



**York County
Comprehensive Plan Study**

Comp Plan Committee Meeting

August 7, 2019

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I.
**Objectives and
Methodology**

Background and objectives

Over the next two years, York County will be updating its 2040 Comprehensive Plan, which is the long-range plan for the physical development of the County. This is an important project that will have a lasting impact on the County and its citizens. Getting input from their residents is a key part of their plan to make sure York County is headed in the right direction and to make it an even better community for all residents to live, work, and play.



SIR was hired to conduct a public opinion survey to support the development of York County's Comprehensive Plan (Comp Plan).

The overall objectives for this study include:

- Identify key priorities for the Comp Plan.
- Identify the level of resident support for potential Comp Plan initiatives.
- To the extent possible, interpret results according to various demographic factors, such as by upper county vs. lower county residence, by generation, by years lived in York County, etc.

Methodology

York County and SIR developed a 10 to 12 minute survey among county residents that was distributed in two separate ways: a scientific, panel sample survey and a convenience, opportunity sample survey.

SCIENTIFIC SURVEY

- This survey was conducted by telephone among a random sample of York County residents, using a mix of landline and cell phone numbers.
- Survey respondents had to meet the following qualifications:
 - Aged 18 or older
 - Reside in York County
- Fieldwork began on April 8, 2019 and ended on April 24, 2019, resulting in 464 completed surveys.
- A mix of phone types were contacted
 - Cell: 45%
 - Land: 55%

CONVENIENCE SURVEY

- This survey was distributed online through a convenience link. The link was posted on the York County 2040 website and social media sites.
- Survey respondents had to reside in York County.
- Fieldwork began on May 6, 2019 and ended on June 17, 2019, resulting in 500 completed surveys.

**This report focuses on the
scientific survey, weighted to
reflect census data in generation
and area of county.**



II. Respondent Profile

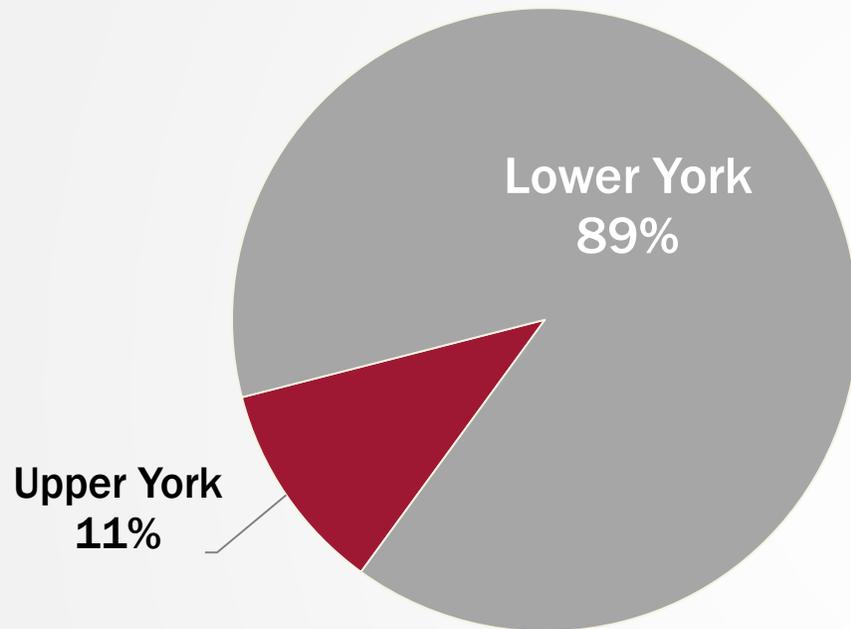
Data was weighted by GENERATION and AREA OF COUNTY to more closely reflect Census data for York County

DEMOGRAPHIC	GROUP	UNWEIGHTED SAMPLE %	CENSUS PROPORTION	WEIGHTED SAMPLE
GENERATION (Q1. In what year were you born?)	Millennial and younger	19%	27%	28%
	Gen X	21%	36%	36%
	Boomers or older	55%	37%	36%
AREA OF COUNTY (Q2. What is your home Zip code?)	Upper	27%	11%	11%
	Lower	73%	89%	89%

NOTE: From this point forward, all sample sizes and proportions listed are **WEIGHTED** unless otherwise specified.

About nine in ten respondents live in Lower York County and the remainder live in Upper York County

YORK COUNTY LOCATION



HOME ZIP CODE

UPPER YORK	11%
23185	9%
23188	2%
LOWER YORK	89%
23693	43%
23692	28%
23696	8%
23690	5%
23665	4%

Demographic information

DEMOGRAPHIC	Q #	GROUP	SAMPLE PROPORTION
GENDER	Q27	Male	48%
		Female	52%
GENERATION	Q1	Gen Z/Millennials (born 1983 & after)	28%
		Generation X (born 1965–1982)	36%
		Boomers (born 1946–1964)	22%
		Silent/ GI (born prior to 1946)	14%
LENGTH OF RESIDENCE IN YORK COUNTY	Q22	Average length of residence	19 years
ANNUAL HOUSEHOLD INCOME	Q26	Average total household income	\$91K

Other demographic information (cont'd)

DEMOGRAPHIC	Q #	GROUP	SAMPLE PROPORTION
RACE	Q26b	White	78%
		Black or African-American	12%
		Other	10%
HISPANIC ETHNICITY	Q26a	Hispanic or Latino	4%
		Not Hispanic or Latino	96%

Other demographic information (cont'd)

DEMOGRAPHIC	Q #	GROUP	SAMPLE PROPORTION
HAVE A HOME-BASED BUSINESS	Q25	Household has home-based business	15%
TYPE OF RESIDENCE	Q24	Single-family detached home	82%
		Townhouse or duplex	11%
		Apartment or condominium	6%
		Other	1%
RESIDENCE OWNERSHIP VS RENTING	Q23	Own	82%
		Rent	18%



III.
Key Insights



5

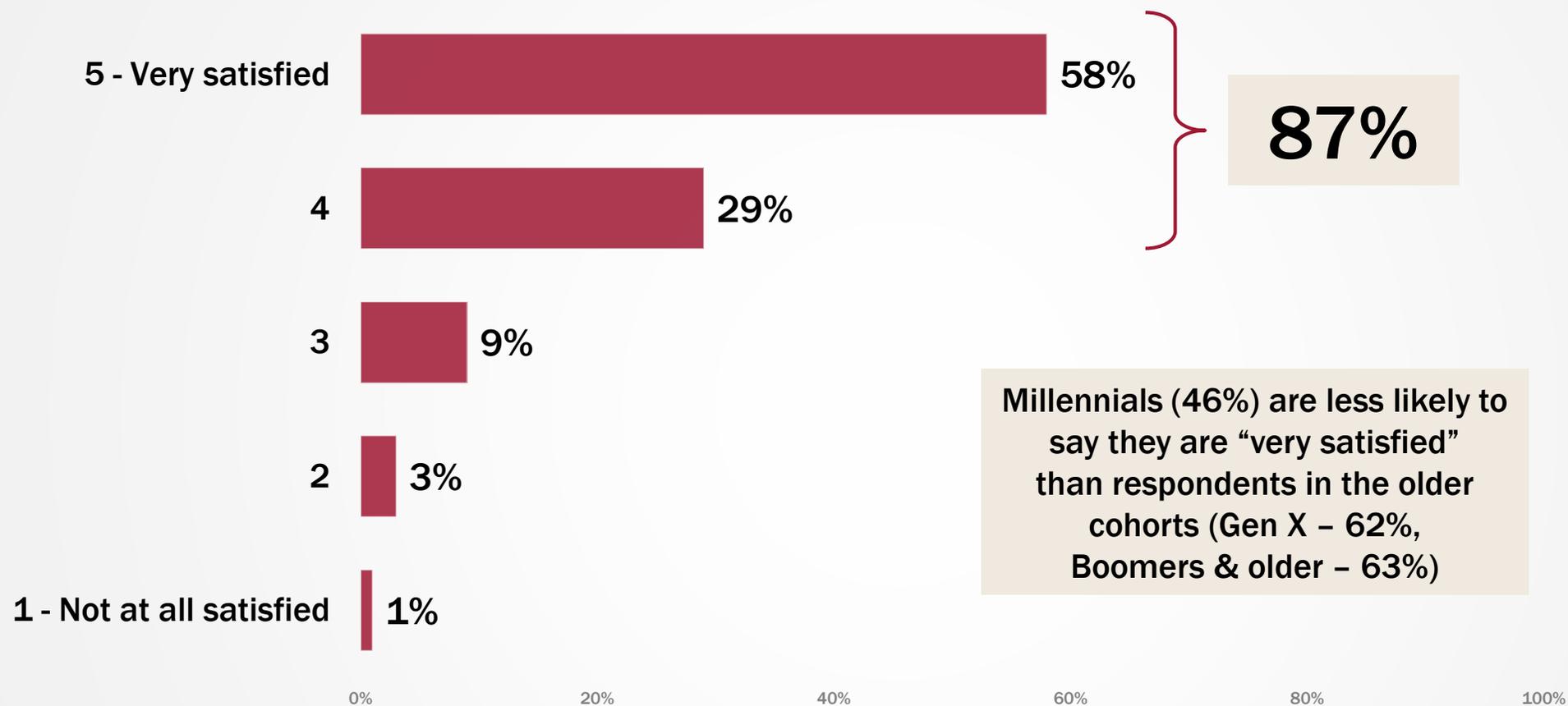
This report is
organized around
5 key insights.

OVERALL IMPRESSIONS

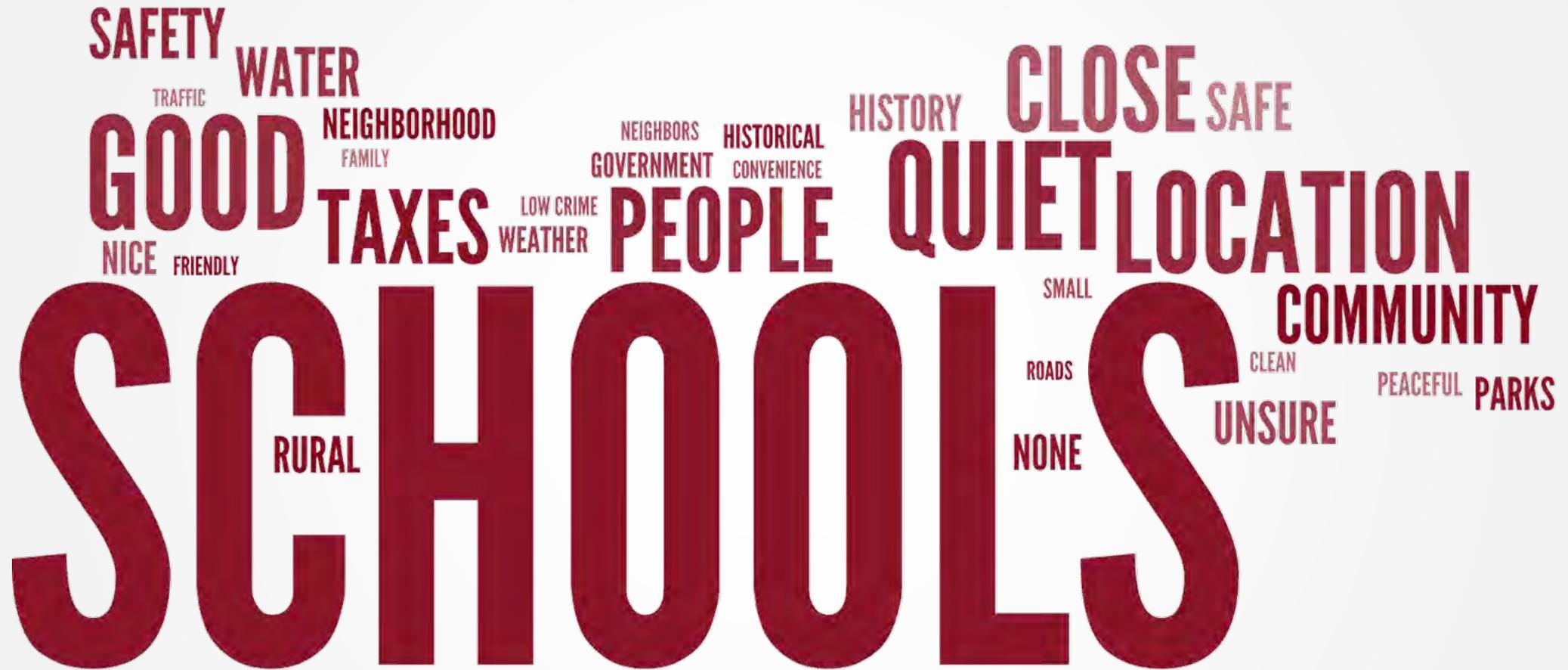
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York County residents are satisfied with where they live and cite schools as one of the things they like most.

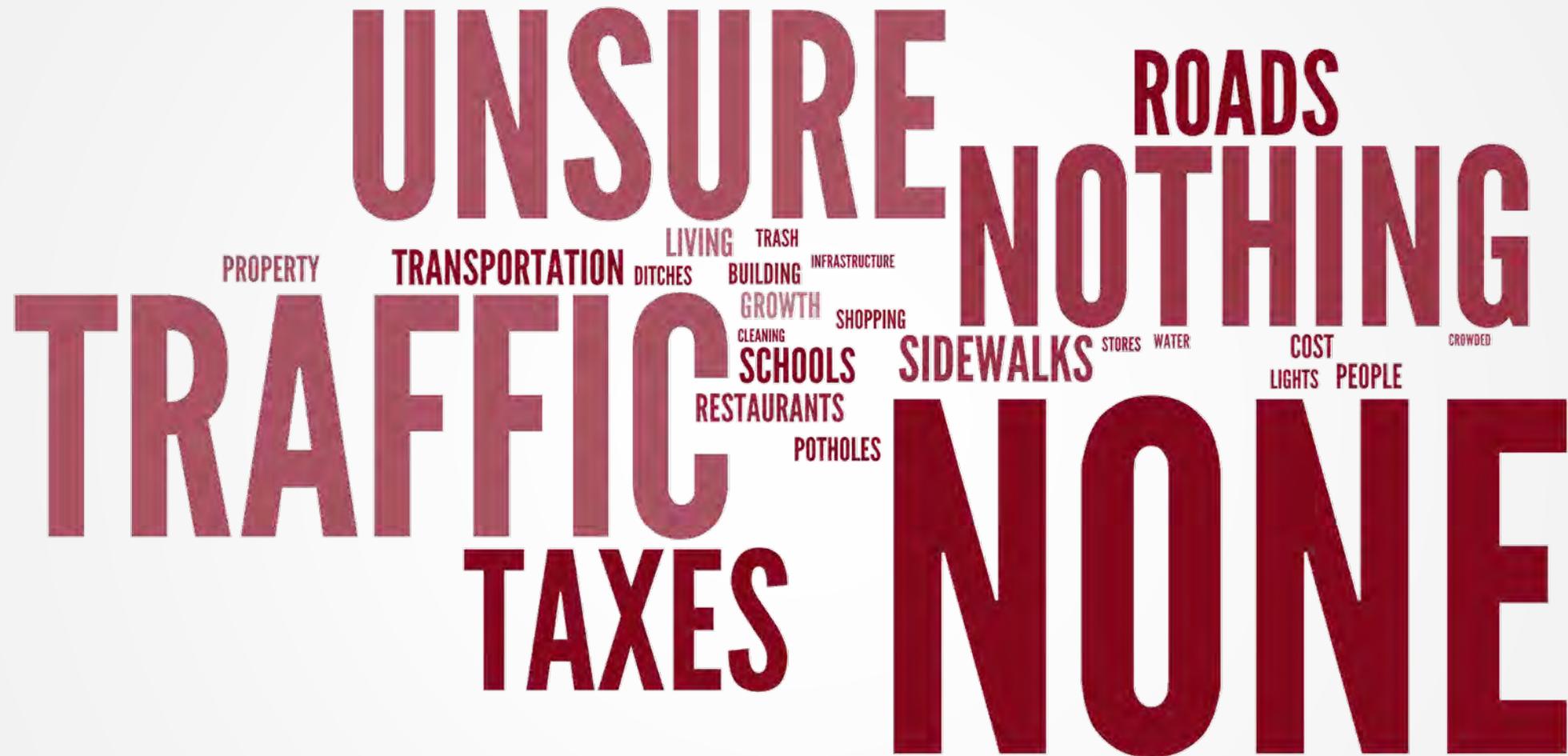
Nearly nine in ten residents are satisfied with living in York County



What are the top three things you like MOST about living in York County?



