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TOWN OF FALMOUTH VISION AND VALUES

BENCHMARK REPORT - MAINE, USA

July 2022



COMMUNITY PROFILE AND BENCHMARK ANALYSIS FOR THE TOWN OF FALMOUTH

This report presents an analysis of the demographic, economic, environmental conditions and trends for Falmouth, Maine, US

MAINE, USA

This report has been prepared as part of the development of a new community vision for the Town of Falmouth Vision and Values Project. The report aims to present a baseline demographic, environmental, and economic analysis of the community. This report describes the Town of Falmouth and includes current population makeup and topics such as labor force, public health, education, and employment characteristics. It also includes some longitudinal analysis to show the current demographic and economic trends in Falmouth and compares the town to a range of other communities in the United States with similar attributes.

These reports and the associated data analysis are available on the project portal:

<https://lab2.future-iq.com/town-of-falmouth-vision-and-values-project/>

July 2022

Report Prepared by:

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The Town of Falmouth is a vibrant and evolving community located near the urban of Poland metropolis. The Town boundaries Portland, South Portland, Cape Elizabeth, and Westbrook. It is a destination community for people seeking outdoor activities, coastal, and park recreation.

1.0 INTRODUCTION

This benchmark report has been prepared as part of the development of a new community vision for the Town of Falmouth Vision and Values Project. The report aims to present a baseline demographic, environmental, and economic analysis of the community. This report describes Falmouth and includes the current population makeup and topics such as labor force, public health, education, and employment characteristics. It also includes some longitudinal analysis to show the current demographic and economic trends of the town.

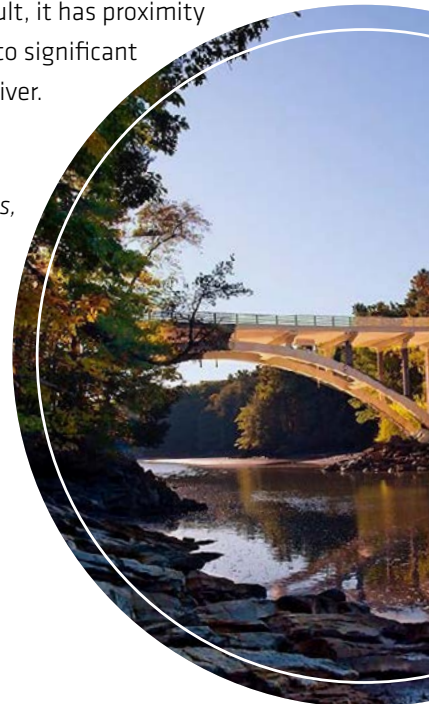
This report explores key metrics that compare Falmouth to twenty-one other communities sharing similar characteristics. The focus of this analysis is to provide valuable insights into Falmouth and to highlight the town's strengths relevant to the community vision and values.

Falmouth is in Cumberland County and is part of the Portland-South Portland-Biddeford Metropolitan Statistical Area. The town is home to 12,444 residents (2020 April Census) which amounts to a 1.13% annual population growth since the 2010 census. Falmouth's schools are ranked as some of the best in Maine, attracting families to settle here. Its proximity to Portland and ease of access to Interstate 295 and the Maine turnpike make it a practical choice for commuters, employers, and residents.

Falmouth is located close to the Portland International Jetport and downtown Portland. As a result, it has proximity to major infrastructure and easy access to all parts of the metropolis. Falmouth is also adjacent to significant water bodies, including Casco Bay, the Gulf of Maine, the Atlantic Ocean, and the Presumpscot River.

Technical note:

The analysis presented in this benchmark report draws on numerous publicly available data sources, most notably the Census 2019 American Community Survey 5-Year estimates and the 2020 Decennial census (for population and race data) unless otherwise stated. All of the data utilized in the preparation of this report can be accessed online at <https://data.census.gov/cedsci/>.



1.1 TOWN OF FALMOUTH – COMMUNITY SNAPSHOT

The following table provides a summary of the economic and demographic features of Falmouth. The median age for individuals is 46.7 years with a median income of \$121,285. 44% of households earn approximately \$100,000 and above annually, and 2.7% live below the poverty level. 68.9% of the population 16 years and over participates in the labor force.

The major occupations in Falmouth are (1) Management, business, science, and arts, and (2) Sales and office occupations, which altogether represent 82.9% of the occupations in Falmouth. Across industries, the major areas of employment are (1) Educational services, and health care and social assistance (2) Finance and insurance, and real estate and rental and leasing, and (3) Professional, scientific, and management, and administrative and waste management services. These three industries account for 58% of the jobs of residents in the town.

Falmouth has the feel of an intimate and independent community with a relatively rural look. It is home to a high percentage of educated professionals and is a predominately single-family home area that serves as a coastal and rural escape from Portland.

Falmouth's Demographics and Economics Summary

Population (2010)	11,185
Population (2020)	12,444
Median Age	46.7 years
Workforce Participation Rate	68.9%
Median Household Income	\$121,285
Median Home Value	\$439,800
Population Below Poverty Line	2.7%
Home Ownership Rate	85.4%
Major Occupations	Management, business, science, and arts Sales and office Finance and Insurance
Major Industries	Retail Trade Health care and social assistance

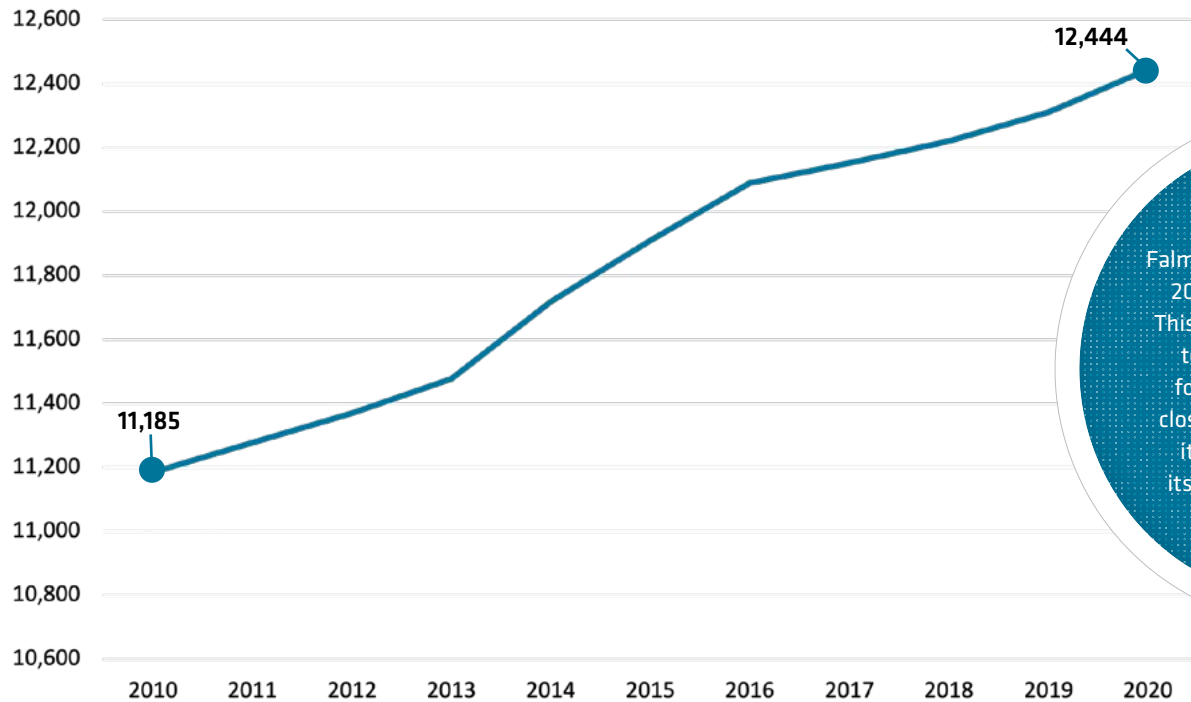
Source: 2000 Decennial Census; 2020 Decennial Census; 2019 5-Year American Community Survey; Projections extrapolated from Decennial Census



1.2 POPULATION TRENDS

Following the census in 2020, the population of Falmouth was 12,444, with a median age of 46.7 years. Falmouth's population went through a significant increase between 2013 and 2017, which amounted to an annual growth rate of 1.13%.

Population Trend for Falmouth Town, Maine (2010 – 2020)



Falmouth's population since 2010 has been on the rise. This could be a result of the town being a destination for outdoor recreation, its closeness to the urban city, its excellent schools, and its "quality of life" appeal.

Source: U.S. Census Bureau: Population Estimates for States, Counties, Places and Minor Civil Divisions, 2020 Decennial Census



DataInsight

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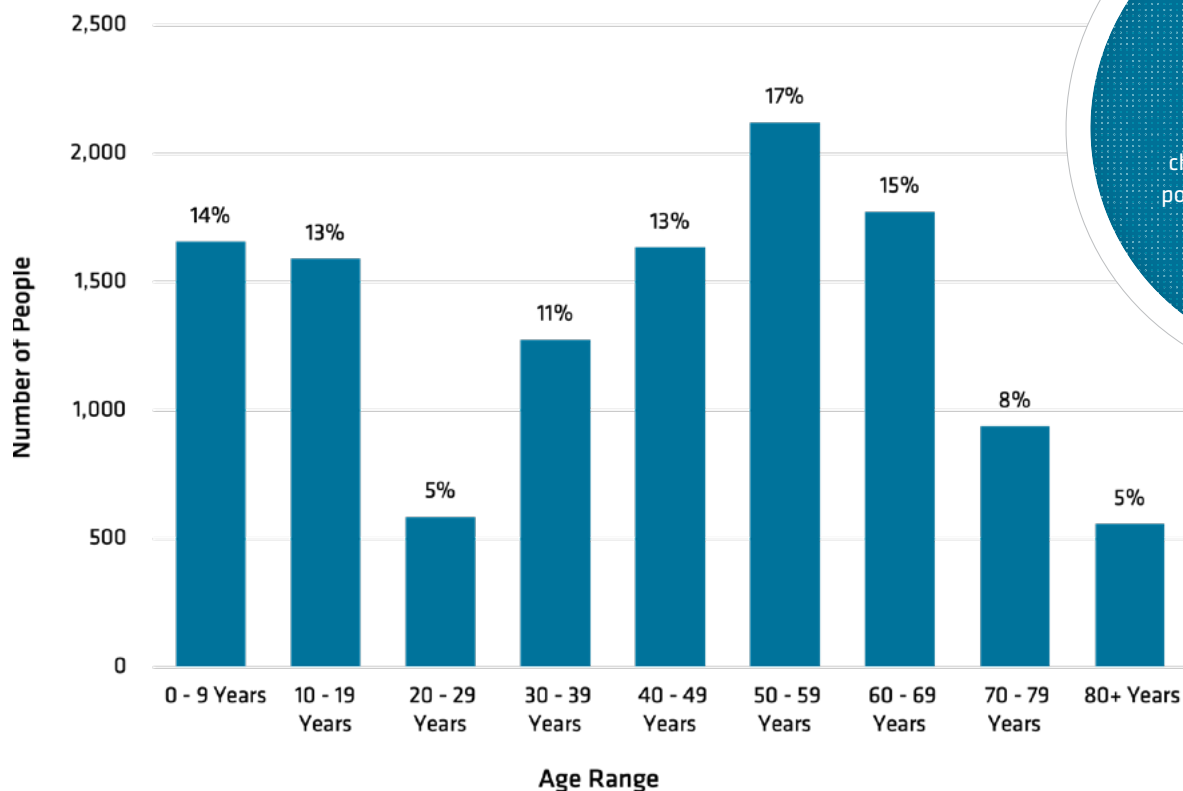
- The increase in the population of Falmouth over the past 10 years has significantly shaped the community as a vibrant, independent town that provides most services to its own residents.



1.3 DEMOGRAPHIC PROFILE

The 2019 age profile for Falmouth shows 50 to 59 years old as the predominant age group, accounting for 17% of the population. Residents within the ages of 55 to 75 (Baby Boomers) account for 28% of the population, 40 to 54 (Gen X) account for 22% of the population, and those within the ages of 25 to 39 (Gen Y or Millennials) account for 13% of the residents of Falmouth.

Residents Age Profile for Falmouth, 2019



With 45% of Falmouth's population over the age of 50, the town will be required to address the changing needs of its aging population with appropriate infrastructural planning.

Source: American Community Survey (2019 - ACS 5-year estimates)



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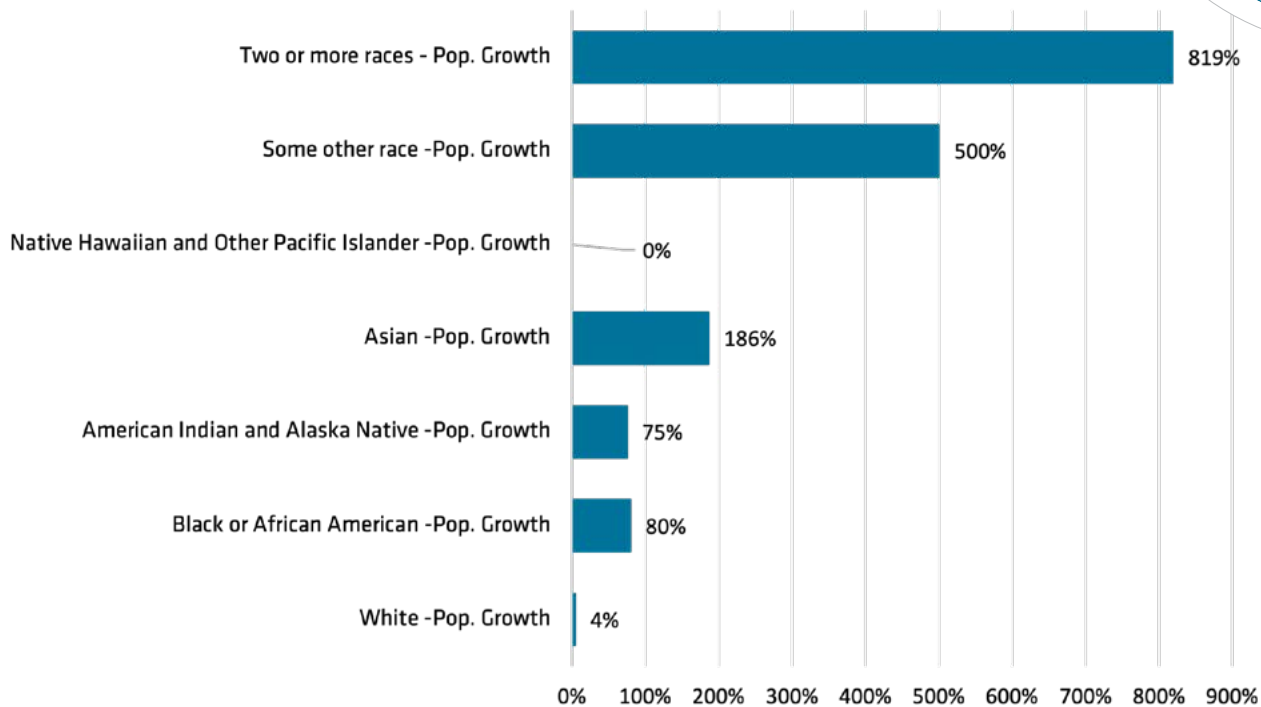
- In 2019, almost half (45%) of the residents in Falmouth are within 50 to 80 plus years of age. The rapid growth of people over 50 years of age will require changing infrastructure and housing needs in the community.
- 32% of Falmouth's population fall into the category below 29 years of age while 24% are between 30 to 49 years.



1.4 CHANGING ETHNIC AND DEMOGRAPHIC MAKEUP

Between 2010 and 2020, the fastest growing racial group in Falmouth was the population with two or more races, which added a total of 524 people. Second fastest was those who are of some other race with the third being the Asian population. Some other race and the Asian group grew by 50% and 18.6% annually respectively since 2010.

Population Change between 2010 and 2020 of Ethnicities in Falmouth, Maine



Source: American Community Survey (2019 - ACS 5-year estimates), 2020 Decennial Census



DataInsight

DATA INSIGHT:

- In Falmouth, 'white' residents represented the remaining 90.6% of the town's population. Those who identify as 'other than white alone' race made up 9.4% of the total population in 2020.
- The total change in white population over the last 10 years was 4%, which is greater than the average of the cohort communities (1%).

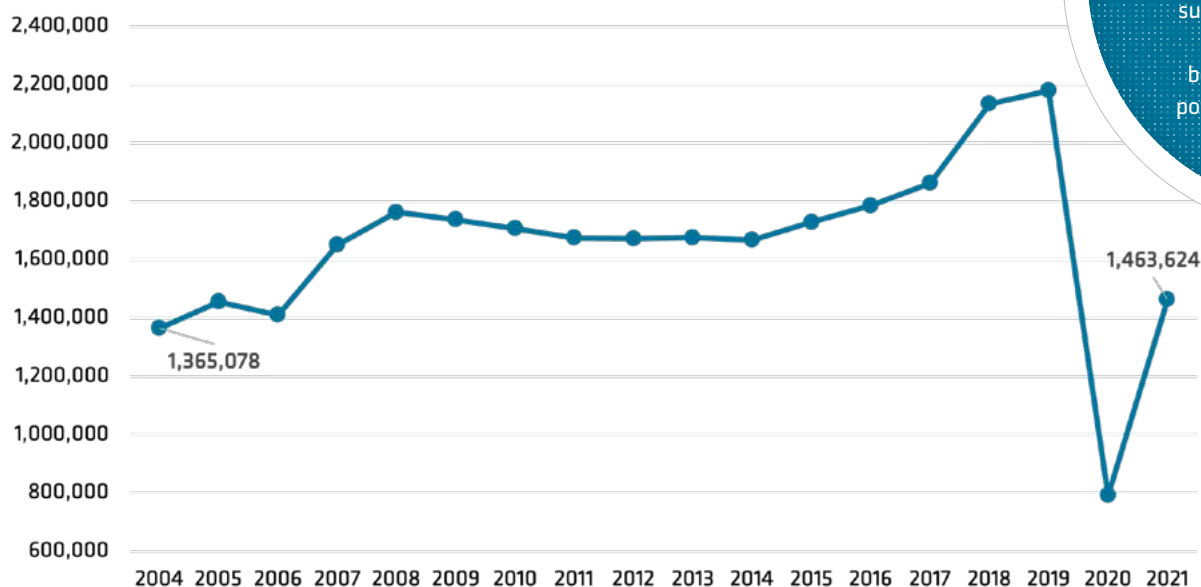
The shift in the ethnic composition of the community shows a significant increase in the population of residents that are Asian, some other race, and of two or more races.



