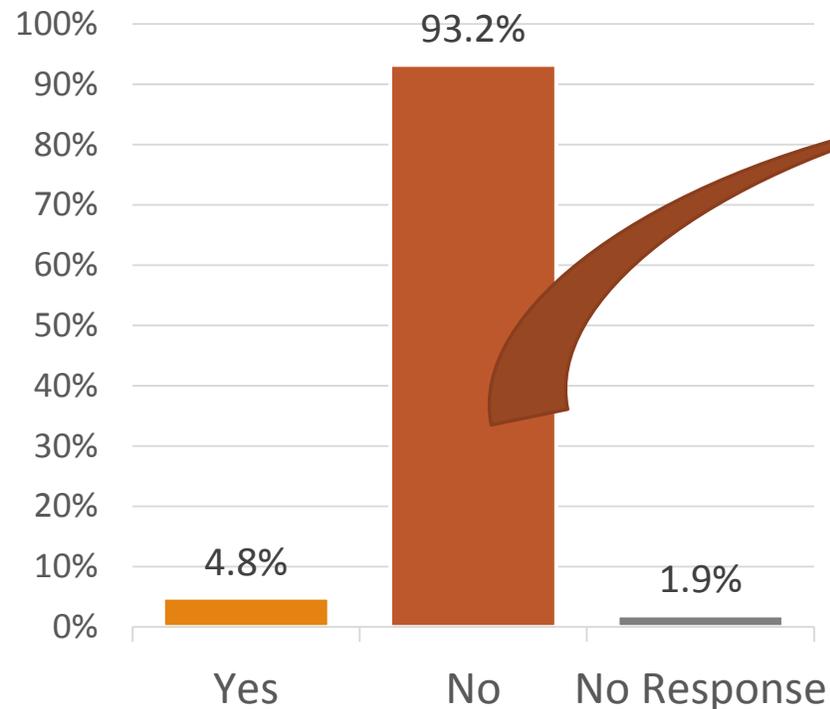
Q14: Over the past two years, have you searched for and/or visited any type of active adult (55+) community, retirement community or senior housing developments?

- 7.4% of respondents older than 65 have searched for an active retirement community to buy in the past two years, while only 3.1% of those between the ages of 55 and 64 have done so.
- 7.0% of respondents with household incomes higher greater than \$50,000 have searched for an active retirement community to buy in the past two years, while only 4.7% of those with household incomes lower than \$50,000 have done so.
- Lower income respondents showed a higher likelihood to visit an active adult community to rent for themselves:
 - 10.3% of those with incomes below \$50,000 have visited an active adult community to rent versus 5.0% of all others.

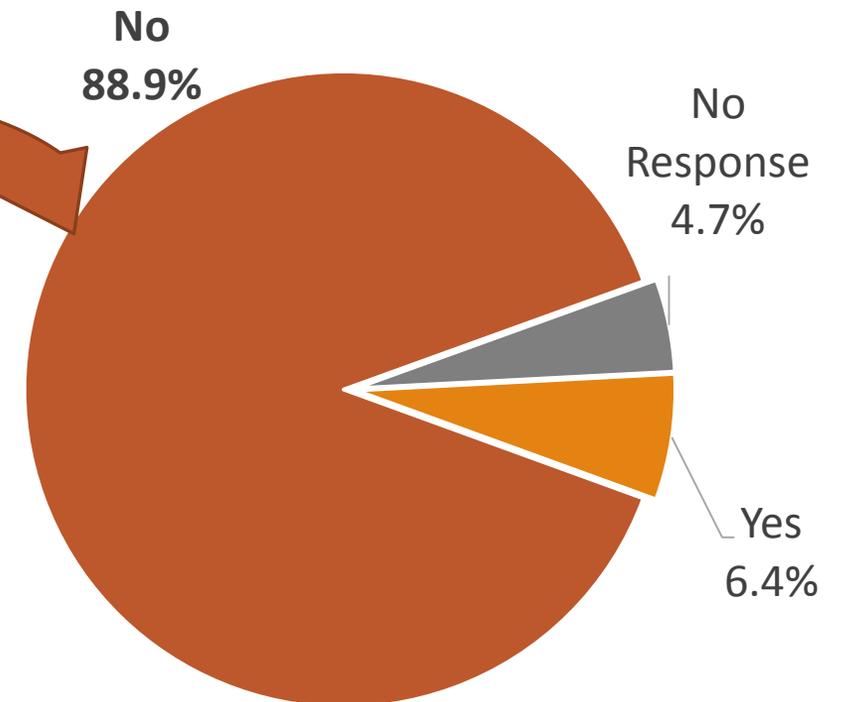


93.2% of respondents who are homeowners (N=725) have not listed their home for sale in the past 12 months. Of these, 6.4% plan to offer it for sale during the next 12 months.

Q15a: Have you listed your home for sale during the **past 12 months**? [Asked of those indicating that they own their home in Q5; N=725]

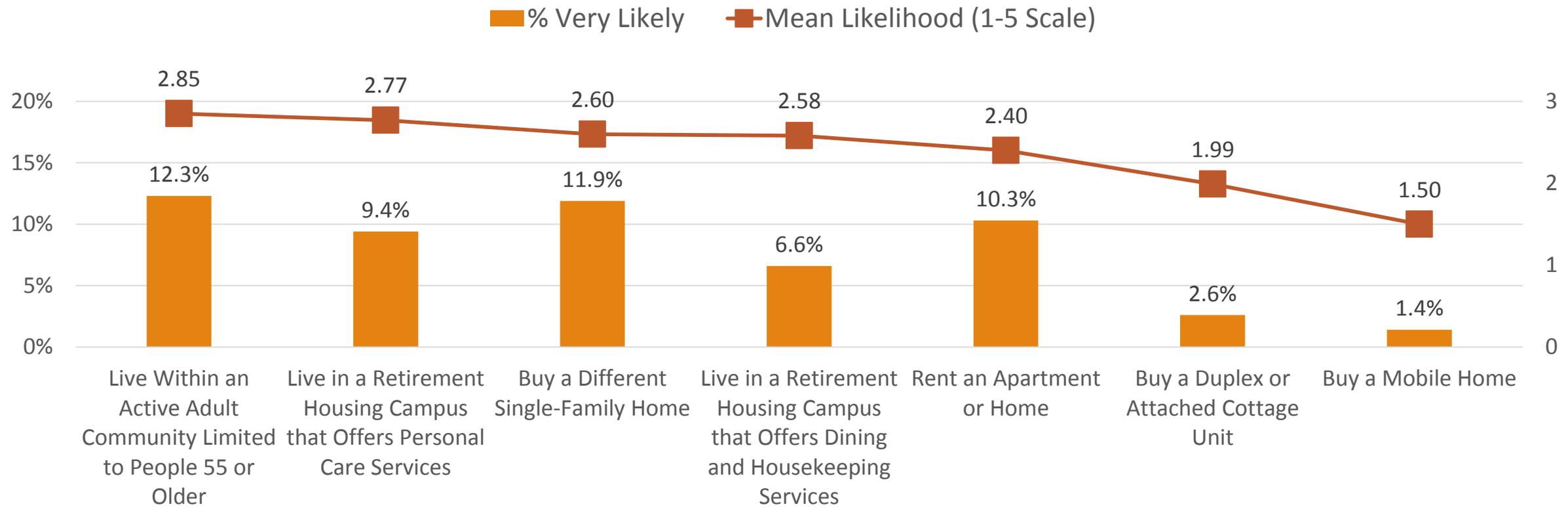


Q15b: If 'no,' do you intend to offer it for sale during the **next 12 months**? [Asked of those answering "No" to Q15a; N=676]



When provided several potential housing options, respondents most frequently said that they would “very likely” consider an “active adult community” (12.3%) as their next residence, followed very closely by “buy a different single family home” (11.9%)

Q16: Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.



Preferences varied significantly by income level for several of the suggested residential options.

Q16: Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

		Income	Under \$25,000	\$25,000-\$49,999	\$50,000-\$75,000	\$75,000+
Increasing likelihood with income	Buy a different single family home		2.04	2.59	2.67	3.04
	Buy a duplex or attached cottage unit		1.78	1.88	2.28	2.05
	Live in a retirement housing campus with dining and housekeeping services		2.82	2.43	2.57	2.57
	Live in a retirement housing campus with personal care services		3.08	2.62	2.69	2.73
Decreasing likelihood with income	Live within an active adult community		3.36	2.67	2.85	2.62
	Rent an apartment or home		2.63	2.52	2.49	2.18
	Buy a mobile home		1.54	1.71	1.45	1.34



Preferences also varied significantly by age for several of the suggested residential options.

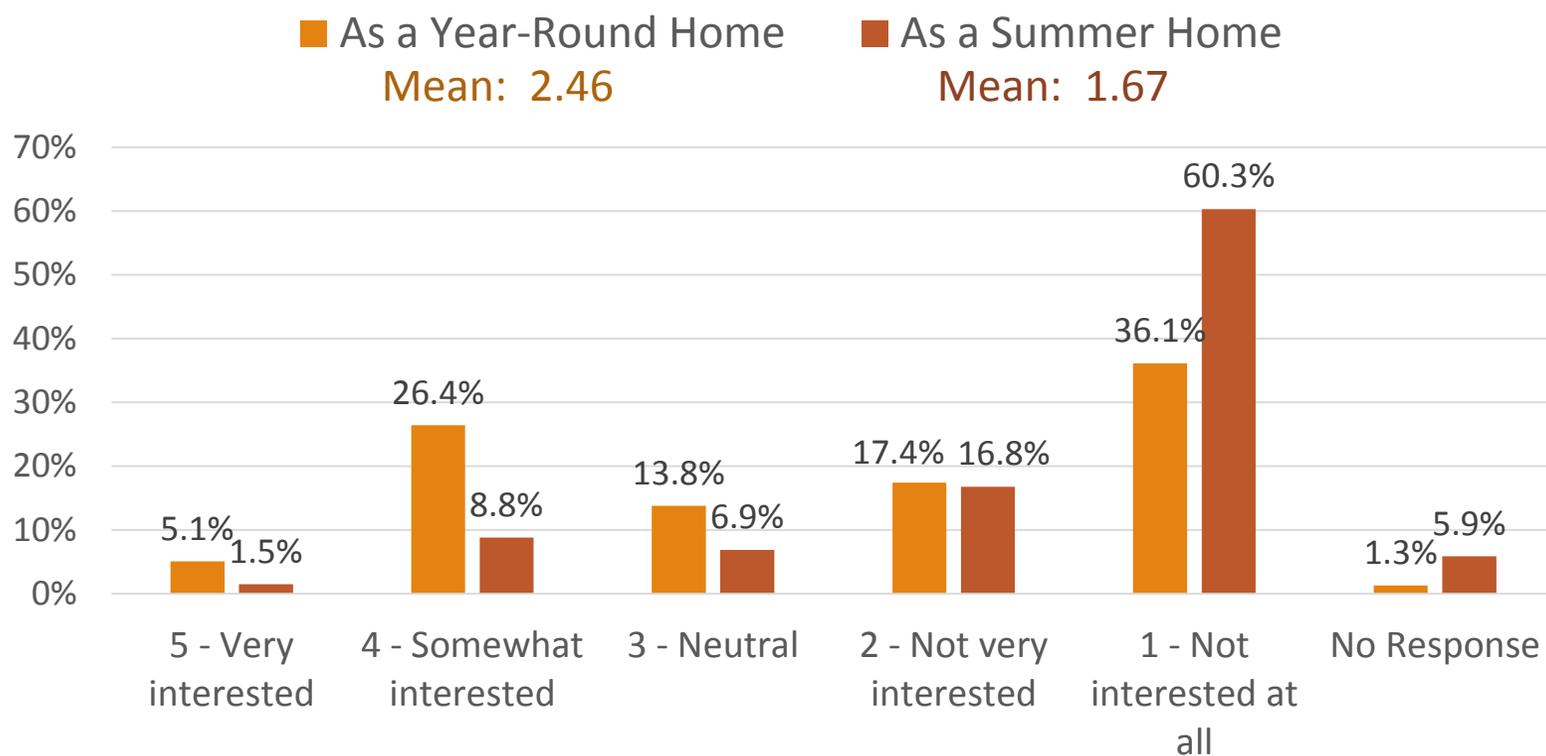
Q16: Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

		Age	55-64	65-74	75+
Increasing likelihood with age	}	Live within an active adult community	2.57	3.00	2.97
		Live in a retirement housing campus with personal care services	2.36	2.85	3.19
		Live in a retirement housing campus with dining and housekeeping services	2.23	2.65	2.94
		Rent an apartment or home	2.26	2.57	2.33
		Buy a mobile home	1.46	1.55	1.47
Decreasing likelihood with age	}	Buy a duplex or attached cottage unit	2.02	2.10	1.76
		Buy a different single family home	2.79	2.83	1.95



About a quarter of respondents say they would be “somewhat interested” (26.4%) and a further 5.1% “very interested” (5.1%) in purchasing a new home in an active adult community.

Q17: If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?



- Interest was significantly lower in purchasing a new home in an active adult community as a summer home (mean 1.67).
- Residents of Greater Ellsworth showed somewhat greater interest in purchasing a year-round home (mean 2.53 versus 2.36 among all others).



Interest was significantly lower in purchasing a new home in an active adult community as a summer home (mean 1.67) versus “as a year-round home” (2.46).

Q17: If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?

- 7.4% of respondents older than 65 have searched for an active retirement community to buy in the past two years, while only 3.1% of those between the ages of 55 and 64 have done so.
- Respondents who said that they would be “somewhat” or “very interested” in purchasing a new year-round home in an active community tend to be more in the 65-75 year age segment and have annual household incomes greater than \$50,000:

Age 55-64: 23.4% interested overall	Age 65-74: 40.9% interested overall	Age 75+: 26.5% interested overall
Household Income Under \$50,000: 30.0% interested overall	Household Income Above \$50,000: 33.4% interested overall	



Summary Analysis of Q14, Q16, and Q17

Q14: Over the past two years, have you searched for and/or visited any type of active adult (55+) community, retirement community or senior housing developments?

	Self	Parent / Relative
Buy	6.0%	2.1%
Rent	7.2%	7.2%

Q16: Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

Live in an active retirement community	12.3%
Buy a different single-family home	11.9%
Rent an apartment or home	10.3%
Live in a retirement housing campus that offers personal care services	9.4%
Live in a retirement housing campus that offers dining and housekeeping services	6.6%
Buy a duplex or attached cottage unit	2.6%
Buy a mobile home	1.4%

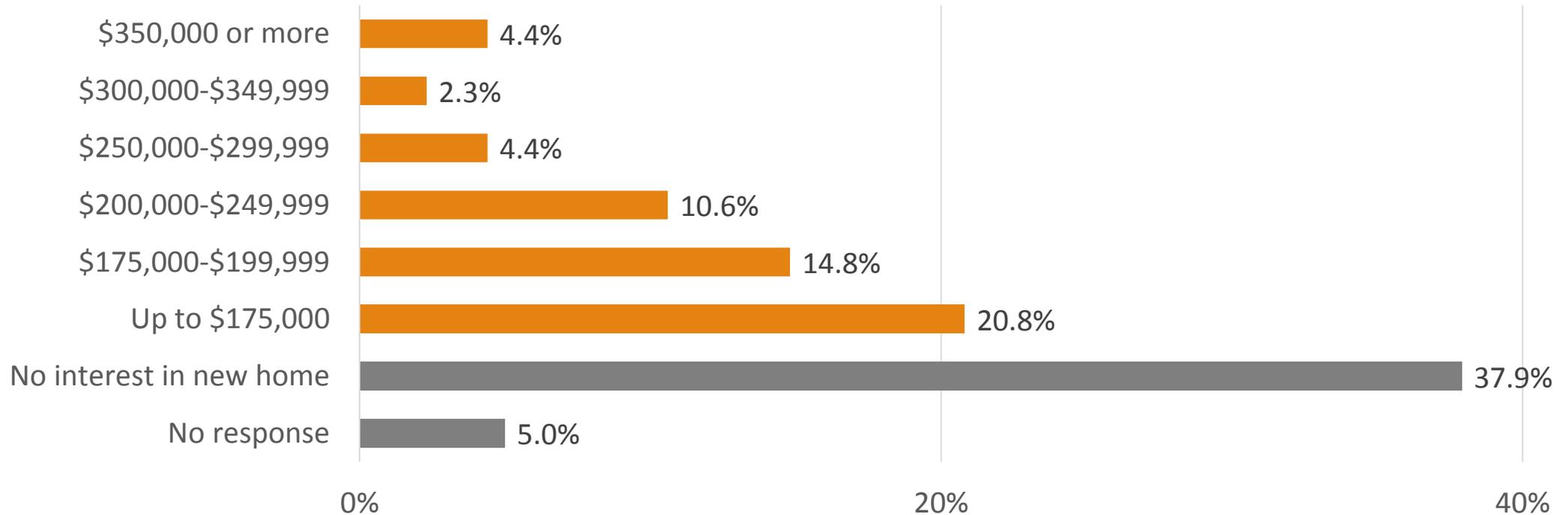
Q17: If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?

	Very Interested	Somewhat Interested
Year-round	5.1%	26.4%
Summer home	1.5%	8.8%



11.1% of respondents described the maximum amount that they would expect to pay for a new home with the features they would like as \$250,000 or more. A further 10.6% set a maximum amount between \$200,000 and \$250,000.

Q18: If you were to buy a different home, what is the maximum you would expect to pay for a new housing unit if it had all of the features you would like it to have?



Among those respondents who, earlier in the survey, had indicated some level of interest in purchasing a new year-round home in an active adult community (N=252), 14.3% would set their maximum expected price as at least \$250,000.

Q17: If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?

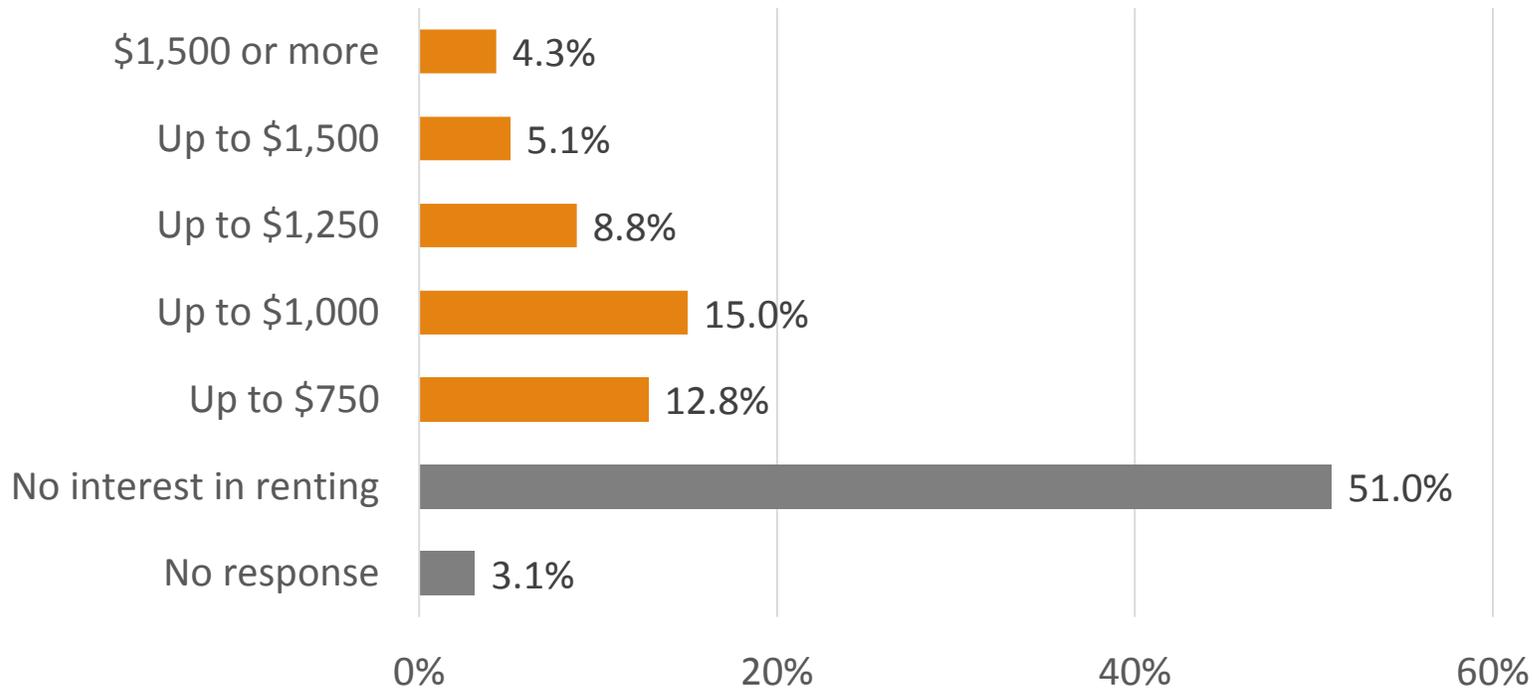
Q18: If you were to buy a different home, what is the maximum you would expect to pay for a new housing unit if it had all of the features you would like it to have?

	Interested (N=252)	Neutral (N=110)	Not Interested (N=428)
Maximum over \$250,000	14.3%	3.6%	10.7%
Maximum \$200,000-\$249,999	15.5%	12.7%	7.5%
Maximum below \$200,000	45.6%	54.5%	25.2%
No Response / No Interest	24.6%	29.1%	56.5%



18.2% of respondents indicated that the maximum that they would expect to pay in rent is over \$1,000 for new rental housing with luxury features in a good location.

Q19: If new rental housing with luxury features were available today in a good location, what is the maximum you would expect to pay in monthly rent (including heat and hot water).



- It should be noted that half (51.0%) of respondents indicated that they have no interest in renting.



Summary Analysis of Q18 and Q19

Q18: If you were to buy a different home, what is the maximum you would expect to pay for a new housing unit if it had all of the features you would like it to have?

- ✓ 11.1% of respondents would expect to pay a maximum amount of \$250,000 or more.
- ✓ More than one-fifth of respondents (21.7%) would expect to pay a maximum amount of \$200,000 or more.

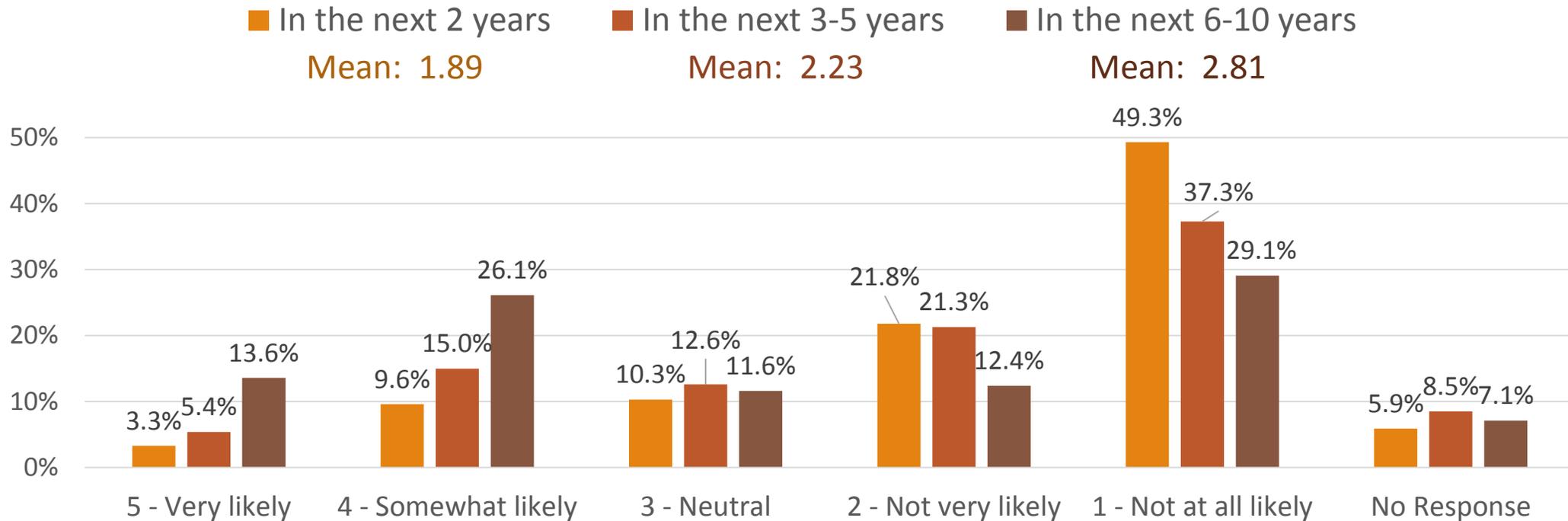
Q19: If new rental housing with luxury features were available today in a good location, what is the maximum you would expect to pay in monthly rent (including heat and hot water).