What three things do you like LEAST about living in York County?



CHANGES TO YORK COUNTY

2

As they think about the past 20 years, many residents dislike the increase in housing and development (and their associated traffic problems). Instead, they hope for slower, better-planned growth, road improvements, and an increase in mostly local shops and restaurants in the future.

About four in ten residents noted changes in the last 20 years that they have **NOT** liked

	TOP THREE DISLIKED CHANGES
1	Development/growth related
2	Housing related
3	Traffic/congestion/roads

“Other” responses were made up of answers that less than 3% of residents mentioned and include:

- Increased population
- Lack of new/larger businesses
- Schools related

Are there any specific changes that have taken place in York County in the last 20 years that you have NOT liked?

Selected development/growth-related comments

- “Over building in certain areas heading towards Yorktown and it’s getting congested, like 154. A lot of new buildings and it seems like a lot. It’s only one way out and in the future it will be congested with the amount of homes they’re building.”
- “Building up too many businesses – like the quiet. The more businesses, the more people, the more crime.”
- “Too much development of neighborhoods, crowding the schools.”
- “They are over building everywhere.”
- “I like Yorktown when it was just York County. For example, there is all these expensive shops that weren’t there before.”
- “When they started changing rural into commercial zoning.”
- “Too much growth near historical sites.”
- “I don’t like the new developments and lack of open space.”

Are there any specific changes that have taken place in York County in the last 20 years that you have NOT liked?

Selected housing-related comments

- “Brought in too many multi-unit town houses and apts. Haven’t planned accordingly for resources.”
- “New homes in the area that become quarter sacks with lights but don’t put money into the area of the zip codes.”
- “A lot of rapid expansion of new communities. Mobile home communities on main.”
- “Do not like having more apartments. Wishes that they’d build more single-family homes.”
- “Getting to the point of overdevelopment ... too many condos & apartments.”
- “Random housing subdivisions being built.”
- “It’s not as rural and quiet as it used to be. I don’t particularly like apartments.”
- “Locale where I live, they keep expanding and building more homes and not taking account of the traffic.”
- “It seems like the county is getting more congested and I don’t like it when commissioners start planting public housing close to middle class working families.”

Are there any specific changes that have taken place in York County in the last 20 years that you have NOT liked?

Selected traffic/congestion/roads-related comments

- “Roads need to be improved/more traffic lanes available.”
- “Congestion on our streets, behind on updating our streets.”
- “Nothing else that really stands out but restructuring the roads and traffic.”
- “The amount of growth and the lack of funds that haven’t been put into the roads.”
- “Over development ... without proper planning for traffic.”
- “It is getting crowded and the traffic is getting worse.”
- “I don’t like the traffic ... it’s obscene and too much development.”
- “It is getting too crowded and they are building too close and no new roads for the people to get in and out.”

Traffic/road, development, and school improvements topped the list of changes residents would like to see in the **next 20 years**

TOP FIVE REQUESTED 2040 CHANGES	
1	Road improvement/traffic mitigation/ public transit
2	Development-related issues
3	More businesses/restaurants/shopping
4	School improvements
5	Sidewalks/bike paths

“Other” responses were made up of answers that less than 5% of residents mentioned and include:

- Recreation/sports
- Parks/playgrounds
- Maintain/lower taxes/ broaden tax base
- Entertainment
- Youth services/activities

Are there any specific changes you would like to see in York County in the next 20 years?

Selected road improvement/traffic mitigation/public transit-related comments

- “Improve the traffic and make sure the roads stay safe. Not this year, but if we get snow, they don’t like to come into the suburbs – so the children don’t miss so much school.”
- “Traffic studies to minimize heavy traffic flow. Lights are off for a long period of time when there is no high flow traffic.”
- “I would like to see more bicycle lanes and improve public transportation.”
- “I would like Rte 17 to be widened.”
- “We need better roads for better flow of traffic.”
- “I want the streets to have lights and the roads to be maintained better, like pot holes and cracked pavement and grass cut on road sides more regularly, and replace damaged drainage pipes under the roadway.”
- “I would like to see more infrastructure like highways to relieve congestion.”

Are there any specific changes you would like to see in York County in the next 20 years?

Selected development-related comments

- “Don’t want to see new buildings and keep the historic buildings in place.”
- “Stop cutting down the trees and constant building of homes.”
- “I don’t want to see new growth, plaza on top of plaza.”
- “Protection of open spaces, changing the zoning away from more buildings.”
- “I want to see the businesses and houses separate. Not so many fast food places. I like the country style life.”
- “We like our small town ways and don’t need to be like a city.”
- “Not do what they did before when they did the last comprehensive plan – like putting in a McDonald’s.”
- “Put a cap on the growth and the overcrowding.”
- “Continuing to maintain, not necessarily grow too much.”

Are there any specific changes you would like to see in York County in the next 20 years?

Selected more businesses/restaurants/shopping comments

- “More local businesses.”
- “Bring more technical jobs, building more businesses to bring more jobs for the citizens.”
- “More businesses and nice restaurants.”
- “Encourage more restaurants. We have almost none.”
- “I would like to see more shopping centers and grocery stores and more sidewalks.”
- “We also need more local restaurants and a couple craft breweries/distilleries.”
- “Incentives for businesses to come to York County.”
- “Less fast food & gas stations along 17, more local business, shopping, restaurants.”
- “I would like to see development of a shopping center or a mall in the county towards the Williamsburg area, also more restaurants as well.”

Are there any specific changes you would like to see in York County in the next 20 years?

Selected school improvement comments

- “Improve the school system. There are a lot of professionals living in York and could be invited to teach in the schools to share their profession and life experience.”
- “I’d like to see our schools be competitive with Northern Virginia.”
- “I would love to see more funding for schools and the same resources for all students no matter what school they attend.”
- “Upper Yorktown address overcrowding schools.”
- “More attention to the school system; should offer trade school amenities.”
- “Maybe get education back to where it should be. The schools are safe but the standardized testing is not great.”
- “Teachers should be paid more to be comparable to what others are being paid locally.”
- “More money towards schools and elementary schools, with no temporary classrooms.”
- “I would like to see the schools be like they were years ago, not so crowded and bringing kids from other areas. That we pay taxes for them to be here, they should build schools in their own areas.”

Are there any specific changes you would like to see in York County in the next 20 years?

Sidewalks/ bike path comments

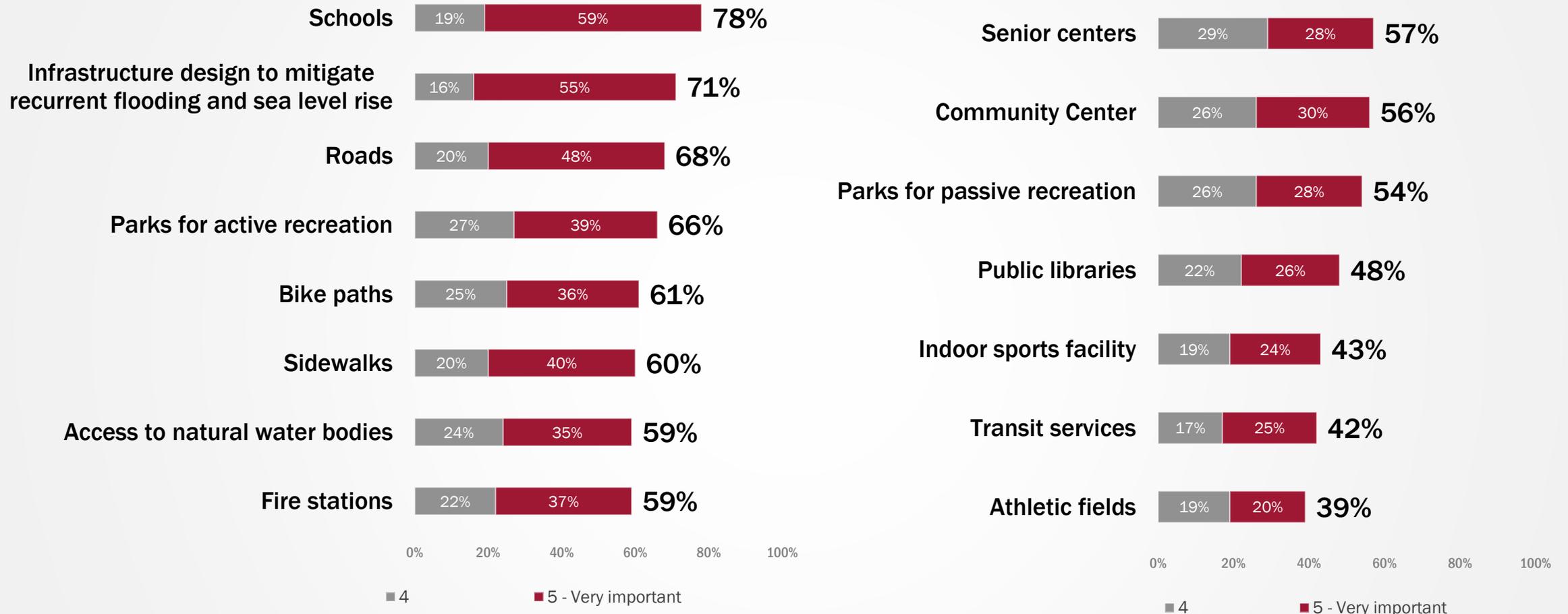
- “Accessibility, there's not much for foot transit maybe more bike paths and side walks.”
- “Need more bike ways in the historic area & make it safe from coast guard base to historic village.”
- “I would like to see sidewalks and bike paths.”
- “...sidewalks on main roads.”
- “More sidewalks and better transportation”
- “Better transportation & walkability”
- “I would like to see better streets and sidewalks.”

FACILITIES AND INFRASTRUCTURE

3

While certain demographic segments have varying priorities when it comes to facility and infrastructure expansion, schools, parks, roads, sidewalks, and flooding infrastructure are top for all respondents.

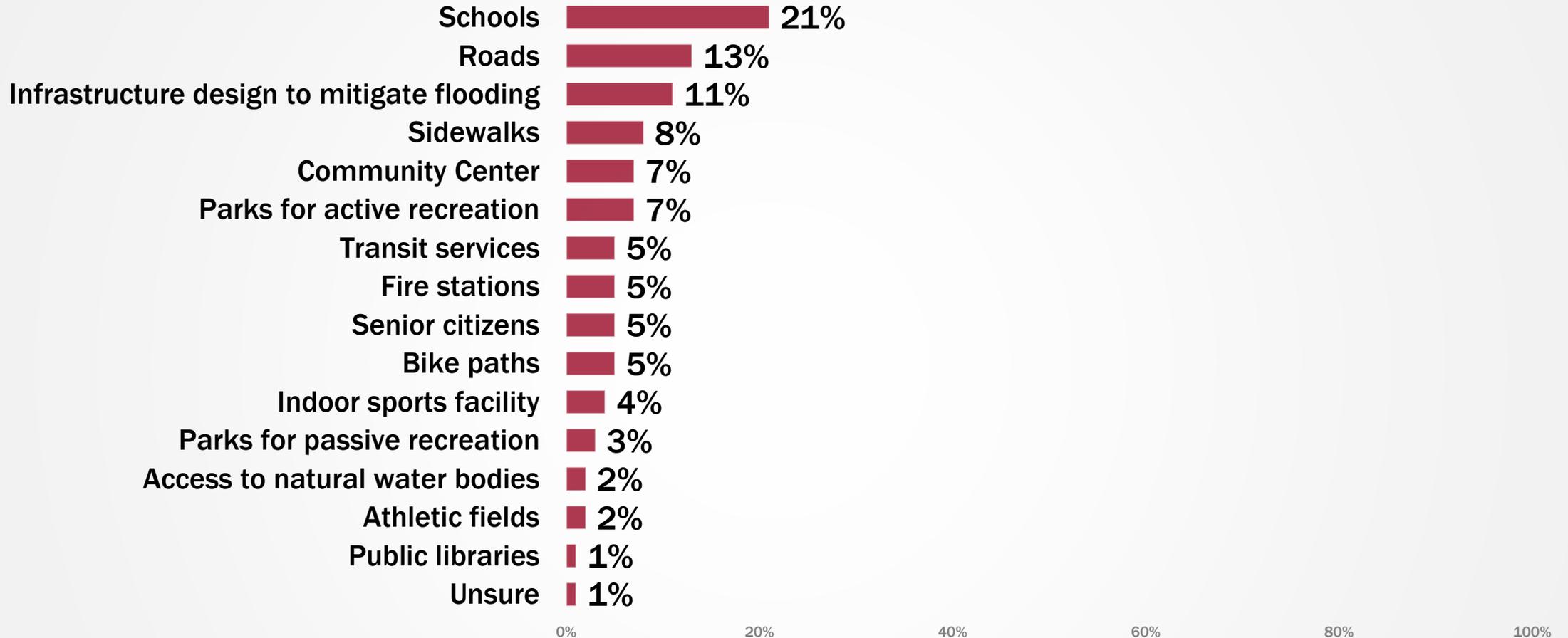
York County residents say the basics are the most important: schools, infrastructure design to mitigate recurrent flooding and sea level rise, and roads



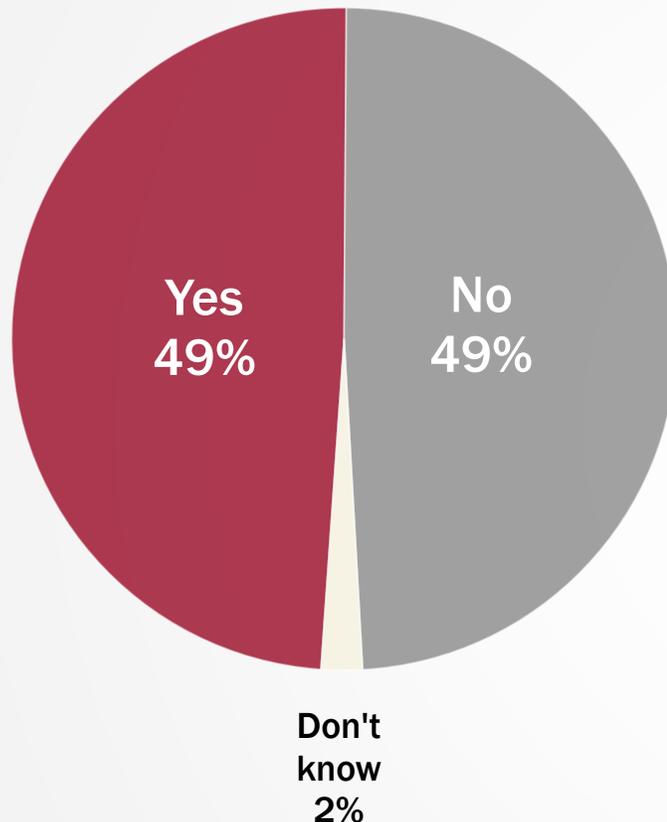
Top importance by segment

	GENERATION			RACE		LOCATION	
	Millennials or younger	Gen X	Boomers +	White	Minority	Upper York	Lower York
1	Schools						
2	Flooding and sea level rise mitigation	Flooding and sea level rise mitigation	Roads	Flooding and sea level rise mitigation	Roads	Roads	Flooding and sea level rise mitigation
3	Parks for active recreation	Roads	Flooding and sea level rise mitigation	Roads	Flooding and sea level rise mitigation	Parks for active recreation	Roads
4	Sidewalks	Parks for active recreation	Fire Stations	Parks for active recreation	Sidewalks	Fire Stations	Parks for active recreation
5	Roads	Access to water	Parks for active recreation	Bike Paths	Parks for passive recreation	Flooding and sea level rise mitigation	Bike Paths

When forced to choose one as MOST important, schools were clearly ranked as most important, with roads and infrastructure design next



About half of respondents suggested other facilities that would be important to build or expand in the next 20 years



SUGGESTED FACILITIES:

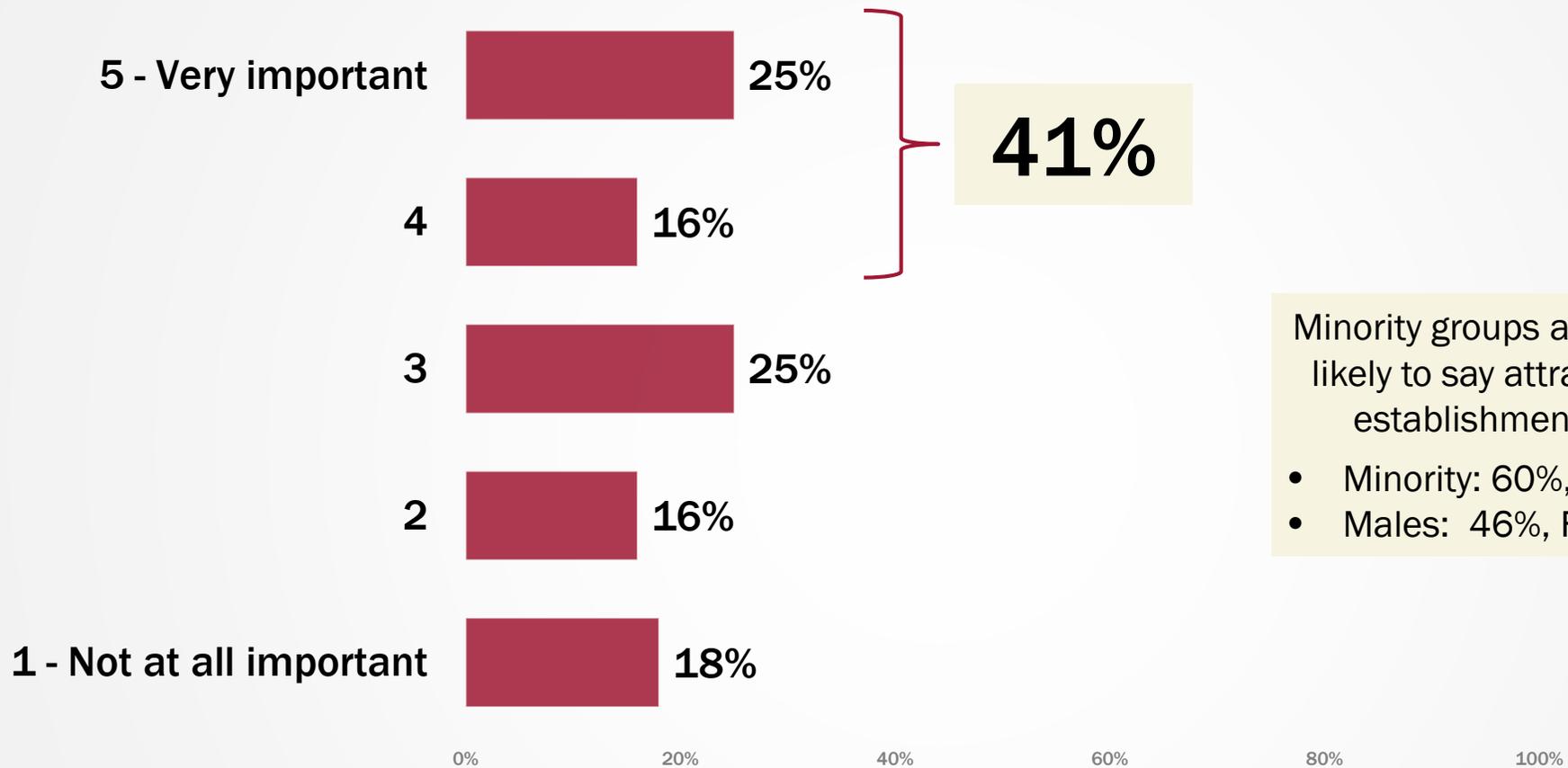
- Schools/tech center
- Recreation
- Utilities/infrastructure
- Parks
- Roads
- Beach/waterfront
- Transportation/travel
- Restaurants
- Police/Sheriff related
- Senior housing/care
- Libraries
- Youth centers
- More business/industrial parks
- Community center
- Fire stations

COMP PLAN CONCEPTS

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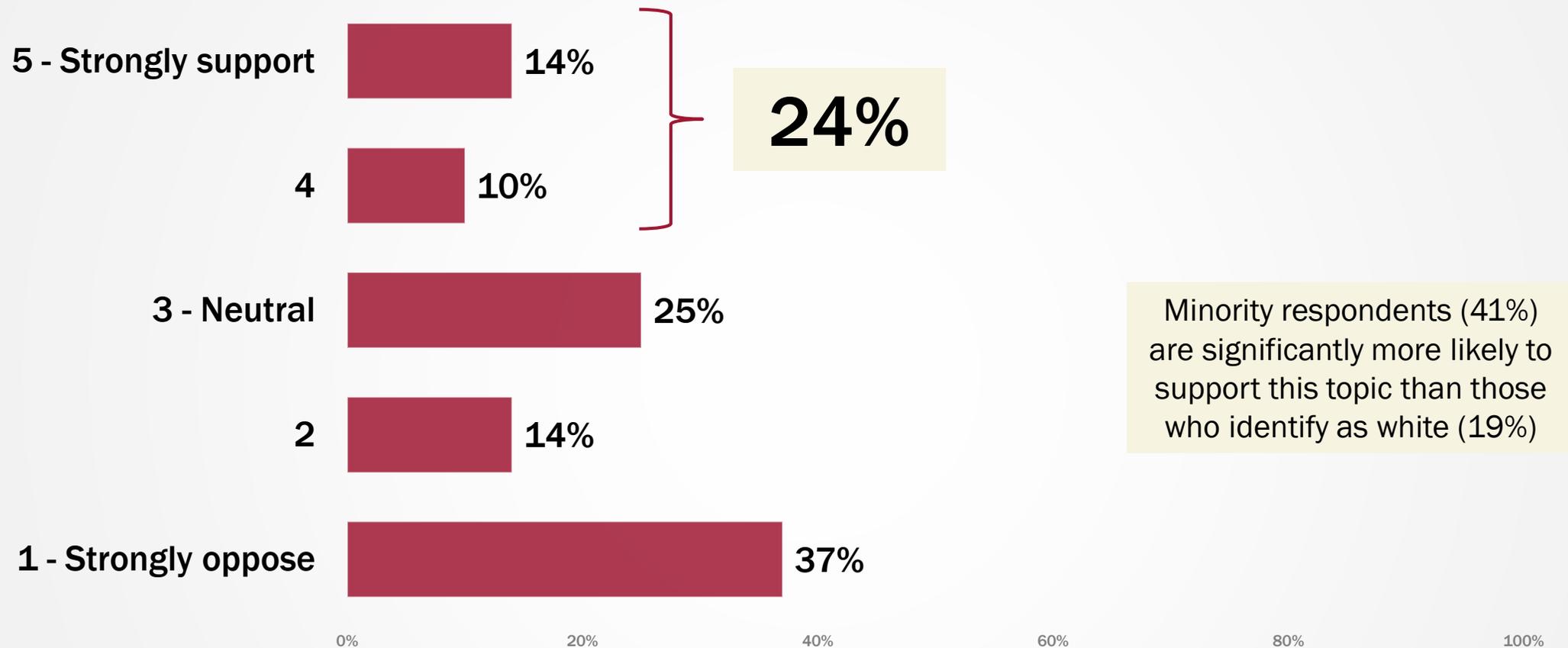
Residents say it is most important for York County to focus on developing moderately-priced housing and encourage a balanced population growth. However, support for related concepts is fairly low, with the exception of those concepts related to home-based businesses.

Two in five residents feel it is important for York County to focus on attracting commercial establishments

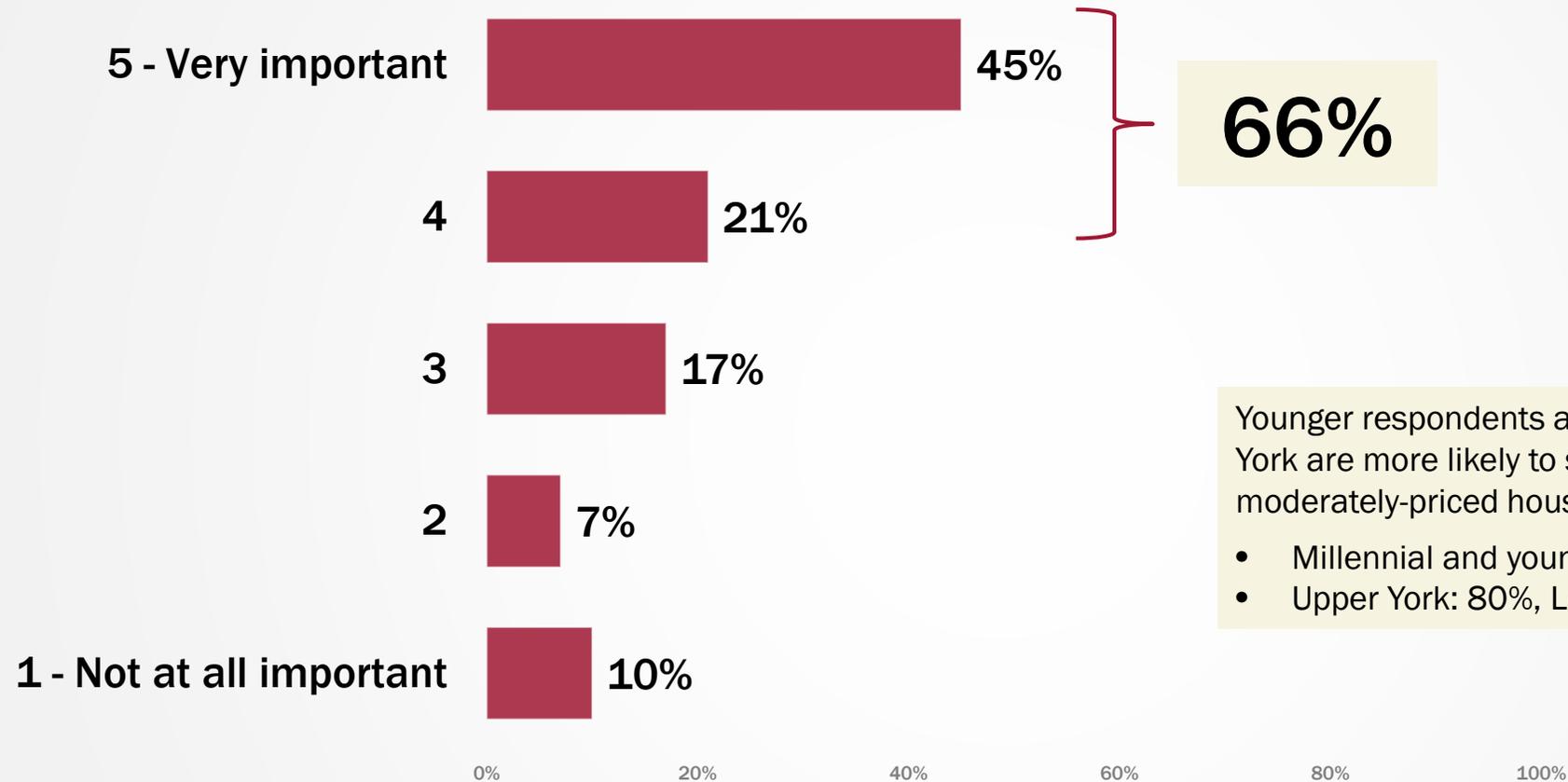


Only a quarter of residents support increasing allowable residential densities to attract commercial establishments

More than a third **STRONGLY OPPOSE** allowing the increase



Two thirds of residents feel it is important to focus on encouraging the development of moderately-priced housing



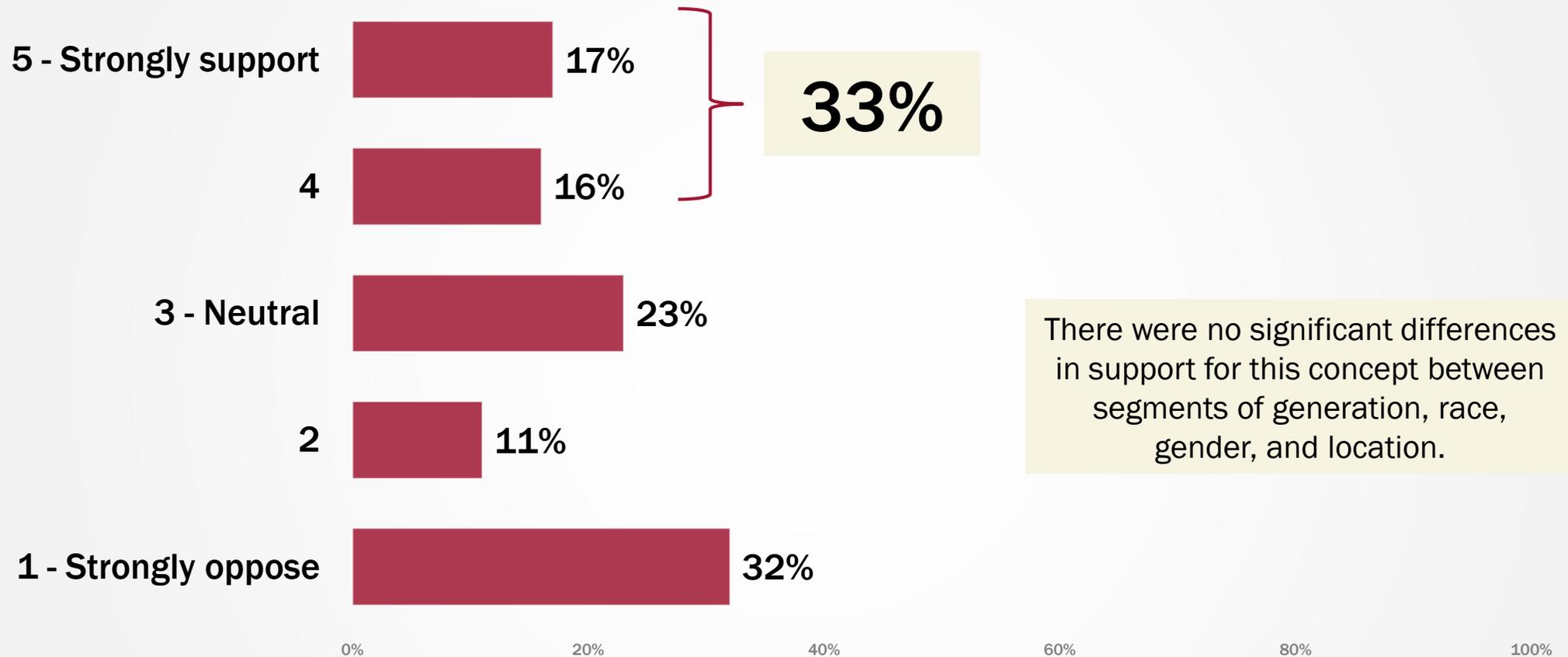
Q13. How important do you feel it is for York County to focus on encouraging the development of moderately-priced housing in the next 20 years? By moderately-priced housing we mean housing that is affordable to people who work in the County – such as service and retail workers, entry-level teachers, fire fighters, law enforcement, and healthcare workers. NOTE: Don't know/unsure responses removed for analysis.