1.5 PORTLAND INTERNATIONAL JETPORT TRAFFIC TRENDS

The Portland International Jetport (PWM) is a significant economic driver for Falmouth. However, the demand fell drastically by 63.6% in 2020 due to movement restrictions during the COVID-19 epidemic. In terms of passenger numbers, this airport grew substantially between 2006 and 2008, and continues to cater to approximately 2.1 million passengers per year. Although located in Portland, the airport is only 6.1 miles away from Falmouth. Today, the Jetport is one of the nation's fastest-growing airports, serving most of the major domestic airlines (source: Portland International Jetport Page).

Traffic Data of Portland International Jetport – Passengers Per Year



The impact of the PWM airport as a major local and regional economic driver cannot be underestimated. Trends in logistics and global supply chains indicate the airport will continue to be part of the sector that powers the local economy.

Source: Portland International Jetport Traffic Statistics



DataInsight

DATA INSIGHT:

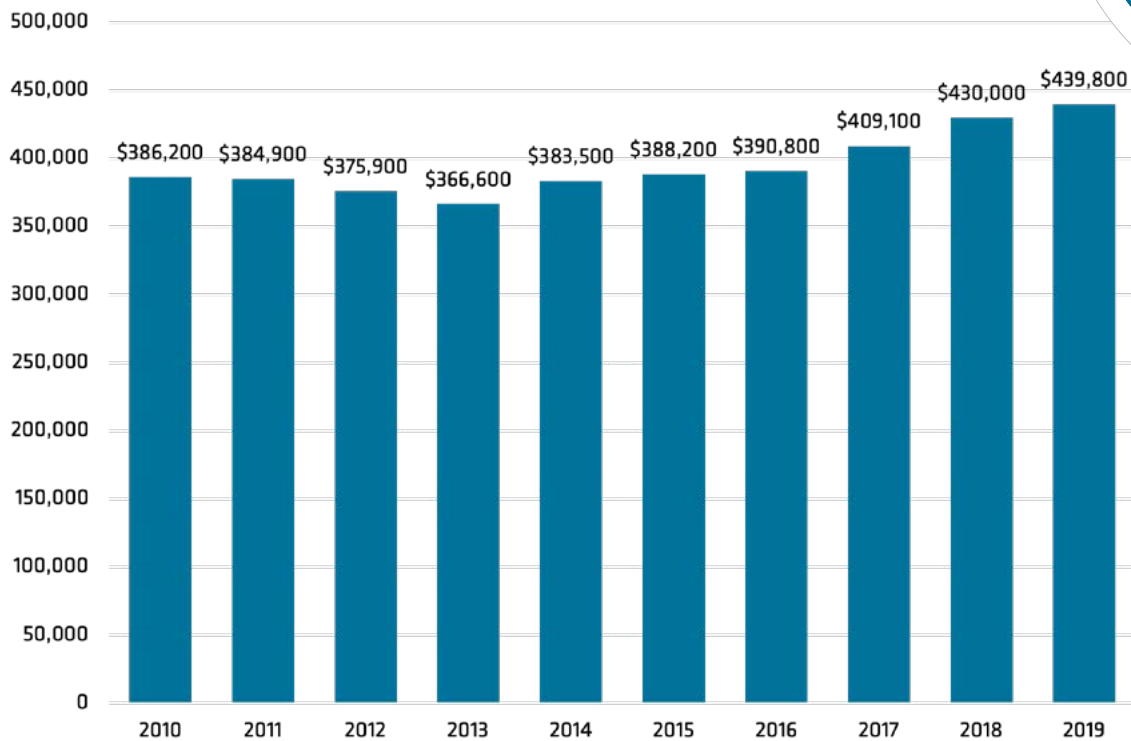
- The number of travelers through PWM almost doubled from 2004 to 2019, from 1.3 million to 2.1 million passengers. Although a large decline was seen in 2020, the demand grew by 46% in 2021 again illustrating the contribution the airport affords to the community.



1.6 HOUSE PRICING TRENDS

The average (median) price of a house is a benchmark that splits the value of a home into two, where half are sold for more and the other half for less than that amount. The median home value considers both newly built and existing homes and is usually a better way to look at home pricing trends because the mean prices (arithmetic average of a set of given numbers) can be skewed by a small share of high-end transactions.

After a slight drop in home prices during 2012 and 2013, home prices in Falmouth have experienced non-stop growth trend since 2014. This correlates to greater demand for housing due to population growth that has occurred during the same time.



House Pricing Trend – Home Median Value for Falmouth

Source: American Community Survey (2019 - ACS 5-year estimates)



DataInsight

DATA INSIGHT:

- The highest median home value is in 2019 at \$439,800 which is almost double the median US existing house price value of \$240,500 for all home types.





2.0 COHORT COMMUNITIES ANALYSIS

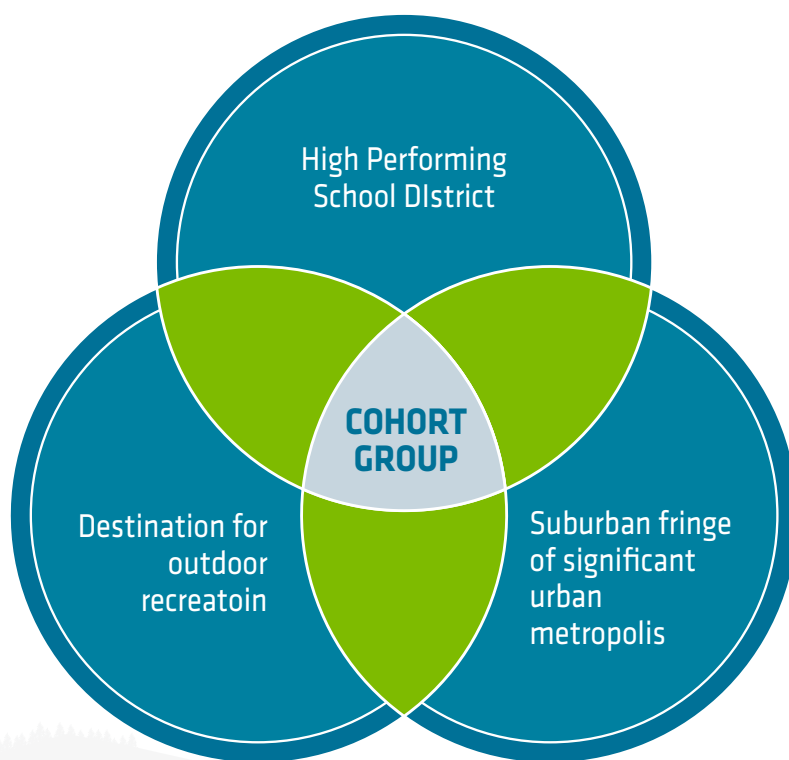
This benchmark report includes a significant component of a cohort community analysis. The analysis is performed to compare Falmouth to similar communities that are dealing with similar issues. This is invaluable as a reference point when considering future strategic actions and best practice examples.

The three major attributes chosen to identify the Falmouth benchmark cohort represent an unusual constellation of features. These define communities that are in the midst of change and are relatively high performing.

2.1 MULTI-DIMENSIONAL ANALYSIS

Cohort communities were selected using a multi-dimensional process. For the first dimension, two overarching criteria were considered. The cohort locations needed both to be in a coastal state on the northeast or southeastern US Atlantic coast, and the cohort was required to be a similar sized population (between 10,000 to 15,000 residents). The second dimension required three defining attributes of Falmouth. These attributes were:

- **High performing School District** - School district ranking in the top 5 school districts in their state.
- **Destination for outdoor recreation:** Cities and towns on the coast or near rivers or other bodies of water that also serve as attractions for recreation.
- **Proximity to major urban metropolis** - Within 15 miles of a major urban area.

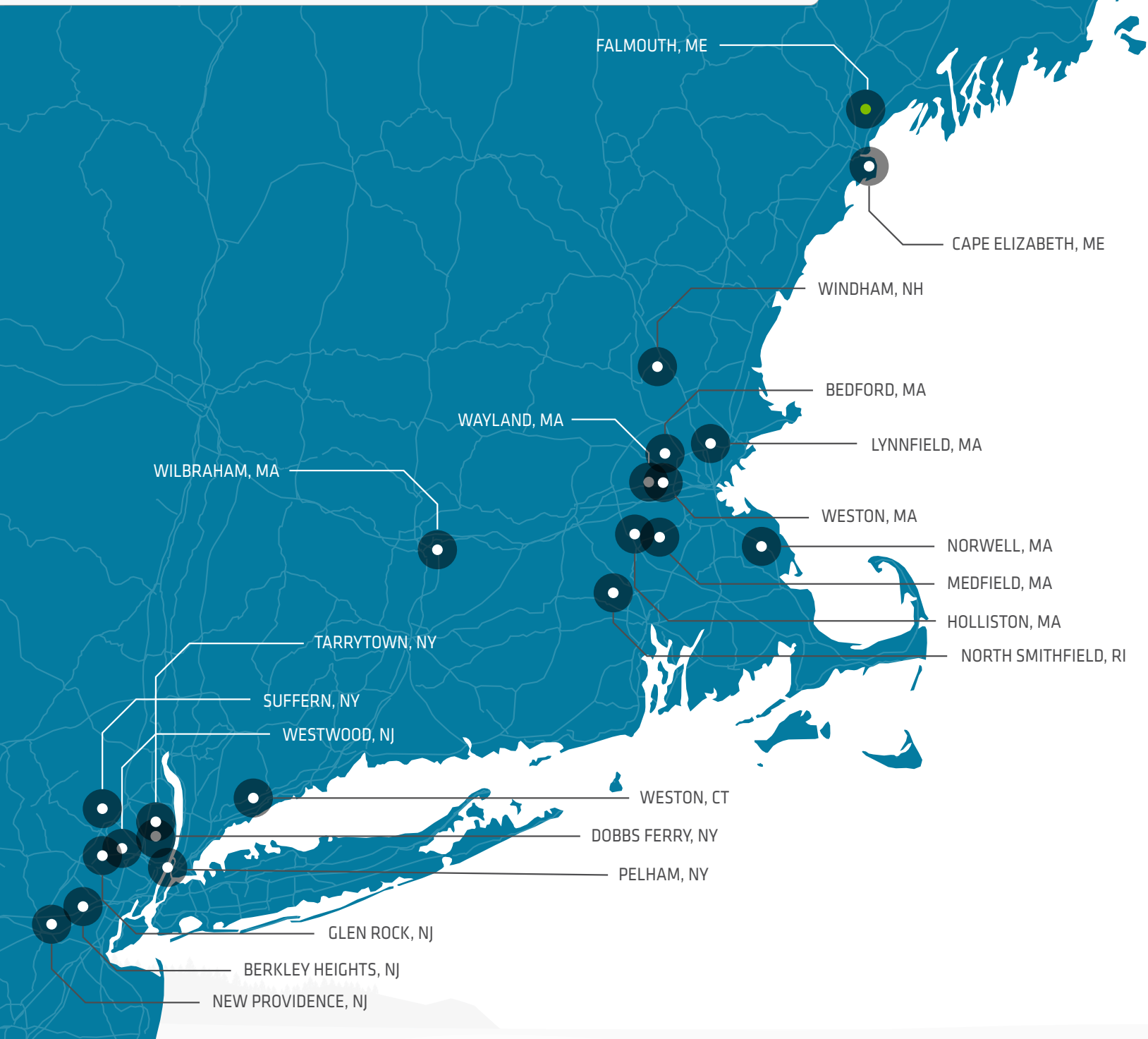


The analysis of the cohort communities relies, in most cases, on comparison over time between 2010 and 2020 census datasets.

2.2 COHORT COMMUNITIES MAP

This report compares Falmouth to 21 similar cities across a variety of metrics in demographics, education, transportation, public health, infrastructure, business and industry, and finance. Cohort communities were selected using a multi-dimensional process that considered cities near water, population size, destination for outdoor recreation, proximity to significant urban metropolis, and high performing school district.

Map of Cohort Communities



2.3 COHORT COMMUNITY PROFILES – SUMMARY

The following 22 communities, including Falmouth, make up the cohort study group for this report:

BEDFORD, MA

Bedford, population 14,383, is a town located in Middlesex County, Massachusetts. Bedford is a relatively circular coastal town bordered by the Concord River, the Shawsheen River, and Vine Brook. Although it is a coastal city, it is just 15 miles northeast of the urban city of Boston. Its population grew by 10% since 2010 which amounts to an annual growth rate of 1% over the past 10 years. The city's median age is 42.2 years with a median household income of \$128,354 and median housing value of \$655,300.

BERKELEY HEIGHTS, NJ

Berkeley Heights is a township in Union County, New Jersey. The town is located on the crest of the Second Watchung Mountain and in the Passaic River Valley which forms the Berkeley Heights' northern border. Its population of 13,285 has undergone an increase of 1.2% since 2010 with an annual growth rate of 0.1% over the past 10 years. The town's median age is 44.2 years with a median household income of \$183,056 and a median housing value of \$617,500.

CAPE ELIZABETH, ME

Cape Elizabeth is a town in Cumberland County, Maine. Cape Elizabeth includes two islands and is bordered by South Portland to the north and Scarborough to the west. Not only is the town a coastal area but it is also known for tourism with its three coastal parks – Fort Williams, Two Lights State Park, and Crescent Beach State Park. Its population of 9,535 has undergone an increase of 5.3% since 2010 with an annual growth rate of 0.5% over the past 10 years. The town's median age is 49.8 years with a median household income of \$123,116 and a median housing value of \$435,700.

DOBBS FERRY, NY

Dobbs Ferry is a village in Westchester County, New York. This city is bounded to the west by the Hudson River, and the east by the Saw Mill River. Its current population of 11,541 grew by 7% since 2010 with an annual growth rate of 0.7% over the past 10 years. The village's median age is 38.6 years with a median household income of \$143,462 and a median housing value of \$671,700.

FALMOUTH, ME

Falmouth, population 12,444, is a town in Cumberland County in Maine. Falmouth is a coastal town located beside Casco Bay, the Gulf of Maine, and Atlantic Ocean. Its location is a suburban fringe because it is bordered by Portland (the most populous city in Maine) to the southwest. The town's population grew by 12.2% since 2010 which amounts to an annual growth rate of 1.2% over the past 10 years. Its median age is 46.7 years with a median household income of \$121,285 and median housing value of \$439,800.

GLEN ROCK, NJ

Glen Rock, population 12,133, is a borough in Bergen County in New Jersey. The borough was included in the cohort because of its close proximity to New York City. Glen Rock's population grew by 5.1% since 2010 which amounts to an annual growth rate of 0.1% over the past 10 years. The town's median age is 40.6 years with a median household income of \$187,000 and median housing value of \$646,600.



HOLLISTON, MA

Holliston is a New England town in Middlesex County, Massachusetts. Holliston is considered a coastal town because water covers 1.73% of the town's total area with the Charles River passing near its southern region. It is also on the suburban fringe of Boston. Its population increased by 11.7% since 2010 to 14,996 in 2020 which amounts to an annual growth rate of 1.2%. The town's median age is 42.2 years with a median household income of \$135,340 and a median housing value of \$448,600.

LYNNFIELD, MA

Lynnfield, population 13,000, is a coastal town located in Essex County, Massachusetts. The town is bordered by the Ipswich River to the north with several brooks, lakes and ponds dotting the town. Its population increased by 13.2% since 2010 which amounts to an annual growth rate of 1.3% over the past 10 years. The town's median age is 43.6 years with a median household income of \$128,641 and median housing value of \$670,700.

MEDFIELD, MA

Medfield, population 12,799, is a town located about 17 miles southwest of Boston, which is a 40-minute drive to Boston's financial district in Norfolk County, Massachusetts. The town is also considered coastal because one-third of it is bordered by the Charles River. Its population increased by 6.9% since 2010 which amounts to an annual growth rate of 0.7% over the past 10 years. The town's median age is 41.8 years with a median household income of \$160,963 and median housing value of \$667,500.

NEW PROVIDENCE, NJ

New Providence is a borough on the northwestern edge of Union County, New Jersey. The town is located on the Passaic River with several creek beds most of which are the forks and branches of the Salt Brook. Its population grew by 13.6% since 2010 which amounts to an annual growth rate of 1.4% over the past 10 years. The town's median age is 40 years with a median household income of \$143,672 and median housing value of \$607,100.

NORTH SMITHFIELD, RI

The town of North Smithfield is a farming community located in Providence County, Rhode Island.

North Smithfield is considered a coastal town because water covers 2.83% of the town's total area. Its population increased by 7% since 2010 to 12,588 in 2020 which amounts to an annual growth rate of 0.7%. The town's median age is 48.2 years with a median household income of \$78,617 and a median housing value of \$295,900.

NORWELL, MA

Norwell, population 11,351, is a town in Massachusetts located in Plymouth County. The town is located 32km to the south of Boston. The town is 1.37% water and much of its eastern border lies along the North River. Its population grew by 9.5% since 2010 which amounts to an annual growth rate of 0.9% over the past 10 years. The town's median age is 42.2 years with a median household income of \$157,987 and median housing value of \$608,300.