- ✓ 18.2% of respondents would expect to pay a maximum monthly rent of \$1,000 or more.
- ✓ 4.3% of respondents would expect to pay a maximum monthly rent of \$1,500 or more.



In the **next 6-10 years**, nearly 40% of respondents would consider themselves “somewhat” (26.1%) or “very likely” (13.6%) to move to affordable, available housing with desirable features in the Greater Ellsworth area.

Q20: If new housing had the features you want and was affordable and available, how likely is it that you would move to a new home in the Greater Ellsworth area in the coming years?



The likelihood of moving to attractive, affordable housing in Greater Ellsworth increases with the prospective timeframe.

Q20: If new housing had the features you want and was affordable and available, how likely is it that you would move to a new home in the Greater Ellsworth area in the coming years?

- Within the next 2 years, respondents rate their likelihood to move to a new home in the Greater Ellsworth area at a mean of 1.89. However, this likelihood rises to 2.23 within the next 3-5 years, and to 2.81 within the next 6-10 years.
- Likelihood of moving within 2 years increases strongly with age—those age 55-64 rate their likelihood at 1.66, while those older than 65 rate their likelihood at 2.01.
- Residents of Greater Ellsworth rate their likelihood to move to another location within Greater Ellsworth higher than other respondents in all timeframes:

	0-2 Years	3-5 Years	6-10 Years
In Greater Ellsworth	1.93	2.31	2.88
Outside Greater Ellsworth	1.81	2.06	2.67



Nearly half (46.4%) of those respondents who are unlikely to move within 10 years give their reason as “happy where I am.”

Q20d: If it is unlikely that you would consider moving within 10 years, why is that? [Open-ended]

(N=332)*	
Happy where I am	46.4%
Would move elsewhere than Ellsworth	9.6%
Plan to live with / be close to family	4.8%
Depends on tax levels	2.4%
Too old to move	2.1%

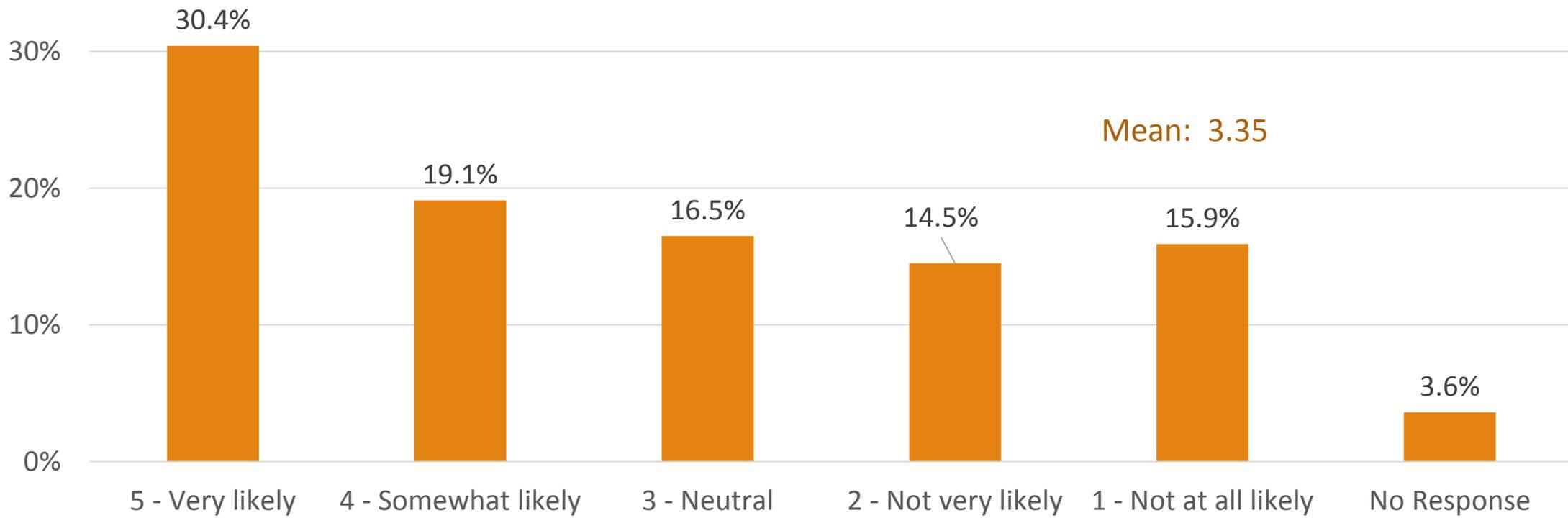
- Other common responses to this question include “would move elsewhere other than Ellsworth” (9.6%) and “plan to live with / be close to family” (4.8%).

*Most common answers shown – for full set of answers, see tabulations attached in Appendix B.



Half of respondents (49.5%) said that they were likely to consider Ellsworth as a place for their next residence, if affordable housing with desirable features is available.

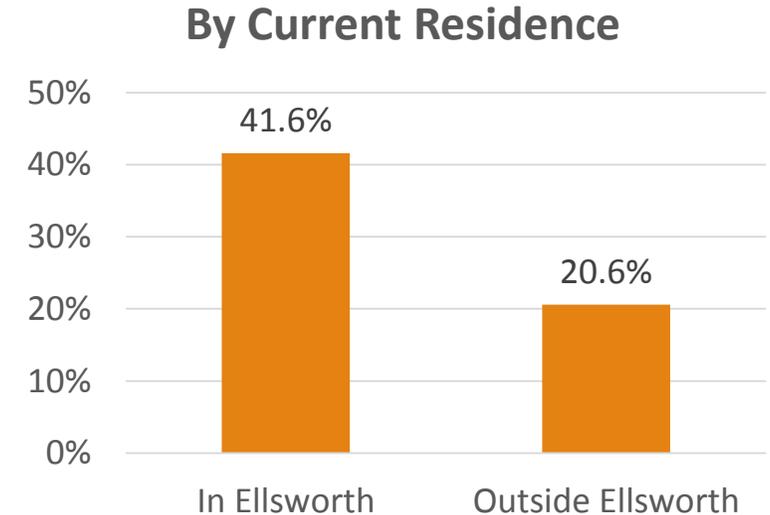
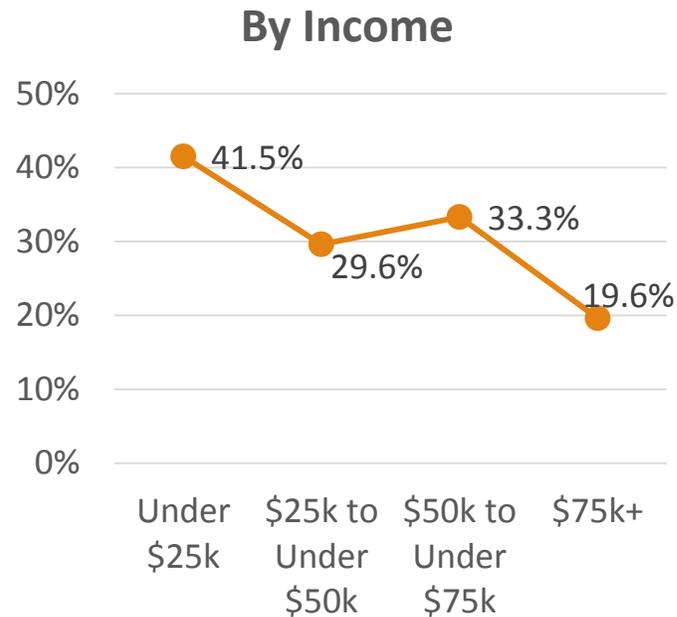
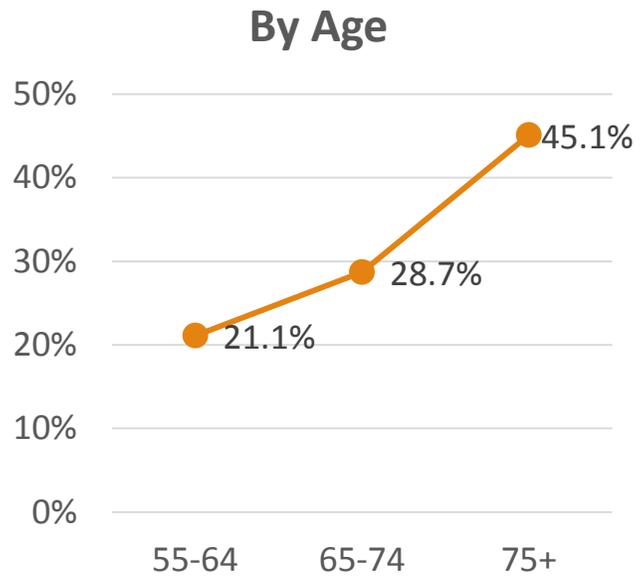
Q21a: If housing with the features you are looking for were affordable to you, how likely is it that you would consider Ellsworth as a place for your next residence?



Demographic groups most likely to consider Ellsworth as a place for their next residence include older residents, residents in lower income categories, and those who currently live in Ellsworth.

Q21a: If housing with the features you are looking for were affordable to you, how likely is it that you would consider Ellsworth as a place for your next residence?

% “Very Likely to Consider Ellsworth as a place for their next residence:



Among respondents who are unsure of whether they would consider Ellsworth, 20.5% cited “proximity to my family” as the reason for their uncertainty.

Q21b: If you answered ‘it depends,’ what would the choice depend on? [Open-ended]

(N=132)*	
Proximity to my family	20.5%
Taxes too high in Ellsworth	14.4%
Will depend on health	12.1%
Will depend on cost	12.1%

- Taxes are a much higher concern among younger respondents and those with a higher household income.
- 29.6% of those age 55-64 cited taxes compared to 6.3% of older respondents.
- Taxes were cited as a concern by:
 - 0% of those with a HHI under \$25,000
 - 12.1% of those with a HHI between \$25,000 and \$49,999.
 - 20.0% of those with a HHI between \$50,000 and \$74,999.
 - 21.1% of those with a HHI over \$75,000.

*Most common answers shown – for full set of answers, see tabulations attached in Appendix B.



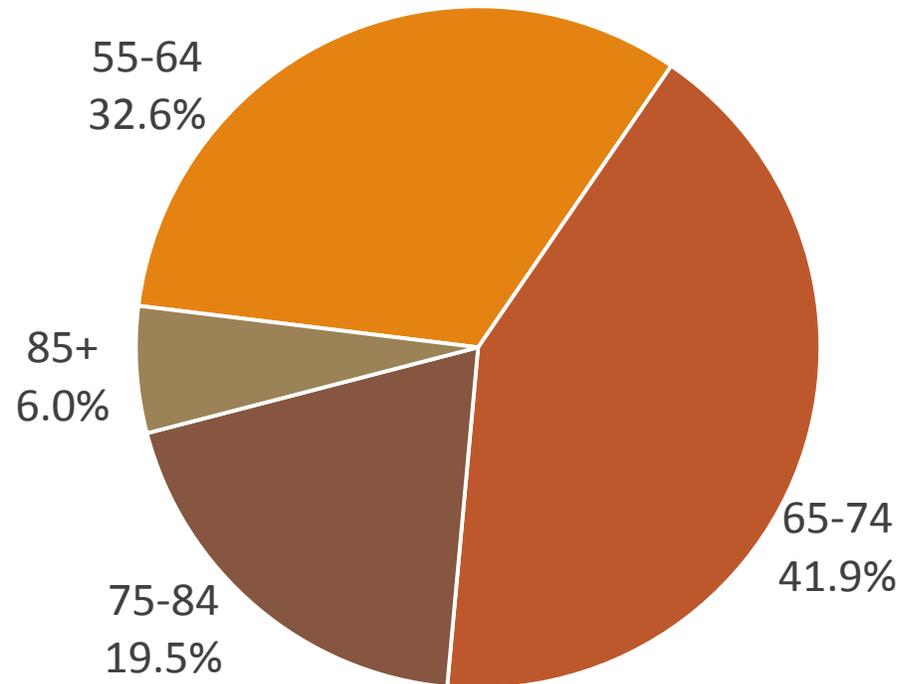
Demographics



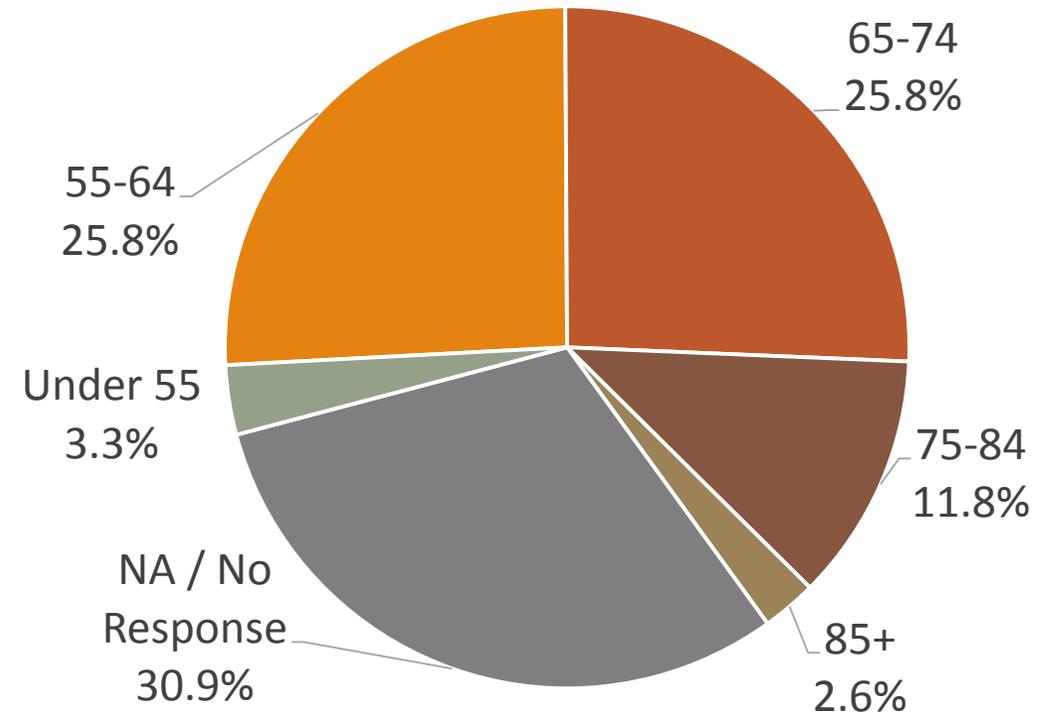
Demographics – Age

Q7: Please indicate your age group and that of your spouse or partner (as applicable).

Age of Respondent



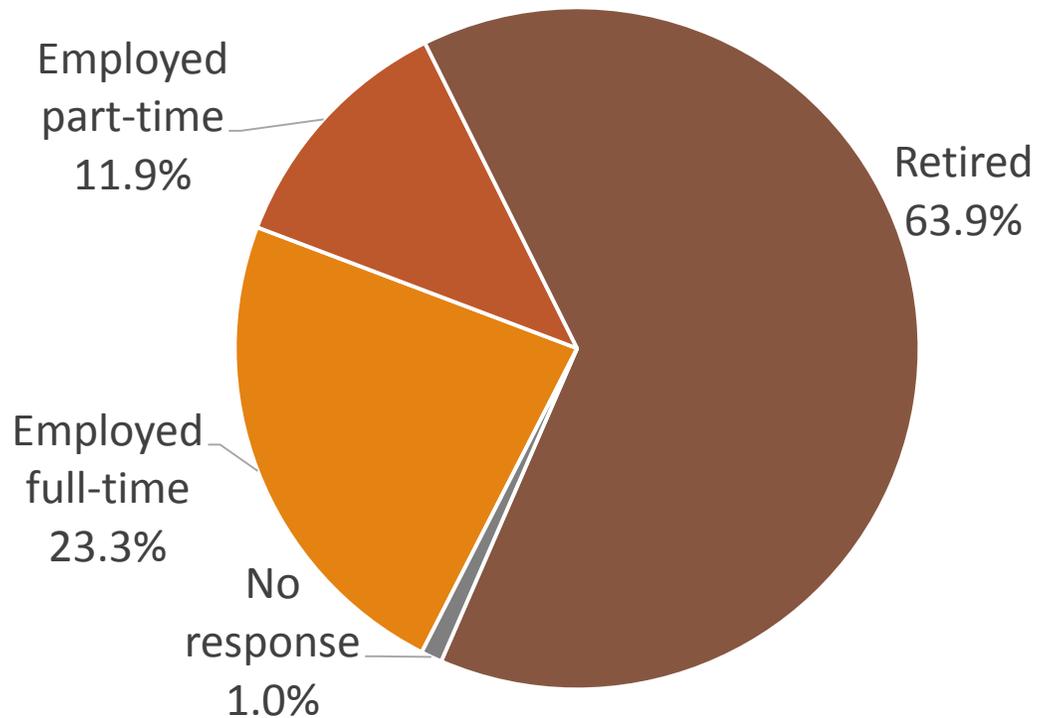
Age of Spouse



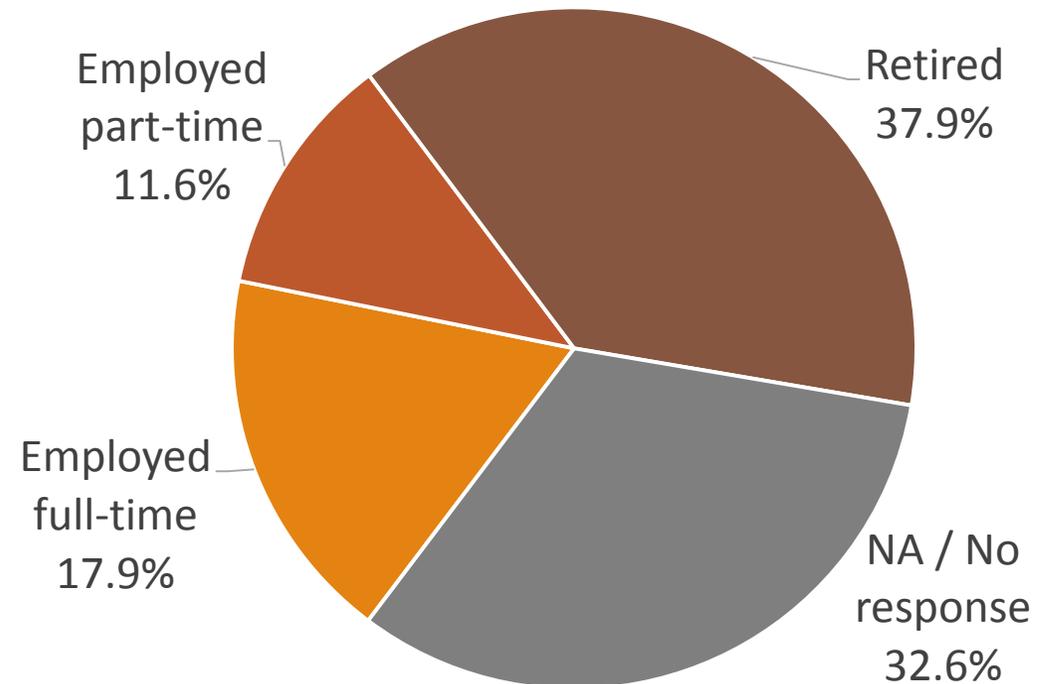
Demographics – Employment Status

Q8: Please indicate your employment status and that of your spouse or partner (as applicable).

Employment Status of Respondent

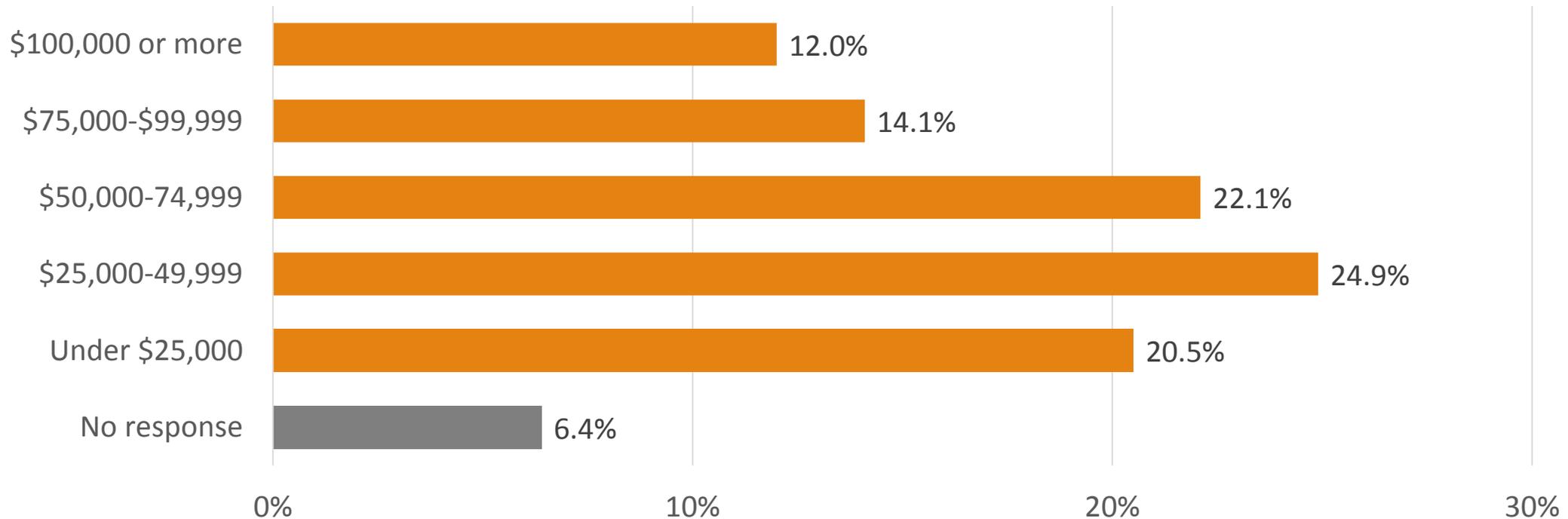


Employment Status of Spouse



Demographics – Income

Q22: For tabulation purposes, which of the following income ranges best approximates your annual household income for 2014 from all sources?



Appendix A

SURVEY INSTRUMENT



10. Does anyone in your household act as a caregiver for a relative in the area?

- No Yes, in my home Yes, in their home Yes, other help outside the home

11. How do you get to work, shopping, services, medical appointments, etc.? *Check all that apply.*

- Drive myself Taxi or paid driver
 Get a ride from friends or family Use MaineCare transportation service
 Use the bus / shuttle Other (please specify): _____
 Get a ride from a volunteer driving organization (Friends in Action, WHCA, Island Connection, etc.)