Weighted n = 488



A third of residents support increasing the permitted number of homes per acre in some areas

One third **STRONGLY OPPOSES** this increase

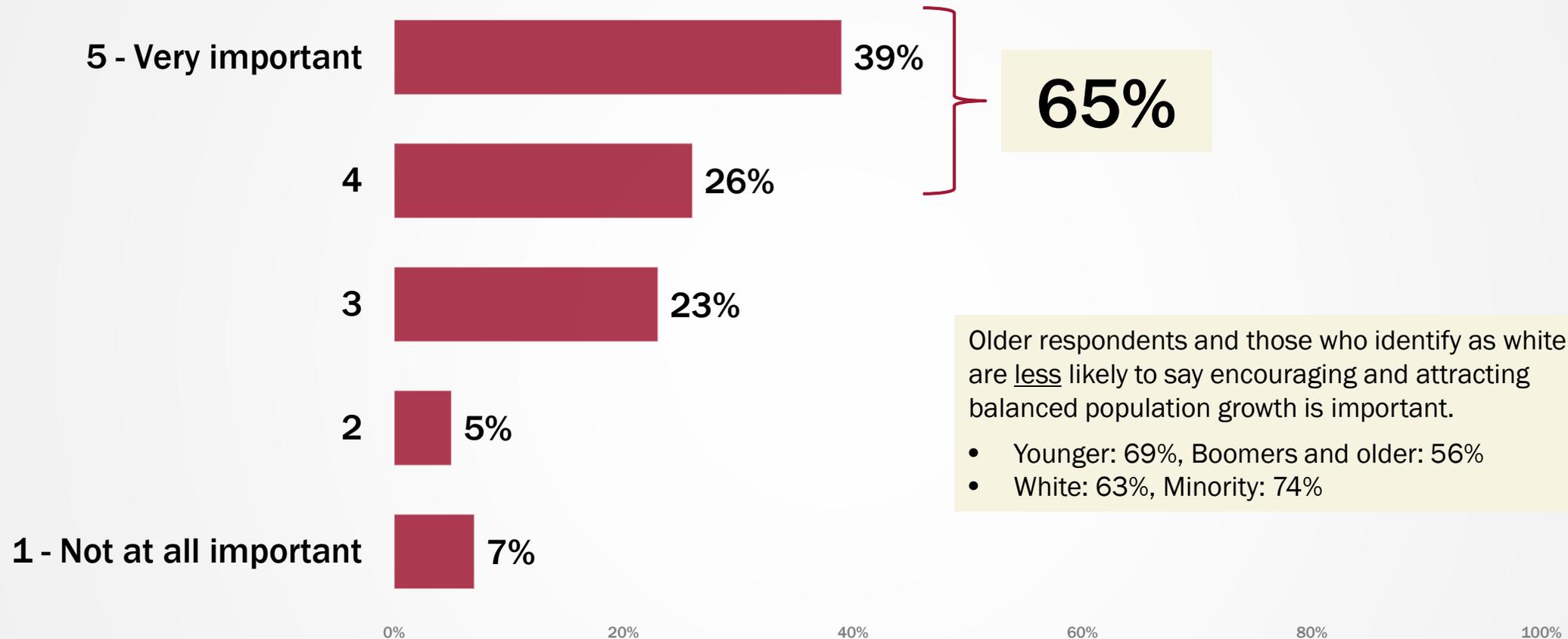


Q14. One way to encourage the development of moderately-priced housing in York County would be to increase the permitted number of homes per acre in some areas. Please tell me whether you support or oppose the concept. NOTE: Don't know/unsure responses removed for analysis.

Weighted n = 485



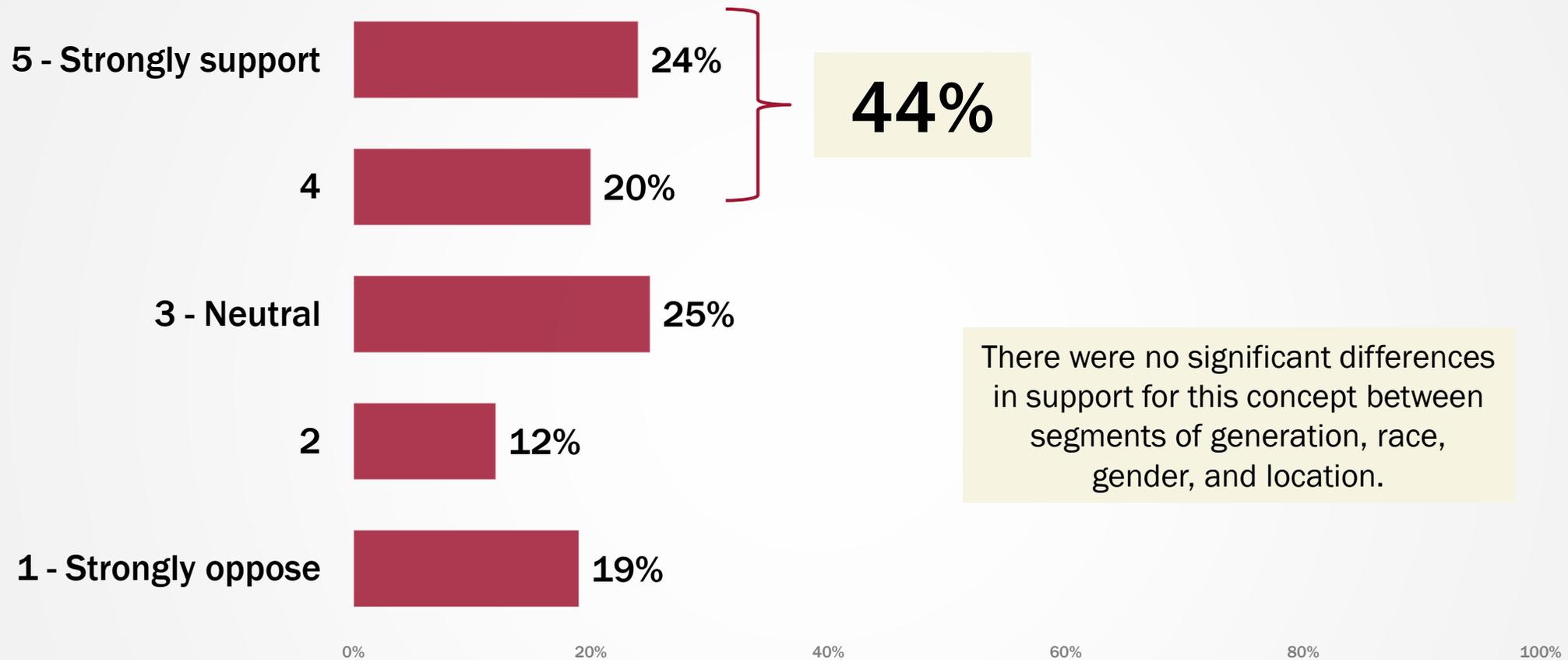
Two thirds of residents feel it is important to focus on encouraging and attracting a balanced population growth



Q15. The population in York County is projected to grow to 92,000 residents over the next 20 years. A large part of this growth is going to be among an older population. With this in mind, how important do you feel is for York County to focus on encouraging and attracting a balanced population growth in the next 20 years (such as younger families)? NOTE: Don't know/unsure responses removed for analysis.

Weighted n = 484

Two in five residents support rezoning some of the vacant land for residential use

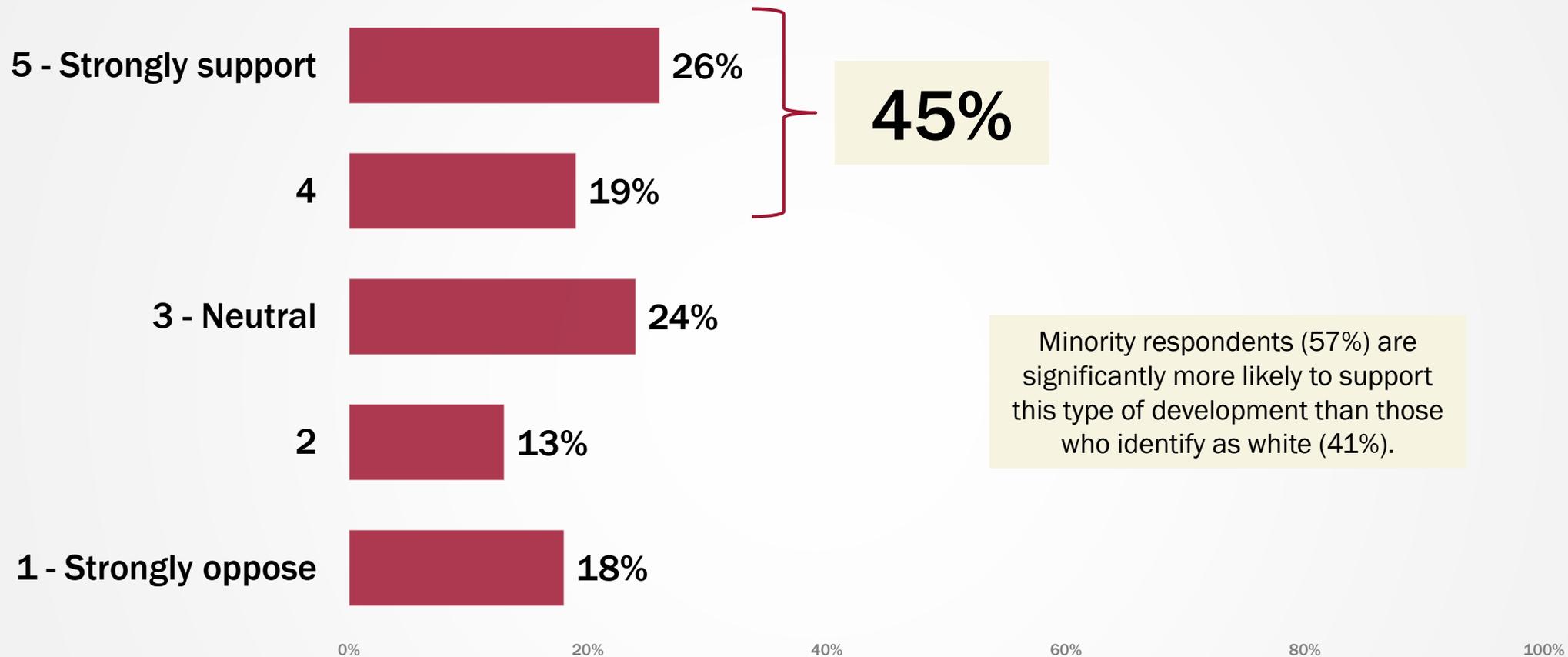


Q16. One way to encourage population growth in York County would be to rezone some of the vacant land for residential use. This rezoning could also help attract new businesses and commercial establishments. Please tell me whether you support or oppose the concept. NOTE: Don't know/unsure responses removed for analysis.

Weighted n = 485

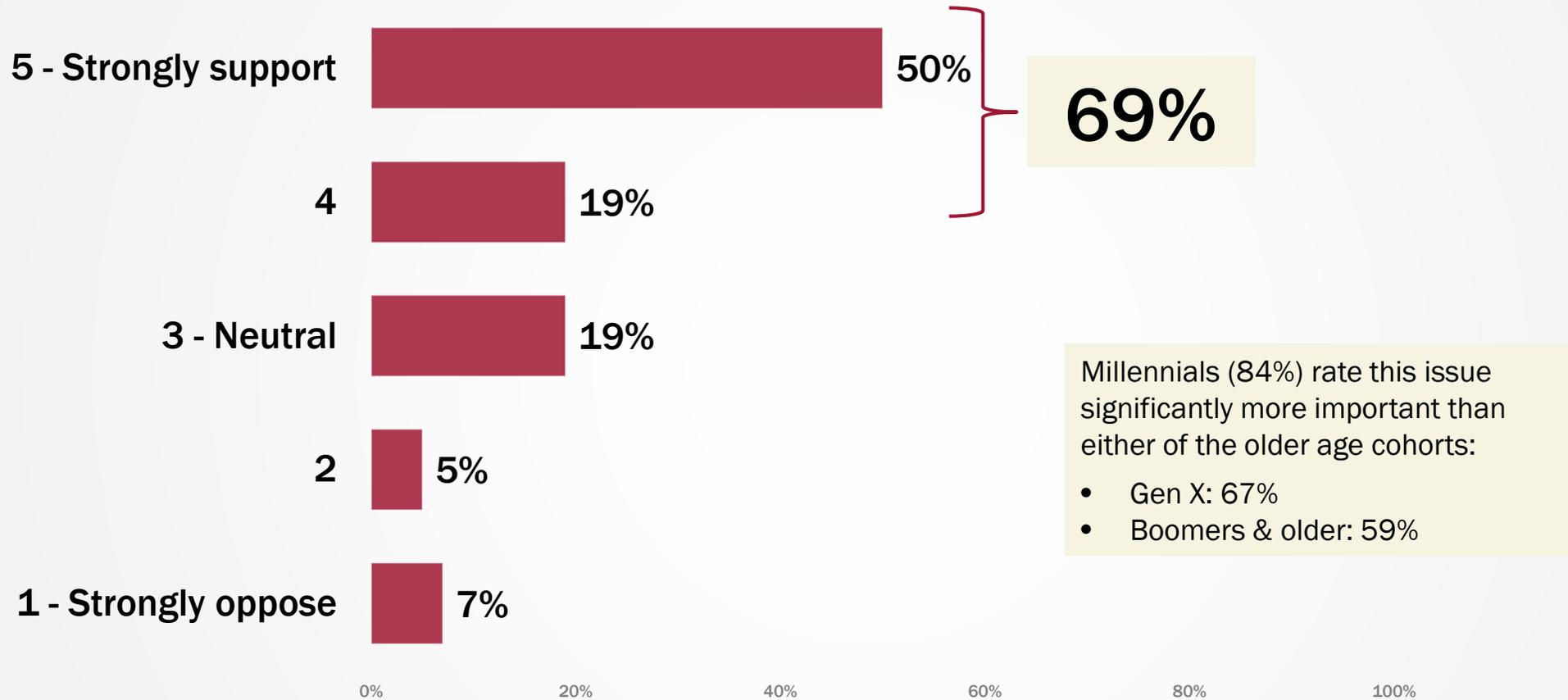


Nearly half of York County residents support mixed-use types of development



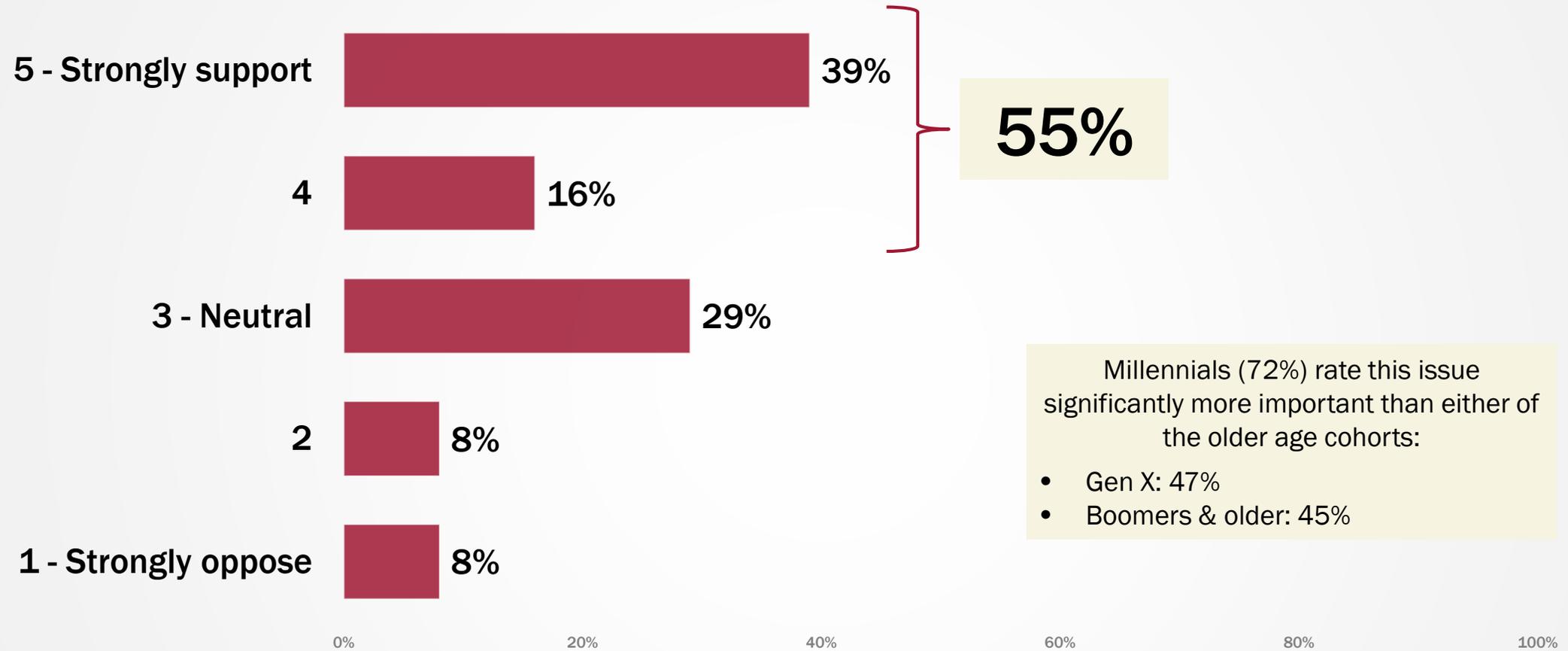
Q17. The Comprehensive Plan provides opportunities for mixed-use development, which involves a mix of retail businesses, offices, and different types of housing (i.e., detached homes, townhouses, apartments) arranged in a master-planned, pedestrian-scale development in which people can live, work, and play. Several such developments have been developed in York County since 2010. Please tell me whether you support or oppose this type of development in York County. NOTE: Don't know/unsure responses removed for analysis.