PELHAM, NY

Pelham, population 13,078, an affluent suburb of New York, is located in Westchester County, New York. The town is on the fringe of New York. It is approximately 14 miles northeast of Midtown Manhattan, 28-minute drive away from the Grand Central Terminal, and 19.5 miles north of the John F. Kennedy International Airport. Its population grew by 7% since 2010 which amounts to an annual growth rate of 0.7% over the past 10 years. The town's median age is 39.1 years with a median household income of \$157,143 and median housing value of \$786,300.

RAMSEY, NJ

Ramsey, population 14,798, is a borough in New Jersey located in Bergen County. The borough is bordered to the east by the Saddle River and Upper Saddle River. Its population grew by 2.9% since 2010 which amounts to an annual growth rate of 0.3% over the past 10 years. The town's median age is 46.1 years with a median household income of \$147,875 and median housing value of \$598,900.

SUFFERN, NY

Suffern, population 11,441, is a village in New York located in Rockland County. The town is considered to be at the fringe of an urban metropolis due to its 30-mile distance northwest of Manhattan. The town is 1.47% water and is designated as a gateway to the Hudson River Valley National Heritage Area. Its population grew by 6.9% since 2010 which amounts to an annual growth rate of 0.7%. The village's median age is 44 years with a median household income of \$81,845 and median housing value of \$310,900.

TARRYTOWN, NY

Tarrytown is a village in the town of Greenburgh in Westchester County, New York. It is located on the eastern bank of the Hudson River, about 25 miles (40 km) north of Midtown Manhattan. Tarrytown is considered coastal because water covers 47.54% of the town's total area. Its population grew by 5.9% since 2010 which amounts to an annual growth rate of 0.6% over the past 10 years. The village's median age is 44.7 years with a median household income of \$124,046 and median housing value of \$609,400.

WAYLAND, MA

Wayland is a town in Middlesex County, Massachusetts. Wayland is considered coastal because water covers 4.21% of the town's total area. The population increased from 12,864 in 2010 to 13,943 in 2020. This represents a 8.4% increase in population. The annual growth rate in the town is 0.8%, and the median age is 44 years. Wayland's median household income is \$185,375 with a median housing value of \$711,500.

WESTON, MA

Weston is a town in Middlesex County, Massachusetts, about 15 miles west of downtown Boston. Weston is considered coastal because water covers 1.85% of the town's total area. The population was 11,191 as of the 2010 census and has increased by 5.9% to bring the population to 11,851 after the 2020 census. The annual growth rate in the town is 0.6%, and the median age is 45.1 years. Weston's median household income is \$207,702 with a median housing value of \$1,312,300.



WESTON, CT

Weston is a town in Fairfield County, Connecticut. The town is considered to be at the fringe of an urban metropolis due to its 45-mile distance southwest of New York City. The population was 10,088 in 2010 and has increased by 2.6% to bring the population to 10,354 in 2020. The annual growth rate in the town is 0.3%, and the median age is 46.8 years. Weston's median household income is \$222,535 with a median housing value of \$868,200.

WESTWOOD, NJ

Westwood, population 11,282, is a borough in Bergen County, New Jersey. The town is at the fringe of an urban metropolis due to its 30-mile distance to New York City. Its population grew by 3.8% since 2010 which amounts to an annual growth rate of 0.4% over the past 10 years. The city's median age is 41.8 years with a median household income of \$110,473 and median housing value of \$463,500.

WILBRAHAM, MA

Wilbraham is a town in Hampden County, Massachusetts. The population was 14,089 as of the 2010 census and has increased by 3.7% to bring the population to 14,613 following the 2020 census. The annual growth rate in the town is 0.4%, and the median age is 46.3 years. Weston's median household income is \$109,191 with a median housing value of \$303,000.

WINDHAM, NH

Windham, population 15,817, is a suburban town in Rockingham County, New Hampshire. The town is at the fringe of an urban metropolis due to its 37-mile distance north of Boston. Its population grew by 19.9% since 2010 which amounts to an annual growth rate of 2% over the last decade. The city's median age is 44 years with a median household income of \$148,459 and median housing value of \$450,300.





3.0 COHORT COMMUNITIES - KEY PERFORMANCE INDICATORS

3.1 DEMOGRAPHICS

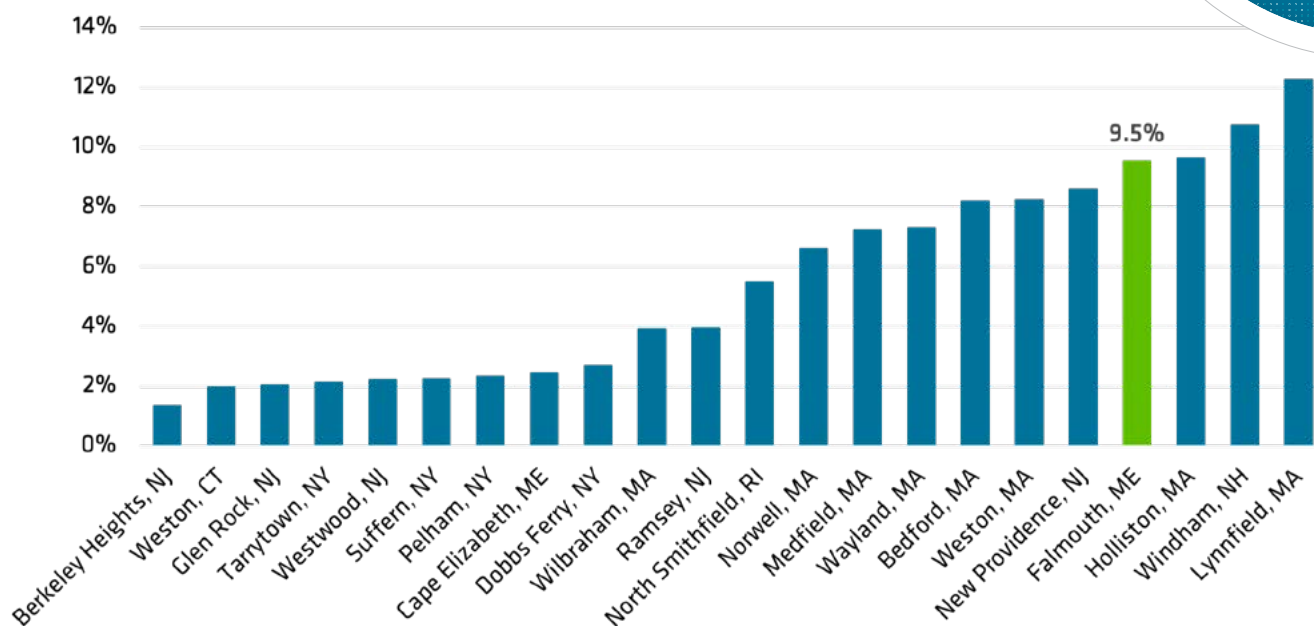
The demographic trends of the cohort communities are compared in this section of the report. This allows for a detailed understanding about the internal community trends and dynamics, and to better appreciate what changes might be considered normal or unusual in Falmouth.

3.1.1 POPULATION GROWTH

Population growth is an important variable to consider, as it impacts a range of dimensions such as physical infrastructure and social dynamics.

Falmouth's population increased by an annual growth rate of 1.2% but has a higher population growth than all but three of its cohort communities.

Population Growth (%), 2010 to 2020



Source: 2010 and 2020 Decennial Census



DataInsight

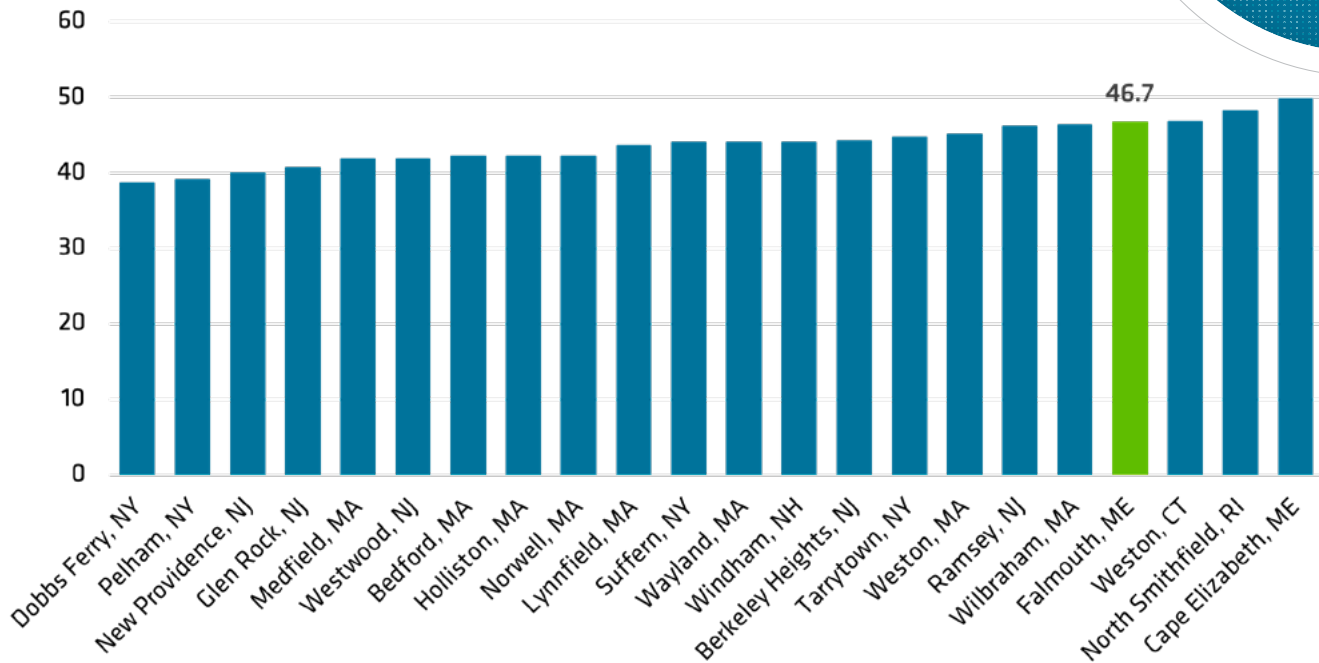
DATA INSIGHT:

- Falmouth's annual growth rate is higher than that of eighteen communities in its cohort. Population growth by itself, however, does not define community success as that is more broadly dependent on a mix of economic, social, political, and environmental characteristics.

3.1.2 POPULATION AGING

Overall median population age in the United States, and other developed countries, is forecast to increase between 2010 and 2040. This is in large part due to people living longer, and declining birth rates. Immigration to the U.S. helps to diminish this population aging effect, relative to other developed countries.

Total Median Age (Years)



Source: American Community Survey (2017 - ACS 5-year estimates)



DataInsight

DATA INSIGHT:

- The communities of Dobbs Ferry and Pelham have the youngest population among the cohort communities with a median age range of 38.6 years and 39.1 years respectively. Also, the communities with the oldest population among the cohort communities are Cape Elizabeth (49.8 years) and North Smithfield (48.2 years).

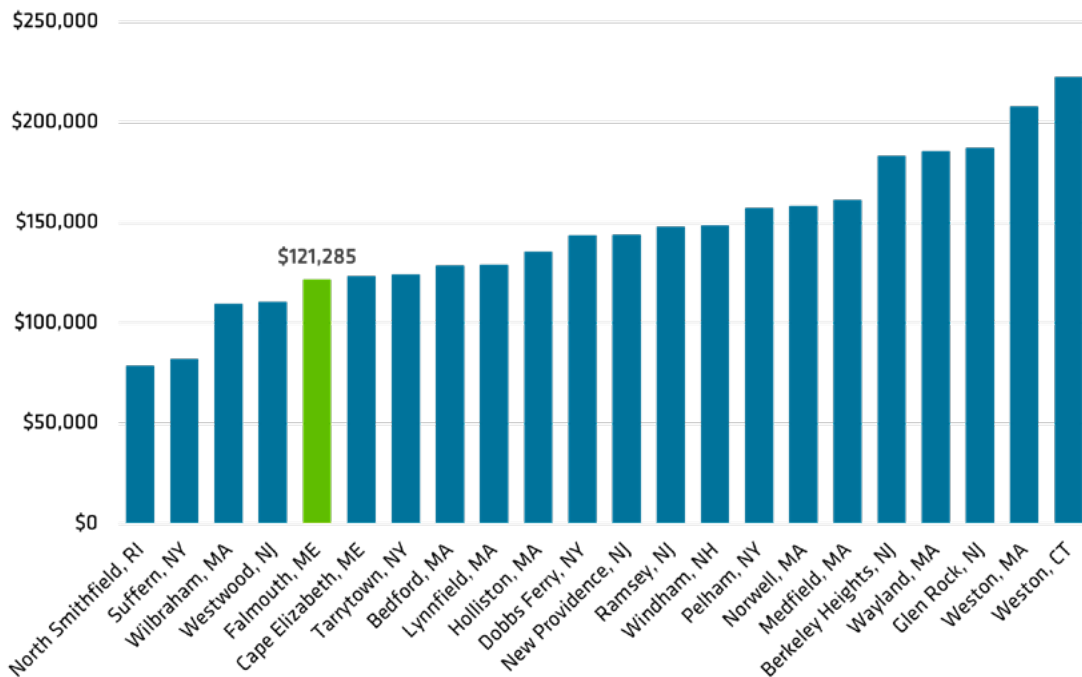


Like many of its cohort communities, Falmouth's population will require a new look at supporting infrastructure and services for its aging residents.

3.1.3 HOUSEHOLD INCOME

Household income is a good measure of the inherent wealth and spending power within a community. In 2020, the median household income in the United States was \$67,521, a decrease of 2.9% from 2019 (U.S. Census). Median household income in Maine at the 2020 Census was \$57,918. At \$121,285, Falmouth's median household income is significantly higher than both, indicating the potential for a relatively high standard of living.

Total Median Household Income



Source: American Community Survey (2017 - ACS 5-year estimates)



DataInsight

DATA INSIGHT:

- The range of median household income for the cohort communities is from \$78,617 (North Smithfield, RI) to \$222,535 (Weston, CT).
- The Town of Falmouth is most similar in terms of median household income to Bedford, Cape Elizabeth, Lynnfield, and Tarrytown. The town also has a higher median household income than 4 of the cohort communities.

The median household income for Falmouth in 2019 (\$121,285) was lower than the average (\$145,945) median household income for the other cohort communities.

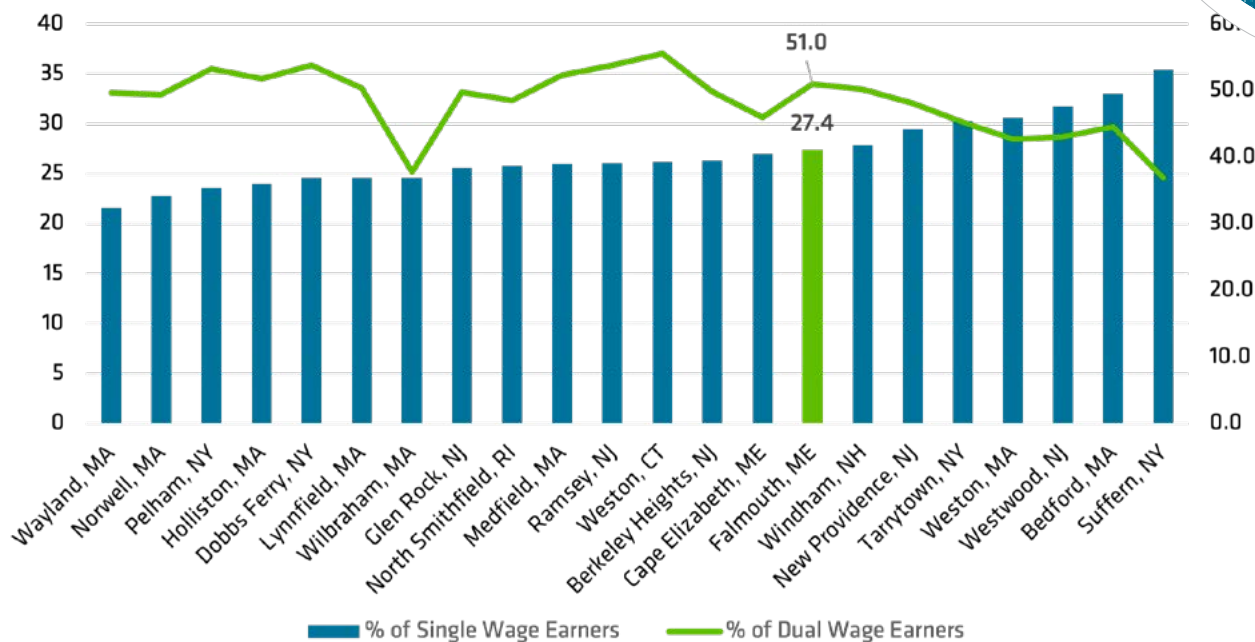


3.1.4 FAMILY INCOME – SINGLE AND DUAL INCOMES

The measure of single and dual incomes looks at the how households operate in terms of generating wealth. In Falmouth, most households are dual income earners. Given that the community is also family-focused and of retirement age suggests a hardworking and busy population.

More than half of all households in Falmouth are dual income households.