PREFERRED LOCATION AND HOME FEATURES

For the following questions concerning preferred location and home features, please answer based on the needs, preferences, and plans of your household.

12. If you were to move to another residence, how important would each of the following community or neighborhood features be to you? *Please tick one box for each part of the question (A through G).*

	1 Not important at all	2 Not very important	3 Neutral	4 Somewhat important	5 Very important
A. Close to shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Near cinemas, entertainment & cultural activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Educational opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Near medical services and hospital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Outdoor recreation/green space/trails nearby	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Walking distance to some services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. How important would these housing unit features be if you were to move to another residence?

Please tick one box for each part of the question (A through F).

	1 Not important at all	2 Not very important	3 Neutral	4 Somewhat important	5 Very important
A. Entry with minimal stairs or at grade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. All living area on one floor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Bedroom and bath on 1 st floor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Home office space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Attached garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Detached garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Over the past two years, have you searched for and / or visited any type of active adult (55+) community, retirement community or senior housing developments...

A. For yourself? Yes, for a unit to buy Yes, for a unit to rent No

B. For a parent or other relative? Yes, for a unit to buy Yes, for a unit to rent No

15. If you are a homeowner:

A. Have you listed your home for sale during the past 12 months? Yes No

B. If “no,” do you intend to offer it for sale during the next 12 months? Yes No

16. Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence. *Please tick one box for each part of the question (A through G).*

	1 Not at all likely	2 Not very likely	3 Neutral	4 Somewhat likely	5 Very likely
A. Rent an apartment or home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Buy a different single family home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Buy a duplex or attached “cottage” unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Buy a mobile home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Live within an active adult community limited to people 55 or older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Live in a retirement housing campus that offers dining and housekeeping services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Live in a retirement housing campus that offers personal care services that you may need as you get older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. If a new home were available today in an active adult community (ages 55 and over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?

	1 Not interested at all	2 Not very interested	3 Neutral	4 Somewhat interested	5 Very interested
A. As a year-round home?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. As a summer residence only?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. If you were to buy a different home, what is the maximum *you would expect to pay* for a new housing unit if it had all of the features you would like to have?

- Up to \$175,000
 \$175,000-\$199,999
 \$200,000-\$249,999
 \$250,000-\$299,999
 300,000-\$349,999
 \$350,000 or more
 No interest in new home

19. If new rental housing with luxury features were available today in a good location, what is the maximum *you would expect to pay* in monthly rent (including heat and hot water)?

- Up to \$750
 Up to \$1,000
 Up to \$1,250
 Up to \$1,500
 \$1,500 or more
 No interest in renting

20. If new housing had the features you want and was affordable and available, how likely is it that you would move to a new home in the *Greater Ellsworth area* in the coming years? Please tick one box for each part of the question (A through C).

	1 Not at all likely	2 Not very likely	3 Neutral	4 Somewhat likely	5 Very likely
A. In the next 2 years?	<input type="checkbox"/>				
B. In the next 3-5 years?	<input type="checkbox"/>				
C. In the next 6-10 years?	<input type="checkbox"/>				

D. If it is unlikely you would consider moving within 10 years, why is that?

21. A. If housing with the features you are looking for were affordable to you, how likely is it that you would consider *Ellsworth* as a place for your next residence?

1 – Not likely at all 2 - Not very likely 3 – It depends 4 - Somewhat likely 5 -Very likely

B. If you answered “it depends,” what would the choice depend on?

C. If you answered “not likely” or “not very likely,” what is the principal reason?

22. For tabulation purposes, which of the following income ranges best approximates your annual household income for 2014 from all sources?

Under \$25,000 \$25,000-\$49,999 \$50,000-\$74,999 \$75,000-\$99,999 \$100,000 or more

DRAWING FOR HANNAFORD GIFT CARDS

If you would like to be entered in the drawing to win one of three Hannaford \$75 gift cards, please enter your name, telephone number, and mailing address below:

Name: _____ Phone #: (____) ____ - ____
 Mailing Address Street: _____ City/Town: _____ State: ____ Zip Code: _____

Please return your completed survey as soon as possible and no later than July 17th.

Appendix B

STATISTICAL CROSS-TABULATIONS



Name of city or town in which your residence is located. (Q1)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
City of Ellsworth	373	126	145	102	90	61	100	96	26
	46.6%	48.3%	43.3%	50.0%	54.9%	30.7%	56.5%	45.9%	51.0%
Other towns	427	135	190	102	74	138	77	113	25
	53.4%	51.7%	56.7%	50.0%	45.1%	69.3%	43.5%	54.1%	49.0%

Pan Atlantic Research (August 2015)

How long have you lived at this residence? (Q2)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
0-5 Years	78	36	32	10	22	24	14	10	8
	9.8%	13.8%	9.6%	4.9%	13.4%	12.1%	7.9%	4.8%	15.7%
6-10 Years	132	46	49	37	18	33	37	36	8
	16.5%	17.6%	14.6%	18.1%	11.0%	16.6%	20.9%	17.2%	15.7%
11-20 Years	272	99	117	56	50	60	58	87	17
	34.0%	37.9%	34.9%	27.5%	30.5%	30.2%	32.8%	41.6%	33.3%
20+ Years	312	79	137	96	70	80	68	76	18
	39.0%	30.3%	40.9%	47.1%	42.7%	40.2%	38.4%	36.4%	35.3%
No response	6	1		5	4	2			
	.8%	.4%		2.5%	2.4%	1.0%			

Pan Atlantic Research (August 2015)

How long have you lived at this residence? (Q2)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
0-5 Years	78	32	46	60	18
	9.8%	8.6%	10.8%	10.8%	7.4%
6-10 Years	132	61	71	94	38
	16.5%	16.4%	16.6%	16.8%	15.7%
11-20 Years	272	126	146	198	74
	34.0%	33.8%	34.2%	35.5%	30.6%
20+ Years	312	150	162	202	110
	39.0%	40.2%	37.9%	36.2%	45.5%
No response	6	4	2	4	2
	.8%	1.1%	.5%	.7%	.8%

Pan Atlantic Research (August 2015)

Prior to living in this home, where did you live? (Q3)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Maine	557	203	216	138	124	144	112	145	32
	69.6%	77.8%	64.5%	67.6%	75.6%	72.4%	63.3%	69.4%	62.7%
Other	219	54	108	57	26	50	63	63	17
	27.4%	20.7%	32.2%	27.9%	15.9%	25.1%	35.6%	30.1%	33.3%
No response	24	4	11	9	14	5	2	1	2
	3.0%	1.5%	3.3%	4.4%	8.5%	2.5%	1.1%	.5%	3.9%

Pan Atlantic Research (August 2015)

Prior to living in this home, where did you live? (Q3)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Maine	557	289	268	415	142
	69.6%	77.5%	62.8%	74.4%	58.7%
Other	219	72	147	131	88
	27.4%	19.3%	34.4%	23.5%	36.4%
No response	24	12	12	12	12
	3.0%	3.2%	2.8%	2.2%	5.0%

Pan Atlantic Research (August 2015)

How would you describe your current residence? (Q4a)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Single family	716	233	314	169	116	181	165	205	49
	89.5%	89.3%	93.7%	82.8%	70.7%	91.0%	93.2%	98.1%	96.1%
Duplex	11	2	5	4	6	1	2	2	
	1.4%	.8%	1.5%	2.0%	3.7%	.5%	1.1%	1.0%	
Multi-family	18	6	3	9	17	1			
	2.3%	2.3%	.9%	4.4%	10.4%	.5%			
Townhouse	2		2		2				
	.3%		.6%		1.2%				
Mobile Home	27	9	11	7	11	10	6		
	3.4%	3.4%	3.3%	3.4%	6.7%	5.0%	3.4%		
Other	26	11		15	12	6	4	2	2
	3.3%	4.2%		7.4%	7.3%	3.0%	2.3%	1.0%	3.9%

Pan Atlantic Research (August 2015)

**How would you describe your current residence?
(Q4a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Single family	716	319	397	492	224
	89.5%	85.5%	93.0%	88.2%	92.6%
Duplex	11	8	3	10	1
	1.4%	2.1%	.7%	1.8%	.4%
Multi-family	18	14	4	15	3
	2.3%	3.8%	.9%	2.7%	1.2%
Townhouse	2	2		2	
	.3%	.5%		.4%	
Mobile Home	27	12	15	18	9
	3.4%	3.2%	3.5%	3.2%	3.7%
Other	26	18	8	21	5
	3.3%	4.8%	1.9%	3.8%	2.1%

Pan Atlantic Research (August 2015)

Is this your primary home (your legal residence)? (Q4b)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Yes	777	256	319	202	164	191	170	201	51
	97.1%	98.1%	95.2%	99.0%	100.0%	96.0%	96.0%	96.2%	100.0%
No	9	2	5	2		4	1	4	
	1.1%	.8%	1.5%	1.0%		2.0%	.6%	1.9%	
No response	14	3	11			4	6	4	
	1.8%	1.1%	3.3%			2.0%	3.4%	1.9%	

Pan Atlantic Research (August 2015)

**Is this your primary home (your legal residence)?
(Q4b)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Yes	777	361	416	536	241
	97.1%	96.8%	97.4%	96.1%	99.6%
No	9	2	7	9	
	1.1%	.5%	1.6%	1.6%	
No response	14	10	4	13	1
	1.8%	2.7%	.9%	2.3%	.4%

Pan Atlantic Research (August 2015)

If 'no,' in what state is your legal residence? (Q4c)

	Total	Age			Income		
		55-64	65-75	75+	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+
Total	9	2	5	2	4	1	4
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Other	5		3	2		1	4
	55.6%		60.0%	100.0%		100.0%	100.0%
No response	4	2	2		4		
	44.4%	100.0%	40.0%		100.0%		

Pan Atlantic Research (August 2015)

**If 'no,' in what state is your legal residence?
(Q4c)**

	Total	Regions		
		City of Ellsworth	Other towns	Greater Ellsworth
Total	9	2	7	9
	100.0%	100.0%	100.0%	100.0%
Other	5		5	5
	55.6%		71.4%	55.6%
No response	4	2	2	4
	44.4%	100.0%	28.6%	44.4%

Pan Atlantic Research (August 2015)

Do you own or rent this residence? (Q5)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Own	725	236	322	167	121	175	173	206	50
	90.6%	90.4%	96.1%	81.9%	73.8%	87.9%	97.7%	98.6%	98.0%
Rent	56	19	6	31	41	11	1	2	1
	7.0%	7.3%	1.8%	15.2%	25.0%	5.5%	.6%	1.0%	2.0%
Other	16	6	7	3	2	11	2	1	
	2.0%	2.3%	2.1%	1.5%	1.2%	5.5%	1.1%	.5%	
No response	3			3		2	1		
	.4%			1.5%		1.0%	.6%		

Pan Atlantic Research (August 2015)

Do you own or rent this residence? (Q5)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Own	725	329	396	499	226
	90.6%	88.2%	92.7%	89.4%	93.4%
Rent	56	36	20	46	10
	7.0%	9.7%	4.7%	8.2%	4.1%
Other	16	8	8	10	6
	2.0%	2.1%	1.9%	1.8%	2.5%
No response	3		3	3	
	.4%		.7%	.5%	

Pan Atlantic Research (August 2015)

How many people are there in your household? (Q6a)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1	229	38	103	88	110	60	31	19	9
	28.6%	14.6%	30.7%	43.1%	67.1%	30.2%	17.5%	9.1%	17.6%
2	502	180	216	106	48	116	128	168	42
	62.7%	69.0%	64.5%	52.0%	29.3%	58.3%	72.3%	80.4%	82.4%
3	57	36	11	10	6	21	13	17	
	7.1%	13.8%	3.3%	4.9%	3.7%	10.6%	7.3%	8.1%	
4+	10	5	5			2	5	3	
	1.3%	1.9%	1.5%			1.0%	2.8%	1.4%	
No response	2	2						2	
	.3%	.8%						1.0%	

Pan Atlantic Research (August 2015)

**How many people are there in your household?
(Q6a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1	229	113	116	159	70
	28.6%	30.3%	27.2%	28.5%	28.9%
2	502	216	286	346	156
	62.7%	57.9%	67.0%	62.0%	64.5%
3	57	34	23	42	15
	7.1%	9.1%	5.4%	7.5%	6.2%
4+	10	8	2	9	1
	1.3%	2.1%	.5%	1.6%	.4%
No response	2	2		2	
	.3%	.5%		.4%	

Pan Atlantic Research (August 2015)

How many of these persons are age 18 or younger? (Q6b)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
0	531	190	231	110	85	130	129	157	30
	66.4%	72.8%	69.0%	53.9%	51.8%	65.3%	72.9%	75.1%	58.8%
1	27	13	6	8	9	5	8	5	
	3.4%	5.0%	1.8%	3.9%	5.5%	2.5%	4.5%	2.4%	
2	49	15	22	12	5	9	15	18	2
	6.1%	5.7%	6.6%	5.9%	3.0%	4.5%	8.5%	8.6%	3.9%
3	6		4	2		2		4	
	.8%		1.2%	1.0%		1.0%		1.9%	
No response / Not applicable	187	43	72	72	65	53	25	25	19
	23.4%	16.5%	21.5%	35.3%	39.6%	26.6%	14.1%	12.0%	37.3%

Pan Atlantic Research (August 2015)

How many of these persons are age 18 or younger? (Q6b)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
0	531	228	303	359	172
	66.4%	61.1%	71.0%	64.3%	71.1%
1	27	14	13	16	11
	3.4%	3.8%	3.0%	2.9%	4.5%
2	49	22	27	33	16
	6.1%	5.9%	6.3%	5.9%	6.6%
3	6	4	2	6	
	.8%	1.1%	.5%	1.1%	
No response / Not applicable	187	105	82	144	43
	23.4%	28.2%	19.2%	25.8%	17.8%

Pan Atlantic Research (August 2015)

**Please indicate your age group and that of your spouse or partner (as applicable):
Yourself (Q7a)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
55-64	261	261			33	56	66	86	20
	32.6%	100.0%			20.1%	28.1%	37.3%	41.1%	39.2%
65-74	335		335		59	89	77	95	15
	41.9%		100.0%		36.0%	44.7%	43.5%	45.5%	29.4%
75-84	156			156	55	37	30	22	12
	19.5%			76.5%	33.5%	18.6%	16.9%	10.5%	23.5%
85+	48			48	17	17	4	6	4
	6.0%			23.5%	10.4%	8.5%	2.3%	2.9%	7.8%

Pan Atlantic Research (August 2015)

**Please indicate your age group and that of your spouse or partner (as applicable):
Yourself (Q7a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
55-64	261	126	135	192	69
	32.6%	33.8%	31.6%	34.4%	28.5%
65-74	335	145	190	221	114
	41.9%	38.9%	44.5%	39.6%	47.1%
75-84	156	76	80	110	46
	19.5%	20.4%	18.7%	19.7%	19.0%
85+	48	26	22	35	13
	6.0%	7.0%	5.2%	6.3%	5.4%

Pan Atlantic Research (August 2015)

**Please indicate your age group and that of your spouse or partner (as applicable):
Your spouse (Q7b)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under 55	26	23	2	1	6		6	13	1
	3.3%	8.8%	.6%	.5%	3.7%		3.4%	6.2%	2.0%
55-64	206	153	47	6	2	46	53	90	15
	25.8%	58.6%	14.0%	2.9%	1.2%	23.1%	29.9%	43.1%	29.4%
65-74	206	27	159	20	17	45	68	67	9
	25.8%	10.3%	47.5%	9.8%	10.4%	22.6%	38.4%	32.1%	17.6%
75-84	94	4	13	77	16	32	19	14	13
	11.8%	1.5%	3.9%	37.7%	9.8%	16.1%	10.7%	6.7%	25.5%
85+	21	3	7	11	2	11		4	4
	2.6%	1.1%	2.1%	5.4%	1.2%	5.5%		1.9%	7.8%
Not applicable / No response	247	51	107	89	121	65	31	21	9
	30.9%	19.5%	31.9%	43.6%	73.8%	32.7%	17.5%	10.0%	17.6%

Pan Atlantic Research (August 2015)

**Please indicate your age group and that of your spouse or partner (as applicable):
Your spouse (Q7b)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Under 55	26	12	14	18	8
	3.3%	3.2%	3.3%	3.2%	3.3%
55-64	206	100	106	156	50
	25.8%	26.8%	24.8%	28.0%	20.7%
65-74	206	92	114	132	74
	25.8%	24.7%	26.7%	23.7%	30.6%
75-84	94	32	62	65	29
	11.8%	8.6%	14.5%	11.6%	12.0%
85+	21	10	11	14	7
	2.6%	2.7%	2.6%	2.5%	2.9%
Not applicable / No response	247	127	120	173	74
	30.9%	34.0%	28.1%	31.0%	30.6%

Pan Atlantic Research (August 2015)

**Please indicate your employment status and that of your spouse or partner (as applicable):
Yourself (Q8a)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Employed full-time	186	149	33	4	20	27	48	77	14
	23.3%	57.1%	9.9%	2.0%	12.2%	13.6%	27.1%	36.8%	27.5%
Employed part-time	95	34	54	7	14	37	23	20	1
	11.9%	13.0%	16.1%	3.4%	8.5%	18.6%	13.0%	9.6%	2.0%
Retired	511	76	248	187	128	131	106	112	34
	63.9%	29.1%	74.0%	91.7%	78.0%	65.8%	59.9%	53.6%	66.7%
No response	8	2		6	2	4			2
	1.0%	.8%		2.9%	1.2%	2.0%			3.9%

Pan Atlantic Research (August 2015)

**Please indicate your employment status and that of your spouse or partner (as applicable):
Yourself (Q8a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Employed full-time	186	100	86	144	42
	23.3%	26.8%	20.1%	25.8%	17.4%
Employed part-time	95	32	63	61	34
	11.9%	8.6%	14.8%	10.9%	14.0%
Retired	511	237	274	345	166
	63.9%	63.5%	64.2%	61.8%	68.6%
No response	8	4	4	8	
	1.0%	1.1%	.9%	1.4%	

Pan Atlantic Research (August 2015)

**Please indicate your employment status and that of your spouse or partner (as applicable):
Your Partner (Q8b)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Employed full-time	143	95	44	4	5	21	39	70	8
	17.9%	36.4%	13.1%	2.0%	3.0%	10.6%	22.0%	33.5%	15.7%
Employed part-time	93	49	37	7	7	16	29	35	6
	11.6%	18.8%	11.0%	3.4%	4.3%	8.0%	16.4%	16.7%	11.8%
Retired	303	61	145	97	29	92	78	79	25
	37.9%	23.4%	43.3%	47.5%	17.7%	46.2%	44.1%	37.8%	49.0%
No response	261	56	109	96	123	70	31	25	12
	32.6%	21.5%	32.5%	47.1%	75.0%	35.2%	17.5%	12.0%	23.5%

Pan Atlantic Research (August 2015)

**Please indicate your employment status and that of your spouse or partner (as applicable):
Your Partner (Q8b)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Employed full-time	143	68	75	111	32
	17.9%	18.2%	17.6%	19.9%	13.2%
Employed part-time	93	42	51	64	29
	11.6%	11.3%	11.9%	11.5%	12.0%
Retired	303	130	173	200	103
	37.9%	34.9%	40.5%	35.8%	42.6%
No response	261	133	128	183	78
	32.6%	35.7%	30.0%	32.8%	32.2%

Pan Atlantic Research (August 2015)

**Do any other relatives currently live with you? (Q9)
[Multiple responses accepted]**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
No, none	727	214	321	192	154	174	157	193	49
	90.9%	82.0%	95.8%	94.1%	93.9%	87.4%	88.7%	92.3%	96.1%
Grandchildren	10	5	5		2	3	5		
	1.3%	1.9%	1.5%		1.2%	1.5%	2.8%		
Parents	22	14	8		2	6	4	10	
	2.8%	5.4%	2.4%		1.2%	3.0%	2.3%	4.8%	
Adult children over 18 not in college	39	23	4	12	4	15	14	6	
	4.9%	8.8%	1.2%	5.9%	2.4%	7.5%	7.9%	2.9%	
No response	7	7			2	1	2		2
	.9%	2.7%			1.2%	.5%	1.1%		3.9%

Pan Atlantic Research (August 2015)

**Do any other relatives currently live with you? (Q9)
[Multiple responses accepted]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
No, none	727	329	398	504	223
	90.9%	88.2%	93.2%	90.3%	92.1%
Grandchildren	10	6	4	7	3
	1.3%	1.6%	.9%	1.3%	1.2%
Parents	22	14	8	18	4
	2.8%	3.8%	1.9%	3.2%	1.7%
Adult children over 18 not in college	39	26	13	30	9
	4.9%	7.0%	3.0%	5.4%	3.7%
No response	7	2	5	4	3
	.9%	.5%	1.2%	.7%	1.2%

Pan Atlantic Research (August 2015)

Does anyone in your household act as a caregiver for a relative in the area? (Q10)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
No	718	226	310	182	155	168	159	188	48
	89.8%	86.6%	92.5%	89.2%	94.5%	84.4%	89.8%	90.0%	94.1%
Yes, in my home	28	7	12	9	1	12	7	6	2
	3.5%	2.7%	3.6%	4.4%	.6%	6.0%	4.0%	2.9%	3.9%
Yes, in their home	41	26	9	6	3	15	9	13	1
	5.1%	10.0%	2.7%	2.9%	1.8%	7.5%	5.1%	6.2%	2.0%
Yes, other help outside the home	4	2		2			2	2	
	.5%	.8%		1.0%			1.1%	1.0%	
No response	9		4	5	5	4			
	1.1%		1.2%	2.5%	3.0%	2.0%			

Pan Atlantic Research (August 2015)

Does anyone in your household act as a caregiver for a relative in the area? (Q10)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
No	718	337	381	505	213
	89.8%	90.3%	89.2%	90.5%	88.0%
Yes, in my home	28	14	14	23	5
	3.5%	3.8%	3.3%	4.1%	2.1%
Yes, in their home	41	12	29	19	22
	5.1%	3.2%	6.8%	3.4%	9.1%
Yes, other help outside the home	4	4		4	
	.5%	1.1%		.7%	
No response	9	6	3	7	2
	1.1%	1.6%	.7%	1.3%	.8%

Pan Atlantic Research (August 2015)

**How do you get to work, shopping, services, medical appointments, etc? (Q11)
[Multiple responses accepted]**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Drive myself	769	259	330	180	142	190	174	213	50
	96.1%	99.2%	98.5%	88.2%	86.6%	95.5%	98.3%	101.9%	98.0%
Get a ride w/friends or family	65	12	18	35	32	12	6	10	5
	8.1%	4.6%	5.4%	17.2%	19.5%	6.0%	3.4%	4.8%	9.8%
Use the bus/shuttle	3		1	2	2		1		
	.4%		.3%	1.0%	1.2%		.6%		
Get a ride from volunteer driving org.	23		8	15	20	3			
	2.9%		2.4%	7.4%	12.2%	1.5%			
Taxi or paid driver	3		3		2			1	
	.4%		.9%		1.2%			.5%	
Use MaineCare transportation service	1			1	1				
	.1%			.5%	.6%				
Other	9	4	3	2	3		4		2
	1.1%	1.5%	.9%	1.0%	1.8%		2.3%		3.9%
No response	9	2	7		7	2			
	1.1%	.8%	2.1%		4.3%	1.0%			

Pan Atlantic Research (August 2015)