More than two thirds of residents support the growth of home-based businesses in York County



Q18. Home-based businesses are thriving in York County. Two thirds of business licenses are for businesses located in homes. Please tell me whether you support or oppose the growth of home-based businesses in York County. NOTE: Don't know/unsure responses removed for analysis.

Among those who support home-based business growth, half also support allowing those home-based businesses to have clients come to their home



Q19. Please tell me whether you support or oppose York County allowing home-based businesses to have customers or clients come to their home. (Note: Question asked among those supported growth of home-based businesses in Q18). NOTE: Don't know/unsure responses removed for analysis.

SCIENTIFIC SURVEY

Focus Area and Concept Summary

FOCUS AREA	FOCUS IMPORTANCE	RELATED CONCEPT	CONCEPT SUPPORT
Attracting commercial establishments	41%	Increase allowable residential densities	24%
Encouraging the development of moderately-priced housing	66%	Increasing the permitted number of homes per acre in some areas	33%
Encouraging and attracting a balanced population growth	65%	Rezone some of the vacant land for residential use	44%

CONCEPT	CONCEPT SUPPORT
Mixed-use development	45%
Growth of home-based businesses	69%
Allowing home-based businesses to have customers or clients come to their home	55%

Support by segment

DEMOGRAPHIC		Increase allowable residential densities	Increase # of homes per acre	Rezone for residential use	Mixed-use development	Growth of home-based businesses	Allowing clients come to home biz
LOCATION	Upper York	28%	38%	49%	51%	71%	52%
	Lower York	24%	32%	43%	44%	68%	55%
GENDER	Male	26%	31%	42%	44%	70%	55%
	Female	23%	35%	45%	45%	68%	55%
GENERATION	Millennials or younger	21%	39%	48%	49%	84%	72%
	Gen X	28%	31%	46%	42%	67%	47%
	Boomers +	21%	32%	37%	45%	59%	45%
RACE	White	19%	32%	44%	41%	68%	53%
	Minority	41%	39%	48%	57%	71%	63%



INTERNET SERVICES

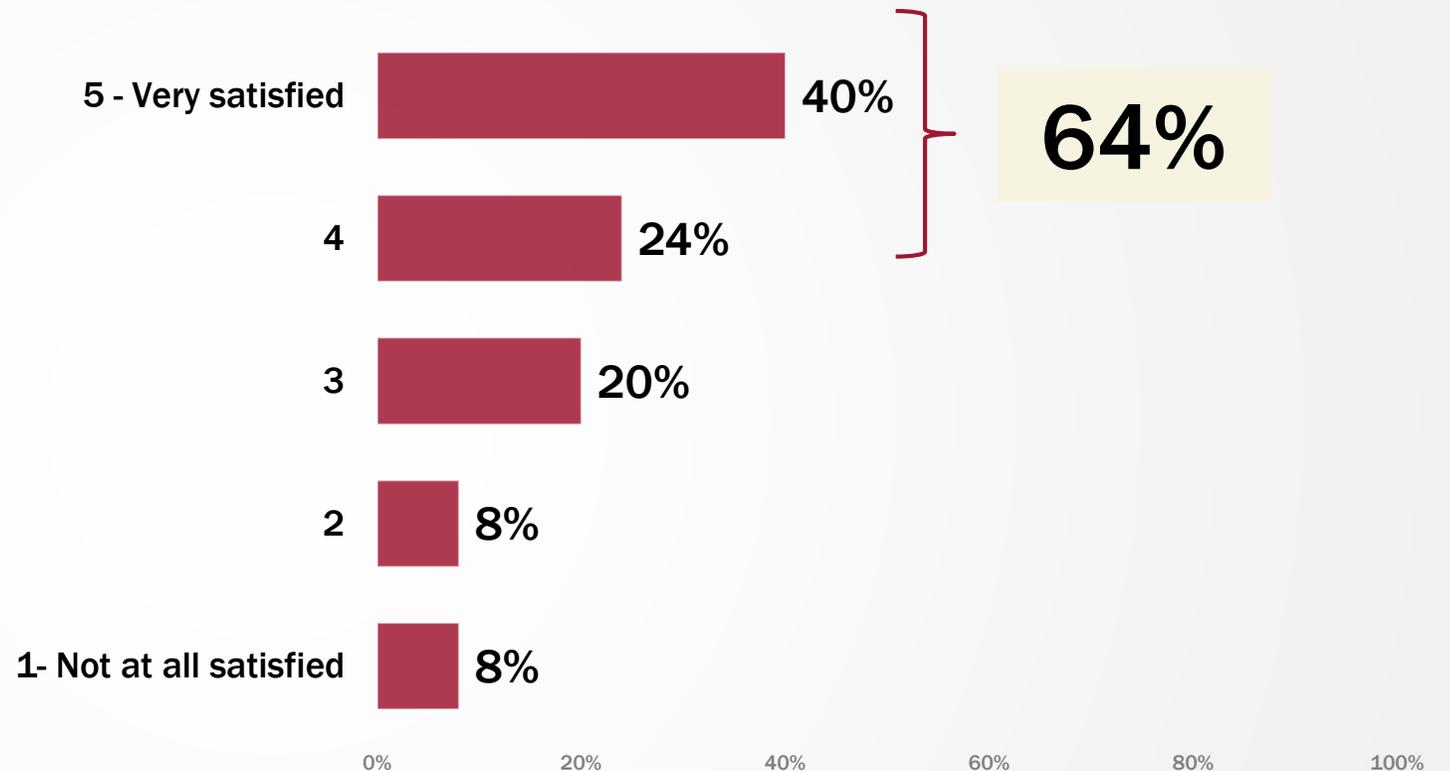
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Residents are mostly satisfied with their internet services, particularly if they have fiber internet service.

Cable is the dominant internet service provider and almost two thirds are satisfied with the internet quality in their home

INTERNET SERVICE PROVIDER	
Cable	55%
Fiber	34%
Cellular	7%
DSL	2%
Satellite	1%

SATISFACTION WITH INTERNET SERVICE QUALITY

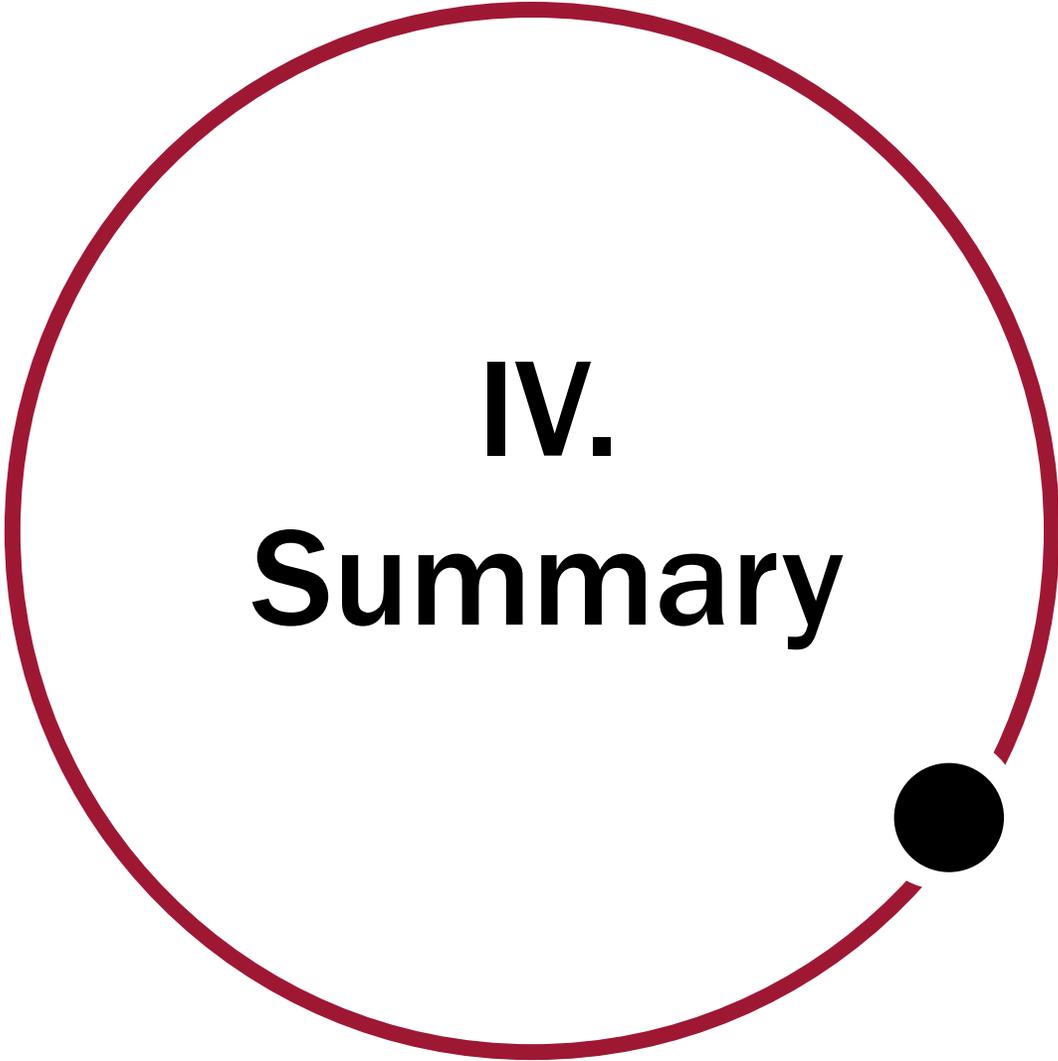


Q20. How is your internet service provided to your home?

Q21. How satisfied are you with the overall quality of internet service in your home?

Residents of Lower York and those who have fiber internet service are significantly more satisfied than Upper York residents and cable subscribers with their internet service

SEGMENT		TOP TWO BOX SCORE
AREA OF COUNTY	Lower York	65%
	Upper York	45%
INTERNET SERVICE PROVIDER	Cable	55%
	Fiber	79%



IV. Summary

Summary of Key Findings

1. York County residents are satisfied with where they live and cite schools as one of the things they like most.
2. As they think about the past 20 years, many residents dislike the increase in housing and development (and their associated traffic problems). Instead, they hope for slower, better-planned growth, road improvements, and an increase in mostly local shops and restaurants in the future.
3. While certain demographic segments have varying priorities when it comes to facility and infrastructure expansion, schools, parks, roads, sidewalks, and flooding infrastructure are top for all respondents.
4. Residents say it is most important for York County to focus on developing moderately-priced housing and encourage a balanced population growth. However, support for related concepts is fairly low, with the exception of those concepts related to home-based businesses.
5. Residents are mostly satisfied with their internet services, particularly if they have fiber internet service.



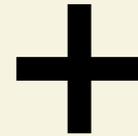
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**Key forces
to keep in
mind**

EQUIP LEADERS **TODAY** TO WIN TOMORROW



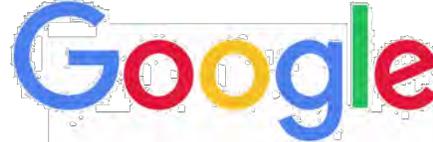
Understanding TODAY
PRIMARY RESEARCH



Understanding
TOMORROW
TRENDS RESEARCH

**UNDERSTAND THE
TRENDS THAT MATTER
AND THE
PEOPLE SHAPING THEM**

Walmart 

Google 

CIRCLE K 


General Mills

 Lincoln
Financial Group[®]

Johnson & Johnson

 FEDERAL
RESERVE
BANK
of ATLANTA

HERSHEY 
THE HERSHEY COMPANY

AARP[®]

verizon 


BROWN-FORMAN

LOWE'S[®]

Humana[®]

 State Farm[™]