Percentage of Single and Dual Income Earners



Source: American Community Survey (2019 - ACS 5-year estimates)



DataInsight

DATA INSIGHT:

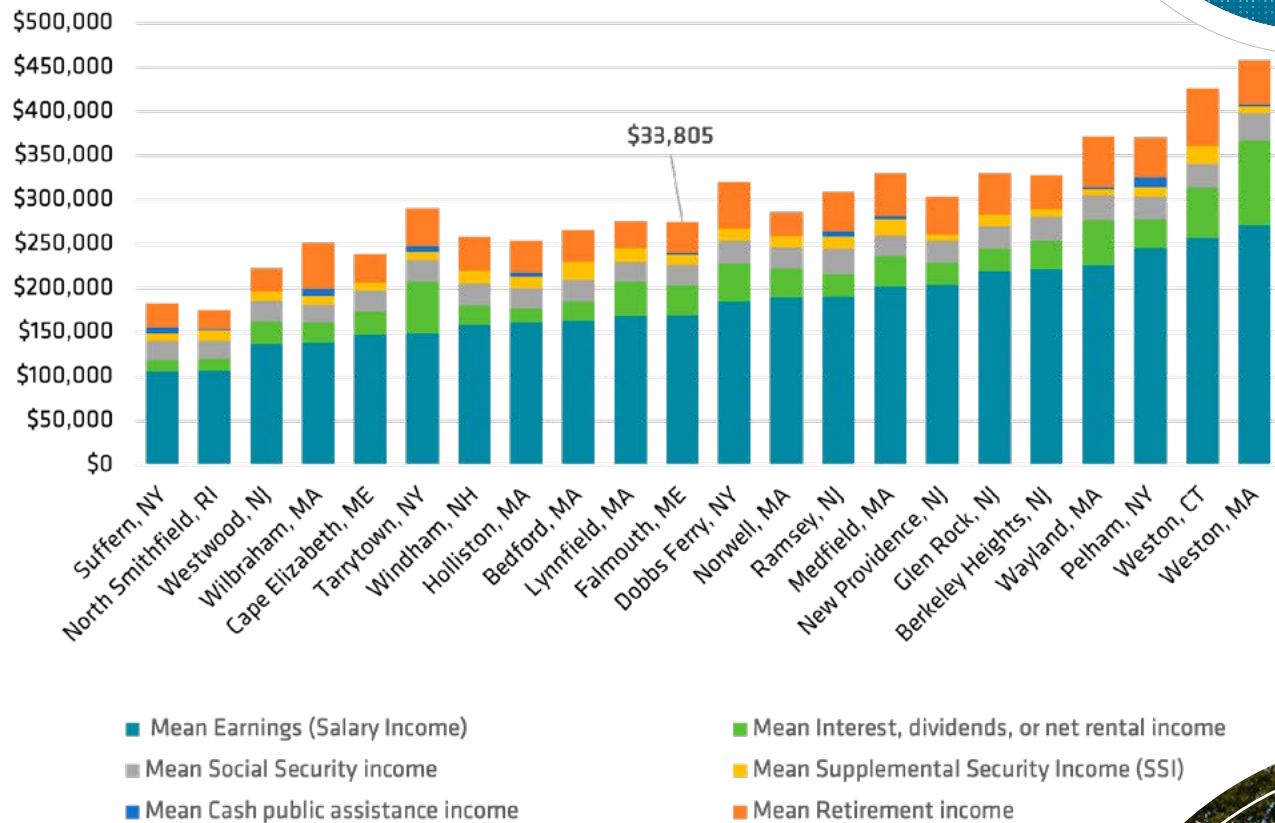
- Six towns (Berkeley Heights, Cape Elizabeth, Medfield, Ramsey, Windham, and Weston, MA) have a proportion of single income earners like that of Falmouth (27.4%).
- Falmouth's proportion of dual income earners (51%) is like that of Berkeley Heights, Glen Rock, Holliston, Lynnfield, Norwell, Wayland, and Windham.
- Among the cohort communities, Weston, CT (55.6%) has the highest percentage of dual income earners and Suffern, NY (35.4%) has the highest percentage of single income earners.



3.1.5 TOTAL INCOME COMPOSITION

The total household income and mix of incomes gives important insight into the wealth of a community. Residents of Falmouth derive most of their income from salary, indicating it is a predominantly working population.

Household income composition



62% of Falmouth's income composition is attributed to salary income, which is 1.8% higher than the average of the cohort communities. 12% is attributed to retirement income and 12% to interest, dividends, and net rental income.



DataInsight

DATA INSIGHT:

- In all the cohort communities observed, 11 towns (Bedford, Cape Elizabeth, Holliston, Lynnfield, North Smithfield, Suffern, Tarrytown, Westwood, Wilbraham, Windham, and Falmouth) had salary income below the median income (\$176,951).
- Except for four towns (Dobbs Ferry, Suffern, Weston, MA, and Wilbraham) in the 50s, the rest of the communities had salary income account for more than 60% of its income composition.
- Bedford, Cape Elizabeth, Ramsey, and Falmouth have identical distribution of salary income (62%), while Berkeley Heights is similar to Falmouth regarding its distribution of retirement income.



In Falmouth, people of color (those who identify as a race other than white alone, and/or those who are Hispanic) make up 9.4% of the total population. This is much lower than the cohort average (excluding Falmouth) of 21.1%.

3.1.6 RACE AND ETHNICITY

This table explores the race and ethnic make-up of the 22 cohort communities. Falmouth ranks fourth in white population among the cohort communities.

Race and Ethnicity % of the Population

Cohort Communities	White	Black or African American	American Indian	Asian	Native Hawaiian	Some other race	Two or more races
Bedford, MA	74.4	2.6	0.2	15.6	-	1.1	6.1
Berkeley Heights, NJ	71.5	1.9	0.1	15.6	-	2.4	8.4
Cape Elizabeth, ME	91.9	0.6	-	2.0	-	0.5	4.8
Dobbs Ferry, NY	69.7	4.6	0.3	9.2	-	6.1	10.1
Falmouth, ME	90.6	0.8	0.2	3.0	-	0.6	4.7
Glen Rock, NJ	76.1	1.4	-	13.4	-	1.4	7.6
Holliston, MA	85.0	1.2	0.1	6.2	-	1.9	5.5
Lynnfield, MA	87.1	0.9	-	5.8	-	1.2	4.9
Medfield, MA	88.0	1.2	0.1	3.9	-	0.9	5.8
New Providence, NJ	70.9	1.8	0.1	16.0	-	2.7	8.4
North Smithfield, RI	91.3	1.2	0.1	1.3	-	1.7	4.4
Norwell, MA	91.9	0.6	-	2.4	-	1.0	4.1
Pelham, NY	71.6	5.8	0.2	6.6	0.1	5.1	10.7
Ramsey, NJ	80.9	1.0	0.2	7.7	-	3.5	6.8
Suffern, NY	60.6	7.9	1.0	6.5	0.1	13.5	10.5
Tarrytown, NY	63.0	6.2	0.3	7.3	-	11.6	11.7
Wayland, MA	77.5	0.9	0.1	13.6	-	1.1	6.8
Weston, MA	82.5	1.4	0.1	5.6	-	1.5	8.8
Weston, CT	75.1	2.1	0.1	16.0	-	1.2	5.4
Westwood, NJ	72.1	4.3	0.2	8.3	0.1	5.6	9.4
Wilbraham, MA	87.3	2.8	0.1	2.4	-	1.5	5.9
Windham, NH	88.5	0.7	0.1	4.4	-	1.0	5.4

Source: American Community Survey (2019 - ACS 5-year estimates)



DataInsight

DATA INSIGHT:

- All cohort communities, including Falmouth, are predominantly white. Falmouth shares similar white ethnic distribution with Cape Elizabeth, North Smithfield, and Norwell.
- The largest non-white proportion among all the cohort communities is in Suffern with 39.4%, this is followed closely by Tarrytown (37%), Dobbs Ferry (30.3%), and New Providence (29.1%).

Data shows that overall, a larger proportion of the population that migrates from Falmouth and the cohort communities move to a different place within the same county.

3.1.7 MIGRATION PATTERNS BY LOCATION

This table examines 2019 migration patterns for the cohort communities. The data explains where people are moving from in the past year. The Town is advised to consider current migration trends and to recognize them for future planning and research.

Population Migration (Percent)

Cohort Communities	Moved from within same County	Moved from different County, same State	Moved from different State	Moved from abroad
Bedford, MA	7.4	2.1	3.2	1.6
Berkeley Heights, NJ	3.7	0.8	0.2	1.3
Cape Elizabeth, ME	3.2	1.1	4.2	1
Dobbs Ferry, NY	7	9.4	1.1	0.7
Falmouth, ME	8.3	0.9	1.8	-
Glen Rock, NJ	2.7	3.3	1.5	0.4
Holliston, MA	4.9	1	1.4	0.1
Lynnfield, MA	3.1	3.5	0.3	0.6
Medfield, MA	1.6	3.8	1.1	0.8
New Providence, NJ	1.8	3.5	2.5	1.2
North Smithfield, RI	9	0.2	1	0.4
Norwell, MA	3	3.4	0.4	0.2
Pelham, NY	4.1	2.9	1	2.4
Ramsey, NJ	3.1	0.6	0.5	1.5
Suffern, NY	4.7	2.9	1.3	0.2
Tarrytown, NY	5.8	2.2	2.2	0.4
Wayland, MA	3.4	1.4	1.6	1
Weston, MA	5.4	1.8	1.9	2
Weston, CT	4.8	0.2	0.8	0.2
Westwood, NJ	6.9	0.9	0.8	0.9
Wilbraham, MA	7.7	2.1	0.2	0.3
Windham, NH	3.9	1	3.9	-

Source: American Community Survey (2017 - ACS 5-year estimates)



DataInsight

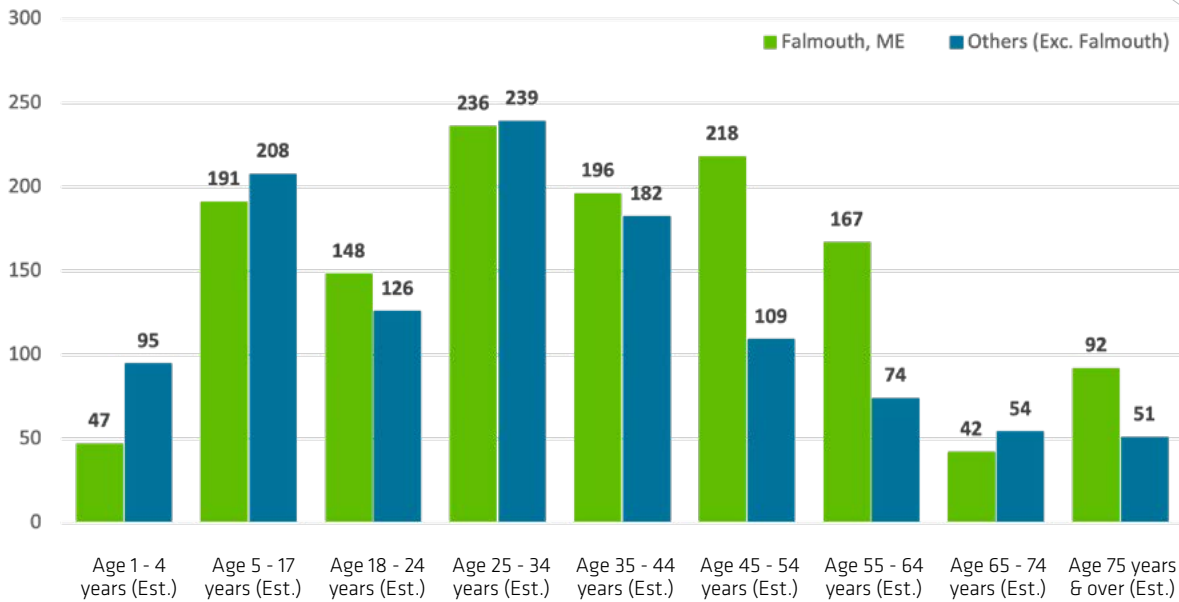
DATA INSIGHT:

- Dobbs Ferry, Lynnfield, Medfield, New Providence, and Norwell had higher proportions of residents that moved from different counties but stayed in the same state.
- Cape Elizabeth, Bedford, and Windham had relatively high number of people that moved from different states.
- While none of Falmouth's residents moved in from abroad, towns like Bedford, Berkeley Heights, New Providence, Ramsey, Wayland, and Weston, MA had more than 1% of their population move from abroad in 2019.

3.1.8 MIGRATION PATTERNS BY AGE GROUP

Migration patterns by age help reveal another dimension of who is moving into communities. This 2019 chart compares Falmouth's in-migration age groups to the average of the other cohort communities.

Comparison of Population In-Migration by Age Group



Source: American Community Survey (2014 - 2019 - ACS 5-year estimates)

DATA INSIGHT:



DataInsight

- The data above shows that adults between 25 to 34 years old migrate into Falmouth the most followed closely by those between 45 to 54 years old. This trend is the same for the 25 to 34 years old population migration in other cohort communities.
- Comparing the migration population of Falmouth with the comparison group shows that Falmouth has a significantly higher migration rate among people older than 45 years than the average of the cohort cities.



In general, Falmouth has more people moving there in retirement and ages 55 and over, suggesting there are suitable retirement amenities, relative to other communities.

3.1.9 PREVALENCE OF POVERTY

This chart examines the prevalence of poverty across the cohort communities. Sometimes relatively prosperous communities can have significant portions of their community in poverty, often exacerbated by larger events such as the recent COVID-19 pandemic. It should be noted that the numbers below are pre-pandemic numbers.

Percentage of families and people in 2019 whose income is below the poverty line

Cohort Communities	All families whose income in the past 12 months is below the poverty level	All people whose income in the past 12 months is below the poverty level
Bedford, MA	2	2.9
Berkeley Heights, NJ	0.6	1.1
Cape Elizabeth, ME	2.1	4.1
Dobbs Ferry, NY	2	3.4
Falmouth, ME	1.6	2.7
Glen Rock, NJ	0.6	2.9
Holliston, MA	0.8	2.1
Lynnfield, MA	1.9	2
Medfield, MA	2.7	3.2
New Providence, NJ	1.9	2.9
North Smithfield, RI	2.8	5.5
Norwell, MA	1.5	3
Pelham, NY	2.6	4.1
Ramsey, NJ	1.3	2
Suffern, NY	4.8	8.1
Tarrytown, NY	2.9	4.2
Wayland, MA	2.3	3
Weston, MA	6.7	7.6
Weston, CT	1.5	2.9
Westwood, NJ	5.4	6
Wilbraham, MA	1.2	2.8
Windham, NH	0.3	0.7

Source: American Community Survey (2019 - ACS 5-year estimates)



DataInsight

DATA INSIGHT:

- Weston, Massachusetts had the highest (6.7%) family poverty rate among the cohort communities. Falmouth (1.6%) ranks 14th out of 22 among all families with income below the poverty level.
- Towns with family poverty levels similar to Falmouth (1.6%), include Norwell (1.5%), Lynnfield (1.9%), New Providence (1.9%), Ramsey (1.3%), Weston, CT (1.5%), and Wilbraham (1.2%).
- Towns with population poverty levels similar to Falmouth (2.7%), include Bedford (2.9%), Glen Rock (2.9%), New Providence (2.9%), Norwell (3%), Weston, CT (2.9%), and Wilbraham (2.8%).

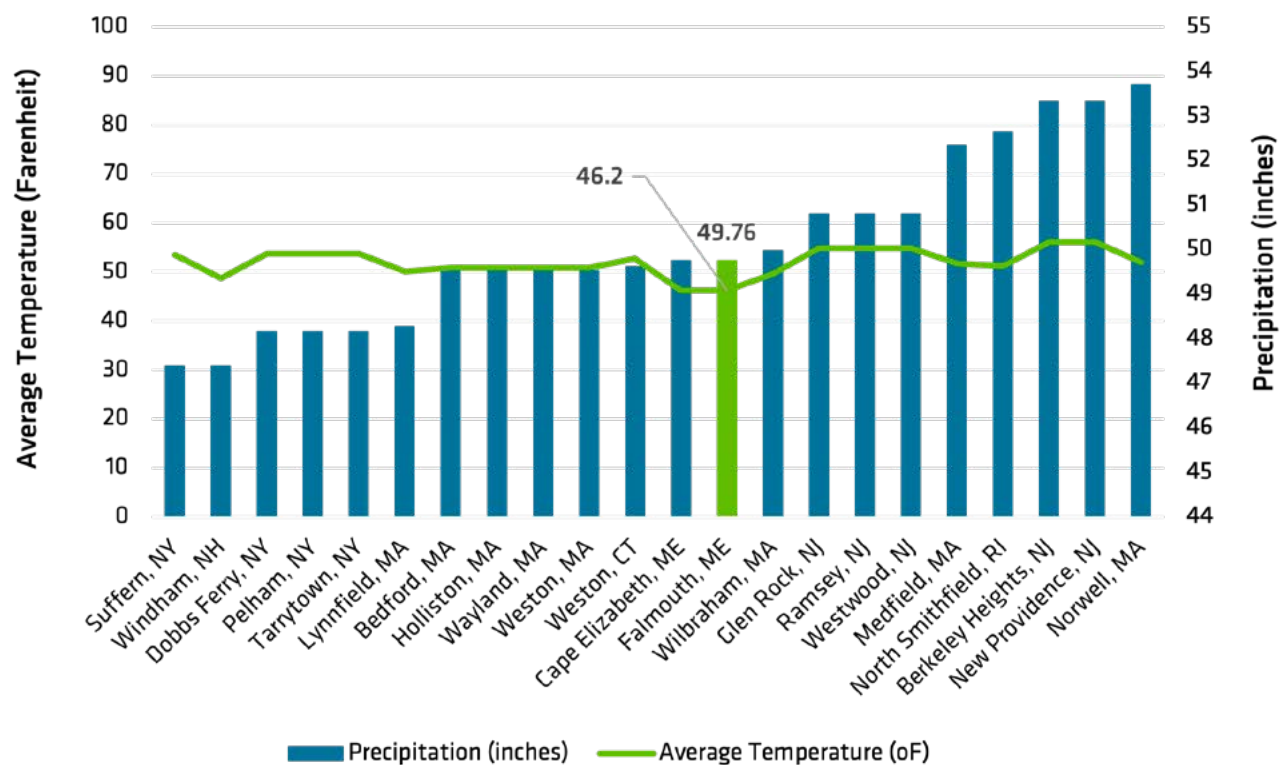
3.2 ENVIRONMENTAL ASPECTS

In this section, the demographic trends of the cohort communities are compared. This will focus on some of the processes and activities that have a direct impact on or direct interaction with the environment. They include climate and weather trends and cost of living.