**How do you get to work, shopping, services, medical appointments,
etc? (Q11)
[Multiple responses accepted]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Drive myself	769	361	408	541	228
	96.1%	96.8%	95.6%	97.0%	94.2%
Get a ride w/friends or family	65	32	33	48	17
	8.1%	8.6%	7.7%	8.6%	7.0%
Use the bus/shuttle	3	2	1	3	
	.4%	.5%	.2%	.5%	
Get a ride from volunteer driving org.	23	14	9	15	8
	2.9%	3.8%	2.1%	2.7%	3.3%
Taxi or paid driver	3	2	1	3	
	.4%	.5%	.2%	.5%	
Use MaineCare transportation service	1		1		1
	.1%		.2%		.4%
Other	9	4	5	8	1
	1.1%	1.1%	1.2%	1.4%	.4%
No response	9	8	1	8	1
	1.1%	2.1%	.2%	1.4%	.4%

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following community or neighborhood features be to you?
CLOSE TO SHOPPING (Q12a)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	25	16	7	2	10	4	4	1	6
	3.1%	6.1%	2.1%	1.0%	6.1%	2.0%	2.3%	.5%	11.8%
2 - Not very important	37	14	13	10	2	9	14	10	2
	4.6%	5.4%	3.9%	4.9%	1.2%	4.5%	7.9%	4.8%	3.9%
3 - Neutral	95	51	23	21	16	23	16	32	8
	11.9%	19.5%	6.9%	10.3%	9.8%	11.6%	9.0%	15.3%	15.7%
4 - Somewhat important	366	111	169	86	58	85	97	110	16
	45.8%	42.5%	50.4%	42.2%	35.4%	42.7%	54.8%	52.6%	31.4%
5 - Very important	268	64	123	81	74	78	46	53	17
	33.5%	24.5%	36.7%	39.7%	45.1%	39.2%	26.0%	25.4%	33.3%
No response	9	5		4	4			3	2
	1.1%	1.9%		2.0%	2.4%			1.4%	3.9%
Not important, overall	62	30	20	12	12	13	18	11	8
	7.8%	11.5%	6.0%	5.9%	7.3%	6.5%	10.2%	5.3%	15.7%
Neutral	95	51	23	21	16	23	16	32	8
	11.9%	19.5%	6.9%	10.3%	9.8%	11.6%	9.0%	15.3%	15.7%
Important, overall	634	175	292	167	132	163	143	163	33
	79.3%	67.0%	87.2%	81.9%	80.5%	81.9%	80.8%	78.0%	64.7%
No response	9	5		4	4			3	2
	1.1%	1.9%		2.0%	2.4%			1.4%	3.9%

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following community or neighborhood features be to you?
CLOSE TO SHOPPING (Q12a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	25	12	13	15	10
	3.1%	3.2%	3.0%	2.7%	4.1%
2 - Not very important	37	12	25	22	15
	4.6%	3.2%	5.9%	3.9%	6.2%
3 - Neutral	95	44	51	68	27
	11.9%	11.8%	11.9%	12.2%	11.2%
4 - Somewhat important	366	168	198	257	109
	45.8%	45.0%	46.4%	46.1%	45.0%
5 - Very important	268	131	137	187	81
	33.5%	35.1%	32.1%	33.5%	33.5%
No response	9	6	3	9	
	1.1%	1.6%	.7%	1.6%	
Not important, overall	62	24	38	37	25
	7.8%	6.4%	8.9%	6.6%	10.3%
Neutral	95	44	51	68	27
	11.9%	11.8%	11.9%	12.2%	11.2%
Important, overall	634	299	335	444	190
	79.3%	80.2%	78.5%	79.6%	78.5%
No response	9	6	3	9	
	1.1%	1.6%	.7%	1.6%	

Pan Atlantic Research (August 2015)

Mean of Q12a (CLOSE TO SHOPPING)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	4.03	3.75	4.16	4.17	4.15	4.13	3.94	3.99	3.73
Std Deviation	.96	1.08	.87	.88	1.08	.93	.93	.81	1.32
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	791	256	335	200	160	199	177	206	49

Pan Atlantic Research (August 2015)

Mean of Q12a (CLOSE TO SHOPPING)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	4.03	4.07	3.99	4.05	3.98
Std Deviation	.96	.95	.98	.93	1.03
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	791	367	424	549	242

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following
community or neighborhood features be to you?
NEAR CINEMAS, ENTERTAINMENT, & CULTURAL ACTIVITIES (Q12b)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	100	34	26	40	34	28	15	14	9
	12.5%	13.0%	7.8%	19.6%	20.7%	14.1%	8.5%	6.7%	17.6%
2 - Not very important	111	27	56	28	16	41	20	33	1
	13.9%	10.3%	16.7%	13.7%	9.8%	20.6%	11.3%	15.8%	2.0%
3 - Neutral	207	82	74	51	43	44	48	60	12
	25.9%	31.4%	22.1%	25.0%	26.2%	22.1%	27.1%	28.7%	23.5%
4 - Somewhat important	246	88	110	48	39	46	66	77	18
	30.8%	33.7%	32.8%	23.5%	23.8%	23.1%	37.3%	36.8%	35.3%
5 - Very important	116	27	65	24	22	36	26	23	9
	14.5%	10.3%	19.4%	11.8%	13.4%	18.1%	14.7%	11.0%	17.6%
No response	20	3	4	13	10	4	2	2	2
	2.5%	1.1%	1.2%	6.4%	6.1%	2.0%	1.1%	1.0%	3.9%
Not important, overall	211	61	82	68	50	69	35	47	10
	26.4%	23.4%	24.5%	33.3%	30.5%	34.7%	19.8%	22.5%	19.6%
Neutral	207	82	74	51	43	44	48	60	12
	25.9%	31.4%	22.1%	25.0%	26.2%	22.1%	27.1%	28.7%	23.5%
Important, overall	362	115	175	72	61	82	92	100	27
	45.3%	44.1%	52.2%	35.3%	37.2%	41.2%	52.0%	47.8%	52.9%
No response	20	3	4	13	10	4	2	2	2
	2.5%	1.1%	1.2%	6.4%	6.1%	2.0%	1.1%	1.0%	3.9%

Pan Atlantic Research (August 2015)

If you were to move to another residence, how important would each of the following community or neighborhood features be to you?
NEAR CINEMAS, ENTERTAINMENT, & CULTURAL ACTIVITIES (Q12b)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	100	50	50	65	35
	12.5%	13.4%	11.7%	11.6%	14.5%
2 - Not very important	111	54	57	79	32
	13.9%	14.5%	13.3%	14.2%	13.2%
3 - Neutral	207	88	119	143	64
	25.9%	23.6%	27.9%	25.6%	26.4%
4 - Somewhat important	246	120	126	176	70
	30.8%	32.2%	29.5%	31.5%	28.9%
5 - Very important	116	49	67	78	38
	14.5%	13.1%	15.7%	14.0%	15.7%
No response	20	12	8	17	3
	2.5%	3.2%	1.9%	3.0%	1.2%
Not important, overall	211	104	107	144	67
	26.4%	27.9%	25.1%	25.8%	27.7%
Neutral	207	88	119	143	64
	25.9%	23.6%	27.9%	25.6%	26.4%
Important, overall	362	169	193	254	108
	45.3%	45.3%	45.2%	45.5%	44.6%
No response	20	12	8	17	3
	2.5%	3.2%	1.9%	3.0%	1.2%

Pan Atlantic Research (August 2015)

Mean of 12b (NEAR CINEMAS, ENTERTAINMENT, & CULTURAL ACTIVITIES)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	3.21	3.18	3.40	2.94	2.99	3.11	3.39	3.30	3.35
Std Deviation	1.23	1.17	1.20	1.32	1.35	1.33	1.13	1.08	1.33
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	780	258	331	191	154	195	175	207	49

Pan Atlantic Research (August 2015)

Mean of 12b (NEAR CINEMAS, ENTERTAINMENT, & CULTURAL ACTIVITIES)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	3.21	3.18	3.25	3.23	3.18
Std Deviation	1.23	1.25	1.22	1.22	1.27
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	780	361	419	541	239

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following
community or neighborhood features be to you?
EDUCATIONAL OPPORTUNITIES (Q12c)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	185	51	79	55	48	43	37	38	19
	23.1%	19.5%	23.6%	27.0%	29.3%	21.6%	20.9%	18.2%	37.3%
2 - Not very important	105	28	49	28	15	29	26	33	2
	13.1%	10.7%	14.6%	13.7%	9.1%	14.6%	14.7%	15.8%	3.9%
3 - Neutral	249	96	100	53	50	66	36	77	20
	31.1%	36.8%	29.9%	26.0%	30.5%	33.2%	20.3%	36.8%	39.2%
4 - Somewhat important	180	66	72	42	35	38	63	36	8
	22.5%	25.3%	21.5%	20.6%	21.3%	19.1%	35.6%	17.2%	15.7%
5 - Very important	58	15	29	14	5	19	13	21	
	7.2%	5.7%	8.7%	6.9%	3.0%	9.5%	7.3%	10.0%	
No response	23	5	6	12	11	4	2	4	2
	2.9%	1.9%	1.8%	5.9%	6.7%	2.0%	1.1%	1.9%	3.9%
Not important, overall	290	79	128	83	63	72	63	71	21
	36.3%	30.3%	38.2%	40.7%	38.4%	36.2%	35.6%	34.0%	41.2%
Neutral	249	96	100	53	50	66	36	77	20
	31.1%	36.8%	29.9%	26.0%	30.5%	33.2%	20.3%	36.8%	39.2%
Important, overall	238	81	101	56	40	57	76	57	8
	29.8%	31.0%	30.1%	27.5%	24.4%	28.6%	42.9%	27.3%	15.7%
No response	23	5	6	12	11	4	2	4	2
	2.9%	1.9%	1.8%	5.9%	6.7%	2.0%	1.1%	1.9%	3.9%

Pan Atlantic Research (August 2015)

If you were to move to another residence, how important would each of the following community or neighborhood features be to you?

EDUCATIONAL OPPORTUNITIES (Q12c)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	185	106	79	134	51
	23.1%	28.4%	18.5%	24.0%	21.1%
2 - Not very important	105	52	53	77	28
	13.1%	13.9%	12.4%	13.8%	11.6%
3 - Neutral	249	96	153	159	90
	31.1%	25.7%	35.8%	28.5%	37.2%
4 - Somewhat important	180	78	102	129	51
	22.5%	20.9%	23.9%	23.1%	21.1%
5 - Very important	58	25	33	40	18
	7.2%	6.7%	7.7%	7.2%	7.4%
No response	23	16	7	19	4
	2.9%	4.3%	1.6%	3.4%	1.7%
Not important, overall	290	158	132	211	79
	36.3%	42.4%	30.9%	37.8%	32.6%
Neutral	249	96	153	159	90
	31.1%	25.7%	35.8%	28.5%	37.2%
Important, overall	238	103	135	169	69
	29.8%	27.6%	31.6%	30.3%	28.5%
No response	23	16	7	19	4
	2.9%	4.3%	1.6%	3.4%	1.7%

Pan Atlantic Research (August 2015)

Mean of 12c (EDUCATIONAL OPPORTUNITIES)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.77	2.87	2.77	2.65	2.57	2.80	2.94	2.85	2.35
Std Deviation	1.25	1.18	1.28	1.30	1.24	1.26	1.29	1.21	1.16
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	4.00
Valid N	777	256	329	192	153	195	175	205	49

Pan Atlantic Research (August 2015)

Mean of 12c (EDUCATIONAL OPPORTUNITIES)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.77	2.62	2.90	2.75	2.82
Std Deviation	1.25	1.30	1.20	1.27	1.21
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	777	357	420	539	238

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following community or neighborhood features be to you?
JOB OPPORTUNITIES (Q12d)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	325	48	150	127	80	79	68	72	26
	40.6%	18.4%	44.8%	62.3%	48.8%	39.7%	38.4%	34.4%	51.0%
2 - Not very important	105	31	51	23	18	40	21	24	2
	13.1%	11.9%	15.2%	11.3%	11.0%	20.1%	11.9%	11.5%	3.9%
3 - Neutral	139	49	63	27	30	26	26	45	12
	17.4%	18.8%	18.8%	13.2%	18.3%	13.1%	14.7%	21.5%	23.5%
4 - Somewhat important	118	69	45	4	12	24	35	41	6
	14.8%	26.4%	13.4%	2.0%	7.3%	12.1%	19.8%	19.6%	11.8%
5 - Very important	74	57	17		10	21	21	19	3
	9.3%	21.8%	5.1%		6.1%	10.6%	11.9%	9.1%	5.9%
No response	39	7	9	23	14	9	6	8	2
	4.9%	2.7%	2.7%	11.3%	8.5%	4.5%	3.4%	3.8%	3.9%
Not important, overall	430	79	201	150	98	119	89	96	28
	53.8%	30.3%	60.0%	73.5%	59.8%	59.8%	50.3%	45.9%	54.9%
Neutral	139	49	63	27	30	26	26	45	12
	17.4%	18.8%	18.8%	13.2%	18.3%	13.1%	14.7%	21.5%	23.5%
Important, overall	192	126	62	4	22	45	56	60	9
	24.0%	48.3%	18.5%	2.0%	13.4%	22.6%	31.6%	28.7%	17.6%
No response	39	7	9	23	14	9	6	8	2
	4.9%	2.7%	2.7%	11.3%	8.5%	4.5%	3.4%	3.8%	3.9%

Pan Atlantic Research (August 2015)

If you were to move to another residence, how important would each of the following community or neighborhood features be to you?
JOB OPPORTUNITIES (Q12d)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	325	160	165	221	104
	40.6%	42.9%	38.6%	39.6%	43.0%
2 - Not very important	105	42	63	66	39
	13.1%	11.3%	14.8%	11.8%	16.1%
3 - Neutral	139	68	71	105	34
	17.4%	18.2%	16.6%	18.8%	14.0%
4 - Somewhat important	118	50	68	85	33
	14.8%	13.4%	15.9%	15.2%	13.6%
5 - Very important	74	30	44	49	25
	9.3%	8.0%	10.3%	8.8%	10.3%
No response	39	23	16	32	7
	4.9%	6.2%	3.7%	5.7%	2.9%
Not important, overall	430	202	228	287	143
	53.8%	54.2%	53.4%	51.4%	59.1%
Neutral	139	68	71	105	34
	17.4%	18.2%	16.6%	18.8%	14.0%
Important, overall	192	80	112	134	58
	24.0%	21.4%	26.2%	24.0%	24.0%
No response	39	23	16	32	7
	4.9%	6.2%	3.7%	5.7%	2.9%

Pan Atlantic Research (August 2015)

Mean of 12d (JOB OPPORTUNITIES)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.36	3.22	2.17	1.49	2.03	2.31	2.53	2.56	2.14
Std Deviation	1.41	1.42	1.29	.83	1.29	1.40	1.48	1.40	1.35
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	4.00	5.00	5.00	5.00	5.00	5.00
Valid N	761	254	326	181	150	190	171	201	49

Pan Atlantic Research (August 2015)

Mean of 12d (JOB OPPORTUNITIES)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.36	2.28	2.42	2.38	2.30
Std Deviation	1.41	1.39	1.42	1.40	1.42
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	761	350	411	526	235

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following
community or neighborhood features be to you?
NEAR MEDICAL SERVICES AND HOSPITAL (Q12e)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	21	17	4		5	6	2	4	4
	2.6%	6.5%	1.2%		3.0%	3.0%	1.1%	1.9%	7.8%
2 - Not very important	14	1	5	8	2	8	2	2	
	1.8%	.4%	1.5%	3.9%	1.2%	4.0%	1.1%	1.0%	
3 - Neutral	63	30	22	11	5	14	16	21	7
	7.9%	11.5%	6.6%	5.4%	3.0%	7.0%	9.0%	10.0%	13.7%
4 - Somewhat important	289	126	103	60	37	72	74	91	15
	36.1%	48.3%	30.7%	29.4%	22.6%	36.2%	41.8%	43.5%	29.4%
5 - Very important	404	84	199	121	111	99	81	90	23
	50.5%	32.2%	59.4%	59.3%	67.7%	49.7%	45.8%	43.1%	45.1%
No response	9	3	2	4	4		2	1	2
	1.1%	1.1%	.6%	2.0%	2.4%		1.1%	.5%	3.9%
Not important, overall	35	18	9	8	7	14	4	6	4
	4.4%	6.9%	2.7%	3.9%	4.3%	7.0%	2.3%	2.9%	7.8%
Neutral	63	30	22	11	5	14	16	21	7
	7.9%	11.5%	6.6%	5.4%	3.0%	7.0%	9.0%	10.0%	13.7%
Important, overall	693	210	302	181	148	171	155	181	38
	86.6%	80.5%	90.1%	88.7%	90.2%	85.9%	87.6%	86.6%	74.5%
No response	9	3	2	4	4		2	1	2
	1.1%	1.1%	.6%	2.0%	2.4%		1.1%	.5%	3.9%

Pan Atlantic Research (August 2015)

If you were to move to another residence, how important would each of the following community or neighborhood features be to you?

NEAR MEDICAL SERVICES AND HOSPITAL (Q12e)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	21	12	9	16	5
	2.6%	3.2%	2.1%	2.9%	2.1%
2 - Not very important	14	2	12	11	3
	1.8%	.5%	2.8%	2.0%	1.2%
3 - Neutral	63	30	33	47	16
	7.9%	8.0%	7.7%	8.4%	6.6%
4 - Somewhat important	289	116	173	193	96
	36.1%	31.1%	40.5%	34.6%	39.7%
5 - Very important	404	207	197	282	122
	50.5%	55.5%	46.1%	50.5%	50.4%
No response	9	6	3	9	
	1.1%	1.6%	.7%	1.6%	
Not important, overall	35	14	21	27	8
	4.4%	3.8%	4.9%	4.8%	3.3%
Neutral	63	30	33	47	16
	7.9%	8.0%	7.7%	8.4%	6.6%
Important, overall	693	323	370	475	218
	86.6%	86.6%	86.7%	85.1%	90.1%
No response	9	6	3	9	
	1.1%	1.6%	.7%	1.6%	

Pan Atlantic Research (August 2015)

Mean of 12e (NEAR MEDICAL SERVICES AND HOSPITAL)

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Mean	4.32	4.00	4.47	4.47	4.54	4.26	4.31	4.25	4.08
Std Deviation	.90	1.03	.79	.78	.87	.97	.78	.83	1.17
Minimum	1.00	1.00	1.00	2.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	791	258	333	200	160	199	175	208	49

Pan Atlantic Research (August 2015)

Mean of 12e (NEAR MEDICAL SERVICES AND HOSPITAL)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	4.32	4.37	4.27	4.30	4.35
Std Deviation	.90	.91	.88	.92	.83
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	791	367	424	549	242

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following
community or neighborhood features be to you?
OUTDOOR RECREATION / GREEN SPACE / TRAILS NEARBY (Q12f)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	55	18	12	25	27	9	4	6	9
	6.9%	6.9%	3.6%	12.3%	16.5%	4.5%	2.3%	2.9%	17.6%
2 - Not very important	65	15	31	19	20	16	20	9	
	8.1%	5.7%	9.3%	9.3%	12.2%	8.0%	11.3%	4.3%	
3 - Neutral	172	49	63	60	46	48	27	42	9
	21.5%	18.8%	18.8%	29.4%	28.0%	24.1%	15.3%	20.1%	17.6%
4 - Somewhat important	259	79	121	59	39	63	62	82	13
	32.4%	30.3%	36.1%	28.9%	23.8%	31.7%	35.0%	39.2%	25.5%
5 - Very important	230	95	104	31	25	59	62	66	18
	28.7%	36.4%	31.0%	15.2%	15.2%	29.6%	35.0%	31.6%	35.3%
No response	19	5	4	10	7	4	2	4	2
	2.4%	1.9%	1.2%	4.9%	4.3%	2.0%	1.1%	1.9%	3.9%
Not important, overall	120	33	43	44	47	25	24	15	9
	15.0%	12.6%	12.8%	21.6%	28.7%	12.6%	13.6%	7.2%	17.6%
Neutral	172	49	63	60	46	48	27	42	9
	21.5%	18.8%	18.8%	29.4%	28.0%	24.1%	15.3%	20.1%	17.6%
Important, overall	489	174	225	90	64	122	124	148	31
	61.1%	66.7%	67.2%	44.1%	39.0%	61.3%	70.1%	70.8%	60.8%
No response	19	5	4	10	7	4	2	4	2
	2.4%	1.9%	1.2%	4.9%	4.3%	2.0%	1.1%	1.9%	3.9%

Pan Atlantic Research (August 2015)

If you were to move to another residence, how important would each of the following community or neighborhood features be to you?

OUTDOOR RECREATION / GREEN SPACE / TRAILS NEARBY (Q12f)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	55	38	17	47	8
	6.9%	10.2%	4.0%	8.4%	3.3%
2 - Not very important	65	34	31	47	18
	8.1%	9.1%	7.3%	8.4%	7.4%
3 - Neutral	172	86	86	117	55
	21.5%	23.1%	20.1%	21.0%	22.7%
4 - Somewhat important	259	116	143	186	73
	32.4%	31.1%	33.5%	33.3%	30.2%
5 - Very important	230	87	143	144	86
	28.7%	23.3%	33.5%	25.8%	35.5%
No response	19	12	7	17	2
	2.4%	3.2%	1.6%	3.0%	.8%
Not important, overall	120	72	48	94	26
	15.0%	19.3%	11.2%	16.8%	10.7%
Neutral	172	86	86	117	55
	21.5%	23.1%	20.1%	21.0%	22.7%
Important, overall	489	203	286	330	159
	61.1%	54.4%	67.0%	59.1%	65.7%
No response	19	12	7	17	2
	2.4%	3.2%	1.6%	3.0%	.8%

Pan Atlantic Research (August 2015)

Mean of 12f (OUTDOOR RECREATION / GREEN SPACE / TRAILS NEARBY)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	3.70	3.85	3.83	3.27	3.10	3.75	3.90	3.94	3.63
Std Deviation	1.18	1.19	1.09	1.22	1.30	1.11	1.08	.98	1.45
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	781	256	331	194	157	195	175	205	49

Pan Atlantic Research (August 2015)

Mean of 12f (OUTDOOR RECREATION / GREEN SPACE / TRAILS NEARBY)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	3.70	3.50	3.87	3.62	3.88
Std Deviation	1.18	1.25	1.09	1.21	1.09
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	781	361	420	541	240

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following
community or neighborhood features be to you?
WALKING DISTANCE TO SOME SERVICES (Q12g)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	88	30	24	34	25	17	14	26	6
	11.0%	11.5%	7.2%	16.7%	15.2%	8.5%	7.9%	12.4%	11.8%
2 - Not very important	84	14	41	29	11	16	21	29	7
	10.5%	5.4%	12.2%	14.2%	6.7%	8.0%	11.9%	13.9%	13.7%
3 - Neutral	153	80	40	33	34	35	31	44	9
	19.1%	30.7%	11.9%	16.2%	20.7%	17.6%	17.5%	21.1%	17.6%
4 - Somewhat important	260	81	128	51	50	64	66	66	14
	32.5%	31.0%	38.2%	25.0%	30.5%	32.2%	37.3%	31.6%	27.5%
5 - Very important	200	53	99	48	39	65	42	43	11
	25.0%	20.3%	29.6%	23.5%	23.8%	32.7%	23.7%	20.6%	21.6%
No response	15	3	3	9	5	2	3	1	4
	1.9%	1.1%	.9%	4.4%	3.0%	1.0%	1.7%	.5%	7.8%
Not important, overall	172	44	65	63	36	33	35	55	13
	21.5%	16.9%	19.4%	30.9%	22.0%	16.6%	19.8%	26.3%	25.5%
Neutral	153	80	40	33	34	35	31	44	9
	19.1%	30.7%	11.9%	16.2%	20.7%	17.6%	17.5%	21.1%	17.6%
Important, overall	460	134	227	99	89	129	108	109	25
	57.5%	51.3%	67.8%	48.5%	54.3%	64.8%	61.0%	52.2%	49.0%
No response	15	3	3	9	5	2	3	1	4
	1.9%	1.1%	.9%	4.4%	3.0%	1.0%	1.7%	.5%	7.8%

Pan Atlantic Research (August 2015)

If you were to move to another residence, how important would each of the following community or neighborhood features be to you?