P&G



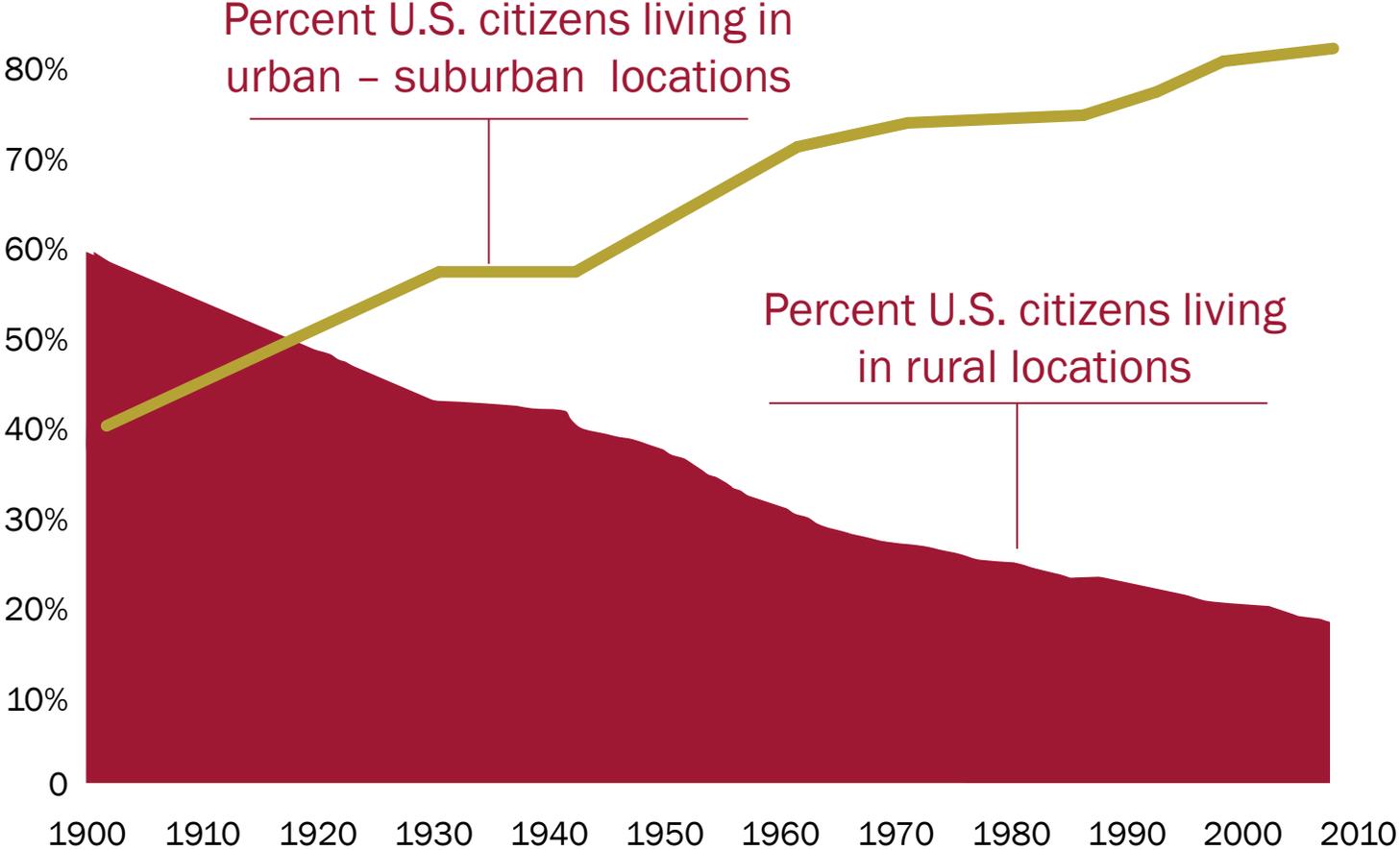


5 FORCES RELEVANT TO YORK COUNTY'S COMP PLANNING CONCEPTS

1

POPULATION SHIFTS
HIGHER DENSITY
ACTIVITY CENTERS

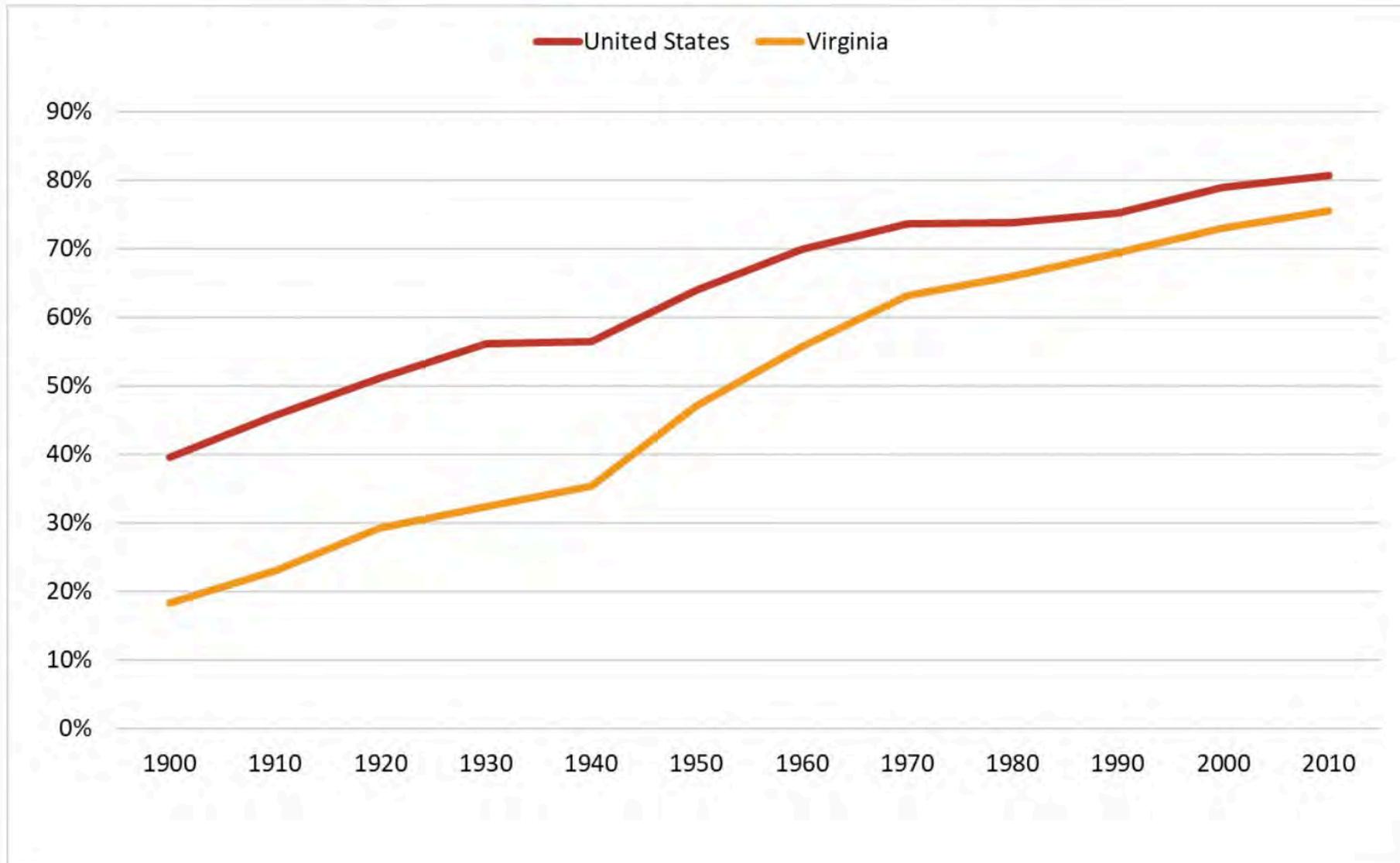
100 years of moving from the countryside to the city



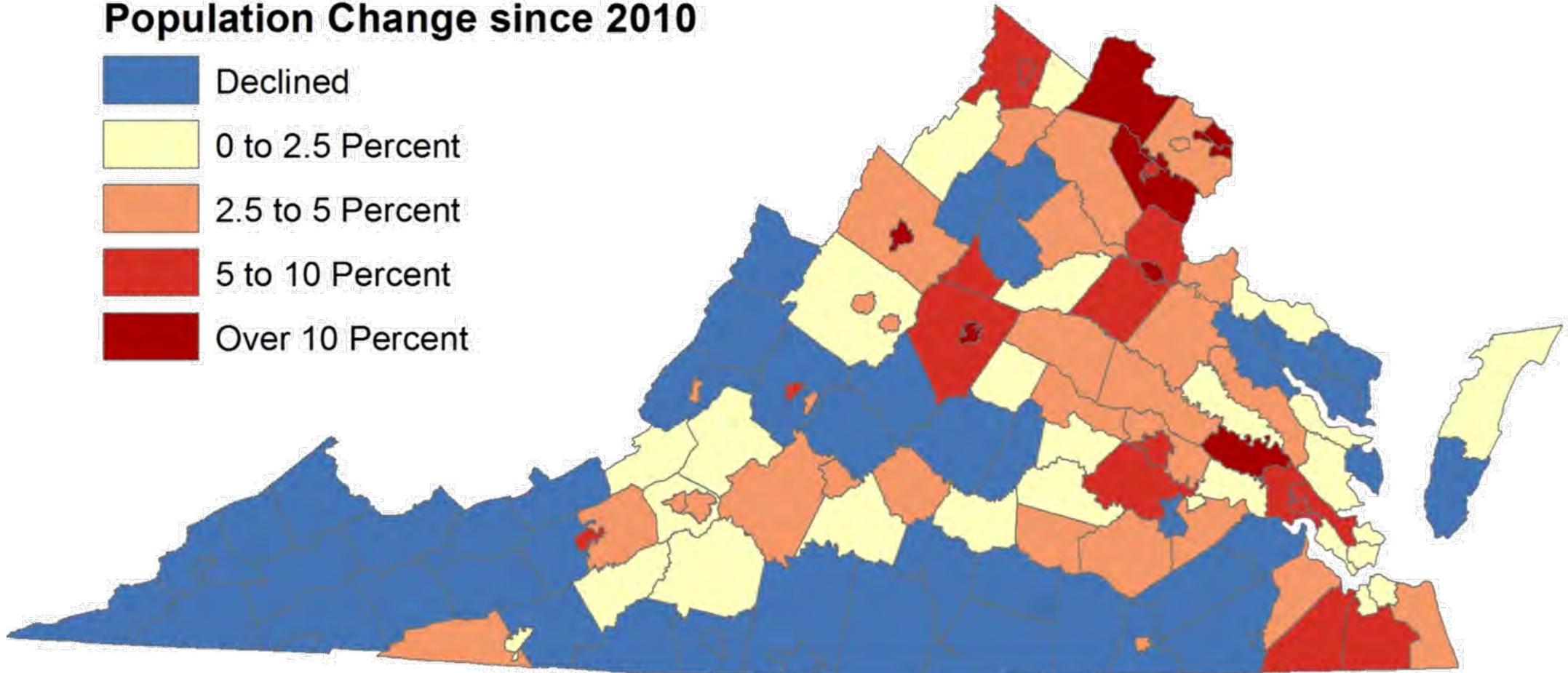
Source: U.S. Census



Figure 3. Urban Percentage of Population, United States and Virginia, 1900 – 2010

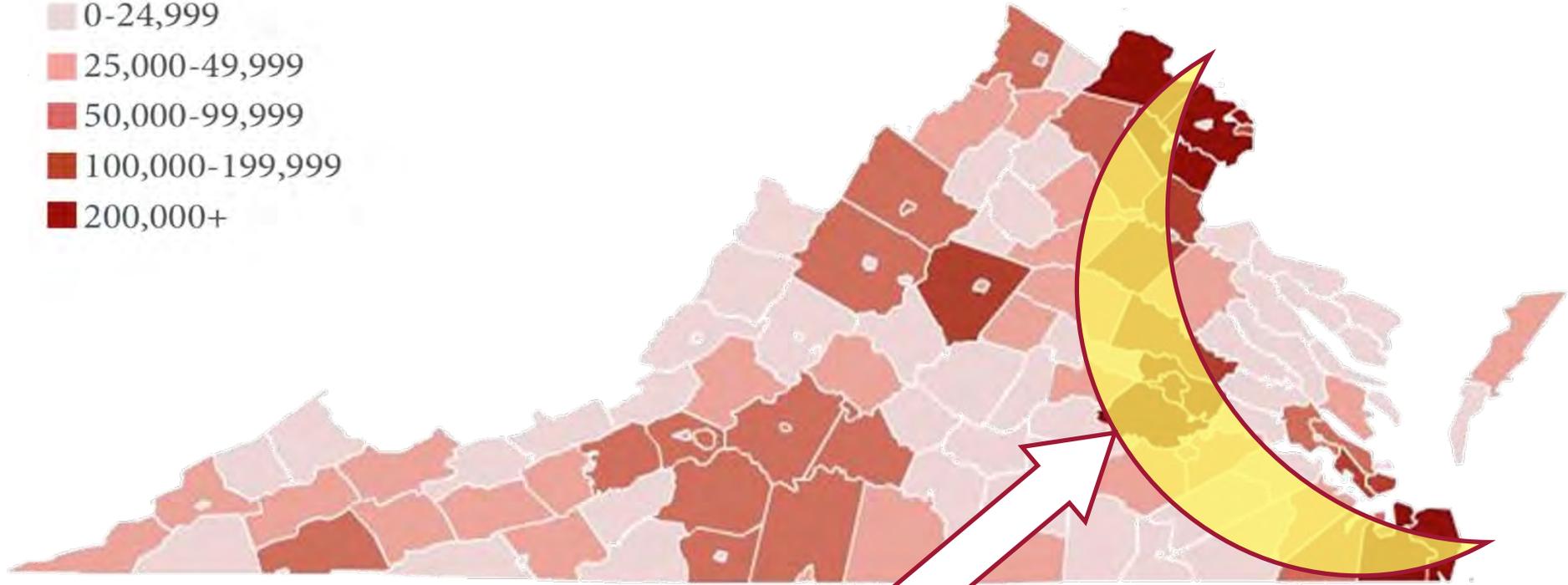


Population Change since 2010



Source: U.S. Census projections, updated May 2016 by the Weldon Cooper Center for Public Service, Demographics & Workforce Group, www.coopercenter.org/demographics, University of Virginia.

Virginia Population Growth



80% of future population growth will occur in the “Golden Crescent”

Walkable Community Trends

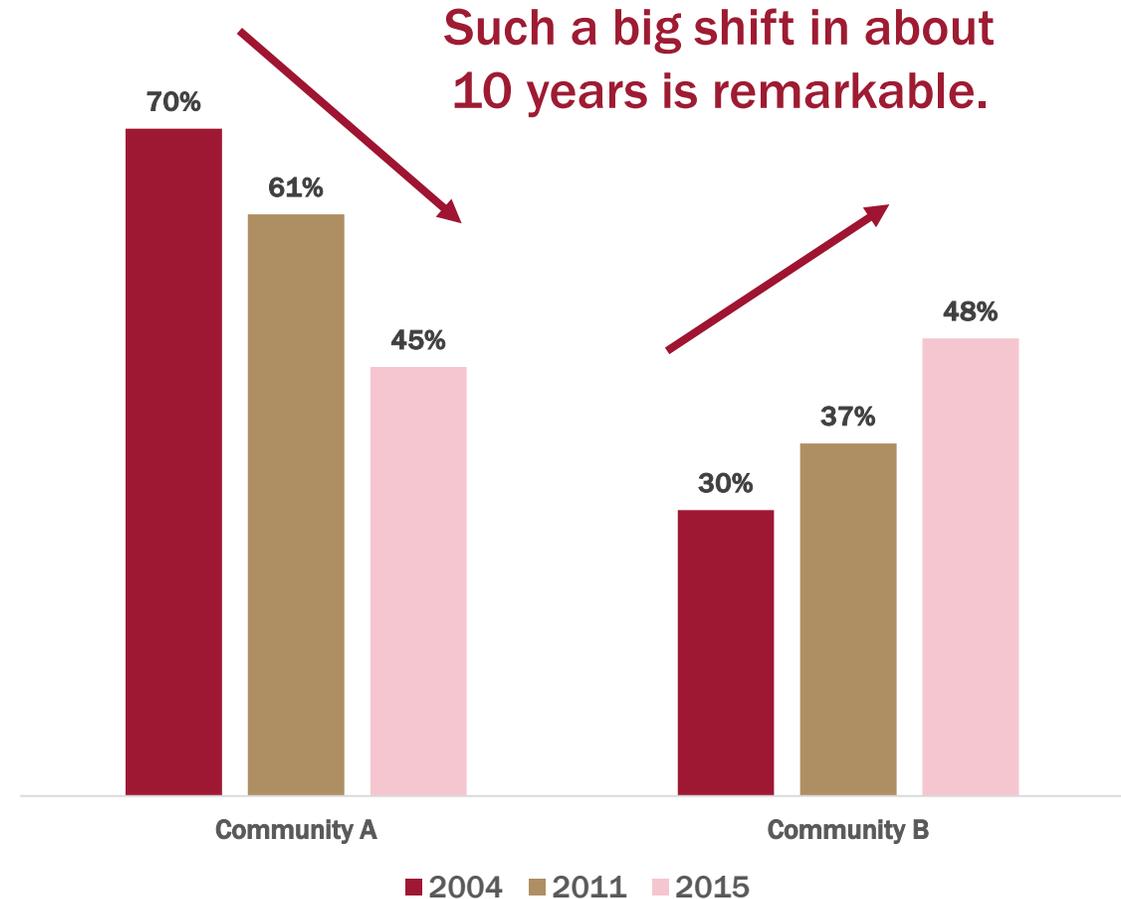
2015 is the first year a preference for **walkable communities** overtook a preference for **conventional communities**.

Community A:

Houses with large yards, and you have to drive to the places you need to go

Community B:

Houses with small yards, and it is easy to walk to the places you need to go



Top desires for “ideal” neighborhood

Percent saying “4” or “5”

Having access to stores, restaurants, and services close to my home (within about 15 minutes)



81%

I would love to live within 15 minutes commute of my work and/or my school.

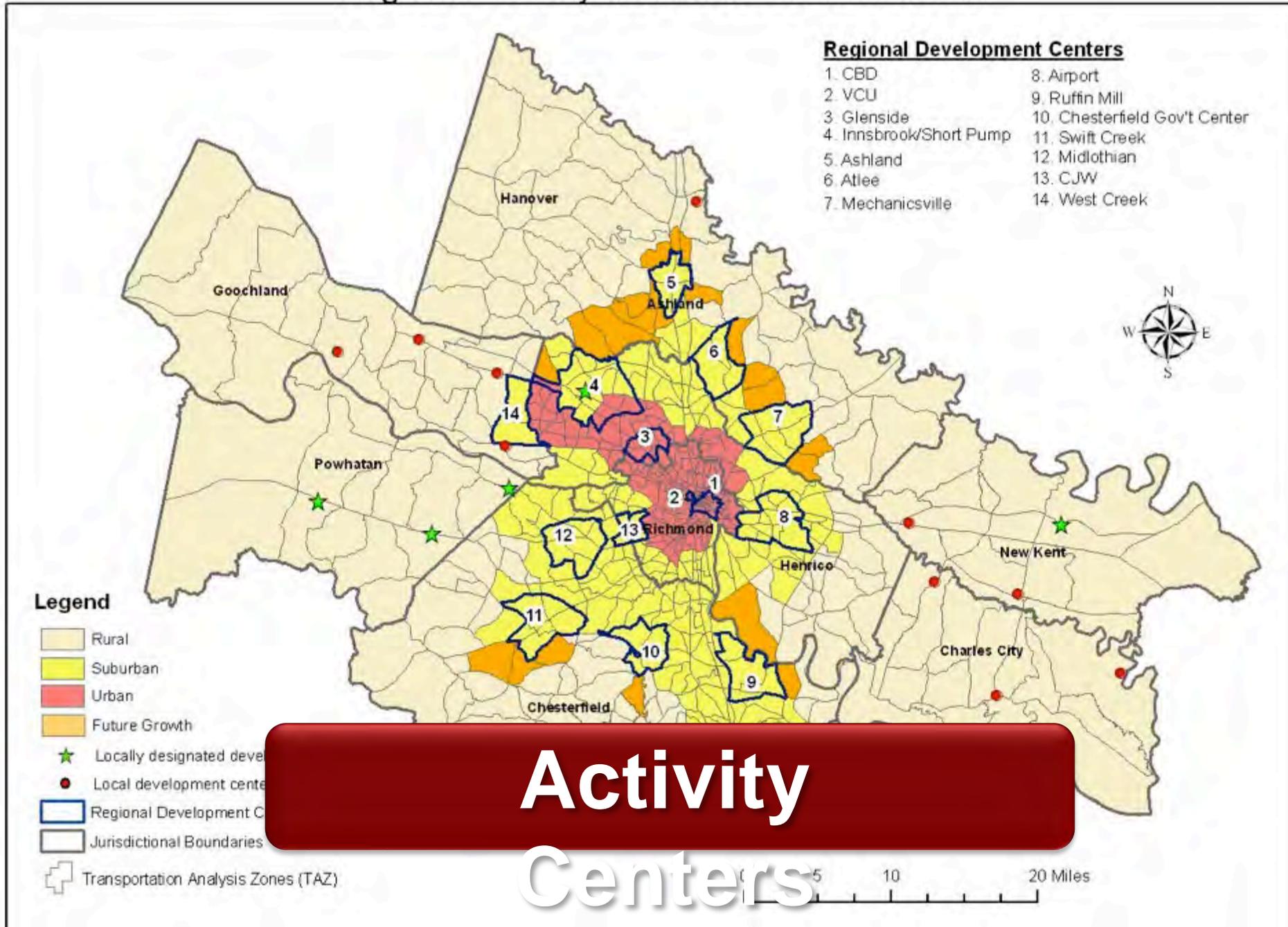


64%

Future Movers
n = 300

Q40. How much do you agree with each of the following statements, when thinking about your ideal neighborhood? Please use a scale of 1 to 5, where “1” means “completely disagree” and “5” means “completely agree.”