3.2.1 CLIMATE AND WEATHER TRENDS

According to the University Corporation for Atmospheric Research, temperature and precipitation are major parts of the measurable aspects of climate and weather. The average annual temperature and the amount of precipitation that accumulates, mostly in the form of rain and snow, are key ingredients of climate. This section shows the average temperature and precipitation information for the cohort communities from November 2020 to October 2021. In this analysis, comparable individual town data was not available, so county level data was used.

Average temperature and precipitation for Counties of cohort communities



Source: NOAA National Centers for Environmental information - Climate at a Glance: County Mapping, published October 2021, retrieved on November 30, 2021, from <https://www.ncdc.noaa.gov/cag/>

DATA INSIGHT:

- Cumberland County experienced an annual average temperature of 53°F from November 2020 to October 2021. Cumberland County was the second coolest county among the 13 cohort counties. Union County was the highest with an average temperature of 61.7°F. The average temperature for Cumberland County is also significantly lower than the peer average of 58.41°F.
- Regarding precipitation, Cumberland County ranks 13th out of 13 cohort counties with 48.08 inches of precipitation. This is significantly lower than the peer average of 57.88 inches.

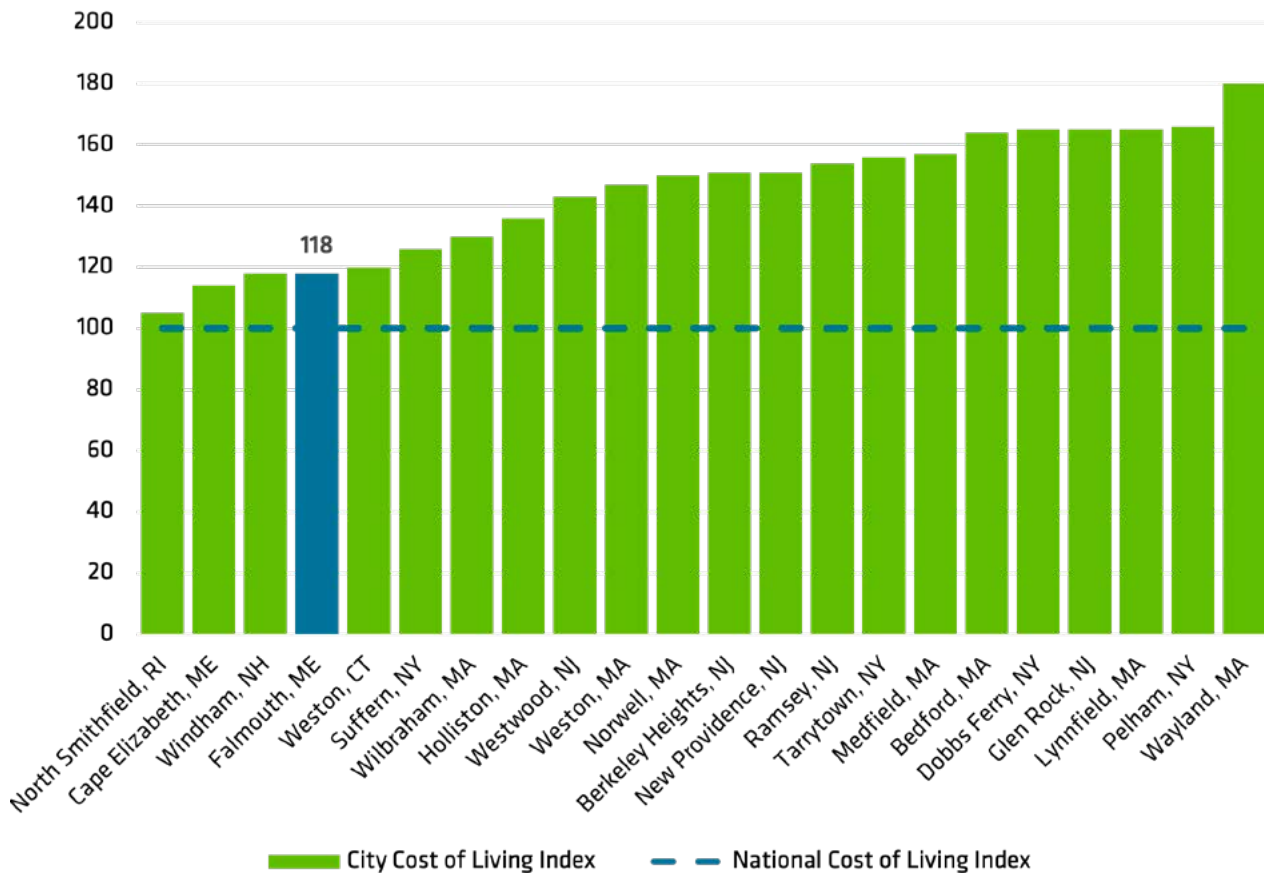


DataInsight

3.2.2 COST OF LIVING

The cost-of-living index gives the percentage difference in the cost of living between one location and another. The cost-of-living index is comprised of the cost of retail goods and services, groceries, health care, housing, cost of public/private transportation, and utilities. Communities can be compared to the National Cost of Living Index to determine if they are more or less expensive than the national average.

Cost of Living Index



Source: Council for Community and Economic Research (C2ER) for 2020 through <https://www.areavibes.com/>. Sourced on November 30, 2021



DATA INSIGHT:

- Although higher than average, North Smithfield (107) and Cape Elizabeth (111) are the least expensive cities to live in among the cohort communities.
- Falmouth (131) is 31% more expensive to live in than the national average, but it is not as expensive as Wayland (80% more expensive), Pelham (80% more expensive), and Lynnfield (66% more expensive), Glen Rock (64% more expensive), and Dobbs Ferry (71% more expensive).

DataInsight

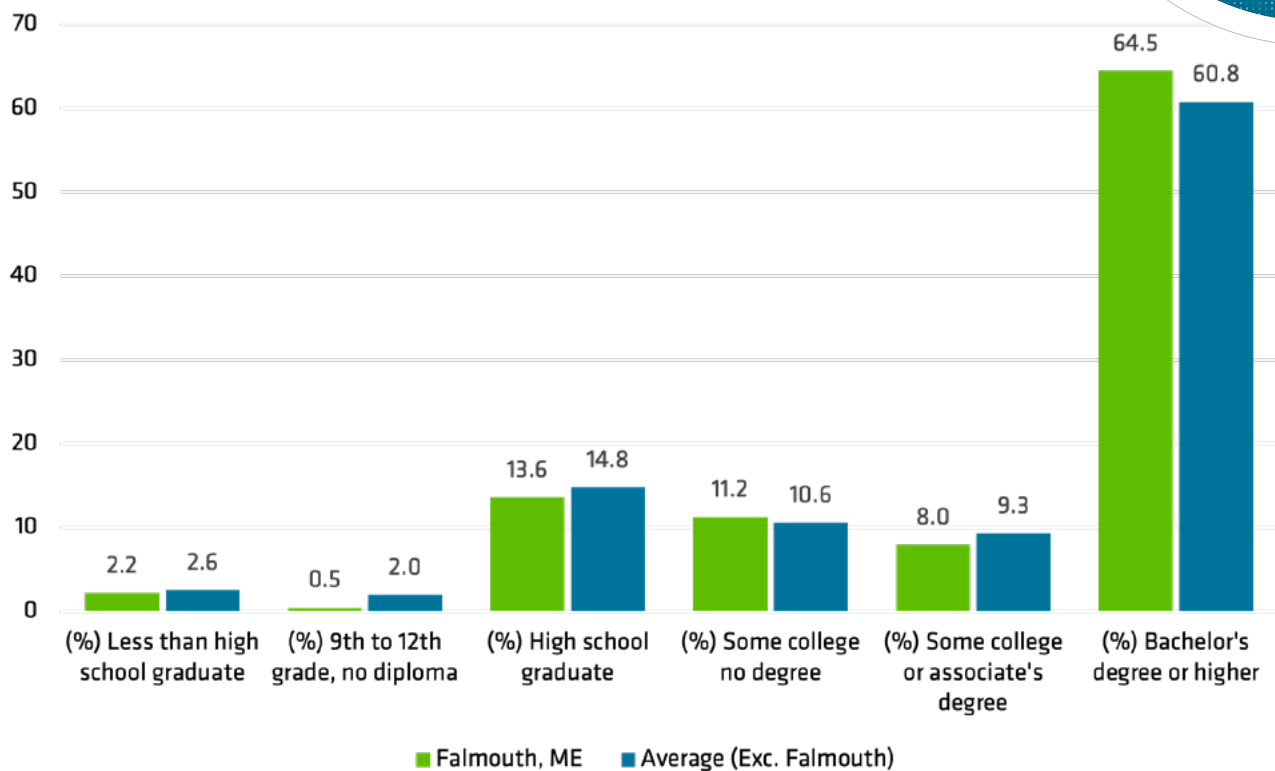
3.3 EDUCATION

3.3.1 EDUCATIONAL ATTAINMENT

It is well understood that education is important to community well-being. All the cohort communities used in this benchmark study are successful and relatively high performing communities in the area of education.

Falmouth has the fifth lowest (\$87,564) median earnings among the cohort communities for individuals with a bachelor's degree and higher.

Educational Attainment, Percent of Population (Falmouth vs. Cohort Communities)



Source: American Community Survey (2019 - ACS 5-year estimates)



DATA INSIGHT:

- Falmouth has higher educational attainment for bachelor's degree or higher (64.5%) for the population over 18 years old than the average percentage (60.8%) for the cohort communities.
- With respect to middle-skills jobs, Falmouth has lower educational attainment than the cohort communities for high school graduates (13.6% and 14.8% respectively) and some college or associate degree (8% and 9.3% respectively), but higher for some college, no degree (11.2% and 10.6% respectively).
- Individuals with a bachelor's degree or higher in Falmouth have a median income of \$87,564 (2019). This is significantly lower than the cohort average of \$97,055 for someone with the same educational attainment.

3.3.2 SCHOOL DISTRICT PERFORMANCE

The data in the table below show the most comprehensive performance ranking data for school districts in the cohort communities. Data used in this section stems from an analysis of data available from public data sources, millions of survey responses, and reviews. The factors considered and weight for the overall ranking includes a wide range of factors such as academics grade, teachers' grade, culture and diversity, parent/student survey on overall experience, health and safety, resources and facilities, clubs and activities, and sports. Some sources of public data used are US Department of Education, National Center for Education Statistics, and Civil Rights Data Collection.

National School District Performance Ranking (Districts in ranking; N = 10,772)

Cohort Communities	High School	Best School district in America (Position)
Weston, MA	Weston School District	34
Pelham, NY	Pelham Union Free School District	67
Wayland, MA	Wayland School District	89
Cape Elizabeth, ME	Cape Elizabeth Public Schools	208
Weston, CT	Weston School District	210
New Providence, NJ	New Providence Board Of Education School District	234
Bedford, MA	Bedford School District	264
Glen Rock, NJ	Glen Rock Public School District	281
Berkeley Heights, NJ	Berkeley Heights Public School District	290
Dobbs Ferry, NY	Dobbs Ferry Union Free School District	302
Medfield, MA	Medfield School District	304
Suffern, NY	Suffern Central School District	316
Norwell, MA	Norwell School District	323
Lynnfield, MA	Lynnfield School District	359
Falmouth, ME	Falmouth School District	370
Ramsey, NJ	Ramsey Public School District	371
Tarrytown, NY	Union Free School District-Tarrytowns	598
Westwood, NJ	Westwood Regional School District	686
Windham, NH	Windham School District	842
Holliston, MA	Holliston School District	Not available
North Smithfield, RI	North Smithfield School District	Not available
Wilbraham, MA	Hampden-Wilbraham School District	Not available

Source: Niche 2021 K-12 School & District Rankings ; <https://www.niche.com/k12/d/falmouth-public-schools-me/rankings/>



DataInsight

DATA INSIGHT:

- Falmouth ranks as the 370th best school district in America among 10,772 districts, and the 5th lowest among the cohort communities.
- Falmouth School District also holds the position of the 4th best school district among others in Maine. This ranking considers factors such as academics, staffing, health and safety, resources and facilities, and sports.

Among the cohort communities, none spent less than the national average per student (\$12,239). Spending per student for all the cohort communities ranged from \$16,393 to \$32,761.

3.3.3 SPENDING ON SCHOOL DISTRICT

The Falmouth School District is a public school district. It has 2,126 students in grades K-12 with a student-teacher ratio of 12 to 1. According to state test scores, 71% of students are at least proficient in math and 78% in reading. The total expense per student for the Falmouth School District is 30% higher than the national average of \$12,239 per student.

School District Education Expenses

Cohort Communities	School District Name	Total Expenses	Expenses Per Student
Holliston, MA	Holliston School District	\$47,623,000	\$16,393
North Smithfield, RI	North Smithfield School District	\$28,746,000	\$16,578
Cape Elizabeth, ME	Cape Elizabeth Public Schools	\$26,903,000	\$16,762
Wilbraham, MA	Hampden-Wilbraham School District	\$52,609,000	\$17,192
Medfield, MA	Medfield School District	\$45,908,000	\$17,462
Falmouth, ME	Falmouth School District	\$36,724,000	\$17,463
Norwell, MA	Norwell School District	\$39,254,000	\$17,867
Bedford, MA	Bedford School District	\$229,854,000	\$18,205
Lynnfield, MA	Lynnfield School District	\$40,566,000	\$18,265
Windham, NH	Windham School District	\$58,590,000	\$19,787
Berkeley Heights, NJ	Berkeley Heights Public School District	\$58,271,000	\$22,123
Glen Rock, NJ	Glen Rock Public School District	\$56,864,000	\$22,265
Wayland, MA	Wayland School District	\$60,749,000	\$22,483
Westwood, NJ	Westwood Regional School District	\$64,873,000	\$22,827
New Providence, NJ	New Providence Board of Education School District	\$55,517,000	\$23,046
Ramsey, NJ	Ramsey Public School District	\$66,559,000	\$23,737
Pelham, NY	Pelham Union Free School District	\$74,006,000	\$25,414
Weston, CT	Weston School District	\$62,970,000	\$27,037
Tarrytown, NY	Union Free School District-Tarrytown	\$73,815,000	\$27,329
Suffern, NY	Suffern Central School District	\$132,052,000	\$30,163
Weston, MA	Weston School District	\$64,070,000	\$30,466
Dobbs Ferry, NY	Dobbs Ferry Union Free School District	\$48,618,000	\$32,761
Lansing, KS	Lansing Unified School District	\$26,707,000	\$34,221

Source: National Center for Education Statistics, CCD Public school district data for the 2019-2020, 2020-2021 school years

Note: District Details (2019-2020 school year; Fiscal data from 2017-2018)



DataInsight

DATA INSIGHT:

- Falmouth ranks 6th among the cohort communities for expense per student. Falmouth's total education expenses are the third lowest among all the 22 cities in the cohort.
- All the school districts in the cohort including Falmouth spend an average of 63% of the total expenses on instruction, 13% on students and staff support, and 24% on other expenses (administration, operations, food service and others).

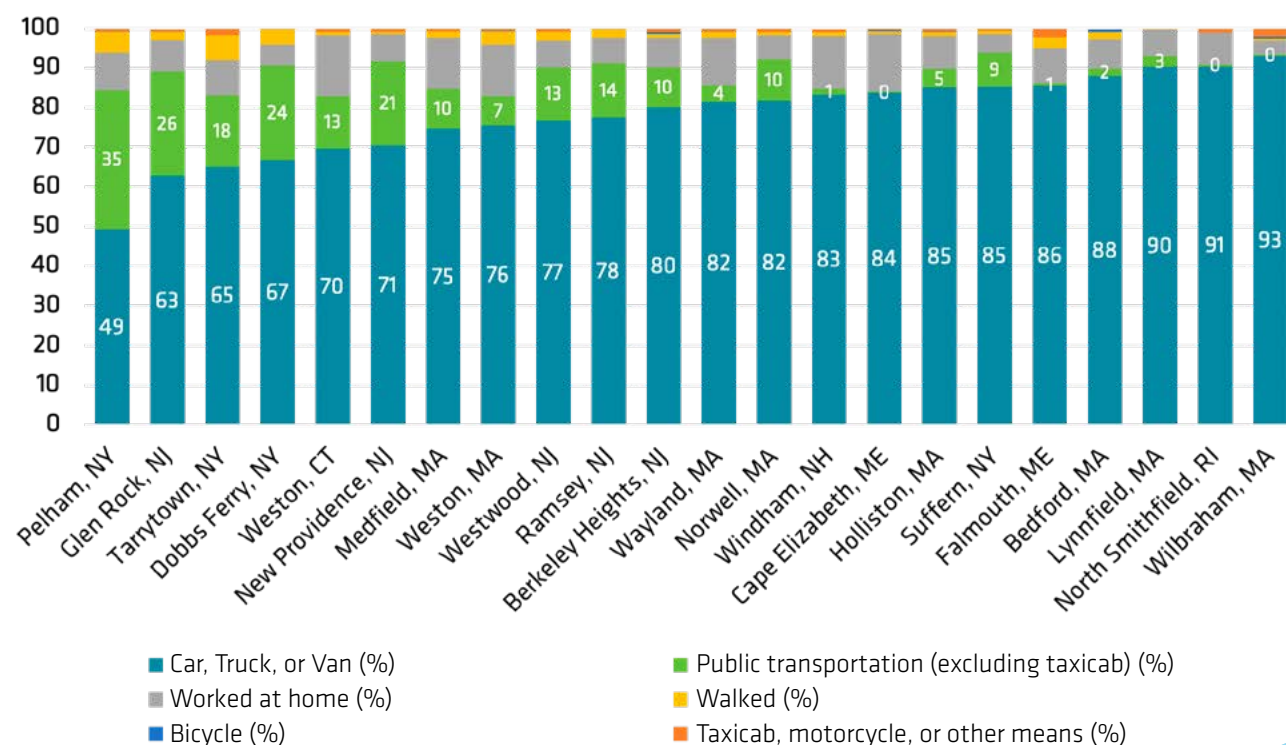
Falmouth residents spend an average of 21.6 minutes commuting to work, the lowest average commute time among the cohort communities.