WALKING DISTANCE TO SOME SERVICES (Q12g)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	88	58	30	72	16
	11.0%	15.5%	7.0%	12.9%	6.6%
2 - Not very important	84	36	48	58	26
	10.5%	9.7%	11.2%	10.4%	10.7%
3 - Neutral	153	58	95	104	49
	19.1%	15.5%	22.2%	18.6%	20.2%
4 - Somewhat important	260	126	134	177	83
	32.5%	33.8%	31.4%	31.7%	34.3%
5 - Very important	200	85	115	134	66
	25.0%	22.8%	26.9%	24.0%	27.3%
No response	15	10	5	13	2
	1.9%	2.7%	1.2%	2.3%	.8%
Not important, overall	172	94	78	130	42
	21.5%	25.2%	18.3%	23.3%	17.4%
Neutral	153	58	95	104	49
	19.1%	15.5%	22.2%	18.6%	20.2%
Important, overall	460	211	249	311	149
	57.5%	56.6%	58.3%	55.7%	61.6%
No response	15	10	5	13	2
	1.9%	2.7%	1.2%	2.3%	.8%

Pan Atlantic Research (August 2015)

Mean of 12g (WALKING DISTANCE TO SOME SERVICES)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	3.51	3.44	3.71	3.26	3.42	3.73	3.58	3.34	3.36
Std Deviation	1.28	1.21	1.22	1.43	1.35	1.24	1.21	1.29	1.34
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	785	258	332	195	159	197	174	208	47

Pan Atlantic Research (August 2015)

Mean of 12g (WALKING DISTANCE TO SOME SERVICES)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	3.51	3.40	3.61	3.45	3.65
Std Deviation	1.28	1.37	1.20	1.32	1.18
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	785	363	422	545	240

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following community or neighborhood features be to you?
Other Suggestions (Q12 Other)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	100	37	51	12	13	29	25	30	3
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Nature retreat, garden	6		2	4	2	4			
	6.0%		3.9%	33.3%	15.4%	13.8%			
Downtown area, good location	3		1	2				3	
	3.0%		2.0%	16.7%				10.0%	
Quiet area	6	2	4			2	2		2
	6.0%	5.4%	7.8%			6.9%	8.0%		66.7%
Allow pets	8	6	2		4		2	2	
	8.0%	16.2%	3.9%		30.8%		8.0%	6.7%	
A senior center	7		7		1	2	4		
	7.0%		13.7%		7.7%	6.9%	16.0%		
Near shops, services, and church	14	5	6	3		7		7	
	14.0%	13.5%	11.8%	25.0%		24.1%		23.3%	
Privacy and good level of safety	11	5	6		2	2	7		
	11.0%	13.5%	11.8%		15.4%	6.9%	28.0%		
Access to public transport	5	2	3			1	2	2	
	5.0%	5.4%	5.9%			3.4%	8.0%	6.7%	
Other	40	17	20	3	4	11	8	16	1
	40.0%	45.9%	39.2%	25.0%	30.8%	37.9%	32.0%	53.3%	33.3%

Pan Atlantic Research (August 2015)

**If you were to move to another residence, how important would each of the following community or neighborhood features be to you?
Other Suggestions (Q12 Other)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	100	52	48	75	25
	100.0%	100.0%	100.0%	100.0%	100.0%
Nature retreat, garden	6	2	4	2	4
	6.0%	3.8%	8.3%	2.7%	16.0%
Downtown area, good location	3		3	3	
	3.0%		6.3%	4.0%	
Quiet area	6	6		6	
	6.0%	11.5%		8.0%	
Allow pets	8	8		8	
	8.0%	15.4%		10.7%	
A senior center	7	6	1	6	1
	7.0%	11.5%	2.1%	8.0%	4.0%
Near shops, services, and church	14	6	8	7	7
	14.0%	11.5%	16.7%	9.3%	28.0%
Privacy and good level of safety	11	8	3	8	3
	11.0%	15.4%	6.3%	10.7%	12.0%
Access to public transport	5	2	3	4	1
	5.0%	3.8%	6.3%	5.3%	4.0%
Other	40	14	26	31	9
	40.0%	26.9%	54.2%	41.3%	36.0%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
ENTRY WITH MINIMAL STAIRS OR AT GRADE (Q13a)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	36	21	6	9	6	10	2	14	4
	4.5%	8.0%	1.8%	4.4%	3.7%	5.0%	1.1%	6.7%	7.8%
2 - Not very important	54	26	16	12	2	17	16	18	1
	6.8%	10.0%	4.8%	5.9%	1.2%	8.5%	9.0%	8.6%	2.0%
3 - Neutral	83	42	35	6	7	12	34	20	10
	10.4%	16.1%	10.4%	2.9%	4.3%	6.0%	19.2%	9.6%	19.6%
4 - Somewhat important	281	83	138	60	60	58	61	89	13
	35.1%	31.8%	41.2%	29.4%	36.6%	29.1%	34.5%	42.6%	25.5%
5 - Very important	333	86	136	111	83	98	64	67	21
	41.6%	33.0%	40.6%	54.4%	50.6%	49.2%	36.2%	32.1%	41.2%
No response	13	3	4	6	6	4		1	2
	1.6%	1.1%	1.2%	2.9%	3.7%	2.0%		.5%	3.9%
Not important, overall	90	47	22	21	8	27	18	32	5
	11.3%	18.0%	6.6%	10.3%	4.9%	13.6%	10.2%	15.3%	9.8%
Neutral	83	42	35	6	7	12	34	20	10
	10.4%	16.1%	10.4%	2.9%	4.3%	6.0%	19.2%	9.6%	19.6%
Important, overall	614	169	274	171	143	156	125	156	34
	76.8%	64.8%	81.8%	83.8%	87.2%	78.4%	70.6%	74.6%	66.7%
No response	13	3	4	6	6	4		1	2
	1.6%	1.1%	1.2%	2.9%	3.7%	2.0%		.5%	3.9%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
ENTRY WITH MINIMAL STAIRS OR AT GRADE (Q13a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	36	22	14	31	5
	4.5%	5.9%	3.3%	5.6%	2.1%
2 - Not very important	54	14	40	26	28
	6.8%	3.8%	9.4%	4.7%	11.6%
3 - Neutral	83	39	44	69	14
	10.4%	10.5%	10.3%	12.4%	5.8%
4 - Somewhat important	281	128	153	190	91
	35.1%	34.3%	35.8%	34.1%	37.6%
5 - Very important	333	160	173	229	104
	41.6%	42.9%	40.5%	41.0%	43.0%
No response	13	10	3	13	
	1.6%	2.7%	.7%	2.3%	
Not important, overall	90	36	54	57	33
	11.3%	9.7%	12.6%	10.2%	13.6%
Neutral	83	39	44	69	14
	10.4%	10.5%	10.3%	12.4%	5.8%
Important, overall	614	288	326	419	195
	76.8%	77.2%	76.3%	75.1%	80.6%
No response	13	10	3	13	
	1.6%	2.7%	.7%	2.3%	

Pan Atlantic Research (August 2015)

Mean of 13a (ENTRY WITH MINIMAL STAIRS OR AT GRADE)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	4.04	3.72	4.15	4.27	4.34	4.11	3.95	3.85	3.94
Std Deviation	1.10	1.25	.92	1.08	.92	1.17	1.01	1.16	1.21
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	787	258	331	198	158	195	177	208	49

Pan Atlantic Research (August 2015)

Mean of 13a (ENTRY WITH MINIMAL STAIRS OR AT GRADE)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	4.04	4.07	4.02	4.03	4.08
Std Deviation	1.10	1.12	1.09	1.12	1.07
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	787	363	424	545	242

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
ALL LIVING AREA ON ONE FLOOR (Q13b)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	33	24	2	7	4	6	2	14	7
	4.1%	9.2%	.6%	3.4%	2.4%	3.0%	1.1%	6.7%	13.7%
2 - Not very important	36	16	16	4	2	13	11	8	2
	4.5%	6.1%	4.8%	2.0%	1.2%	6.5%	6.2%	3.8%	3.9%
3 - Neutral	85	40	32	13	3	21	27	29	5
	10.6%	15.3%	9.6%	6.4%	1.8%	10.6%	15.3%	13.9%	9.8%
4 - Somewhat important	250	78	120	52	53	57	59	70	11
	31.3%	29.9%	35.8%	25.5%	32.3%	28.6%	33.3%	33.5%	21.6%
5 - Very important	384	99	159	126	98	102	74	86	24
	48.0%	37.9%	47.5%	61.8%	59.8%	51.3%	41.8%	41.1%	47.1%
No response	12	4	6	2	4		4	2	2
	1.5%	1.5%	1.8%	1.0%	2.4%		2.3%	1.0%	3.9%
Not important, overall	69	40	18	11	6	19	13	22	9
	8.6%	15.3%	5.4%	5.4%	3.7%	9.5%	7.3%	10.5%	17.6%
Neutral	85	40	32	13	3	21	27	29	5
	10.6%	15.3%	9.6%	6.4%	1.8%	10.6%	15.3%	13.9%	9.8%
Important, overall	634	177	279	178	151	159	133	156	35
	79.3%	67.8%	83.3%	87.3%	92.1%	79.9%	75.1%	74.6%	68.6%
No response	12	4	6	2	4		4	2	2
	1.5%	1.5%	1.8%	1.0%	2.4%		2.3%	1.0%	3.9%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
ALL LIVING AREA ON ONE FLOOR (Q13b)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	33	20	13	29	4
	4.1%	5.4%	3.0%	5.2%	1.7%
2 - Not very important	36	8	28	16	20
	4.5%	2.1%	6.6%	2.9%	8.3%
3 - Neutral	85	46	39	68	17
	10.6%	12.3%	9.1%	12.2%	7.0%
4 - Somewhat important	250	110	140	174	76
	31.3%	29.5%	32.8%	31.2%	31.4%
5 - Very important	384	181	203	259	125
	48.0%	48.5%	47.5%	46.4%	51.7%
No response	12	8	4	12	
	1.5%	2.1%	.9%	2.2%	
Not important, overall	69	28	41	45	24
	8.6%	7.5%	9.6%	8.1%	9.9%
Neutral	85	46	39	68	17
	10.6%	12.3%	9.1%	12.2%	7.0%
Important, overall	634	291	343	433	201
	79.3%	78.0%	80.3%	77.6%	83.1%
No response	12	8	4	12	
	1.5%	2.1%	.9%	2.2%	

Pan Atlantic Research (August 2015)

Mean of 13b (ALL LIVING AREA ON ONE FLOOR)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	4.16	3.82	4.27	4.42	4.49	4.19	4.11	4.00	3.88
Std Deviation	1.06	1.27	.87	.95	.82	1.06	.97	1.15	1.44
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	788	257	329	202	160	199	173	207	49

Pan Atlantic Research (August 2015)

Mean of 13b (ALL LIVING AREA ON ONE FLOOR)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	4.16	4.16	4.16	4.13	4.23
Std Deviation	1.06	1.09	1.04	1.09	1.01
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	788	365	423	546	242

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
BEDROOM AND BATH ON 1ST FLOOR (Q13c)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	798	261	333	204	164	199	177	209	49
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	35	22	6	7	8	6	4	12	5
	4.4%	8.4%	1.8%	3.4%	4.9%	3.0%	2.3%	5.7%	10.2%
2 - Not very important	31	12	13	6		9	12	8	2
	3.9%	4.6%	3.9%	2.9%		4.5%	6.8%	3.8%	4.1%
3 - Neutral	62	35	19	8	2	18	21	16	5
	7.8%	13.4%	5.7%	3.9%	1.2%	9.0%	11.9%	7.7%	10.2%
4 - Somewhat important	210	85	87	38	36	53	51	62	8
	26.3%	32.6%	26.1%	18.6%	22.0%	26.6%	28.8%	29.7%	16.3%
5 - Very important	451	104	206	141	115	113	87	109	27
	56.5%	39.8%	61.9%	69.1%	70.1%	56.8%	49.2%	52.2%	55.1%
No response	9	3	2	4	3		2	2	2
	1.1%	1.1%	.6%	2.0%	1.8%		1.1%	1.0%	4.1%
Not important, overall	66	34	19	13	8	15	16	20	7
	8.3%	13.0%	5.7%	6.4%	4.9%	7.5%	9.0%	9.6%	14.3%
Neutral	62	35	19	8	2	18	21	16	5
	7.8%	13.4%	5.7%	3.9%	1.2%	9.0%	11.9%	7.7%	10.2%
Important, overall	661	189	293	179	151	166	138	171	35
	82.8%	72.4%	88.0%	87.7%	92.1%	83.4%	78.0%	81.8%	71.4%
No response	9	3	2	4	3		2	2	2
	1.1%	1.1%	.6%	2.0%	1.8%		1.1%	1.0%	4.1%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
BEDROOM AND BATH ON 1ST FLOOR (Q13c)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	798	371	427	556	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	35	22	13	31	4
	4.4%	5.9%	3.0%	5.6%	1.7%
2 - Not very important	31	8	23	16	15
	3.9%	2.2%	5.4%	2.9%	6.2%
3 - Neutral	62	34	28	47	15
	7.8%	9.2%	6.6%	8.5%	6.2%
4 - Somewhat important	210	82	128	145	65
	26.3%	22.1%	30.0%	26.1%	26.9%
5 - Very important	451	221	230	310	141
	56.5%	59.6%	53.9%	55.8%	58.3%
No response	9	4	5	7	2
	1.1%	1.1%	1.2%	1.3%	.8%
Not important, overall	66	30	36	47	19
	8.3%	8.1%	8.4%	8.5%	7.9%
Neutral	62	34	28	47	15
	7.8%	9.2%	6.6%	8.5%	6.2%
Important, overall	661	303	358	455	206
	82.8%	81.7%	83.8%	81.8%	85.1%
No response	9	4	5	7	2
	1.1%	1.1%	1.2%	1.3%	.8%

Pan Atlantic Research (August 2015)

Mean of 13c (BEDROOM AND BATH ON 1ST FLOOR)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	4.28	3.92	4.43	4.50	4.55	4.30	4.17	4.20	4.06
Std Deviation	1.06	1.22	.90	.97	.93	1.01	1.04	1.12	1.36
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	789	258	331	200	161	199	175	207	47

Pan Atlantic Research (August 2015)

Mean of 13c (BEDROOM AND BATH ON 1ST FLOOR)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	4.28	4.29	4.28	4.25	4.35
Std Deviation	1.06	1.11	1.02	1.10	.97
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	789	367	422	549	240

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
HOME OFFICE SPACE (Q13d)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	171	45	59	67	62	45	29	25	10
	21.4%	17.2%	17.6%	32.8%	37.8%	22.6%	16.4%	12.0%	19.6%
2 - Not very important	106	38	39	29	17	37	23	25	4
	13.3%	14.6%	11.6%	14.2%	10.4%	18.6%	13.0%	12.0%	7.8%
3 - Neutral	184	71	74	39	36	39	46	42	21
	23.0%	27.2%	22.1%	19.1%	22.0%	19.6%	26.0%	20.1%	41.2%
4 - Somewhat important	213	65	110	38	28	48	51	81	5
	26.6%	24.9%	32.8%	18.6%	17.1%	24.1%	28.8%	38.8%	9.8%
5 - Very important	102	39	45	18	8	26	26	35	7
	12.8%	14.9%	13.4%	8.8%	4.9%	13.1%	14.7%	16.7%	13.7%
No response	24	3	8	13	13	4	2	1	4
	3.0%	1.1%	2.4%	6.4%	7.9%	2.0%	1.1%	.5%	7.8%
Not important, overall	277	83	98	96	79	82	52	50	14
	34.6%	31.8%	29.3%	47.1%	48.2%	41.2%	29.4%	23.9%	27.5%
Neutral	184	71	74	39	36	39	46	42	21
	23.0%	27.2%	22.1%	19.1%	22.0%	19.6%	26.0%	20.1%	41.2%
Important, overall	315	104	155	56	36	74	77	116	12
	39.4%	39.8%	46.3%	27.5%	22.0%	37.2%	43.5%	55.5%	23.5%
No response	24	3	8	13	13	4	2	1	4
	3.0%	1.1%	2.4%	6.4%	7.9%	2.0%	1.1%	.5%	7.8%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
HOME OFFICE SPACE (Q13d)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	171	92	79	125	46
	21.4%	24.7%	18.5%	22.4%	19.0%
2 - Not very important	106	40	66	72	34
	13.3%	10.7%	15.5%	12.9%	14.0%
3 - Neutral	184	88	96	122	62
	23.0%	23.6%	22.5%	21.9%	25.6%
4 - Somewhat important	213	95	118	153	60
	26.6%	25.5%	27.6%	27.4%	24.8%
5 - Very important	102	40	62	65	37
	12.8%	10.7%	14.5%	11.6%	15.3%
No response	24	18	6	21	3
	3.0%	4.8%	1.4%	3.8%	1.2%
Not important, overall	277	132	145	197	80
	34.6%	35.4%	34.0%	35.3%	33.1%
Neutral	184	88	96	122	62
	23.0%	23.6%	22.5%	21.9%	25.6%
Important, overall	315	135	180	218	97
	39.4%	36.2%	42.2%	39.1%	40.1%
No response	24	18	6	21	3
	3.0%	4.8%	1.4%	3.8%	1.2%

Pan Atlantic Research (August 2015)

Mean of 13d (HOME OFFICE SPACE)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.96	3.06	3.13	2.53	2.36	2.86	3.13	3.37	2.89
Std Deviation	1.35	1.31	1.31	1.39	1.32	1.37	1.29	1.24	1.29
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	776	258	327	191	151	195	175	208	47

Pan Atlantic Research (August 2015)

Mean of 13d (HOME OFFICE SPACE)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.96	2.86	3.04	2.93	3.03
Std Deviation	1.35	1.36	1.33	1.35	1.34
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	776	355	421	537	239

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
ATTACHED GARAGE (Q13e)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	82	20	22	40	32	23	8	11	8
	10.3%	7.7%	6.6%	19.6%	19.5%	11.6%	4.5%	5.3%	15.7%
2 - Not very important	50	6	26	18	16	15	7	12	
	6.3%	2.3%	7.8%	8.8%	9.8%	7.5%	4.0%	5.7%	
3 - Neutral	136	53	47	36	23	24	31	43	15
	17.0%	20.3%	14.0%	17.6%	14.0%	12.1%	17.5%	20.6%	29.4%
4 - Somewhat important	287	97	138	52	63	75	68	68	13
	35.9%	37.2%	41.2%	25.5%	38.4%	37.7%	38.4%	32.5%	25.5%
5 - Very important	234	81	100	53	27	59	61	74	13
	29.3%	31.0%	29.9%	26.0%	16.5%	29.6%	34.5%	35.4%	25.5%
No response	11	4	2	5	3	3	2	1	2
	1.4%	1.5%	.6%	2.5%	1.8%	1.5%	1.1%	.5%	3.9%
Not important, overall	132	26	48	58	48	38	15	23	8
	16.5%	10.0%	14.3%	28.4%	29.3%	19.1%	8.5%	11.0%	15.7%
Neutral	136	53	47	36	23	24	31	43	15
	17.0%	20.3%	14.0%	17.6%	14.0%	12.1%	17.5%	20.6%	29.4%
Important, overall	521	178	238	105	90	134	129	142	26
	65.1%	68.2%	71.0%	51.5%	54.9%	67.3%	72.9%	67.9%	51.0%
No response	11	4	2	5	3	3	2	1	2
	1.4%	1.5%	.6%	2.5%	1.8%	1.5%	1.1%	.5%	3.9%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
ATTACHED GARAGE (Q13e)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	82	52	30	69	13
	10.3%	13.9%	7.0%	12.4%	5.4%
2 - Not very important	50	12	38	18	32
	6.3%	3.2%	8.9%	3.2%	13.2%
3 - Neutral	136	60	76	89	47
	17.0%	16.1%	17.8%	15.9%	19.4%
4 - Somewhat important	287	134	153	200	87
	35.9%	35.9%	35.8%	35.8%	36.0%
5 - Very important	234	109	125	173	61
	29.3%	29.2%	29.3%	31.0%	25.2%
No response	11	6	5	9	2
	1.4%	1.6%	1.2%	1.6%	.8%
Not important, overall	132	64	68	87	45
	16.5%	17.2%	15.9%	15.6%	18.6%
Neutral	136	60	76	89	47
	17.0%	16.1%	17.8%	15.9%	19.4%
Important, overall	521	243	278	373	148
	65.1%	65.1%	65.1%	66.8%	61.2%
No response	11	6	5	9	2
	1.4%	1.6%	1.2%	1.6%	.8%

Pan Atlantic Research (August 2015)

Mean of 13e (ATTACHED GARAGE)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	3.69	3.83	3.80	3.30	3.23	3.67	3.95	3.88	3.47
Std Deviation	1.25	1.14	1.15	1.46	1.38	1.30	1.05	1.12	1.34
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	789	257	333	199	161	196	175	208	49

Pan Atlantic Research (August 2015)

Mean of 13e (ATTACHED GARAGE)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	3.69	3.64	3.72	3.71	3.63
Std Deviation	1.25	1.32	1.18	1.29	1.16
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	789	367	422	549	240

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
DETACHED GARAGE (Q13f)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	154	35	62	57	34	31	39	40	10
	19.3%	13.4%	18.5%	27.9%	20.7%	15.6%	22.0%	19.1%	19.6%
2 - Not very important	59	16	28	15	11	14	13	20	1
	7.4%	6.1%	8.4%	7.4%	6.7%	7.0%	7.3%	9.6%	2.0%
3 - Neutral	260	119	85	56	44	61	58	74	23
	32.5%	45.6%	25.4%	27.5%	26.8%	30.7%	32.8%	35.4%	45.1%
4 - Somewhat important	199	68	88	43	49	54	41	48	7
	24.9%	26.1%	26.3%	21.1%	29.9%	27.1%	23.2%	23.0%	13.7%
5 - Very important	46	14	22	10	6	15	12	9	4
	5.8%	5.4%	6.6%	4.9%	3.7%	7.5%	6.8%	4.3%	7.8%
No response	82	9	50	23	20	24	14	18	6
	10.3%	3.4%	14.9%	11.3%	12.2%	12.1%	7.9%	8.6%	11.8%
Not important, overall	213	51	90	72	45	45	52	60	11
	26.6%	19.5%	26.9%	35.3%	27.4%	22.6%	29.4%	28.7%	21.6%
Neutral	260	119	85	56	44	61	58	74	23
	32.5%	45.6%	25.4%	27.5%	26.8%	30.7%	32.8%	35.4%	45.1%
Important, overall	245	82	110	53	55	69	53	57	11
	30.6%	31.4%	32.8%	26.0%	33.5%	34.7%	29.9%	27.3%	21.6%
No response	82	9	50	23	20	24	14	18	6
	10.3%	3.4%	14.9%	11.3%	12.2%	12.1%	7.9%	8.6%	11.8%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
DETACHED GARAGE (Q13f)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not important at all	154	92	62	123	31
	19.3%	24.7%	14.5%	22.0%	12.8%
2 - Not very important	59	20	39	33	26
	7.4%	5.4%	9.1%	5.9%	10.7%
3 - Neutral	260	124	136	181	79
	32.5%	33.2%	31.9%	32.4%	32.6%
4 - Somewhat important	199	88	111	140	59
	24.9%	23.6%	26.0%	25.1%	24.4%
5 - Very important	46	14	32	27	19
	5.8%	3.8%	7.5%	4.8%	7.9%
No response	82	35	47	54	28
	10.3%	9.4%	11.0%	9.7%	11.6%
Not important, overall	213	112	101	156	57
	26.6%	30.0%	23.7%	28.0%	23.6%
Neutral	260	124	136	181	79
	32.5%	33.2%	31.9%	32.4%	32.6%
Important, overall	245	102	143	167	78
	30.6%	27.3%	33.5%	29.9%	32.2%
No response	82	35	47	54	28
	10.3%	9.4%	11.0%	9.7%	11.6%