Regional Density and 2035 Growth Pattern



New Town



Residents have expressed a lack of support for higher density and mixed-use developments thus fighting a trend of growing communities.

Yet, residents do not show much support for higher density or mixed-use developments

FOCUS AREA	FOCUS IMPORTANCE	RELATED CONCEPT	CONCEPT SUPPORT
Attracting commercial establishments	41%	Increase allowable residential densities	24%
		Increasing the permitted number of homes per acre in some areas	33%
		Rezone some of the vacant land for residential use	44%
		Mixed-use development	45%



2

AGE SHIFTS
BALANCED
POPULATION GROWTH

U.S. LIFE EXPECTANCY

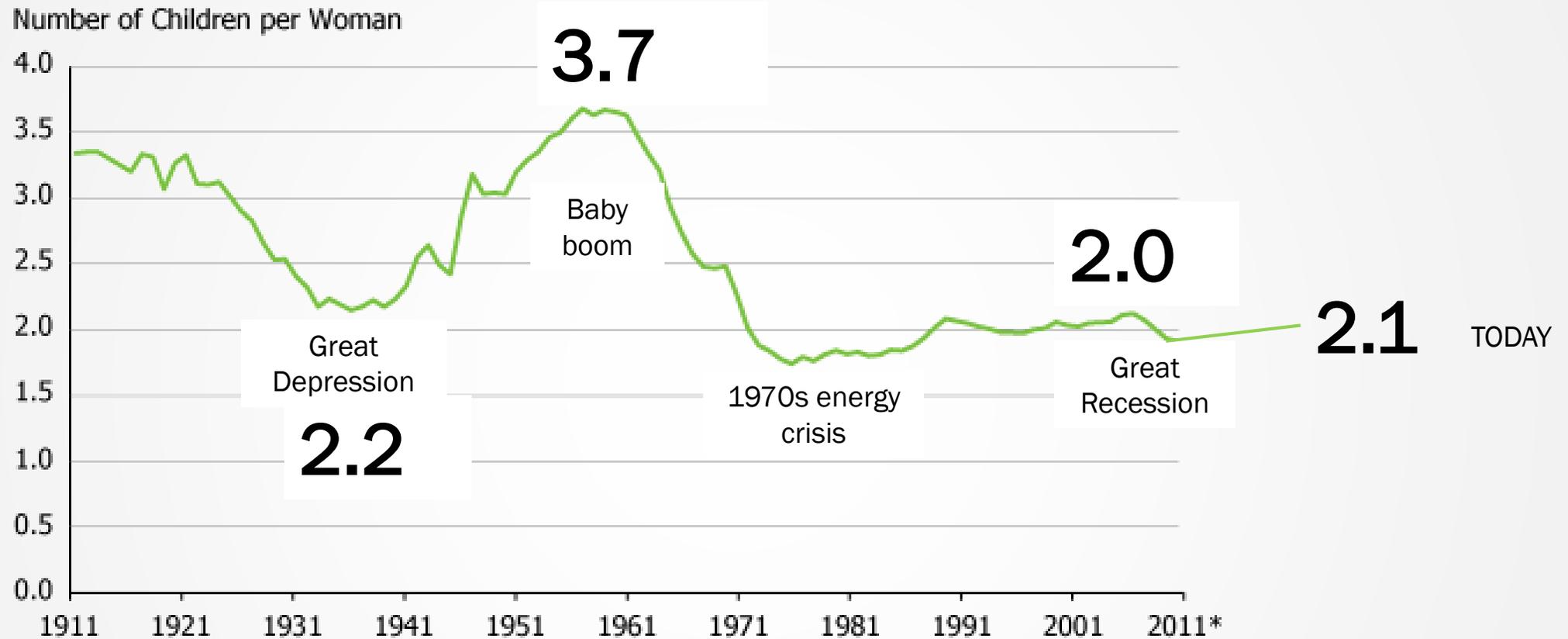




AT THE SAME TIME:
U.S. BIRTH RATES HAVE
DECLINED

Shifting birth rates

Total fertility rate



Source: Population Reference Bureau. <http://www.prb.org/publications/datasheets/2012/world-population-data-sheet/fact-sheet-us-population.aspx>



A large, golden-brown pyramid, likely the Great Pyramid of Giza, is the central focus of the image. The pyramid is set against a plain white background. Overlaid on the pyramid are four stages of human life, written in bold, black, sans-serif capital letters. The text is arranged in a vertical stack, with each stage positioned at a different height on the pyramid's face. The pyramid's surface shows some texture and shadows, suggesting a light source from the upper left. At the very bottom of the pyramid, there are some small, faint silhouettes of what appear to be camels and people, adding a sense of scale and context to the scene.

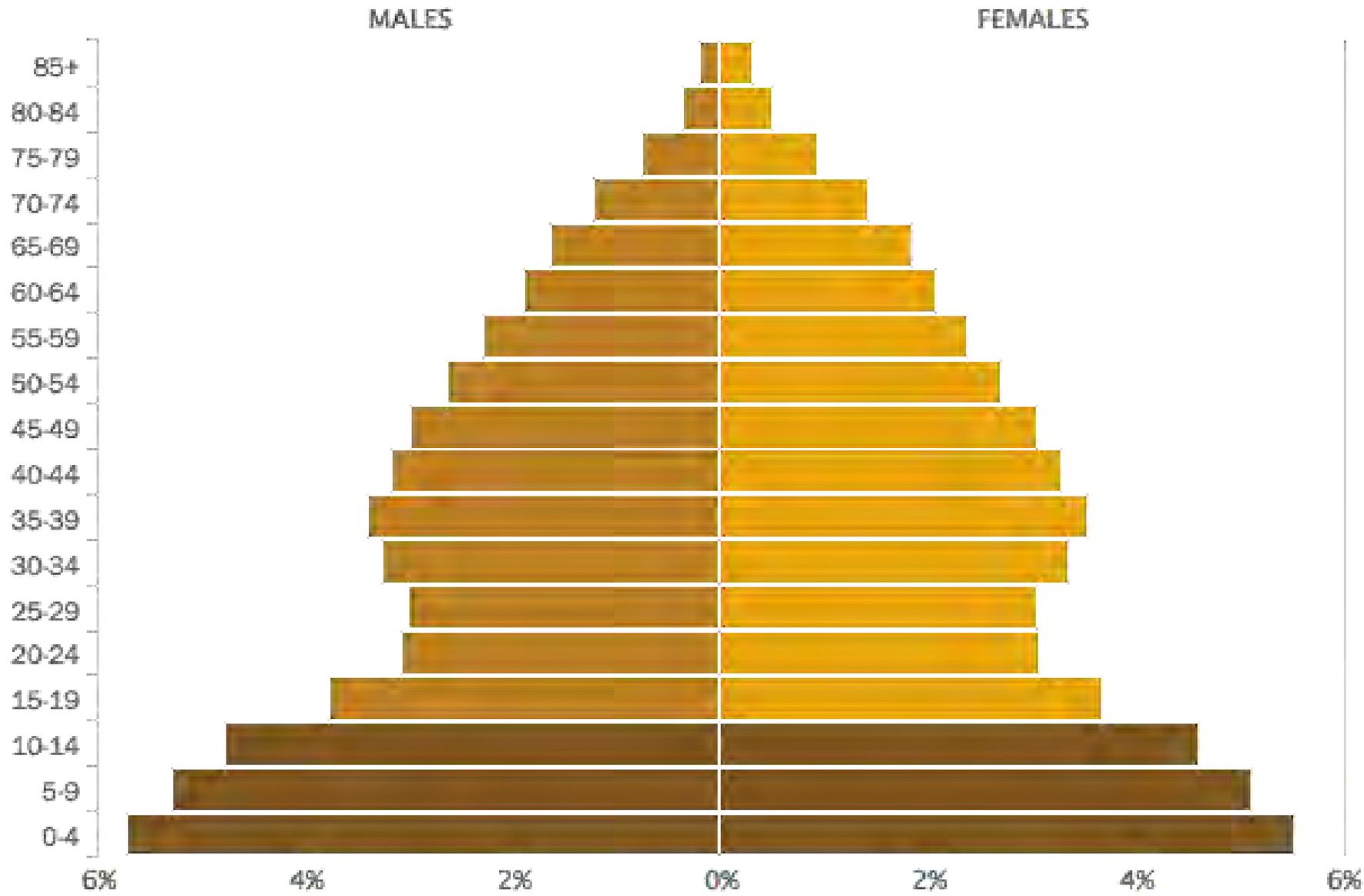
OLD AGE

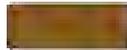
MIDLIFE

YOUNG ADULT

YOUTH

1960

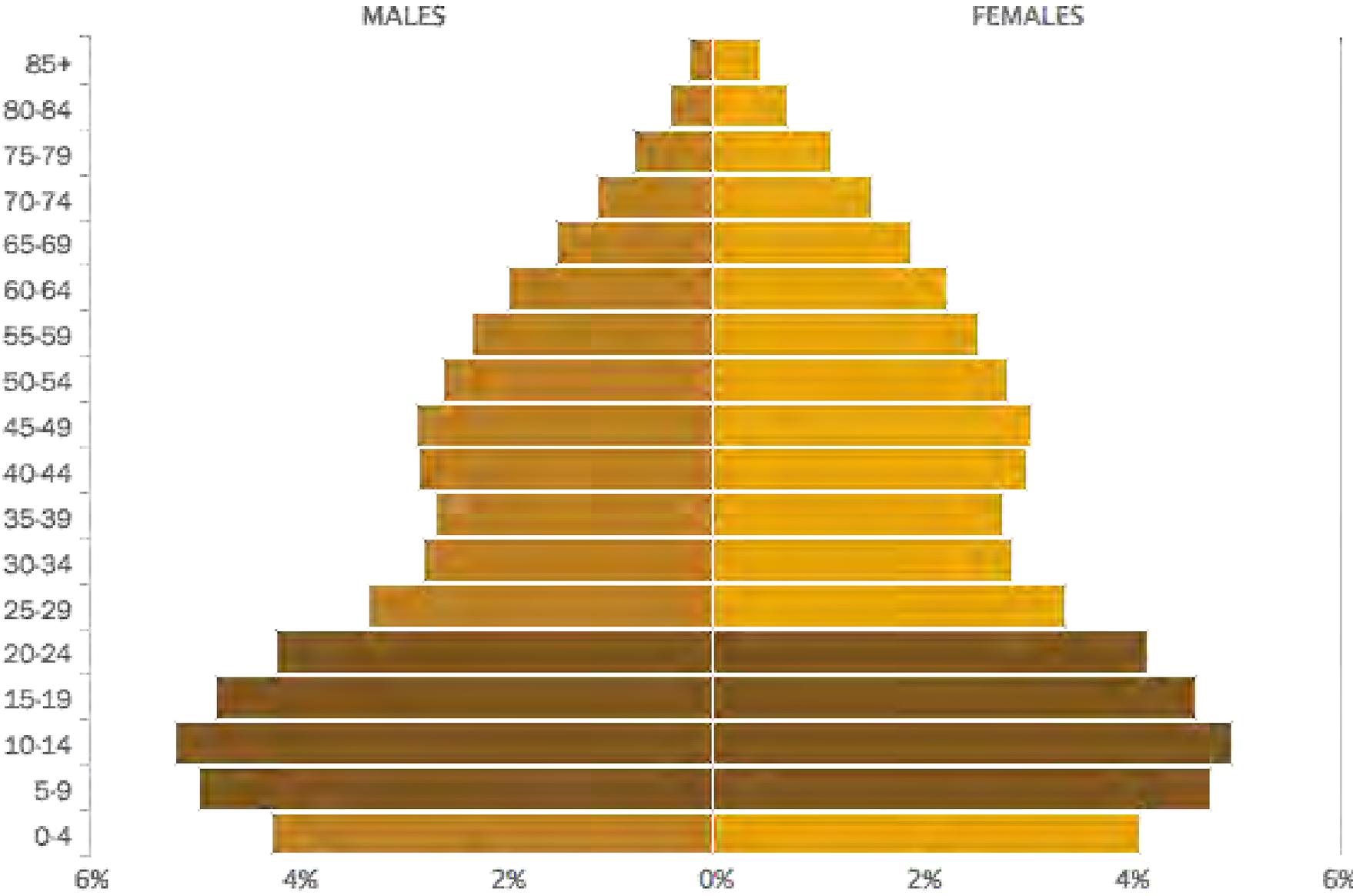


 Baby Boomers (born 1946-1964)

Source: U.S. Census Bureau



1970

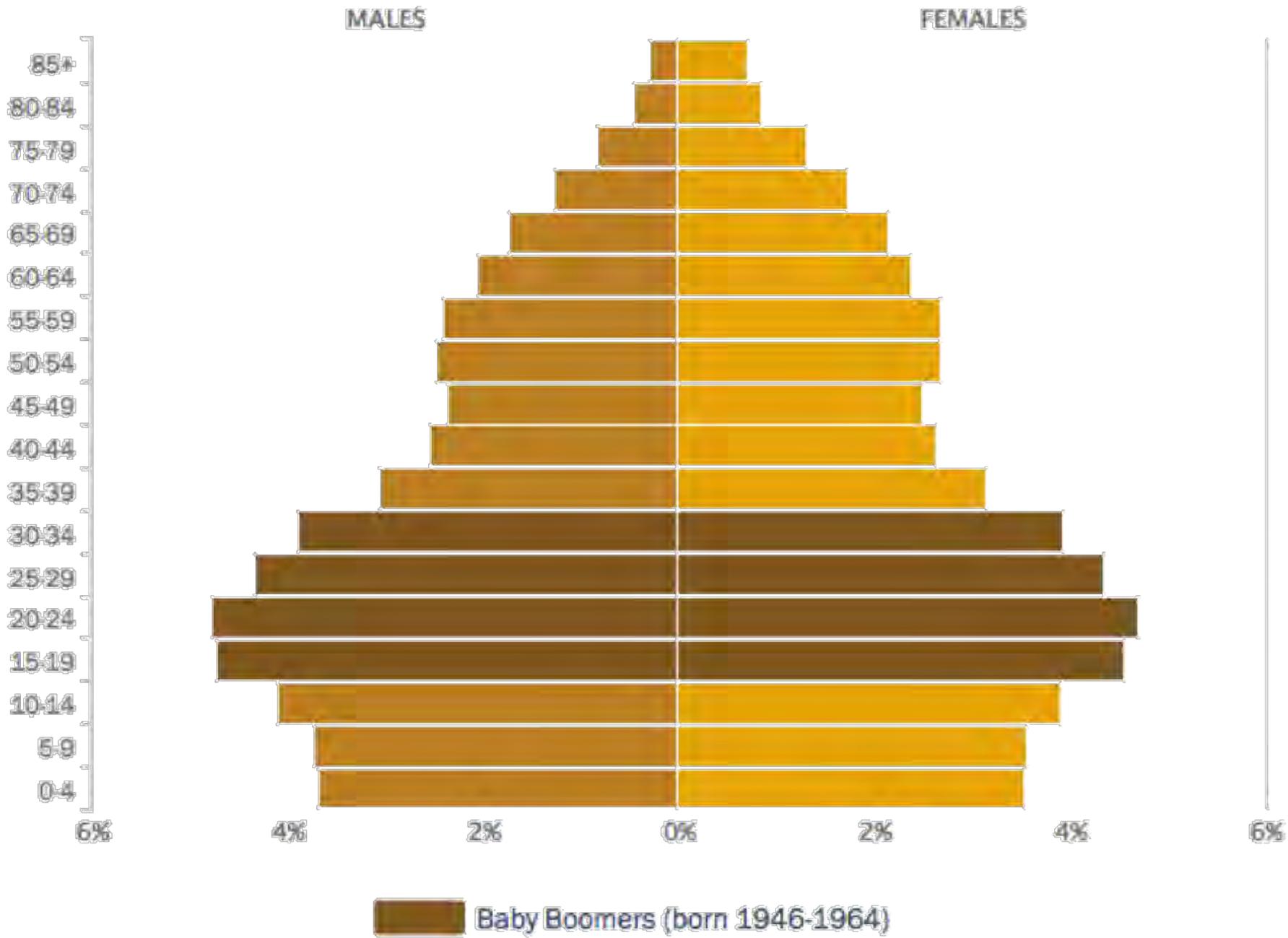


 Baby Boomers (born 1946-1964)