3.4 TRANSPORTATION

3.4.1 COMMUTING PATTERNS

This section highlights Falmouth's workforce commuting trends. It focuses on the means of transportation that employees use in getting to work.

Work Commuting Patterns of Residents in Falmouth



Source: American Community Survey (2019 - ACS 5-year estimates)



DataInsight

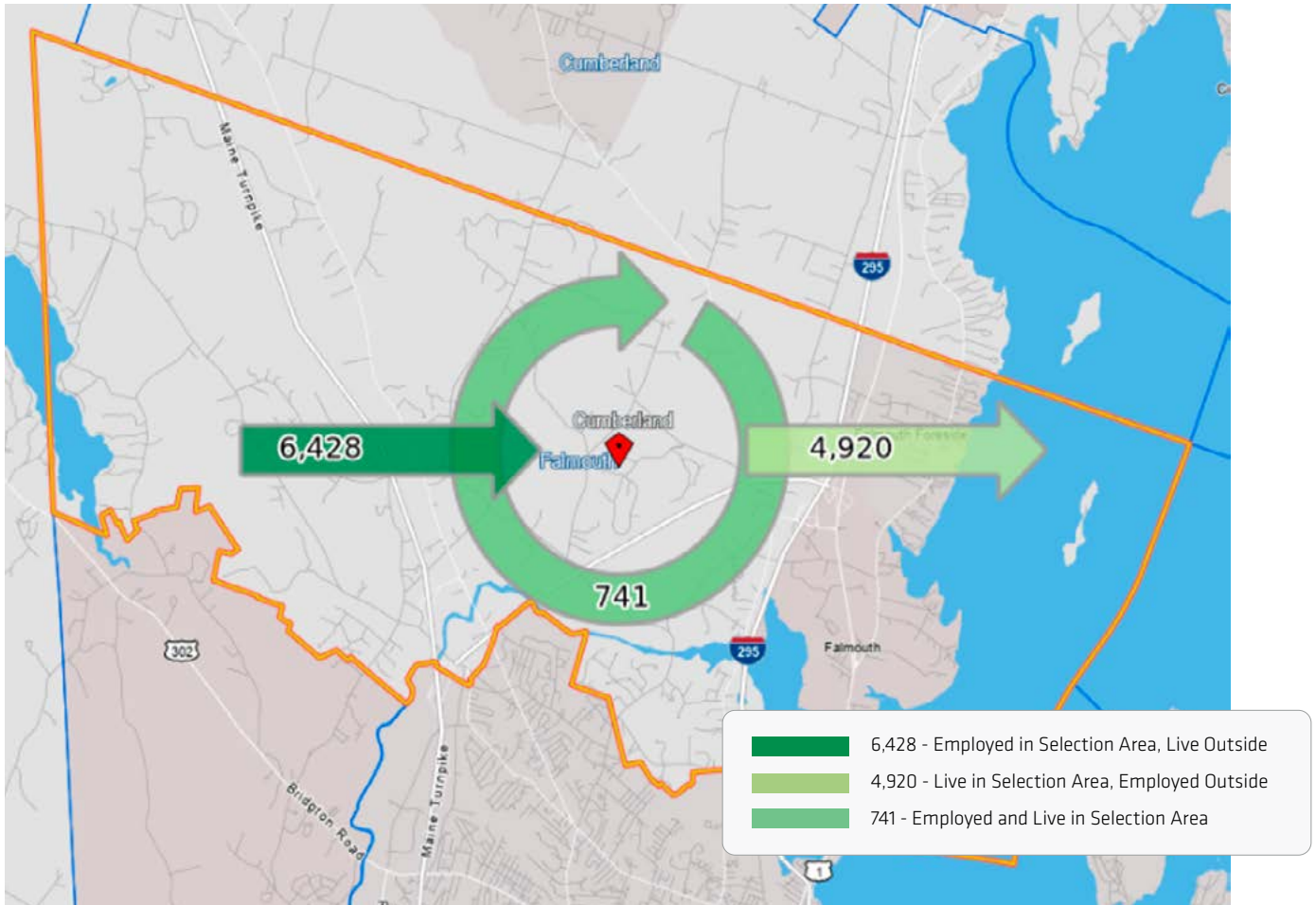
DATA INSIGHT:

- 86% of the Falmouth population 16 years and older use Car, Truck or Van when commuting which is 8% more than the average (78%) for the cohort communities.
- The use of public transportation excluding Taxicabs and bicycle as a commuting mode is almost non-existent in Falmouth. A greater percent of people in Falmouth commute to work using their private vehicles.



3.4.2 INFLOW AND OUTFLOW OF COMMUTERS

This chart provides insight on three populations: those who are employed in Falmouth but live elsewhere, those who are living in the coastal town, but work elsewhere, and those who live and work in Falmouth. Understanding the inflow and outflow of commuters helps to explain how the local economy interfaces with the local population and if there might be potential, over time, to create more live and work opportunities.



Source: 2019 Longitudinal Employer-Household Dynamics: <https://onthemap.ces.census.gov/>



DataInsight

DATA INSIGHT:

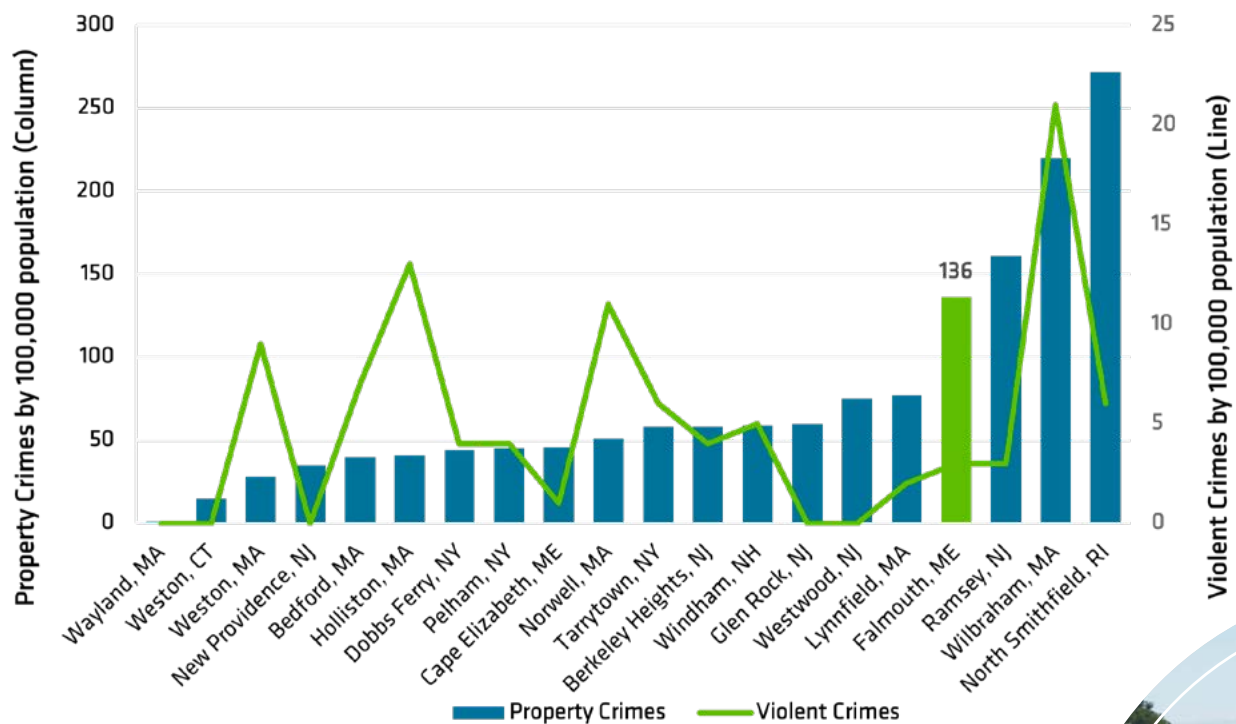
- A total of 7,169 people work in Falmouth. Of this population, 6,428 (89.7%) live outside the town and 741 (10.3%) are residents of Falmouth.
- 5,661 employed people live in Falmouth and of this, 4,920 (87%) commutes outside of the town to their workplace while 741 (13%) commute within Falmouth to their workplace.

3.5 PUBLIC SAFETY AND RESOURCES

3.5.1 CRIME RATES/LEVELS

This chart shows the level of violent and property crime in each cohort community as reported in the United States tables of the FBI's United Crime Reporting (UCR) Program. Violent crime, as defined in the UCR, includes murder, non-negligent manslaughter, rape, robbery, and aggravated assault. Property crime, as defined in the UCR includes burglary, larceny-theft, motor vehicle theft, and arson.

Crime known to law enforcement (per 100,000 population)



Source: FBI's Unified Crime Reporting (UCR): 2019 Offenses known to law enforcement by City
<https://ucr.fbi.gov/crime-in-the-u.s/2019/crime-in-the-u.s.-2019/topic-pages/tables/table-8/table-8.xls/view>



DataInsight

DATA INSIGHT:

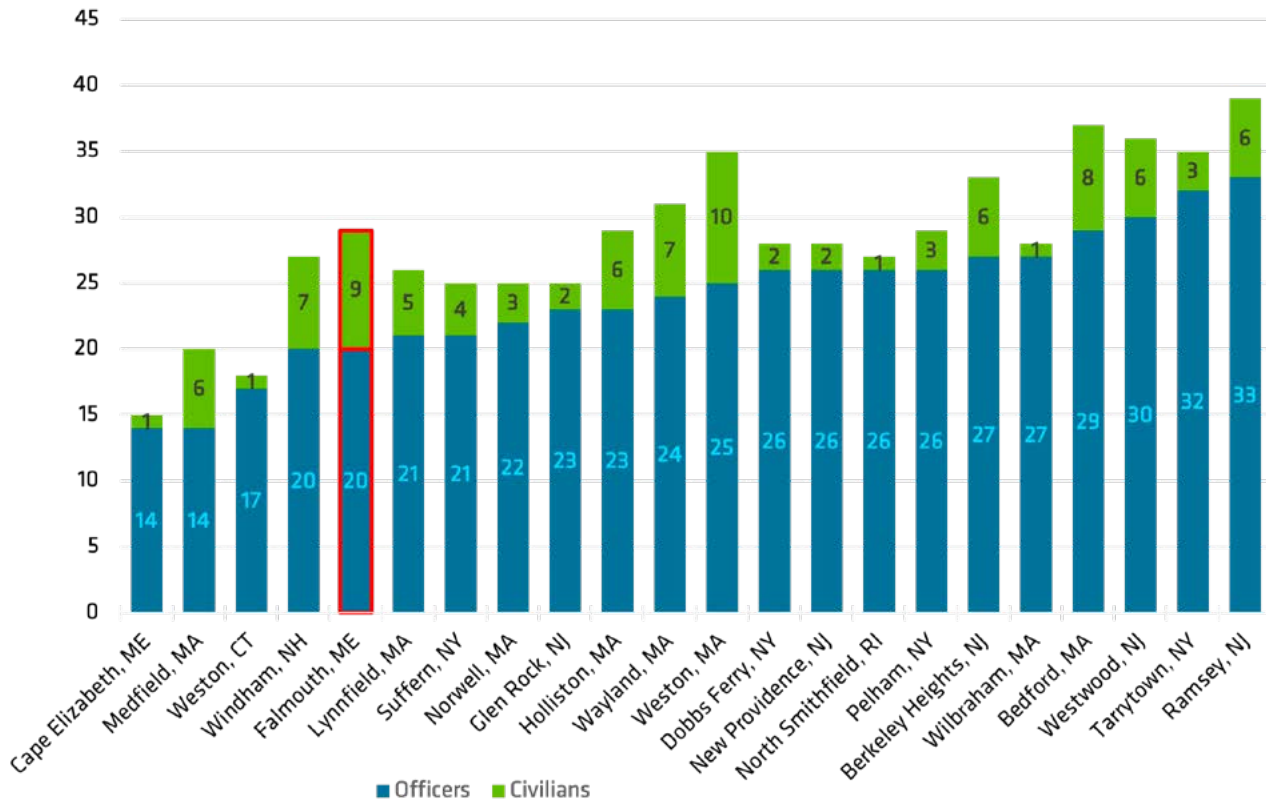
- It is of note that property crime occurs in more substantial numbers than violent crimes. Among all the communities considered, Wilbraham (183) has the highest property and violent crimes reported in 2020.
- In comparison, Falmouth (30) places 17th (excluding the city (Suffern) without data) with the most property crime known to law enforcement among the cohort communities. For violent crimes, Falmouth (3) has a rate lower than the average (5) violent crimes known to law enforcement in the cohort communities.



3.5.2 POLICE STAFFING

The police staffing data presented in the chart below is sourced from the 2020 crime tables of the FBI's United Crime Reporting (UCR) Program. The chart depicts the number of full-time sworn officers and civilian law enforcement staff in each cohort community. Falmouth's relative high numbers are most likely due to the number of dispatchers it has.

Number of full-time employees by 100,000 population



Source: FBI's Unified Crime Reporting (UCR): 2020 Law Enforcement Employments



DATA INSIGHT:

- The average number of police staffing among the cohort communities, including Falmouth, is 19 for sworn-in officers and 9 for law enforcement civilians.
- Falmouth ranks 18th highest and is right on the average for all cohort communities, for full-time police employees among the cohort communities with 19 sworn in officers and 9 law enforcement civilians.

DataInsight



3.6 PUBLIC HEALTH

This section highlights county-level public health indicators. It should be noted there are specific differences in the health outcomes of each county due to the different state health care systems in the cohort communities.

Health Indicator Ranking by county

Cohort Community	County	% Fair/ Poor health	% Obese	Child Mortality Rate	% Diabetic	% Food Insecure	% Limited Access to Healthy Food
Bedford, MA	Middlesex	11	22	26	7	7	3
Berkeley Heights, NJ	Union	19	26	34	8	8	1
Cape Elizabeth, ME	Cumberland	12	24	38	8	11	5
Dobbs Ferry, NY	Westchester	14	22	30	8	8	1
Falmouth, ME	Cumberland	12	24	38	8	11	5
Glen Rock, NJ	Bergen	14	22	22	9	7	1
Holliston, MA	Middlesex	11	22	26	7	7	3
Lynnfield, MA	Essex	15	26	32	10	8	4
Medfield, MA	Norfolk	11	25	23	8	6	3
New Providence, NJ	Union	19	26	34	8	8	1
North Smithfield, RI	Providence	19	30	48	11	12	3
Norwell, MA	Plymouth	14	27	27	11	7	6
Pelham, NY	Westchester	14	22	30	8	8	1
Ramsey, NJ	Bergen	14	22	22	9	7	1
Suffern, NY	Rockland	16	23	30	9	9	3
Tarrytown, NY	Westchester	14	22	30	8	8	1
Wayland, MA	Middlesex	11	22	26	7	7	3
Weston, CT	Fairfield	12	21	29	7	10	3
Weston, MA	Middlesex	11	22	26	7	7	3
Westwood, NJ	Bergen	14	22	22	9	7	1
Wilbraham, MA	Hampden	19	31	43	7	8	10
Windham, NH	Rockingham	11	27	22	9	7	6

Source: The Robert Wood Johnson Foundation's 2021 County Health Rankings Data

DATA INSIGHT:



DataInsight

- Cumberland County has one of the lowest percentages of people with fair or poor health.
- The child mortality rate for Cumberland County is one of the highest among the cohort communities. High percentages for Falmouth are also noted for health indicators such as obesity, diabetes, food insecurity, and access to healthy food when compared to the other cohort communities.
- Note that these numbers reflect total numbers per county and do not reflect the numbers broken out for the town or cities themselves.

3.7 LOCATION AND INFRASTRUCTURE

3.7.1 HOUSING

Single family homes dominate the housing stock in Falmouth, with over 85% of these owner-occupied. This is typical of a suburban or coastal landscape.

Percent Housing Occupancy by Population

Cohort Community	Occupied housing units	Vacant housing units	Occupied housing units - Owner-occupied	Occupied housing units - Renter-occupied
Bedford, MA	96.4	3.6	73.9	26.1
Berkeley Heights, NJ	94.8	5.2	94.9	5.1
Cape Elizabeth, ME	90	10	88.7	11.3
Dobbs Ferry, NY	95.3	4.7	61.9	38.1
Falmouth, ME	94.2	5.8	85.4	14.6
Glen Rock, NJ	96.8	3.2	94.5	5.5
Holliston, MA	98	2	91.4	8.6
Lynnfield, MA	94.1	5.9	85.1	14.9
Medfield, MA	97.5	2.5	86.9	13.1
New Providence, NJ	97	3	76.1	23.9
North Smithfield, RI	94.3	5.7	78.4	21.6
Norwell, MA	94.8	5.2	93.5	6.5
Pelham, NY	94.6	5.4	77.5	22.5
Ramsey, NJ	94.8	5.2	86.9	13.1
Suffern, NY	93.3	6.7	71.5	28.5
Tarrytown, NY	94.8	5.2	61.4	38.6
Wayland, MA	93.1	6.9	91.4	8.6
Weston, MA	95.5	4.5	85.8	14.2
Weston, CT	88.8	11.2	96.3	3.7
Westwood, NJ	94.2	5.8	59.7	40.3
Wilbraham, MA	98	2	88.1	11.9
Windham, NH	90.2	9.8	95.9	4.1

Source: American Community Survey (2019 - ACS 5-year estimates)



DataInsight

DATA INSIGHT:

- In 2019, 85.4% of the occupied housing units in Falmouth were owner-occupied, which is above the cohort community average (Falmouth inclusive) of 83% and ranks 13 out of 22.
- Similarly, 14.6% of the occupied housing units were renter-occupied, which is less than the cohort community average (Falmouth inclusive) of 17% and ranks 11 out of 22.