Pan Atlantic Research (August 2015)

Mean of 13f (DETACHED GARAGE)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.89	3.04	2.93	2.64	2.88	3.05	2.84	2.82	2.87
Std Deviation	1.21	1.06	1.26	1.30	1.23	1.20	1.25	1.17	1.20
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	718	252	285	181	144	175	163	191	45

Pan Atlantic Research (August 2015)

Mean of 13f (DETACHED GARAGE)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.89	2.74	3.03	2.83	3.04
Std Deviation	1.21	1.23	1.18	1.23	1.16
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	718	338	380	504	214

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
Other Suggestions (Q13 Other)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	79	21	50	8	9	14	25	25	6
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Storage space	8		8				2	6	
	10.1%		16.0%				8.0%	24.0%	
Good facility maintenance	2		2					2	
	2.5%		4.0%					8.0%	
Small yard/garden	8		6	2			5	3	
	10.1%		12.0%	25.0%			20.0%	12.0%	
Extra bedroom	3		3				2		1
	3.8%		6.0%				8.0%		16.7%
Handicapped accessible	2	2				2			
	2.5%	9.5%				14.3%			
Pets allowed	6	2	4		3	1	2		
	7.6%	9.5%	8.0%		33.3%	7.1%	8.0%		
Laundry facilities	9		9		2		6		1
	11.4%		18.0%		22.2%		24.0%		16.7%
Garage	4		4		2		2		
	5.1%		8.0%		22.2%		8.0%		
Other	37	17	14	6	2	11	6	14	4
	46.8%	81.0%	28.0%	75.0%	22.2%	78.6%	24.0%	56.0%	66.7%

Pan Atlantic Research (August 2015)

**How important would these housing unit features be if you were to move to another residence?
Other Suggestions (Q13 Other)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	79	40	39	60	19
	100.0%	100.0%	100.0%	100.0%	100.0%
Storage space	8	6	2	8	
	10.1%	15.0%	5.1%	13.3%	
Good facility maintenance	2	2		2	
	2.5%	5.0%		3.3%	
Small yard/garden	8	4	4	8	
	10.1%	10.0%	10.3%	13.3%	
Extra bedroom	3		3	3	
	3.8%		7.7%	5.0%	
Handicapped accessible	2		2	2	
	2.5%		5.1%	3.3%	
Pets allowed	6	4	2	5	1
	7.6%	10.0%	5.1%	8.3%	5.3%
Laundry facilities	9	6	3	7	2
	11.4%	15.0%	7.7%	11.7%	10.5%
Garage	4	4		4	
	5.1%	10.0%		6.7%	
Other	37	14	23	21	16
	46.8%	35.0%	59.0%	35.0%	84.2%

Pan Atlantic Research (August 2015)

**Over the past two years, have you searched for and/or visited any type of active adult (55+) community, retirement community or senior housing developments?
FOR YOURSELF (Q14a) [Multiple responses accepted]**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Yes, to buy	48	8	28	12	9	8	15	12	4
	6.0%	3.1%	8.4%	5.9%	5.5%	4.0%	8.5%	5.7%	7.8%
Yes, to rent	58	14	25	19	19	19	8	10	2
	7.2%	5.4%	7.5%	9.3%	11.6%	9.5%	4.5%	4.8%	3.9%
No	690	235	282	173	132	174	154	189	41
	86.3%	90.0%	84.2%	84.8%	80.5%	87.4%	87.0%	90.4%	80.4%
No response	16	6	8	2	4	4	2	2	4
	2.0%	2.3%	2.4%	1.0%	2.4%	2.0%	1.1%	1.0%	7.8%

Pan Atlantic Research (August 2015)

**Over the past two years, have you searched for and/or visited any type of active adult (55+) community, retirement community or senior housing developments?
FOR YOURSELF (Q14a) [Multiple responses accepted]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Yes, to buy	48	30	18	41	7
	6.0%	8.0%	4.2%	7.3%	2.9%
Yes, to rent	58	28	30	51	7
	7.2%	7.5%	7.0%	9.1%	2.9%
No	690	317	373	468	222
	86.3%	85.0%	87.4%	83.9%	91.7%
No response	16	4	12	6	10
	2.0%	1.1%	2.8%	1.1%	4.1%

Pan Atlantic Research (August 2015)

**Over the past two years, have you searched for and/or visited any type of active adult (55+) community, retirement community or senior housing developments?
FOR A PARENT OR OTHER RELATIVE (Q14b) [Multiple responses accepted]**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Yes, to buy	17	6	11			4	13		
	2.1%	2.3%	3.3%			2.0%	7.3%		
Yes, to rent	58	21	33	4		14	22	22	
	7.2%	8.0%	9.9%	2.0%		7.0%	12.4%	10.5%	
No	646	215	259	172	136	161	137	167	45
	80.8%	82.4%	77.3%	84.3%	82.9%	80.9%	77.4%	79.9%	88.2%
No response	86	23	35	28	28	22	10	20	6
	10.8%	8.8%	10.4%	13.7%	17.1%	11.1%	5.6%	9.6%	11.8%

Pan Atlantic Research (August 2015)

Over the past two years, have you searched for and/or visited any type of active adult (55+) community, retirement community or senior housing developments?

**FOR A PARENT OR OTHER RELATIVE (Q14b)
[Multiple responses accepted]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Yes, to buy	17	6	11	9	8
	2.1%	1.6%	2.6%	1.6%	3.3%
Yes, to rent	58	28	30	45	13
	7.2%	7.5%	7.0%	8.1%	5.4%
No	646	305	341	450	196
	80.8%	81.8%	79.9%	80.6%	81.0%
No response	86	34	52	57	29
	10.8%	9.1%	12.2%	10.2%	12.0%

Pan Atlantic Research (August 2015)

**If you are a homeowner:
Have you listed your home for sale during the past 12 months? (Q15a)
[Asked only of those answering 'Own' to Q5]**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	725	236	322	167	121	175	173	206	50
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Yes	35	4	29	2	9	8	4	12	2
	4.8%	1.7%	9.0%	1.2%	7.4%	4.6%	2.3%	5.8%	4.0%
No	676	228	287	161	112	163	167	190	44
	93.2%	96.6%	89.1%	96.4%	92.6%	93.1%	96.5%	92.2%	88.0%
No response	14	4	6	4		4	2	4	4
	1.9%	1.7%	1.9%	2.4%		2.3%	1.2%	1.9%	8.0%

Pan Atlantic Research (August 2015)

**If you are a homeowner:
Have you listed your home for sale during the past 12 months? (Q15a)
[Asked only of those answering 'Own' to Q5]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	725	329	396	499	226
	100.0%	100.0%	100.0%	100.0%	100.0%
Yes	35	12	23	19	16
	4.8%	3.6%	5.8%	3.8%	7.1%
No	676	311	365	468	208
	93.2%	94.5%	92.2%	93.8%	92.0%
No response	14	6	8	12	2
	1.9%	1.8%	2.0%	2.4%	.9%

Pan Atlantic Research (August 2015)

**If you are a homeowner:
If 'no,' do you intend to offer it for sale during the next 12 months? (Q15b)
[Asked only of those answering 'Own' to Q5 and 'No' to Q15a]**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	676	228	287	161	112	163	167	190	44
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Yes	43	9	31	3	6	16	8	9	4
	6.4%	3.9%	10.8%	1.9%	5.4%	9.8%	4.8%	4.7%	9.1%
No	601	214	238	149	96	139	159	173	34
	88.9%	93.9%	82.9%	92.5%	85.7%	85.3%	95.2%	91.1%	77.3%
No response	32	5	18	9	10	8		8	6
	4.7%	2.2%	6.3%	5.6%	8.9%	4.9%		4.2%	13.6%

Pan Atlantic Research (August 2015)

**If you are a homeowner:
If 'no,' do you intend to offer it for sale during the
next 12 months? (Q15b)
[Asked only of those answering 'Own' to Q5 and 'No'
to Q15a]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	676	311	365	468	208
	100.0%	100.0%	100.0%	100.0%	100.0%
Yes	43	20	23	28	15
	6.4%	6.4%	6.3%	6.0%	7.2%
No	601	269	332	416	185
	88.9%	86.5%	91.0%	88.9%	88.9%
No response	32	22	10	24	8
	4.7%	7.1%	2.7%	5.1%	3.8%

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
RENT AN APARTMENT OR HOME (Q16a)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	276	104	100	72	42	63	67	76	28
	34.5%	39.8%	29.9%	35.3%	25.6%	31.7%	37.9%	36.4%	54.9%
2 - Not very likely	189	67	81	41	35	52	36	56	10
	23.6%	25.7%	24.2%	20.1%	21.3%	26.1%	20.3%	26.8%	19.6%
3 - Neutral	90	31	37	22	21	18	15	32	4
	11.3%	11.9%	11.0%	10.8%	12.8%	9.0%	8.5%	15.3%	7.8%
4 - Somewhat likely	124	31	59	34	29	32	31	25	7
	15.5%	11.9%	17.6%	16.7%	17.7%	16.1%	17.5%	12.0%	13.7%
5 - Very likely	82	26	42	14	18	27	25	10	2
	10.3%	10.0%	12.5%	6.9%	11.0%	13.6%	14.1%	4.8%	3.9%
No response	39	2	16	21	19	7	3	10	
	4.9%	.8%	4.8%	10.3%	11.6%	3.5%	1.7%	4.8%	
Not likely, overall	465	171	181	113	77	115	103	132	38
	58.1%	65.5%	54.0%	55.4%	47.0%	57.8%	58.2%	63.2%	74.5%
Neutral	90	31	37	22	21	18	15	32	4
	11.3%	11.9%	11.0%	10.8%	12.8%	9.0%	8.5%	15.3%	7.8%
Likely, overall	206	57	101	48	47	59	56	35	9
	25.8%	21.8%	30.1%	23.5%	28.7%	29.6%	31.6%	16.7%	17.6%
No response	39	2	16	21	19	7	3	10	
	4.9%	.8%	4.8%	10.3%	11.6%	3.5%	1.7%	4.8%	

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
RENT AN APARTMENT OR HOME (Q16a)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	276	133	143	183	93
	34.5%	35.7%	33.5%	32.8%	38.4%
2 - Not very likely	189	70	119	130	59
	23.6%	18.8%	27.9%	23.3%	24.4%
3 - Neutral	90	38	52	64	26
	11.3%	10.2%	12.2%	11.5%	10.7%
4 - Somewhat likely	124	62	62	84	40
	15.5%	16.6%	14.5%	15.1%	16.5%
5 - Very likely	82	42	40	63	19
	10.3%	11.3%	9.4%	11.3%	7.9%
No response	39	28	11	34	5
	4.9%	7.5%	2.6%	6.1%	2.1%
Not likely, overall	465	203	262	313	152
	58.1%	54.4%	61.4%	56.1%	62.8%
Neutral	90	38	52	64	26
	11.3%	10.2%	12.2%	11.5%	10.7%
Likely, overall	206	104	102	147	59
	25.8%	27.9%	23.9%	26.3%	24.4%
No response	39	28	11	34	5
	4.9%	7.5%	2.6%	6.1%	2.1%

Pan Atlantic Research (August 2015)

Mean of Q16a (RENT AN APARTMENT OR HOME)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.40	2.26	2.57	2.33	2.63	2.52	2.49	2.18	1.92
Std Deviation	1.39	1.36	1.43	1.36	1.40	1.45	1.50	1.21	1.25
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	761	259	319	183	145	192	174	199	51

Pan Atlantic Research (August 2015)

Mean of Q16a (RENT AN APARTMENT OR HOME)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.40	2.45	2.37	2.45	2.30
Std Deviation	1.39	1.45	1.34	1.41	1.35
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	761	345	416	524	237

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
BUY A DIFFERENT SINGLE FAMILY HOME (Q16b)

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	262	65	95	102	90	67	43	36	26
	32.8%	24.9%	28.4%	50.0%	54.9%	33.7%	24.3%	17.2%	51.0%
2 - Not very likely	149	56	57	36	16	39	42	48	4
	18.6%	21.5%	17.0%	17.6%	9.8%	19.6%	23.7%	23.0%	7.8%
3 - Neutral	93	38	36	19	18	17	22	27	9
	11.6%	14.6%	10.7%	9.3%	11.0%	8.5%	12.4%	12.9%	17.6%
4 - Somewhat likely	175	72	80	23	17	39	58	59	2
	21.9%	27.6%	23.9%	11.3%	10.4%	19.6%	32.8%	28.2%	3.9%
5 - Very likely	95	30	56	9	15	28	7	35	10
	11.9%	11.5%	16.7%	4.4%	9.1%	14.1%	4.0%	16.7%	19.6%
No response	26		11	15	8	9	5	4	
	3.3%		3.3%	7.4%	4.9%	4.5%	2.8%	1.9%	
Not likely, overall	411	121	152	138	106	106	85	84	30
	51.4%	46.4%	45.4%	67.6%	64.6%	53.3%	48.0%	40.2%	58.8%
Neutral	93	38	36	19	18	17	22	27	9
	11.6%	14.6%	10.7%	9.3%	11.0%	8.5%	12.4%	12.9%	17.6%
Likely, overall	270	102	136	32	32	67	65	94	12
	33.8%	39.1%	40.6%	15.7%	19.5%	33.7%	36.7%	45.0%	23.5%
No response	26		11	15	8	9	5	4	
	3.3%		3.3%	7.4%	4.9%	4.5%	2.8%	1.9%	

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

BUY A DIFFERENT SINGLE FAMILY HOME (Q16b)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	262	129	133	184	78
	32.8%	34.6%	31.1%	33.0%	32.2%
2 - Not very likely	149	56	93	105	44
	18.6%	15.0%	21.8%	18.8%	18.2%
3 - Neutral	93	52	41	65	28
	11.6%	13.9%	9.6%	11.6%	11.6%
4 - Somewhat likely	175	74	101	124	51
	21.9%	19.8%	23.7%	22.2%	21.1%
5 - Very likely	95	40	55	55	40
	11.9%	10.7%	12.9%	9.9%	16.5%
No response	26	22	4	25	1
	3.3%	5.9%	.9%	4.5%	.4%
Not likely, overall	411	185	226	289	122
	51.4%	49.6%	52.9%	51.8%	50.4%
Neutral	93	52	41	65	28
	11.6%	13.9%	9.6%	11.6%	11.6%
Likely, overall	270	114	156	179	91
	33.8%	30.6%	36.5%	32.1%	37.6%
No response	26	22	4	25	1
	3.3%	5.9%	.9%	4.5%	.4%

Pan Atlantic Research (August 2015)

Mean of 16b (BUY A DIFFERENT SINGLE FAMILY HOME)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.60	2.79	2.83	1.95	2.04	2.59	2.67	3.04	2.33
Std Deviation	1.45	1.38	1.51	1.25	1.42	1.50	1.28	1.38	1.60
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	774	261	324	189	156	190	172	205	51

Pan Atlantic Research (August 2015)

Mean of 16b (BUY A DIFFERENT SINGLE FAMILY HOME)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.60	2.54	2.65	2.55	2.71
Std Deviation	1.45	1.45	1.46	1.42	1.51
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	774	351	423	533	241

Pan Atlantic Research (August 2015)

**Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
BUY A DUPLEX OR ATTACHED COTTAGE UNIT (Q16c)**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	355	116	126	113	96	95	62	72	30
	44.4%	44.4%	37.6%	55.4%	58.5%	47.7%	35.0%	34.4%	58.8%
2 - Not very likely	205	58	112	35	20	50	51	78	6
	25.6%	22.2%	33.4%	17.2%	12.2%	25.1%	28.8%	37.3%	11.8%
3 - Neutral	97	51	30	16	16	19	26	26	10
	12.1%	19.5%	9.0%	7.8%	9.8%	9.5%	14.7%	12.4%	19.6%
4 - Somewhat likely	95	34	45	16	14	27	25	25	4
	11.9%	13.0%	13.4%	7.8%	8.5%	13.6%	14.1%	12.0%	7.8%
5 - Very likely	21	1	13	7	6		12	2	1
	2.6%	.4%	3.9%	3.4%	3.7%		6.8%	1.0%	2.0%
No response	27	1	9	17	12	8	1	6	
	3.4%	.4%	2.7%	8.3%	7.3%	4.0%	.6%	2.9%	
Not likely, overall	560	174	238	148	116	145	113	150	36
	70.0%	66.7%	71.0%	72.5%	70.7%	72.9%	63.8%	71.8%	70.6%
Neutral	97	51	30	16	16	19	26	26	10
	12.1%	19.5%	9.0%	7.8%	9.8%	9.5%	14.7%	12.4%	19.6%
Likely, overall	116	35	58	23	20	27	37	27	5
	14.5%	13.4%	17.3%	11.3%	12.2%	13.6%	20.9%	12.9%	9.8%
No response	27	1	9	17	12	8	1	6	
	3.4%	.4%	2.7%	8.3%	7.3%	4.0%	.6%	2.9%	

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

BUY A DUPLEX OR ATTACHED COTTAGE UNIT (Q16c)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	355	171	184	247	108
	44.4%	45.8%	43.1%	44.3%	44.6%
2 - Not very likely	205	86	119	136	69
	25.6%	23.1%	27.9%	24.4%	28.5%
3 - Neutral	97	52	45	69	28
	12.1%	13.9%	10.5%	12.4%	11.6%
4 - Somewhat likely	95	38	57	70	25
	11.9%	10.2%	13.3%	12.5%	10.3%
5 - Very likely	21	10	11	13	8
	2.6%	2.7%	2.6%	2.3%	3.3%
No response	27	16	11	23	4
	3.4%	4.3%	2.6%	4.1%	1.7%
Not likely, overall	560	257	303	383	177
	70.0%	68.9%	71.0%	68.6%	73.1%
Neutral	97	52	45	69	28
	12.1%	13.9%	10.5%	12.4%	11.6%
Likely, overall	116	48	68	83	33
	14.5%	12.9%	15.9%	14.9%	13.6%
No response	27	16	11	23	4
	3.4%	4.3%	2.6%	4.1%	1.7%

Pan Atlantic Research (August 2015)

Mean of 16c (BUY A DUPLEX OR ATTACHED COTTAGE UNIT)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	1.99	2.02	2.10	1.76	1.78	1.88	2.28	2.05	1.82
Std Deviation	1.15	1.10	1.18	1.15	1.19	1.07	1.27	1.03	1.13
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	4.00	5.00	5.00	5.00
Valid N	773	260	326	187	152	191	176	203	51

Pan Atlantic Research (August 2015)

Mean of 16c (BUY A DUPLEX OR ATTACHED COTTAGE UNIT)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	1.99	1.96	2.02	2.00	1.97
Std Deviation	1.15	1.14	1.16	1.16	1.14
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	773	357	416	535	238

Pan Atlantic Research (August 2015)

**Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
BUY A MOBILE HOME (Q16d)**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	570	196	233	141	114	128	129	159	40
	71.3%	75.1%	69.6%	69.1%	69.5%	64.3%	72.9%	76.1%	78.4%
2 - Not very likely	89	29	39	21	13	24	26	24	2
	11.1%	11.1%	11.6%	10.3%	7.9%	12.1%	14.7%	11.5%	3.9%
3 - Neutral	59	20	29	10	17	16	9	15	2
	7.4%	7.7%	8.7%	4.9%	10.4%	8.0%	5.1%	7.2%	3.9%
4 - Somewhat likely	45	14	25	6	4	22	12	5	2
	5.6%	5.4%	7.5%	2.9%	2.4%	11.1%	6.8%	2.4%	3.9%
5 - Very likely	11	2	2	7	6	4			1
	1.4%	.8%	.6%	3.4%	3.7%	2.0%			2.0%
No response	26		7	19	10	5	1	6	4
	3.3%		2.1%	9.3%	6.1%	2.5%	.6%	2.9%	7.8%
Not likely, overall	659	225	272	162	127	152	155	183	42
	82.4%	86.2%	81.2%	79.4%	77.4%	76.4%	87.6%	87.6%	82.4%
Neutral	59	20	29	10	17	16	9	15	2
	7.4%	7.7%	8.7%	4.9%	10.4%	8.0%	5.1%	7.2%	3.9%
Likely, overall	56	16	27	13	10	26	12	5	3
	7.0%	6.1%	8.1%	6.4%	6.1%	13.1%	6.8%	2.4%	5.9%
No response	26		7	19	10	5	1	6	4
	3.3%		2.1%	9.3%	6.1%	2.5%	.6%	2.9%	7.8%

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
BUY A MOBILE HOME (Q16d)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	570	265	305	398	172
	71.3%	71.0%	71.4%	71.3%	71.1%
2 - Not very likely	89	32	57	59	30
	11.1%	8.6%	13.3%	10.6%	12.4%
3 - Neutral	59	34	25	42	17
	7.4%	9.1%	5.9%	7.5%	7.0%
4 - Somewhat likely	45	20	25	30	15
	5.6%	5.4%	5.9%	5.4%	6.2%
5 - Very likely	11	2	9	6	5
	1.4%	.5%	2.1%	1.1%	2.1%
No response	26	20	6	23	3
	3.3%	5.4%	1.4%	4.1%	1.2%
Not likely, overall	659	297	362	457	202
	82.4%	79.6%	84.8%	81.9%	83.5%
Neutral	59	34	25	42	17
	7.4%	9.1%	5.9%	7.5%	7.0%
Likely, overall	56	22	34	36	20
	7.0%	5.9%	8.0%	6.5%	8.3%
No response	26	20	6	23	3
	3.3%	5.4%	1.4%	4.1%	1.2%

Pan Atlantic Research (August 2015)

Mean of 16d (BUY A MOBILE HOME)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	1.50	1.46	1.55	1.47	1.54	1.71	1.45	1.34	1.34
Std Deviation	.96	.90	.98	1.01	1.05	1.14	.87	.72	.92
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	4.00	4.00	5.00
Valid N	774	261	328	185	154	194	176	203	47

Pan Atlantic Research (August 2015)

Mean of 16d (BUY A MOBILE HOME)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	1.50	1.48	1.52	1.48	1.54
Std Deviation	.96	.92	.99	.94	1.01
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	774	353	421	535	239

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
LIVE WITHIN AN ACTIVE ADULT COMMUNITY LIMITED TO PEOPLE 55 OR OLDER (Q16e)

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	180	70	59	51	29	53	39	48	11
	22.5%	26.8%	17.6%	25.0%	17.7%	26.6%	22.0%	23.0%	21.6%
2 - Not very likely	153	66	67	20	10	48	33	50	12
	19.1%	25.3%	20.0%	9.8%	6.1%	24.1%	18.6%	23.9%	23.5%
3 - Neutral	148	50	61	37	31	27	36	47	7
	18.5%	19.2%	18.2%	18.1%	18.9%	13.6%	20.3%	22.5%	13.7%
4 - Somewhat likely	199	57	87	55	42	46	51	47	13
	24.9%	21.8%	26.0%	27.0%	25.6%	23.1%	28.8%	22.5%	25.5%
5 - Very likely	98	18	49	31	40	22	17	11	8
	12.3%	6.9%	14.6%	15.2%	24.4%	11.1%	9.6%	5.3%	15.7%
No response	22		12	10	12	3	1	6	
	2.8%		3.6%	4.9%	7.3%	1.5%	.6%	2.9%	
Not likely, overall	333	136	126	71	39	101	72	98	23
	41.6%	52.1%	37.6%	34.8%	23.8%	50.8%	40.7%	46.9%	45.1%
Neutral	148	50	61	37	31	27	36	47	7
	18.5%	19.2%	18.2%	18.1%	18.9%	13.6%	20.3%	22.5%	13.7%
Likely, overall	297	75	136	86	82	68	68	58	21
	37.1%	28.7%	40.6%	42.2%	50.0%	34.2%	38.4%	27.8%	41.2%
No response	22		12	10	12	3	1	6	
	2.8%		3.6%	4.9%	7.3%	1.5%	.6%	2.9%	

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

LIVE WITHIN AN ACTIVE ADULT COMMUNITY LIMITED TO PEOPLE 55 OR OLDER (Q16e)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	180	77	103	114	66
	22.5%	20.6%	24.1%	20.4%	27.3%
2 - Not very likely	153	68	85	108	45
	19.1%	18.2%	19.9%	19.4%	18.6%
3 - Neutral	148	90	58	118	30
	18.5%	24.1%	13.6%	21.1%	12.4%
4 - Somewhat likely	199	78	121	132	67
	24.9%	20.9%	28.3%	23.7%	27.7%
5 - Very likely	98	44	54	68	30
	12.3%	11.8%	12.6%	12.2%	12.4%
No response	22	16	6	18	4
	2.8%	4.3%	1.4%	3.2%	1.7%
Not likely, overall	333	145	188	222	111
	41.6%	38.9%	44.0%	39.8%	45.9%
Neutral	148	90	58	118	30
	18.5%	24.1%	13.6%	21.1%	12.4%
Likely, overall	297	122	175	200	97
	37.1%	32.7%	41.0%	35.8%	40.1%
No response	22	16	6	18	4
	2.8%	4.3%	1.4%	3.2%	1.7%

Pan Atlantic Research (August 2015)

Mean of 16e (LIVE WITHIN AN ACTIVE ADULT COMMUNITY LIMITED TO PEOPLE 55 OR OLDER)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.85	2.57	3.00	2.97	3.36	2.67	2.85	2.62	2.90
Std Deviation	1.36	1.28	1.35	1.44	1.43	1.38	1.32	1.23	1.42
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	778	261	323	194	152	196	176	203	51

Pan Atlantic Research (August 2015)

Mean of 16e (LIVE WITHIN AN ACTIVE ADULT COMMUNITY LIMITED TO PEOPLE 55 OR OLDER)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.85	2.84	2.85	2.87	2.79
Std Deviation	1.36	1.32	1.40	1.33	1.43
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	778	357	421	540	238

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS DINING AND HOUSEKEEPING SERVICES (Q16f)

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	212	86	82	44	42	58	49	47	16
	26.5%	33.0%	24.5%	21.6%	25.6%	29.1%	27.7%	22.5%	31.4%
2 - Not very likely	196	84	82	30	23	53	46	64	10
	24.5%	32.2%	24.5%	14.7%	14.0%	26.6%	26.0%	30.6%	19.6%
3 - Neutral	137	41	54	42	33	38	20	35	11
	17.1%	15.7%	16.1%	20.6%	20.1%	19.1%	11.3%	16.7%	21.6%
4 - Somewhat likely	187	46	90	51	40	37	54	49	7
	23.4%	17.6%	26.9%	25.0%	24.4%	18.6%	30.5%	23.4%	13.7%
5 - Very likely	53	4	21	28	19	10	7	10	7
	6.6%	1.5%	6.3%	13.7%	11.6%	5.0%	4.0%	4.8%	13.7%
No response	15		6	9	7	3	1	4	
	1.9%		1.8%	4.4%	4.3%	1.5%	.6%	1.9%	
Not likely, overall	408	170	164	74	65	111	95	111	26
	51.0%	65.1%	49.0%	36.3%	39.6%	55.8%	53.7%	53.1%	51.0%
Neutral	137	41	54	42	33	38	20	35	11
	17.1%	15.7%	16.1%	20.6%	20.1%	19.1%	11.3%	16.7%	21.6%
Likely, overall	240	50	111	79	59	47	61	59	14
	30.0%	19.2%	33.1%	38.7%	36.0%	23.6%	34.5%	28.2%	27.5%
No response	15		6	9	7	3	1	4	
	1.9%		1.8%	4.4%	4.3%	1.5%	.6%	1.9%	

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS DINING AND HOUSEKEEPING SERVICES (Q16f)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	212	101	111	141	71
	26.5%	27.1%	26.0%	25.3%	29.3%
2 - Not very likely	196	74	122	131	65
	24.5%	19.8%	28.6%	23.5%	26.9%
3 - Neutral	137	70	67	101	36
	17.1%	18.8%	15.7%	18.1%	14.9%
4 - Somewhat likely	187	100	87	141	46
	23.4%	26.8%	20.4%	25.3%	19.0%
5 - Very likely	53	16	37	30	23
	6.6%	4.3%	8.7%	5.4%	9.5%
No response	15	12	3	14	1
	1.9%	3.2%	.7%	2.5%	.4%
Not likely, overall	408	175	233	272	136
	51.0%	46.9%	54.6%	48.7%	56.2%
Neutral	137	70	67	101	36
	17.1%	18.8%	15.7%	18.1%	14.9%
Likely, overall	240	116	124	171	69
	30.0%	31.1%	29.0%	30.6%	28.5%
No response	15	12	3	14	1
	1.9%	3.2%	.7%	2.5%	.4%

Pan Atlantic Research (August 2015)

Mean of 16f (LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS DINING AND HOUSEKEEPING SERVICES)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.58	2.23	2.65	2.94	2.82	2.43	2.57	2.57	2.59
Std Deviation	1.29	1.13	1.29	1.38	1.39	1.24	1.29	1.22	1.42
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	785	261	329	195	157	196	176	205	51

Pan Atlantic Research (August 2015)

Mean of 16f (LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS DINING AND HOUSEKEEPING SERVICES)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.58	2.60	2.57	2.61	2.52
Std Deviation	1.29	1.27	1.31	1.27	1.34
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	785	361	424	544	241

Pan Atlantic Research (August 2015)

**Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS PERSONAL CARE SERVICES THAT YOU MAY NEED AS YOU GET OLDER (Q16g)**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	189	74	75	40	34	54	42	45	14
	23.6%	28.4%	22.4%	19.6%	20.7%	27.1%	23.7%	21.5%	27.5%
2 - Not very likely	163	85	61	17	19	34	45	57	8
	20.4%	32.6%	18.2%	8.3%	11.6%	17.1%	25.4%	27.3%	15.7%
3 - Neutral	152	45	64	43	33	51	30	29	9
	19.0%	17.2%	19.1%	21.1%	20.1%	25.6%	16.9%	13.9%	17.6%
4 - Somewhat likely	211	48	103	60	48	46	43	61	13
	26.4%	18.4%	30.7%	29.4%	29.3%	23.1%	24.3%	29.2%	25.5%
5 - Very likely	75	9	29	37	26	11	16	15	7
	9.4%	3.4%	8.7%	18.1%	15.9%	5.5%	9.0%	7.2%	13.7%
No response	10		3	7	4	3	1	2	
	1.3%		.9%	3.4%	2.4%	1.5%	.6%	1.0%	
Not likely, overall	352	159	136	57	53	88	87	102	22
	44.0%	60.9%	40.6%	27.9%	32.3%	44.2%	49.2%	48.8%	43.1%
Neutral	152	45	64	43	33	51	30	29	9
	19.0%	17.2%	19.1%	21.1%	20.1%	25.6%	16.9%	13.9%	17.6%
Likely, overall	286	57	132	97	74	57	59	76	20
	35.8%	21.8%	39.4%	47.5%	45.1%	28.6%	33.3%	36.4%	39.2%
No response	10		3	7	4	3	1	2	
	1.3%		.9%	3.4%	2.4%	1.5%	.6%	1.0%	

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.

LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS PERSONAL CARE SERVICES THAT YOU MAY NEED AS YOU GET OLDER (Q16g)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	189	89	100	123	66
	23.6%	23.9%	23.4%	22.0%	27.3%
2 - Not very likely	163	70	93	108	55
	20.4%	18.8%	21.8%	19.4%	22.7%
3 - Neutral	152	72	80	117	35
	19.0%	19.3%	18.7%	21.0%	14.5%
4 - Somewhat likely	211	104	107	153	58
	26.4%	27.9%	25.1%	27.4%	24.0%
5 - Very likely	75	30	45	48	27
	9.4%	8.0%	10.5%	8.6%	11.2%
No response	10	8	2	9	1
	1.3%	2.1%	.5%	1.6%	.4%
Not likely, overall	352	159	193	231	121
	44.0%	42.6%	45.2%	41.4%	50.0%
Neutral	152	72	80	117	35
	19.0%	19.3%	18.7%	21.0%	14.5%
Likely, overall	286	134	152	201	85
	35.8%	35.9%	35.6%	36.0%	35.1%
No response	10	8	2	9	1
	1.3%	2.1%	.5%	1.6%	.4%

Pan Atlantic Research (August 2015)

Mean of 16g (LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS PERSONAL CARE SERVICES THAT YOU MAY NEED AS YOU GET OLDER)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.77	2.36	2.85	3.19	3.08	2.62	2.69	2.73	2.82
Std Deviation	1.33	1.17	1.32	1.39	1.39	1.27	1.32	1.29	1.44
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	790	261	332	197	160	196	176	207	51

Pan Atlantic Research (August 2015)

Mean of 16g (LIVE IN A RETIREMENT HOUSING CAMPUS THAT OFFERS PERSONAL CARE SERVICES THAT YOU MAY NEED AS YOU GET OLDER)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.77	2.77	2.77	2.81	2.69
Std Deviation	1.33	1.32	1.34	1.30	1.39
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	790	365	425	549	241

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
Other Suggestions (Q16 Other)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	27	11	15	1	5	2	6	8	6
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Will stay where I am	2	2						2	
	7.4%	18.2%						25.0%	
Maintenance included	2		2				2		
	7.4%		13.3%				33.3%		
Assisted living	2		2					2	
	7.4%		13.3%					25.0%	
Other	21	9	11	1	5	2	4	4	6
	77.8%	81.8%	73.3%	100.0%	100.0%	100.0%	66.7%	50.0%	100.0%

Pan Atlantic Research (August 2015)

Please look at the housing options below and indicate how likely it would be that you would consider each of them as your next residence.
Other Suggestions (Q16 Other)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	27	16	11	21	6
	100.0%	100.0%	100.0%	100.0%	100.0%
Will stay where I am	2	2		2	
	7.4%	12.5%		9.5%	
Maintenance included	2	2		2	
	7.4%	12.5%		9.5%	
Assisted living	2	2		2	
	7.4%	12.5%		9.5%	
Other	21	10	11	15	6
	77.8%	62.5%	100.0%	71.4%	100.0%

Pan Atlantic Research (August 2015)

**If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?
AS A YEAR-ROUND HOME (Q17a)**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not interested at all	289	105	94	90	67	77	62	60	23
	36.1%	40.2%	28.1%	44.1%	40.9%	38.7%	35.0%	28.7%	45.1%
2 - Not very interested	139	63	49	27	24	40	25	43	7
	17.4%	24.1%	14.6%	13.2%	14.6%	20.1%	14.1%	20.6%	13.7%
3 - Neutral	110	31	52	27	13	26	31	33	7
	13.8%	11.9%	15.5%	13.2%	7.9%	13.1%	17.5%	15.8%	13.7%
4 - Somewhat interested	211	58	111	42	42	44	49	63	13
	26.4%	22.2%	33.1%	20.6%	25.6%	22.1%	27.7%	30.1%	25.5%
5 - Very interested	41	3	26	12	12	11	9	8	1
	5.1%	1.1%	7.8%	5.9%	7.3%	5.5%	5.1%	3.8%	2.0%
No response	10	1	3	6	6	1	1	2	
	1.3%	.4%	.9%	2.9%	3.7%	.5%	.6%	1.0%	
Not interested, overall	428	168	143	117	91	117	87	103	30
	53.5%	64.4%	42.7%	57.4%	55.5%	58.8%	49.2%	49.3%	58.8%
Neutral	110	31	52	27	13	26	31	33	7
	13.8%	11.9%	15.5%	13.2%	7.9%	13.1%	17.5%	15.8%	13.7%
Interested, overall	252	61	137	54	54	55	58	71	14
	31.5%	23.4%	40.9%	26.5%	32.9%	27.6%	32.8%	34.0%	27.5%
No response	10	1	3	6	6	1	1	2	
	1.3%	.4%	.9%	2.9%	3.7%	.5%	.6%	1.0%	

Pan Atlantic Research (August 2015)

**If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?
AS A YEAR-ROUND HOME (Q17a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not interested at all	289	139	150	193	96
	36.1%	37.3%	35.1%	34.6%	39.7%
2 - Not very interested	139	56	83	96	43
	17.4%	15.0%	19.4%	17.2%	17.8%
3 - Neutral	110	46	64	76	34
	13.8%	12.3%	15.0%	13.6%	14.0%
4 - Somewhat interested	211	106	105	150	61
	26.4%	28.4%	24.6%	26.9%	25.2%
5 - Very interested	41	20	21	33	8
	5.1%	5.4%	4.9%	5.9%	3.3%
No response	10	6	4	10	
	1.3%	1.6%	.9%	1.8%	
Not interested, overall	428	195	233	289	139
	53.5%	52.3%	54.6%	51.8%	57.4%
Neutral	110	46	64	76	34
	13.8%	12.3%	15.0%	13.6%	14.0%
Interested, overall	252	126	126	183	69
	31.5%	33.8%	29.5%	32.8%	28.5%
No response	10	6	4	10	
	1.3%	1.6%	.9%	1.8%	

Pan Atlantic Research (August 2015)

Mean of 17a (AS A YEAR-ROUND HOME)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.46	2.20	2.78	2.29	2.42	2.35	2.53	2.59	2.25
Std Deviation	1.35	1.22	1.37	1.38	1.45	1.34	1.35	1.29	1.32
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	790	260	332	198	158	198	176	207	51

Pan Atlantic Research (August 2015)

Mean of 17a (AS A YEAR-ROUND HOME)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.46	2.49	2.44	2.51	2.35
Std Deviation	1.35	1.38	1.32	1.37	1.32
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	790	367	423	548	242

Pan Atlantic Research (August 2015)

**If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?
AS A SUMMER RESIDENCE ONLY (Q17b)**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not interested at all	482	145	193	144	105	131	99	114	33
	60.3%	55.6%	57.6%	70.6%	64.0%	65.8%	55.9%	54.5%	64.7%
2 - Not very interested	134	59	59	16	19	24	36	53	2
	16.8%	22.6%	17.6%	7.8%	11.6%	12.1%	20.3%	25.4%	3.9%
3 - Neutral	55	15	29	11	4	23	12	11	5
	6.9%	5.7%	8.7%	5.4%	2.4%	11.6%	6.8%	5.3%	9.8%
4 - Somewhat interested	70	33	33	4	8	11	19	22	10
	8.8%	12.6%	9.9%	2.0%	4.9%	5.5%	10.7%	10.5%	19.6%
5 - Very interested	12	1	7	4	4	2	2	3	1
	1.5%	.4%	2.1%	2.0%	2.4%	1.0%	1.1%	1.4%	2.0%
No response	47	8	14	25	24	8	9	6	
	5.9%	3.1%	4.2%	12.3%	14.6%	4.0%	5.1%	2.9%	
Not interested, overall	616	204	252	160	124	155	135	167	35
	77.0%	78.2%	75.2%	78.4%	75.6%	77.9%	76.3%	79.9%	68.6%
Neutral	55	15	29	11	4	23	12	11	5
	6.9%	5.7%	8.7%	5.4%	2.4%	11.6%	6.8%	5.3%	9.8%
Interested, overall	82	34	40	8	12	13	21	25	11
	10.3%	13.0%	11.9%	3.9%	7.3%	6.5%	11.9%	12.0%	21.6%
No response	47	8	14	25	24	8	9	6	
	5.9%	3.1%	4.2%	12.3%	14.6%	4.0%	5.1%	2.9%	

Pan Atlantic Research (August 2015)

**If a new home were available today in an active adult community (ages 55 or over, no minor children), with outdoor maintenance provided for a fee, how interested would you be in purchasing it?
AS A SUMMER RESIDENCE ONLY (Q17b)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not interested at all	482	223	259	327	155
	60.3%	59.8%	60.7%	58.6%	64.0%
2 - Not very interested	134	60	74	101	33
	16.8%	16.1%	17.3%	18.1%	13.6%
3 - Neutral	55	22	33	33	22
	6.9%	5.9%	7.7%	5.9%	9.1%
4 - Somewhat interested	70	36	34	53	17
	8.8%	9.7%	8.0%	9.5%	7.0%
5 - Very interested	12	6	6	8	4
	1.5%	1.6%	1.4%	1.4%	1.7%
No response	47	26	21	36	11
	5.9%	7.0%	4.9%	6.5%	4.5%
Not interested, overall	616	283	333	428	188
	77.0%	75.9%	78.0%	76.7%	77.7%
Neutral	55	22	33	33	22
	6.9%	5.9%	7.7%	5.9%	9.1%
Interested, overall	82	42	40	61	21
	10.3%	11.3%	9.4%	10.9%	8.7%
No response	47	26	21	36	11
	5.9%	7.0%	4.9%	6.5%	4.5%

Pan Atlantic Research (August 2015)

Mean of 17b (AS A SUMMER RESIDENCE ONLY)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	1.67	1.76	1.76	1.37	1.48	1.58	1.74	1.75	1.90
Std Deviation	1.06	1.07	1.12	.87	1.00	.98	1.08	1.06	1.32
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	753	253	321	179	140	191	168	203	51

Pan Atlantic Research (August 2015)

Mean of 17b (AS A SUMMER RESIDENCE ONLY)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	1.67	1.68	1.66	1.69	1.62
Std Deviation	1.06	1.09	1.03	1.07	1.04
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	753	347	406	522	231

Pan Atlantic Research (August 2015)

If you were to buy a different home, what is the maximum you would expect to pay for a new housing unit if it had all of the features you would like it to have? (Q18)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Up to \$175,000	166	63	75	28	38	57	29	36	6
	20.8%	24.1%	22.4%	13.7%	23.2%	28.6%	16.4%	17.2%	11.8%
\$175,000-\$199,999	118	56	36	26	8	25	46	32	7
	14.8%	21.5%	10.7%	12.7%	4.9%	12.6%	26.0%	15.3%	13.7%
\$200,000-\$249,999	85	24	44	17	5	18	27	31	4
	10.6%	9.2%	13.1%	8.3%	3.0%	9.0%	15.3%	14.8%	7.8%
\$250,000-\$299,999	35	12	18	5		2	5	27	1
	4.4%	4.6%	5.4%	2.5%		1.0%	2.8%	12.9%	2.0%
\$300,000-\$349,999	18	4	10	4		2	4	10	2
	2.3%	1.5%	3.0%	2.0%		1.0%	2.3%	4.8%	3.9%
\$350,000 or more	35	9	21	5		4	3	26	2
	4.4%	3.4%	6.3%	2.5%		2.0%	1.7%	12.4%	3.9%
No interest in new home	303	85	122	96	94	82	56	45	26
	37.9%	32.6%	36.4%	47.1%	57.3%	41.2%	31.6%	21.5%	51.0%
No response	40	8	9	23	19	9	7	2	3
	5.0%	3.1%	2.7%	11.3%	11.6%	4.5%	4.0%	1.0%	5.9%

Pan Atlantic Research (August 2015)

If you were to buy a different home, what is the maximum you would expect to pay for a new housing unit if it had all of the features you would like it to have? (Q18)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Up to \$175,000	166	84	82	119	47
	20.8%	22.5%	19.2%	21.3%	19.4%
\$175,000-\$199,999	118	62	56	95	23
	14.8%	16.6%	13.1%	17.0%	9.5%
\$200,000-\$249,999	85	40	45	57	28
	10.6%	10.7%	10.5%	10.2%	11.6%
\$250,000-\$299,999	35	20	15	29	6
	4.4%	5.4%	3.5%	5.2%	2.5%
\$300,000-\$349,999	18	6	12	18	
	2.3%	1.6%	2.8%	3.2%	
\$350,000 or more	35	4	31	10	25
	4.4%	1.1%	7.3%	1.8%	10.3%
No interest in new home	303	133	170	202	101
	37.9%	35.7%	39.8%	36.2%	41.7%
No response	40	24	16	28	12
	5.0%	6.4%	3.7%	5.0%	5.0%

Pan Atlantic Research (August 2015)

If new rental housing with luxury features were available today in a good location, what is the maximum you would expect to pay in monthly rent (including heat and hot water)? (Q19)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Up to \$750	102	29	46	27	45	28	13	14	2
	12.8%	11.1%	13.7%	13.2%	27.4%	14.1%	7.3%	6.7%	3.9%
Up to \$1,000	120	37	64	19	4	49	27	39	1
	15.0%	14.2%	19.1%	9.3%	2.4%	24.6%	15.3%	18.7%	2.0%
Up to \$1,250	70	22	36	12	5	16	25	19	5
	8.8%	8.4%	10.7%	5.9%	3.0%	8.0%	14.1%	9.1%	9.8%
Up to \$1,500	41	18	13	10	2	5	8	26	
	5.1%	6.9%	3.9%	4.9%	1.2%	2.5%	4.5%	12.4%	
\$1,500 or more	34	10	17	7		8	2	22	2
	4.3%	3.8%	5.1%	3.4%		4.0%	1.1%	10.5%	3.9%
No interest in renting	408	143	152	113	97	87	97	89	38
	51.0%	54.8%	45.4%	55.4%	59.1%	43.7%	54.8%	42.6%	74.5%
No response	25	2	7	16	11	6	5		3
	3.1%	.8%	2.1%	7.8%	6.7%	3.0%	2.8%		5.9%

Pan Atlantic Research (August 2015)

If new rental housing with luxury features were available today in a good location, what is the maximum you would expect to pay in monthly rent (including heat and hot water)? (Q19)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Up to \$750	102	48	54	67	35
	12.8%	12.9%	12.6%	12.0%	14.5%
Up to \$1,000	120	72	48	102	18
	15.0%	19.3%	11.2%	18.3%	7.4%
Up to \$1,250	70	36	34	53	17
	8.8%	9.7%	8.0%	9.5%	7.0%
Up to \$1,500	41	14	27	29	12
	5.1%	3.8%	6.3%	5.2%	5.0%
\$1,500 or more	34	14	20	21	13
	4.3%	3.8%	4.7%	3.8%	5.4%
No interest in renting	408	173	235	267	141
	51.0%	46.4%	55.0%	47.8%	58.3%
No response	25	16	9	19	6
	3.1%	4.3%	2.1%	3.4%	2.5%

Pan Atlantic Research (August 2015)