3.7.2 AGE OF HOUSING

The table shows the age of the housing units in the cohort communities. It should be noted that more than 50% of the housing units in most of the cohort communities, except three (Medfield, Windham, and Falmouth) were built between 1945 and 1969.*

Percent year structure built by the total housing unit

Cohort Community	Total housing units	Built 2010 or Later	Built 1990 to 2009	Built 1970 to 1989	Built 1950 to 1969	Built 1949 or Earlier
Bedford, MA	5,508	7.7	22.9	13.6	44.3	11.6
Berkeley Heights, NJ	4,708	2.4	15.7	14.9	56.9	10.1
Cape Elizabeth, ME	4,167	1.9	16.8	22.7	30.3	28.4
Dobbs Ferry, NY	3,849	2.4	9.7	17	36.9	33.9
Falmouth, ME	5,016	9.2	27.4	21.1	21.4	20.8
Glen Rock, NJ	3,900	2.3	4.7	9	43.9	40.2
Holliston, MA	5,376	4.9	14.7	19.1	41.2	20.2
Lynnfield, MA	4,879	6.4	17.1	20	42.5	14
Medfield, MA	4,354	3.8	19.7	28.8	35.7	12
New Providence, NJ	4,654	3.9	8.8	12.7	60.3	14.3
North Smithfield, RI	5,097	3.9	19.6	21.6	25.6	29.5
Norwell, MA	3,869	6.6	14.4	28.2	33.3	17.4
Pelham, NY	4,233	0	3.1	7.2	20	69.7
Ramsey, NJ	5,825	1.7	11.1	32.6	38.7	16.1
Suffern, NY	4,711	0.8	4.1	44.1	26.5	24.3
Tarrytown, NY	4,704	3.6	8.3	21.8	24.7	41.4
Wayland, MA	5,141	3.7	15.1	13.1	47.2	20.8
Weston, MA	3,964	4.3	16.8	9.2	37.9	31.8
Weston, CT	3,882	2.5	19	24.6	37.7	16.1
Westwood, NJ	4,651	0.4	14.8	19.3	31	34.4
Wilbraham, MA	5,321	3.1	12.4	18.3	47.5	18.9
Windham, NH	5,554	6.5	37.1	39.9	10.4	6.1

Source: American Community Survey (2019 - ACS 5-year estimates)

*Note the time periods are not the same.



DATA INSIGHT:

- 9.2% of housing units in Falmouth were built after 2009, which is the highest among the peer average. Pelham had none built after 2009, and is the only town with more than 50% of its houses built before 1949.
- 27.4% of the housing units in Falmouth were built between 1990 to 2009 which ranks 2 out of 22, second only to Windham in New Hampshire (37.1%).

DataInsight

Falmouth is the 7th least expensive community among the cohort with regards to median rent for occupied units paying rent.

3.7.3 COST OF RENTAL

The rental costs in Falmouth are reflective of many of the cohort communities. In many ways, the community remains affordable for renting, relative to similar communities. A quarter of the rental units are under \$1,000 per month.

Percent gross rent of occupied units paying rent

Cohort Community	Occupied units paying rent	Median Rent (dollars)	% Less than \$1000	% \$1,000 to \$1,999	% \$2,000 to \$2,999	% \$3,000 or more
Bedford, MA	1,471	\$2,031	9.0	39.1	38.9	13.1
Berkeley Heights, NJ	158	\$2,500	19.6	9.5	43.7	27.2
Cape Elizabeth, ME	343	\$1,151	29.2	50.7	20.1	0.0
Dobbs Ferry, NY	1,494	\$2,044	1.8	46.2	37.1	14.9
Falmouth, ME	690	\$1,581	23.6	48.3	26.7	1.4
Glen Rock, NJ	258	\$1,791	12.8	53.1	12.8	21.3
Holliston, MA	542	\$971	51.8	45.4	2.8	0.0
Lynnfield, MA	650	\$1,742	29.2	33.5	26.8	10.5
Medfield, MA	506	\$1,513	25.9	61.7	6.1	6.3
New Providence, NJ	939	\$1,784	1.8	71.0	21.3	5.9
North Smithfield, RI	1,165	\$1,050	47.1	48.8	4.1	0.0
Norwell, MA	263	\$1,740	31.6	28.1	32.7	7.6
Pelham, NY	711	\$1,835	4.1	60.5	21.9	13.5
Ramsey, NJ	613	\$1,733	8.3	64.4	24.5	2.8
Suffern, NY	1,280	\$1,563	24.1	63.2	11.4	1.3
Tarrytown, NY	1,759	\$1,792	4.7	56.7	28.8	9.8
Wayland, MA	376	\$1,263	45.2	13.8	22.6	18.4
Weston, MA	53	\$2,659	0.0	13.2	50.9	35.8
Weston, CT	447	\$1,725	26.8	38.0	5.4	29.8
Westwood, NJ	1,792	\$1,848	6.6	54.6	29.1	9.8
Wilbraham, MA	446	\$740	73.3	20.9	5.8	0.0
Windham, NH	327	\$2,645	20.5	5.5	64.8	9.2

Source: American Community Survey (2020 - ACS 5-year estimates)



DataInsight

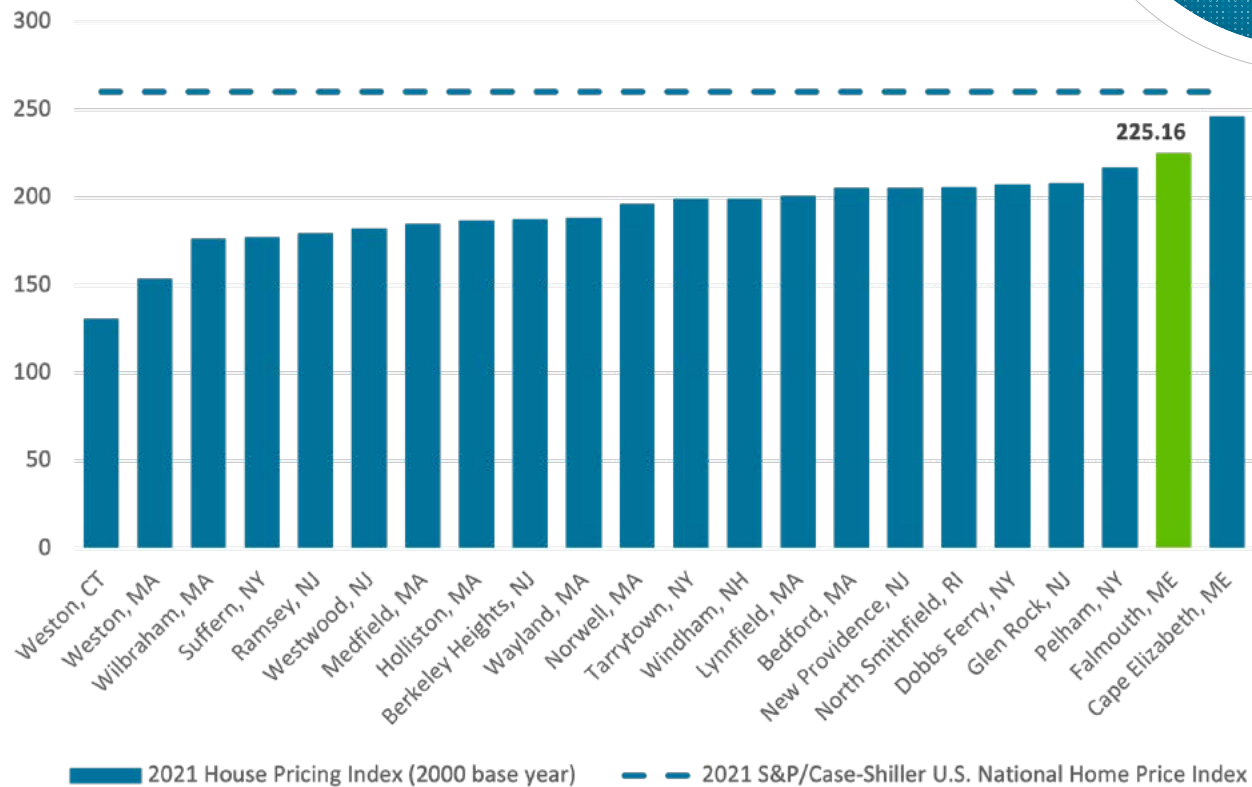
DATA INSIGHT:

- For 15 out of 22 of the cohort communities, the gross rent of rental-occupied housing units is between \$1,000 to \$1,999. While 2 of the remaining 7 have rent less than \$1,000, towns like Bedford, MA; Berkeley Heights, NJ; Dobbs Ferry, NY; Weston, MA, and Windham, NH have a median rent of \$2,000 or more.
- The median gross rent of occupied rental housing units in Falmouth is \$1,581 and was just above the peer average of \$1,669 from the other cities in the cohort.
- Only Holliston (\$971) and Wilbraham (\$740) have median gross rent below \$1,000.

3.7.4 HOUSE PRICING INDEX

The House Pricing Index measures the movement of house pricing, relative to a year 2000 baseline. The data used in the chart was sourced from the Federal Housing Finance Agency using data supplied by Fannie Mae and Freddie Mac.

2021 House Pricing Index (HPI - 2000 base year)



Falmouth house pricing index is just 13% lower than the national average and has experienced a 53% increase between 2010 and 2021.

Source 1: HPI Dataset, Federal Housing Finance Agency. 2021 House Pricing Index (2000 base year)
 Source 2: S&P/Case-Shiller U.S. National Home Price Index



DataInsight

DATA INSIGHT:

- Falmouth's (225.16) house prices are lower than the national average (260.1) for House Pricing Index (HPI) by 13.4%. This means the property is retaining its relative value.
- Falmouth has largely outperformed most of its peers in the cohort communities, with only 1 community in the same county recording higher growth in house pricing over the same period.

3.8 BUSINESS AND INDUSTRY



In comparison to the other cohort states, Maine (13%) has the second highest percentage of structurally deficient bridges with Rhode Island (23.3%) being the highest.

3.7.5 INFRASTRUCTURE AGING

Aging infrastructure is common problem across the United States. One of the key issues for Maine will be the future of its current bridges. Additionally, Maine has the second lowest requirement for drinking water infrastructure needs over the next 20 years, equating to \$1.35 billion.

Infrastructure aging for states in cohort communities

States of cohort communities	Bridges	Dams	Water	Road
Maine (2020)	2,461 bridges (12.8%) are structurally deficient in 2019	There are 66 high-hazard potential dams and 67% of Maine's high-hazard dams have an Emergency Action Plan	\$1.35 billion in drinking water infrastructure needs over 20 years	22,860 miles of public roads, with 23% in poor condition. 70 miles of waterway, ranking it #34 nationally
Connecticut (2018)	4,336 bridges (6.3%) are structurally deficient in 2019	There are 284 high-hazard potential dams and 86% of Connecticut's high-hazard dams have an Emergency Action Plan	\$4.02 billion in drinking water infrastructure needs over 20 years	21,544 miles of public roads, with 34% in poor condition. 120 waterways, ranking it #29 nationally
Massachusetts (2021)	5,233 bridges (9%) are structurally deficient in 2019	There are 328 high-hazard potential dams and 100% of Georgia's high-hazard dams have an Emergency Action Plan	\$12.24 billion in drinking water infrastructure needs over 20 years	36,723 miles of public roads, with 25% in poor condition. 90 miles of waterways, ranking #32 nationally
New Jersey (2021)	6,786 bridges (7.8%) are structurally deficient in 2019	There are 229 high-hazard potential dams and 100% of Illinois's high-hazard dams have an Emergency Action Plan	\$8.6 billion in drinking water infrastructure needs over 20 years	38,896 miles of public roads, with 37% in poor condition. 360 miles of waterways, ranking #22 nationally
New York (2021)	17,540 bridges (9.9%) are structurally deficient in 2019	There are 424 high-hazard potential dams and 98% of Indiana's high-hazard dams have an Emergency Action Plan	\$22.8 billion in drinking water infrastructure needs over 20 years	113,559 miles of public roads, with 27% in poor condition. 390 miles of waterways, ranking #21 nationally
New Hampshire (2017)	2,502 bridges (8.5%) are structurally deficient in 2019	There are 151 high-hazard potential dams and 93% of Maryland's high-hazard dams have an Emergency Action Plan	\$1.01 billion in drinking water infrastructure needs over 20 years	16,156 miles of public roads, with 20% in poor condition. 10 miles of waterways, ranking #36 nationally
Rhode Island (2020)	779 bridges (22.3%) are structurally deficient in 2019	There are 96 high-hazard potential dams and 26% of Minnesota's high-hazard dams have an Emergency Action Plan	\$833 million in drinking water infrastructure needs over 20 years	6,027 miles of public roads, with 50% in poor condition. 40 miles of waterways, ranking #35 nationally

Source: ASCE's Infrastructure Report Card. Produced in 2021

Note: Infrastructure aging data produced by ASCE in year under state name. However, the data years vary



DATA INSIGHT:

- Maine has the lowest number of high-hazard potential dams. However, only 66% of them have an emergency action plan. In terms of overall percentage of dams with emergency action plans, Maine ranks 6 out of 7.
- Maine (\$1.35b) ranks high (5 out of 7) for lowest spending required regarding drinking water infrastructure needs over 20 years. New York (\$22.8b) has the highest spending needed for drinking water infrastructure.
- The data from the table suggests that Maine has good public roads with few in poor condition. Of the 22,860 miles of public roads, only 23% are in poor condition second to New York (20%) which has the lowest.

This section uses the Economic Census data for 2017 which did not include the construction, utilities, and manufacturing industries.

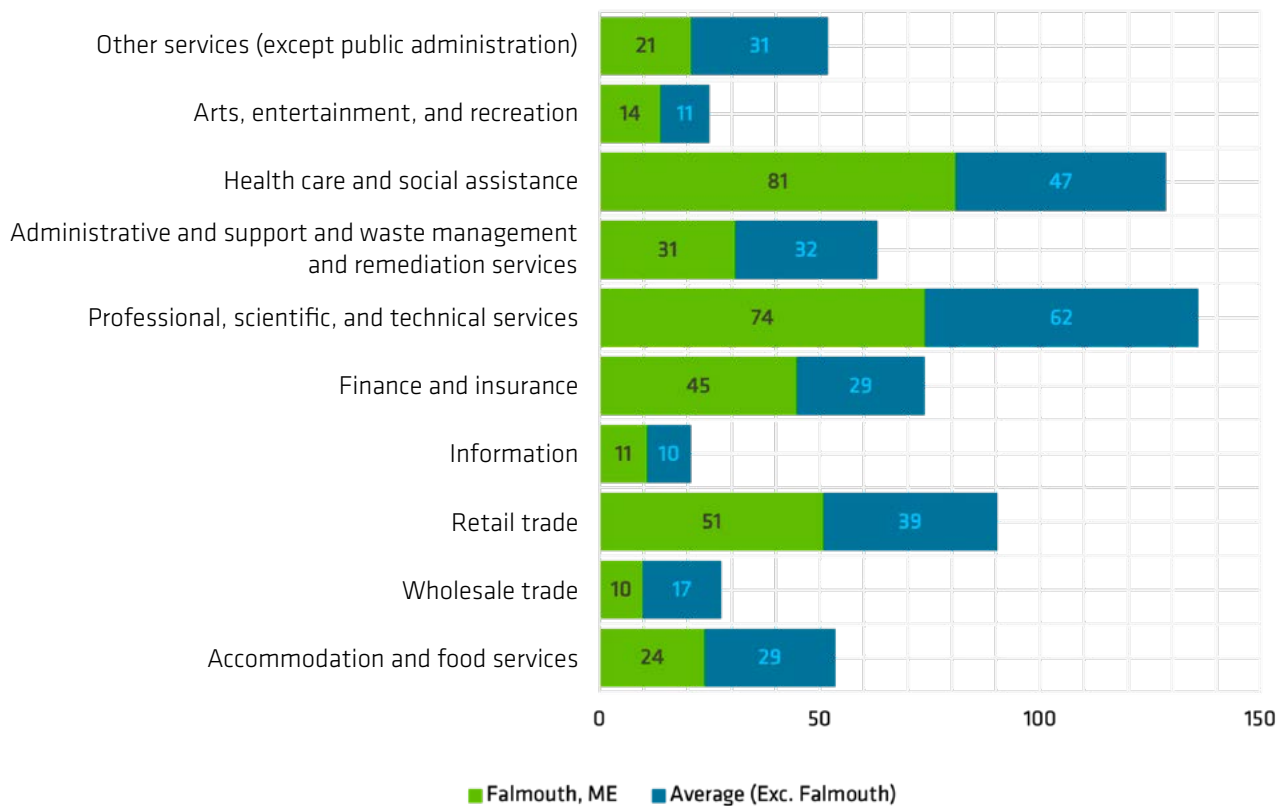
3.8.1 BUSINESS ESTABLISHMENTS

This chart shows the number of business establishments by major sector. This is a way to measure the types of businesses and the relative strength of sectors in the communities. What is notable is the large number of retail trade and health care and social service businesses in all cohort communities, including Falmouth.

Number of Establishments – Falmouth vs. Cohort Community average

Source: Economic Census, 2017

Establishment data was not available for Falmouth for the Educational services, Real estate and leasing, and Transportation and warehousing industry.