**If new housing had the features you want and was affordable and available, how likely is it that you would be move to a new home in the Greater Ellsworth area in the coming years?
IN THE NEXT 2 YEARS? (Q20a)**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	394	152	144	98	77	90	89	111	27
	49.3%	58.2%	43.0%	48.0%	47.0%	45.2%	50.3%	53.1%	52.9%
2 - Not very likely	174	59	76	39	33	39	40	55	7
	21.8%	22.6%	22.7%	19.1%	20.1%	19.6%	22.6%	26.3%	13.7%
3 - Neutral	82	30	27	25	17	18	22	18	7
	10.3%	11.5%	8.1%	12.3%	10.4%	9.0%	12.4%	8.6%	13.7%
4 - Somewhat likely	77	13	47	17	19	22	18	14	4
	9.6%	5.0%	14.0%	8.3%	11.6%	11.1%	10.2%	6.7%	7.8%
5 - Very likely	26	3	11	12	5	11		7	3
	3.3%	1.1%	3.3%	5.9%	3.0%	5.5%		3.3%	5.9%
No response	47	4	30	13	13	19	8	4	3
	5.9%	1.5%	9.0%	6.4%	7.9%	9.5%	4.5%	1.9%	5.9%
Not likely, overall	568	211	220	137	110	129	129	166	34
	71.0%	80.8%	65.7%	67.2%	67.1%	64.8%	72.9%	79.4%	66.7%
Neutral	82	30	27	25	17	18	22	18	7
	10.3%	11.5%	8.1%	12.3%	10.4%	9.0%	12.4%	8.6%	13.7%
Likely, overall	103	16	58	29	24	33	18	21	7
	12.9%	6.1%	17.3%	14.2%	14.6%	16.6%	10.2%	10.0%	13.7%
No response	47	4	30	13	13	19	8	4	3
	5.9%	1.5%	9.0%	6.4%	7.9%	9.5%	4.5%	1.9%	5.9%

Pan Atlantic Research (August 2015)

**If new housing had the features you want and was affordable and available, how likely is it that you would be move to a new home in the Greater Ellsworth area in the coming years?
IN THE NEXT 2 YEARS? (Q20a)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	394	193	201	272	122
	49.3%	51.7%	47.1%	48.7%	50.4%
2 - Not very likely	174	72	102	121	53
	21.8%	19.3%	23.9%	21.7%	21.9%
3 - Neutral	82	36	46	53	29
	10.3%	9.7%	10.8%	9.5%	12.0%
4 - Somewhat likely	77	36	41	55	22
	9.6%	9.7%	9.6%	9.9%	9.1%
5 - Very likely	26	12	14	24	2
	3.3%	3.2%	3.3%	4.3%	.8%
No response	47	24	23	33	14
	5.9%	6.4%	5.4%	5.9%	5.8%
Not likely, overall	568	265	303	393	175
	71.0%	71.0%	71.0%	70.4%	72.3%
Neutral	82	36	46	53	29
	10.3%	9.7%	10.8%	9.5%	12.0%
Likely, overall	103	48	55	79	24
	12.9%	12.9%	12.9%	14.2%	9.9%
No response	47	24	23	33	14
	5.9%	6.4%	5.4%	5.9%	5.8%

Pan Atlantic Research (August 2015)

Mean of Q20a (IN THE NEXT 2 YEARS)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	1.89	1.66	2.03	1.98	1.95	2.03	1.82	1.79	1.94
Std Deviation	1.16	.95	1.23	1.25	1.20	1.28	1.03	1.08	1.28
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	4.00	5.00	5.00
Valid N	753	257	305	191	151	180	169	205	48

Pan Atlantic Research (August 2015)

Mean of Q20a (IN THE NEXT 2 YEARS)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	1.89	1.86	1.92	1.93	1.81
Std Deviation	1.16	1.17	1.15	1.20	1.05
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	753	349	404	525	228

Pan Atlantic Research (August 2015)

**If new housing had the features you want and was affordable and available, how likely is it that you would be move to a new home in the Greater Ellsworth area in the coming years?
IN THE NEXT 3-5 YEARS? (Q20b)**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	298	118	105	75	57	68	66	85	22
	37.3%	45.2%	31.3%	36.8%	34.8%	34.2%	37.3%	40.7%	43.1%
2 - Not very likely	170	73	69	28	23	43	44	53	7
	21.3%	28.0%	20.6%	13.7%	14.0%	21.6%	24.9%	25.4%	13.7%
3 - Neutral	101	32	35	34	23	25	14	25	14
	12.6%	12.3%	10.4%	16.7%	14.0%	12.6%	7.9%	12.0%	27.5%
4 - Somewhat likely	120	25	64	31	30	25	34	29	2
	15.0%	9.6%	19.1%	15.2%	18.3%	12.6%	19.2%	13.9%	3.9%
5 - Very likely	43	8	23	12	9	14	11	7	2
	5.4%	3.1%	6.9%	5.9%	5.5%	7.0%	6.2%	3.3%	3.9%
No response	68	5	39	24	22	24	8	10	4
	8.5%	1.9%	11.6%	11.8%	13.4%	12.1%	4.5%	4.8%	7.8%
Not likely, overall	468	191	174	103	80	111	110	138	29
	58.5%	73.2%	51.9%	50.5%	48.8%	55.8%	62.1%	66.0%	56.9%
Neutral	101	32	35	34	23	25	14	25	14
	12.6%	12.3%	10.4%	16.7%	14.0%	12.6%	7.9%	12.0%	27.5%
Likely, overall	163	33	87	43	39	39	45	36	4
	20.4%	12.6%	26.0%	21.1%	23.8%	19.6%	25.4%	17.2%	7.8%
No response	68	5	39	24	22	24	8	10	4
	8.5%	1.9%	11.6%	11.8%	13.4%	12.1%	4.5%	4.8%	7.8%

Pan Atlantic Research (August 2015)

**If new housing had the features you want and was affordable and available, how likely is it that you would be move to a new home in the Greater Ellsworth area in the coming years?
IN THE NEXT 3-5 YEARS? (Q20b)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	298	135	163	200	98
	37.3%	36.2%	38.2%	35.8%	40.5%
2 - Not very likely	170	70	100	111	59
	21.3%	18.8%	23.4%	19.9%	24.4%
3 - Neutral	101	40	61	67	34
	12.6%	10.7%	14.3%	12.0%	14.0%
4 - Somewhat likely	120	68	52	92	28
	15.0%	18.2%	12.2%	16.5%	11.6%
5 - Very likely	43	22	21	36	7
	5.4%	5.9%	4.9%	6.5%	2.9%
No response	68	38	30	52	16
	8.5%	10.2%	7.0%	9.3%	6.6%
Not likely, overall	468	205	263	311	157
	58.5%	55.0%	61.6%	55.7%	64.9%
Neutral	101	40	61	67	34
	12.6%	10.7%	14.3%	12.0%	14.0%
Likely, overall	163	90	73	128	35
	20.4%	24.1%	17.1%	22.9%	14.5%
No response	68	38	30	52	16
	8.5%	10.2%	7.0%	9.3%	6.6%

Pan Atlantic Research (August 2015)

Mean of Q20b (IN THE NEXT 3-5 YEARS?)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.23	1.95	2.43	2.32	2.37	2.28	2.29	2.10	2.04
Std Deviation	1.29	1.12	1.36	1.34	1.36	1.32	1.34	1.20	1.16
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	732	256	296	180	142	175	169	199	47

Pan Atlantic Research (August 2015)

Mean of Q20b (IN THE NEXT 3-5 YEARS)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.23	2.32	2.16	2.31	2.06
Std Deviation	1.29	1.35	1.24	1.34	1.17
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	732	335	397	506	226

Pan Atlantic Research (August 2015)

**If new housing had the features you want and was affordable and available, how likely is it that you would be move to a new home in the Greater Ellsworth area in the coming years?
IN THE NEXT 6-10 YEARS? (Q20c)**

	Total	Age			Income				No response
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	233	78	74	81	58	55	41	61	18
	29.1%	29.9%	22.1%	39.7%	35.4%	27.6%	23.2%	29.2%	35.3%
2 - Not very likely	99	31	48	20	6	21	27	41	4
	12.4%	11.9%	14.3%	9.8%	3.7%	10.6%	15.3%	19.6%	7.8%
3 - Neutral	93	30	37	26	12	27	21	17	16
	11.6%	11.5%	11.0%	12.7%	7.3%	13.6%	11.9%	8.1%	31.4%
4 - Somewhat likely	209	93	96	20	25	55	55	66	8
	26.1%	35.6%	28.7%	9.8%	15.2%	27.6%	31.1%	31.6%	15.7%
5 - Very likely	109	26	56	27	29	27	33	18	2
	13.6%	10.0%	16.7%	13.2%	17.7%	13.6%	18.6%	8.6%	3.9%
No response	57	3	24	30	34	14		6	3
	7.1%	1.1%	7.2%	14.7%	20.7%	7.0%		2.9%	5.9%
Not likely, overall	332	109	122	101	64	76	68	102	22
	41.5%	41.8%	36.4%	49.5%	39.0%	38.2%	38.4%	48.8%	43.1%
Neutral	93	30	37	26	12	27	21	17	16
	11.6%	11.5%	11.0%	12.7%	7.3%	13.6%	11.9%	8.1%	31.4%
Likely, overall	318	119	152	47	54	82	88	84	10
	39.8%	45.6%	45.4%	23.0%	32.9%	41.2%	49.7%	40.2%	19.6%
No response	57	3	24	30	34	14		6	3
	7.1%	1.1%	7.2%	14.7%	20.7%	7.0%		2.9%	5.9%

Pan Atlantic Research (August 2015)

**If new housing had the features you want and was affordable and available, how likely is it that you would be move to a new home in the Greater Ellsworth area in the coming years?
IN THE NEXT 6-10 YEARS? (Q20c)**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	233	121	112	163	70
	29.1%	32.4%	26.2%	29.2%	28.9%
2 - Not very likely	99	52	47	70	29
	12.4%	13.9%	11.0%	12.5%	12.0%
3 - Neutral	93	22	71	49	44
	11.6%	5.9%	16.6%	8.8%	18.2%
4 - Somewhat likely	209	84	125	145	64
	26.1%	22.5%	29.3%	26.0%	26.4%
5 - Very likely	109	66	43	93	16
	13.6%	17.7%	10.1%	16.7%	6.6%
No response	57	28	29	38	19
	7.1%	7.5%	6.8%	6.8%	7.9%
Not likely, overall	332	173	159	233	99
	41.5%	46.4%	37.2%	41.8%	40.9%
Neutral	93	22	71	49	44
	11.6%	5.9%	16.6%	8.8%	18.2%
Likely, overall	318	150	168	238	80
	39.8%	40.2%	39.3%	42.7%	33.1%
No response	57	28	29	38	19
	7.1%	7.5%	6.8%	6.8%	7.9%

Pan Atlantic Research (August 2015)

Mean of Q20c (IN THE NEXT 6-10 YEARS?)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	2.81	2.84	3.04	2.38	2.70	2.88	3.07	2.70	2.42
Std Deviation	1.49	1.44	1.46	1.53	1.69	1.48	1.46	1.42	1.27
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	743	258	311	174	130	185	177	203	48

Pan Atlantic Research (August 2015)

Mean of Q20c (IN THE NEXT 6-10 YEARS)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	2.81	2.77	2.85	2.88	2.67
Std Deviation	1.49	1.59	1.40	1.54	1.36
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	743	345	398	520	223

Pan Atlantic Research (August 2015)

If it is unlikely you would consider moving within 10 years, why is that? (Q20d)
[Open-ended, asked of those unlikely to move within 10 years]

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	332	109	122	101	64	76	68	102	22
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Happy where I am	154	52	59	43	23	45	33	46	7
	46.4%	47.7%	48.4%	42.6%	35.9%	59.2%	48.5%	45.1%	31.8%
Plan to live with / be close to family	16	6	5	5	2	1	6	6	1
	4.8%	5.5%	4.1%	5.0%	3.1%	1.3%	8.8%	5.9%	4.5%
Not interested in Ellsworth	6	4	2			4		2	
	1.8%	3.7%	1.6%			5.3%		2.0%	
Lack of finances	7		7		6			1	
	2.1%		5.7%		9.4%			1.0%	
Would move elsewhere	32	20	10	2	1	6	8	15	2
	9.6%	18.3%	8.2%	2.0%	1.6%	7.9%	11.8%	14.7%	9.1%
Do not need to move	5	2		3					5
	1.5%	1.8%		3.0%					22.7%
Depends on health	2	2						2	
	.6%	1.8%						2.0%	
Depends on tax levels	8	6	2					4	4
	2.4%	5.5%	1.6%					3.9%	18.2%
Already live in Ellsworth	4			4	2			2	
	1.2%			4.0%	3.1%			2.0%	
Too old to move	7		2	5	2	3	2		
	2.1%		1.6%	5.0%	3.1%	3.9%	2.9%		
Other	18	2	10	6	6	4	7	1	
	5.4%	1.8%	8.2%	5.9%	9.4%	5.3%	10.3%	1.0%	
No response	73	15	25	33	22	13	12	23	3
	22.0%	13.8%	20.5%	32.7%	34.4%	17.1%	17.6%	22.5%	13.6%

Pan Atlantic Research (August 2015)

If it is unlikely you would consider moving within 10 years, why is that? (Q20d)
[Open-ended, asked of those unlikely to move within 10 years]

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	332	173	159	233	99
	100.0%	100.0%	100.0%	100.0%	100.0%
Happy where I am	154	77	77	104	50
	46.4%	44.5%	48.4%	44.6%	50.5%
Plan to live with / be close to family	16	6	10	10	6
	4.8%	3.5%	6.3%	4.3%	6.1%
Not interested in Ellsworth	6	6		6	
	1.8%	3.5%		2.6%	
Lack of finances	7	6	1	6	1
	2.1%	3.5%	.6%	2.6%	1.0%
Would move elsewhere	32	14	18	25	7
	9.6%	8.1%	11.3%	10.7%	7.1%
Do not need to move	5	2	3	2	3
	1.5%	1.2%	1.9%	.9%	3.0%
Depends on health	2	2		2	
	.6%	1.2%		.9%	
Depends on tax levels	8	4	4	8	
	2.4%	2.3%	2.5%	3.4%	
Already live in Ellsworth	4	2	2	4	
	1.2%	1.2%	1.3%	1.7%	
Too old to move	7	6	1	6	1
	2.1%	3.5%	.6%	2.6%	1.0%
Other	18	10	8	12	6
	5.4%	5.8%	5.0%	5.2%	6.1%
No response	73	38	35	48	25
	22.0%	22.0%	22.0%	20.6%	25.3%

Pan Atlantic Research (August 2015)

If housing with the features you are looking for were affordable to you, how likely is it that you would consider Ellsworth as a place for your next residence? (Q21a)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	127	59	40	28	18	35	24	40	10
	15.9%	22.6%	11.9%	13.7%	11.0%	17.6%	13.6%	19.1%	19.6%
2 - Not very likely	116	42	57	17	17	24	25	41	9
	14.5%	16.1%	17.0%	8.3%	10.4%	12.1%	14.1%	19.6%	17.6%
3 - Neutral	132	52	50	30	29	33	25	38	7
	16.5%	19.9%	14.9%	14.7%	17.7%	16.6%	14.1%	18.2%	13.7%
4 - Somewhat likely	153	47	80	26	26	43	35	45	4
	19.1%	18.0%	23.9%	12.7%	15.9%	21.6%	19.8%	21.5%	7.8%
5 - Very likely	243	55	96	92	68	59	59	41	16
	30.4%	21.1%	28.7%	45.1%	41.5%	29.6%	33.3%	19.6%	31.4%
No response	29	6	12	11	6	5	9	4	5
	3.6%	2.3%	3.6%	5.4%	3.7%	2.5%	5.1%	1.9%	9.8%
Not likely, overall	243	101	97	45	35	59	49	81	19
	30.4%	38.7%	29.0%	22.1%	21.3%	29.6%	27.7%	38.8%	37.3%
Neutral	132	52	50	30	29	33	25	38	7
	16.5%	19.9%	14.9%	14.7%	17.7%	16.6%	14.1%	18.2%	13.7%
Likely, overall	396	102	176	118	94	102	94	86	20
	49.5%	39.1%	52.5%	57.8%	57.3%	51.3%	53.1%	41.1%	39.2%
No response	29	6	12	11	6	5	9	4	5
	3.6%	2.3%	3.6%	5.4%	3.7%	2.5%	5.1%	1.9%	9.8%

Pan Atlantic Research (August 2015)

If housing with the features you are looking for were affordable to you, how likely is it that you would consider Ellsworth as a place for your next residence? (Q21a)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
1 - Not at all likely	127	50	77	82	45
	15.9%	13.4%	18.0%	14.7%	18.6%
2 - Not very likely	116	28	88	53	63
	14.5%	7.5%	20.6%	9.5%	26.0%
3 - Neutral	132	62	70	96	36
	16.5%	16.6%	16.4%	17.2%	14.9%
4 - Somewhat likely	153	62	91	97	56
	19.1%	16.6%	21.3%	17.4%	23.1%
5 - Very likely	243	155	88	208	35
	30.4%	41.6%	20.6%	37.3%	14.5%
No response	29	16	13	22	7
	3.6%	4.3%	3.0%	3.9%	2.9%
Not likely, overall	243	78	165	135	108
	30.4%	20.9%	38.6%	24.2%	44.6%
Neutral	132	62	70	96	36
	16.5%	16.6%	16.4%	17.2%	14.9%
Likely, overall	396	217	179	305	91
	49.5%	58.2%	41.9%	54.7%	37.6%
No response	29	16	13	22	7
	3.6%	4.3%	3.0%	3.9%	2.9%

Pan Atlantic Research (August 2015)

Mean of Q21a

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Mean	3.35	2.99	3.42	3.71	3.69	3.35	3.48	3.03	3.15
Std Deviation	1.47	1.46	1.39	1.49	1.41	1.47	1.46	1.42	1.61
Minimum	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Valid N	771	255	323	193	158	194	168	205	46

Pan Atlantic Research (August 2015)

Mean of Q21a

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Mean	3.35	3.68	3.06	3.55	2.89
Std Deviation	1.47	1.44	1.42	1.46	1.36
Minimum	1.00	1.00	1.00	1.00	1.00
Maximum	5.00	5.00	5.00	5.00	5.00
Valid N	771	357	414	536	235

Pan Atlantic Research (August 2015)

**If you answered 'it depends,' what would the choice depend on? (Q21b)
[Open-ended]**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	132	52	50	30	29	33	25	38	7
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Will depend on my health	16	5	3	8	9	2	4	1	
	12.1%	9.6%	6.0%	26.7%	31.0%	6.1%	16.0%	2.6%	
Depends on cost	16	7	4	5	7	5		4	
	12.1%	13.5%	8.0%	16.7%	24.1%	15.2%		10.5%	
Proximity to services	8	4	4			2	2	4	
	6.1%	7.7%	8.0%			6.1%	8.0%	10.5%	
Proximity to family	27	9	14	4	4	5	9	7	2
	20.5%	17.3%	28.0%	13.3%	13.8%	15.2%	36.0%	18.4%	28.6%
Do not want to live in Ellsworth	3	1	2		2		1		
	2.3%	1.9%	4.0%		6.9%		4.0%		
Taxes too high in Ellsworth	19	14	4	1		4	5	8	2
	14.4%	26.9%	8.0%	3.3%		12.1%	20.0%	21.1%	28.6%
Availability of support services	2			2		2			
	1.5%			6.7%		6.1%			
Other	29	6	16	7	4	7	4	11	3
	22.0%	11.5%	32.0%	23.3%	13.8%	21.2%	16.0%	28.9%	42.9%
No response	12	6	3	3	3	6		3	
	9.1%	11.5%	6.0%	10.0%	10.3%	18.2%		7.9%	

Pan Atlantic Research (August 2015)

**If you answered 'it depends,' what would the choice depend on?
(Q21b)
[Open-ended]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	132	62	70	96	36
	100.0%	100.0%	100.0%	100.0%	100.0%
Will depend on my health	16	8	8	11	5
	12.1%	12.9%	11.4%	11.5%	13.9%
Depends on cost	16	12	4	15	1
	12.1%	19.4%	5.7%	15.6%	2.8%
Proximity to services	8	2	6	6	2
	6.1%	3.2%	8.6%	6.3%	5.6%
Proximity to family	27	20	7	26	1
	20.5%	32.3%	10.0%	27.1%	2.8%
Do not want to live in Ellsworth	3	2	1	2	1
	2.3%	3.2%	1.4%	2.1%	2.8%
Taxes too high in Ellsworth	19	8	11	16	3
	14.4%	12.9%	15.7%	16.7%	8.3%
Availability of support services	2		2		2
	1.5%		2.9%		5.6%
Other	29	6	23	14	15
	22.0%	9.7%	32.9%	14.6%	41.7%
No response	12	4	8	6	6
	9.1%	6.5%	11.4%	6.3%	16.7%

Pan Atlantic Research (August 2015)

**If you answered 'not likely' or 'not very likely' what would the choice depend on?
(Q21c)
[Open-ended]**

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	132	52	50	30	29	33	25	38	7
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Happy where I am	4			4	4				
	3.0%			13.3%	13.8%				
Other	1	1				1			
	.8%	1.9%				3.0%			
No response	127	51	50	26	25	32	25	38	7
	96.2%	98.1%	100.0%	86.7%	86.2%	97.0%	100.0%	100.0%	100.0%

Pan Atlantic Research (August 2015)

**If you answered 'not likely' or 'not very likely' what
would the choice depend on? (Q21c)
[Open-ended]**

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	132	62	70	96	36
	100.0%	100.0%	100.0%	100.0%	100.0%
Happy where I am	4	4		4	
	3.0%	6.5%		4.2%	
Other	1		1	1	
	.8%		1.4%	1.0%	
No response	127	58	69	91	36
	96.2%	93.5%	98.6%	94.8%	100.0%

Pan Atlantic Research (August 2015)

For tabulation purposes, which of the following income ranges best approximates your annual household income for 2014 from all sources? (Q22)

	Total	Age			Income				
		55-64	65-75	75+	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000+	No response
Total	800	261	335	204	164	199	177	209	51
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under \$25,000	164	33	59	72	164				
	20.5%	12.6%	17.6%	35.3%	100.0%				
\$25,000-\$49,999	199	56	89	54		199			
	24.9%	21.5%	26.6%	26.5%		100.0%			
\$50,000-\$74,999	177	66	77	34			177		
	22.1%	25.3%	23.0%	16.7%			100.0%		
\$75,000-\$99,999	113	45	53	15				113	
	14.1%	17.2%	15.8%	7.4%				54.1%	
\$100,000 or more	96	41	42	13				96	
	12.0%	15.7%	12.5%	6.4%				45.9%	
No response	51	20	15	16					51
	6.4%	7.7%	4.5%	7.8%					100.0%

Pan Atlantic Research (August 2015)

For tabulation purposes, which of the following income ranges best approximates your annual household income for 2014 from all sources? (Q22)

	Total	Regions			
		City of Ellsworth	Other towns	Greater Ellsworth	All Other
Total	800	373	427	558	242
	100.0%	100.0%	100.0%	100.0%	100.0%
Under \$25,000	164	90	74	108	56
	20.5%	24.1%	17.3%	19.4%	23.1%
\$25,000-\$49,999	199	61	138	110	89
	24.9%	16.4%	32.3%	19.7%	36.8%
\$50,000-\$74,999	177	100	77	144	33
	22.1%	26.8%	18.0%	25.8%	13.6%
\$75,000-\$99,999	113	58	55	83	30
	14.1%	15.5%	12.9%	14.9%	12.4%
\$100,000 or more	96	38	58	74	22
	12.0%	10.2%	13.6%	13.3%	9.1%
No response	51	26	25	39	12
	6.4%	7.0%	5.9%	7.0%	5.0%

Pan Atlantic Research (August 2015)

Appendix C

CITIES/TOWNS SURVEYED



Appendix C

CITIES AND TOWNS SURVEYED

Mail Survey Town	Est. Number of Households Age 55+
Blue Hill	732
Brooklin	308
Brooksville	254
Castine	199
Dedham	276
Eastbrook	85
Ellsworth	1,455
Franklin	295

Mail Survey Town	Est. Number of Households Age 55+
Gouldsboro	414
Hancock	498
Lamoine	348
Mariavile	98
Orland	471
Otis	160
Penobscot	303
Sedgwick	249

Mail Survey Town	Est. Number of Households Age 55+
Sorrento	88
Sullivan	244
Surry	343
Trenton	364
Waltham	60
Winter Harbor	173
Total	7,417