DATA INSIGHT:

- Falmouth outperforms the cohort communities in the creation of establishments in five industries (Health care and social services; Professional, scientific, and technical services; Finance and insurance; Arts, entertainment, and recreation; and Retail trade industries)



EMPLOYMENT

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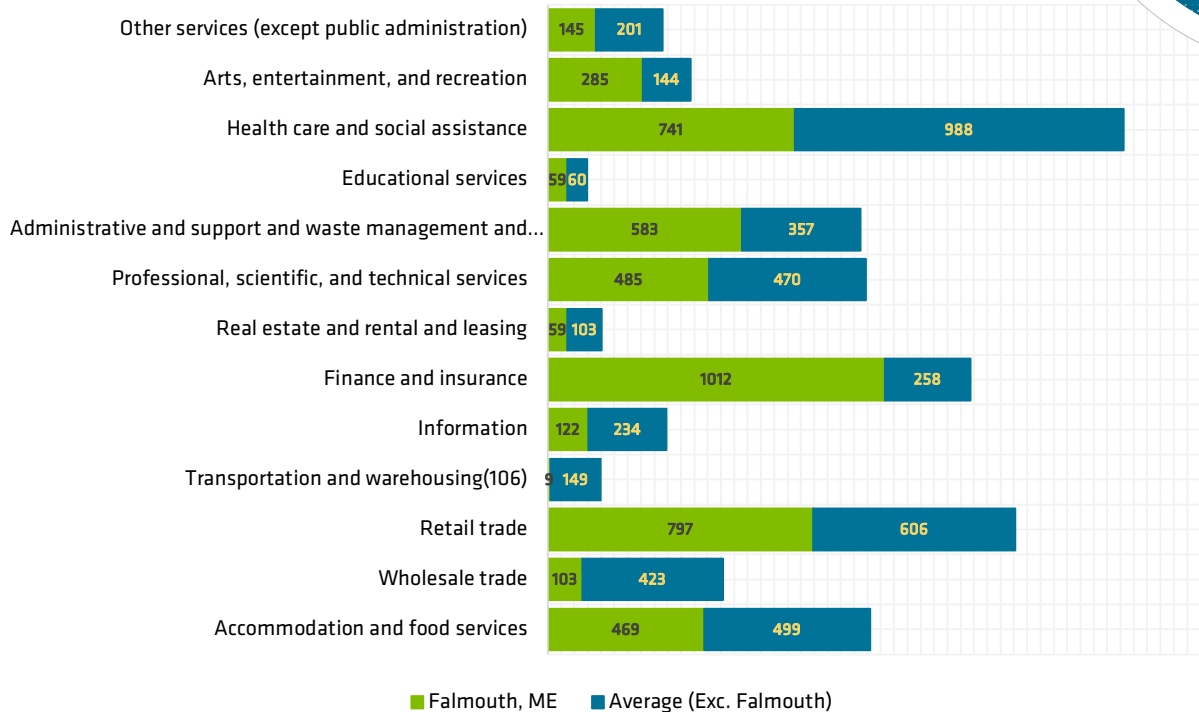
This chart explores the number of employees by industry sector in the cohort communities. For communities where only

a range of employees were provided, the median of the range was represented as the number of employees such that a range of 0 – 9 employees was replaced with 5, 20 to 99 with 54, etc.

Industry by Number of Employees

Source: Economic Census, 2017

DATA INSIGHT:



The top three employment sectors in Falmouth are Finance and Insurance; Retail trade; and the Health care and social assistance industry.



DataInsight

- In Falmouth, the three top sectors with most employees were: Health care and social services; Finance and insurance; and Retail trade.
- Falmouth leads against the other cohort communities in terms of employment in five industries (Finance and insurance; Retail trade; Professional, scientific, and technical services; Administrative support and waste management services; and Arts, entertainment, and recreation).

3.8.3 BUSINESS REVENUE

This chart explores the revenue of businesses in cohort communities. Revenue data is



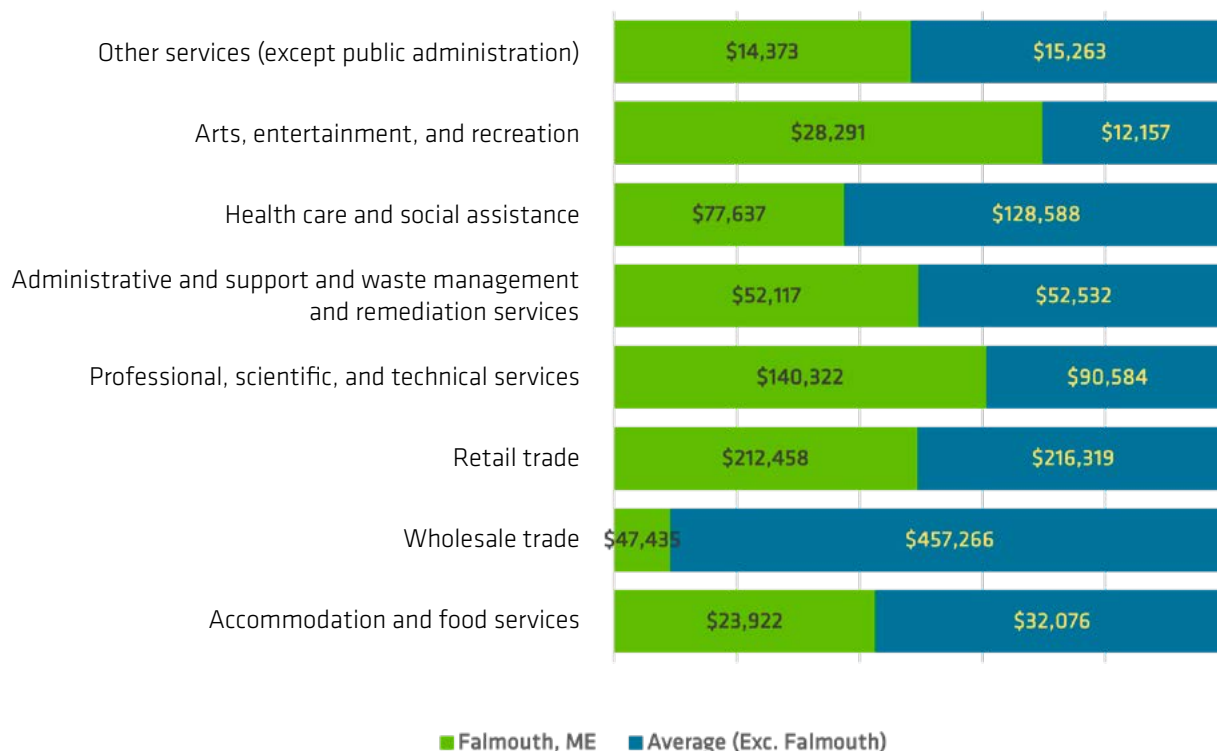
In Falmouth, the retail trade (\$212,458) industry is seen as the sector with the most significant revenue regarding the value of sales, shipments, receipts, and business done.

unavailable for the Finance and insurance and Information industries.

Industry by Value of sales, shipments, receipts, revenue, or business done (\$1,000)

Source: Economic Census, 2017

Note: Sales data was not available for Falmouth for the Educational services; Real estate, rental and leasing; and, Transportation and warehousing industry.



DATA INSIGHT:

- For the cohort communities other than Falmouth, the sector with the most significant revenue is Wholesale trade (\$457,266)
- The industries with the most revenue in Falmouth are Retail trade and Professional (scientific, and technical services (140,322).



3.8.4 PAYROLL

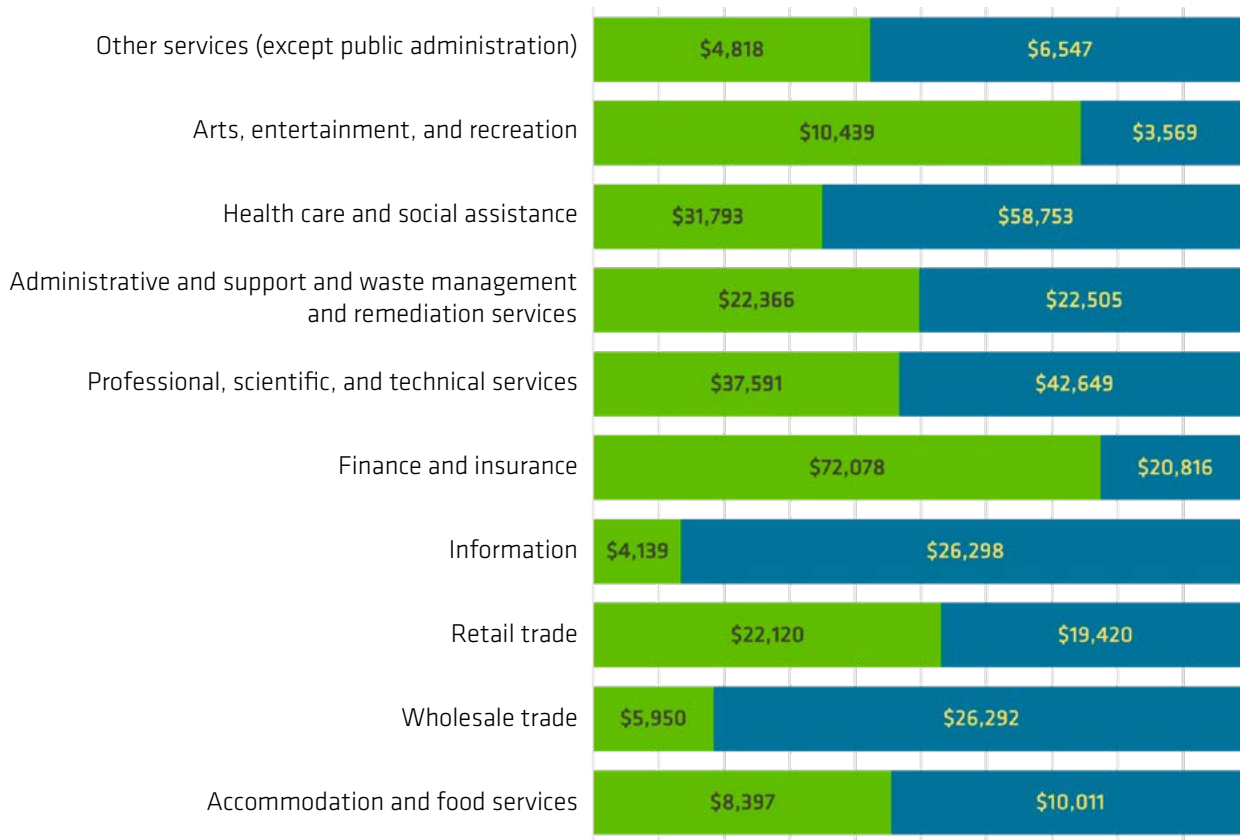
This data examines the payroll of businesses in the cohort communities.



Industry by Annual Payroll (\$1,000)

Source: Economic Census, 2017

Note: Payroll data was not available for Falmouth for the Educational services; Real estate, rental and leasing; and, Transportation and warehousing industry.



DATA INSIGHT:

- The Finance and Insurance sector in Falmouth records the highest amounts of payroll, followed by the Professional, scientific, and technical service sector.
- Significant contributions are also made by the Health care and social assistance; Administrative support and waste management and remediation services; and, the Transportation and Retail trade industry.



DataInsight

3.8.5 INDUSTRY LOCATION QUOTIENT

This table shows the location quotient of employment by industry within each cohort community. The location quotient (L.Q.) is an indicator of the self-sufficiency, or relative



strength, of a particular industry. Areas with scores <0.9 have a relatively low employment level compared to the United States, those with scores from 0.9 to 1.10 have similar employment level relative to the nation, and those who have scores greater than 1.10 have more employment than the nation in that industry.

Location Quotient of Industry Employment of City Residents

Cohort Communities	Agriculture, forestry, fishing and hunting, and mining	Construction	Manufacturing	Wholesale trade	Retail trade	Transportation and warehousing, and utilities	Information	Finance and insurance, and real estate and rental and leasing	Professional, scientific, and management, and administrative and waste management services	Educational services, and health care and social assistance	Arts, entertainment, and recreation, and accommodation and food services	Other services, except public administration	Public administration
Weston, CT	0.09	0.29	0.61	1.65	0.58	0.41	1.50	2.88	1.89	0.81	1.01	0.99	0.40
Cape Elizabeth, ME	1.82	1.03	0.90	0.81	0.72	0.21	1.37	1.74	1.60	1.10	0.53	0.84	0.47
Falmouth, ME	0.21	0.78	0.50	1.32	0.90	0.42	1.12	2.57	1.31	1.10	0.72	0.80	0.68
Lynnfield, MA	0.00	0.66	0.74	1.53	0.98	0.62	1.34	1.81	1.60	1.03	0.56	0.79	0.80
Wilbraham, MA	0.41	0.72	0.86	1.76	0.98	1.15	0.96	1.76	0.39	1.27	0.81	1.15	0.79
Bedford, MA	0.34	0.21	1.31	0.60	0.52	0.13	1.42	1.20	2.57	1.11	0.51	0.55	0.64
Holliston, MA	0.30	0.92	0.80	0.67	0.78	0.44	2.17	1.18	1.44	1.26	0.55	0.85	1.12
Wayland, MA	0.00	0.26	0.97	0.94	0.75	0.13	1.84	1.17	2.13	1.20	0.61	0.94	0.63
Weston, MA	0.44	0.49	0.74	1.57	0.31	0.10	0.88	2.70	1.80	1.23	0.70	0.89	0.12
Medfield, MA	0.40	0.68	0.56	1.36	0.71	0.32	1.56	2.16	1.84	1.02	0.53	1.04	0.80
Norwell, MA	0.39	0.98	0.47	1.05	0.63	1.30	0.89	2.44	1.28	1.05	0.75	0.75	0.71
Windham, NH	0.19	1.02	1.71	1.66	0.92	0.41	1.45	0.82	1.53	0.95	0.39	0.78	0.77
Glen Rock, NJ	0.00	0.33	0.59	1.45	0.77	0.51	2.66	2.71	1.52	1.14	0.43	0.60	0.60
Ramsey, NJ	0.45	0.35	0.60	1.79	0.88	0.61	2.39	2.23	1.41	1.11	0.65	0.92	0.24
Westwood, NJ	0.05	1.05	0.64	1.79	0.66	0.93	3.45	1.29	1.59	0.95	0.64	0.95	0.62
Berkeley Heights, NJ	0.00	0.28	0.78	1.55	0.73	0.44	1.09	3.25	1.30	0.88	0.78	1.07	0.95
New Providence, NJ	0.12	0.59	0.51	0.70	1.04	0.32	3.20	2.45	1.87	0.77	0.74	0.67	0.78
Pelham, NY	0.11	0.55	0.47	1.02	0.49	0.61	2.53	2.36	1.21	1.34	0.58	1.05	0.82
North Smithfield, RI	0.25	1.42	0.81	1.19	1.21	1.15	1.40	0.85	0.78	1.08	0.82	1.03	0.82
Dobbs Ferry, NY	0.06	0.39	0.64	1.20	0.62	0.14	2.64	1.70	1.23	1.27	1.04	1.11	1.11
Suffern, NY	0.02	1.08	0.69	0.70	1.10	0.61	1.29	0.90	1.06	1.23	0.88	1.08	1.20
Tarrytown, NY	0.00	1.01	0.42	0.32	0.46	0.35	2.82	1.95	1.50	1.13	0.89	1.38	0.87
Relative to the US, more employment than one would expect.													
Relative to the US, less employment than one would expect.													
Relative to the US, similar employment.													

Source: American Community Survey (2019 - ACS 5-year estimates)



As Falmouth continues to grow, affordable and attainable housing for new and aging residents will become an important element in community development.

4.0 CONCLUSION

The community profile and benchmark analysis helps provide a snapshot of demographic and economic characteristics of the Town of Falmouth at a given point in time. The 22 communities that made up the cohort group were built around a combination of unique features that all of the communities have in common. All communities were coastal communities with resident populations between 10,000 and 15,000. The unique features used in the cohort construction were:

- **High performing School District** - School district ranking in the top 5 school district in their state.
- **Destination for outdoor recreation** - Cities and Towns on the coast or near rivers or other bodies of water that also serve as attractions for recreation.
- **Proximity to major urban metropolis** - Within 15 miles of a major urban area.

The cohort analysis compares Falmouth with a group of well-performing eastern communities near or on bodies of water. The peer group is generally affluent and well-educated, and host a high number of retail trade, health, and social service businesses within their communities. Falmouth shares many common trends and traits with the cohort communities, suggesting it is performing adequately on peer comparison. Falmouth shows particularly strong performance in areas such as:

- **Property values.** Falmouth's house pricing has increased consistently since 2014. Median home values in Falmouth are \$439,800 which is almost double the median US house price at \$240,500.
- **Payroll for finance and insurance.** Falmouth outperforms the cohort communities for pay in finance and insurance services, retail trade, arts, entertainment, and recreation. This is key to attracting and retaining a vibrant workforce.
- **School district ranking.** School district performance is a key part of the value proposition of Falmouth as a community. It ranks the 370th best school district in the United States among 10,772 districts and 4th highest among the cohort communities.

The population of Falmouth has grown consistently from 2010 to 2019. This trend will require an in-depth look at housing and housing attainability in the Town.





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6.0 APPENDIX

This tables shows the cohort communities and their relative Town, State, and County.

State	Cohort City	Cohort County
Massachusetts	Town of Bedford	Middlesex County
New Jersey	Berkeley Heights Township	Union County
Maine	Cape Elizabeth	Cumberland County
New York	Dobbs Ferry Village	Westchester County
Maine	Town of Falmouth	Cumberland County
New Jersey	Glen Rock Borough	Bergen County
Massachusetts	Town of Holliston	Middlesex County
Massachusetts	Town of Lynnfield	Essex County
Massachusetts	Town of Medfield	Norfolk County
New Jersey	New Providence Borough	Union County
Rhode Island	Town of North Smithfield	Providence County
Massachusetts	Town of Norwell	Plymouth County
New York	Town of Pelham	Westchester County
New Jersey	Ramsey Borough	Bergen County
New York	Suffern Village	Rockland County
New York	Tarrytown Village	Westchester County
Massachusetts	Town of Wayland	Middlesex County
Massachusetts	Town of Weston	Middlesex County
Connecticut	Town of Weston	Fairfield County
New Jersey	Westwood Borough	Bergen County
Massachusetts	Town of Wilbraham	Hampden County
New Hampshire	Town of Windham	Rockingham County



7.0 FOR MORE INFORMATION

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For more details, and to access additional reports, please visit:

<https://lab2.future-iq.com/town-of-falmouth-vision-and-values-project/>





8.0 ABOUT FUTURE IQ

Future iQ specializes in applying innovative tools and approaches to assist cities, organizations, regions, and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents.

To learn more about Future iQ, and our recent projects, please visit www.future-iq.com or by email at info@future-iq.com.

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