Source: U.S. Census Bureau



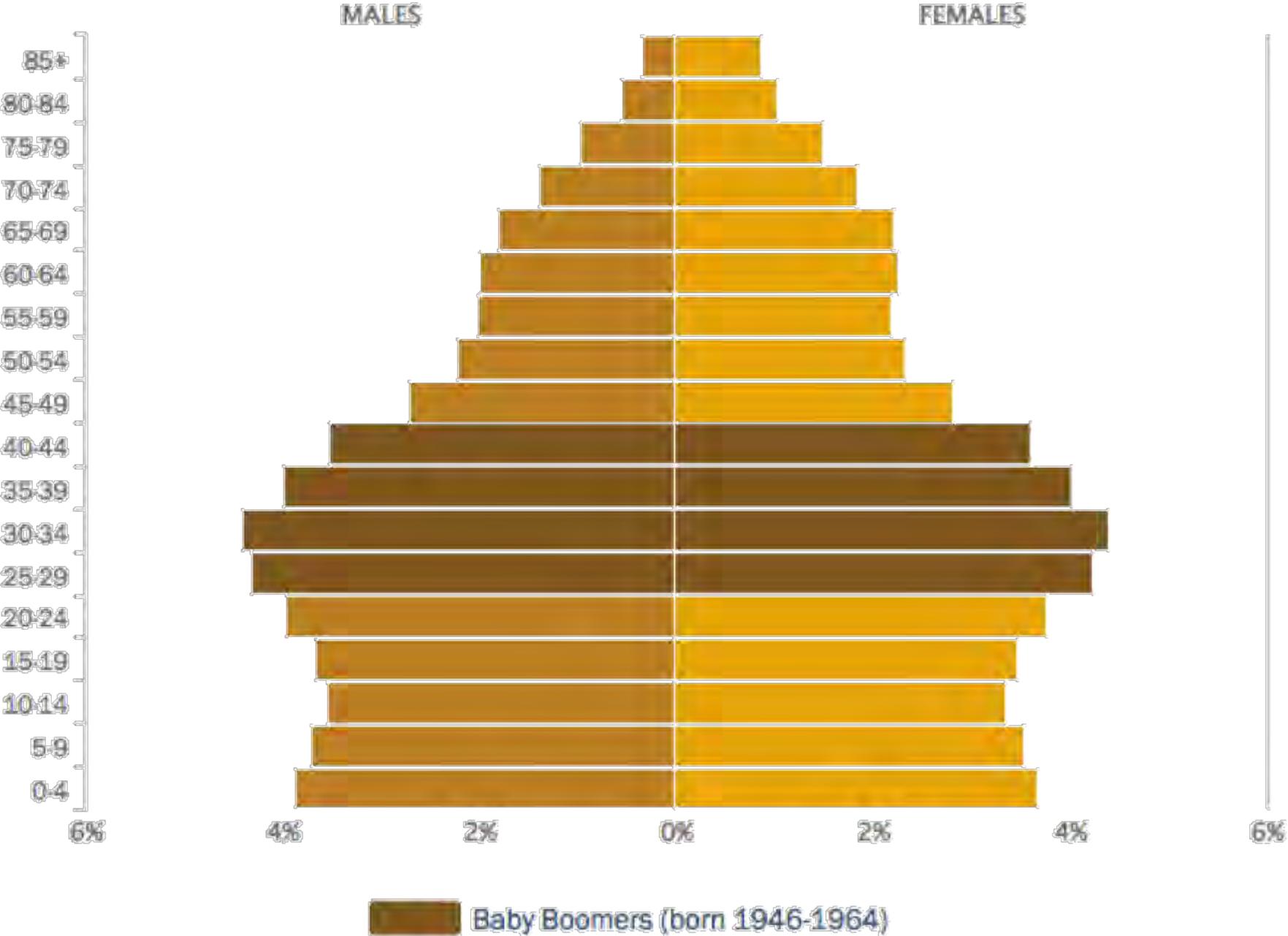
1980



Source: U.S. Census Bureau



1990

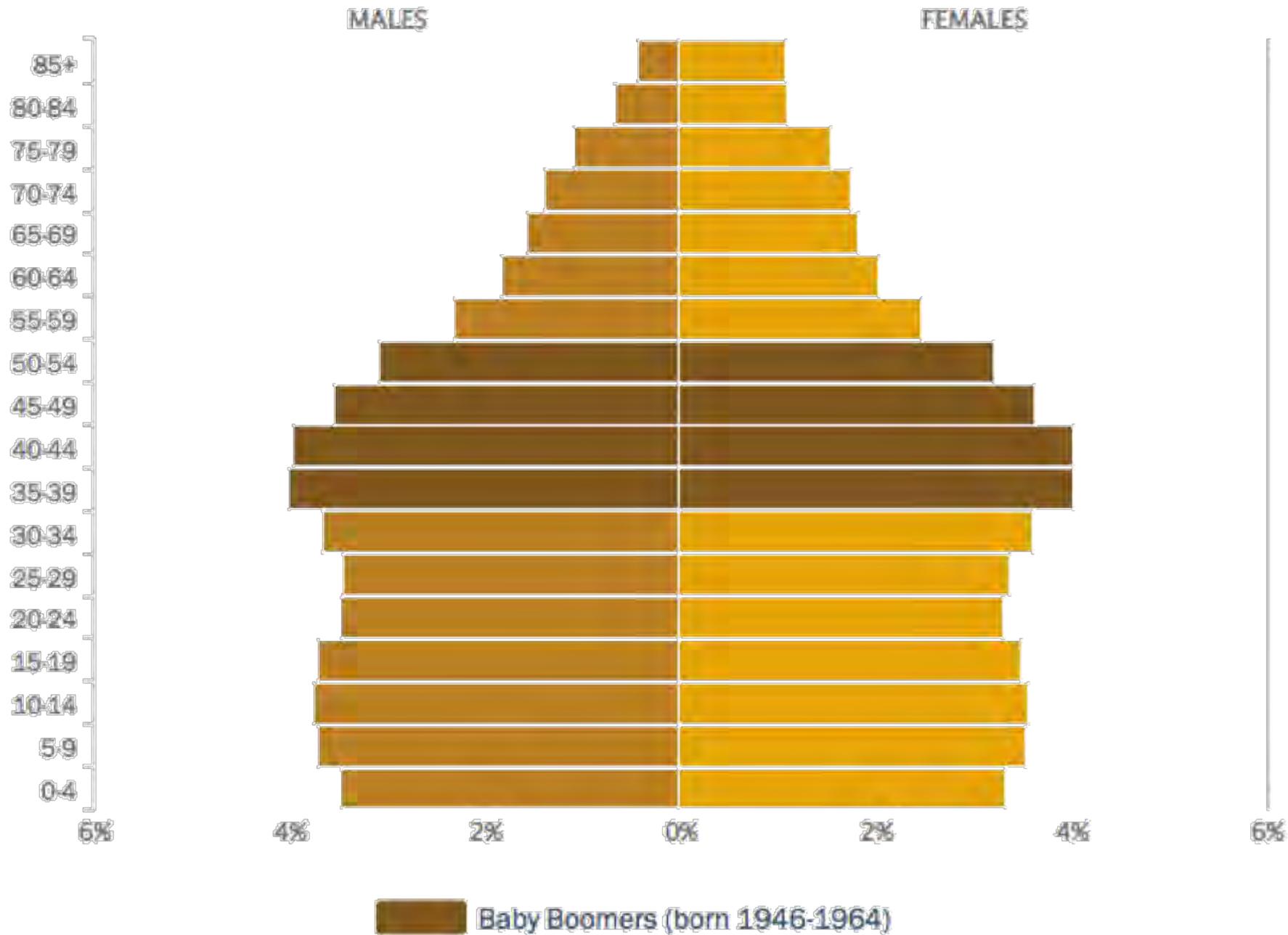


 Baby Boomers (born 1946-1964)

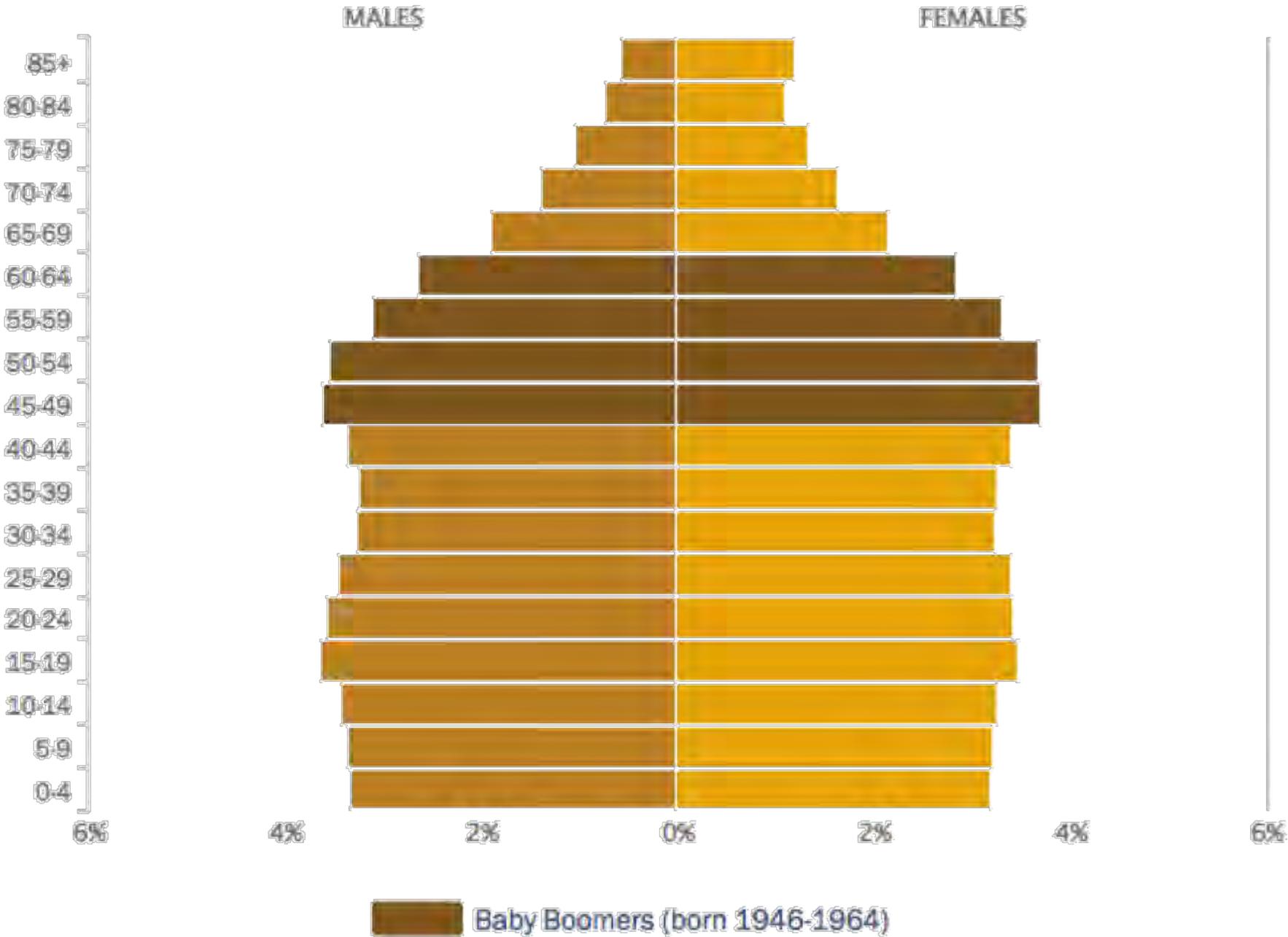


Source: U.S. Census Bureau

2000



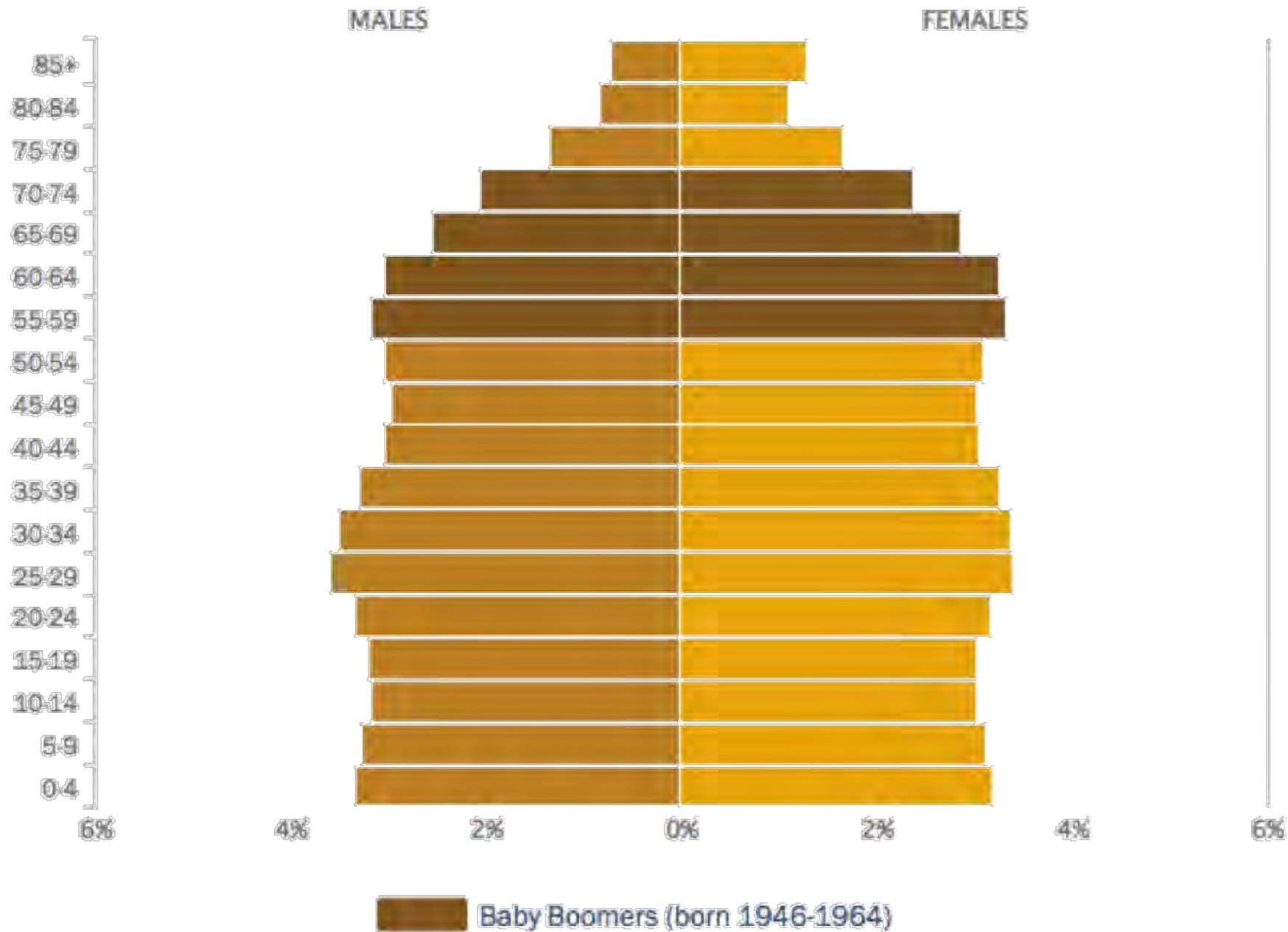
2010



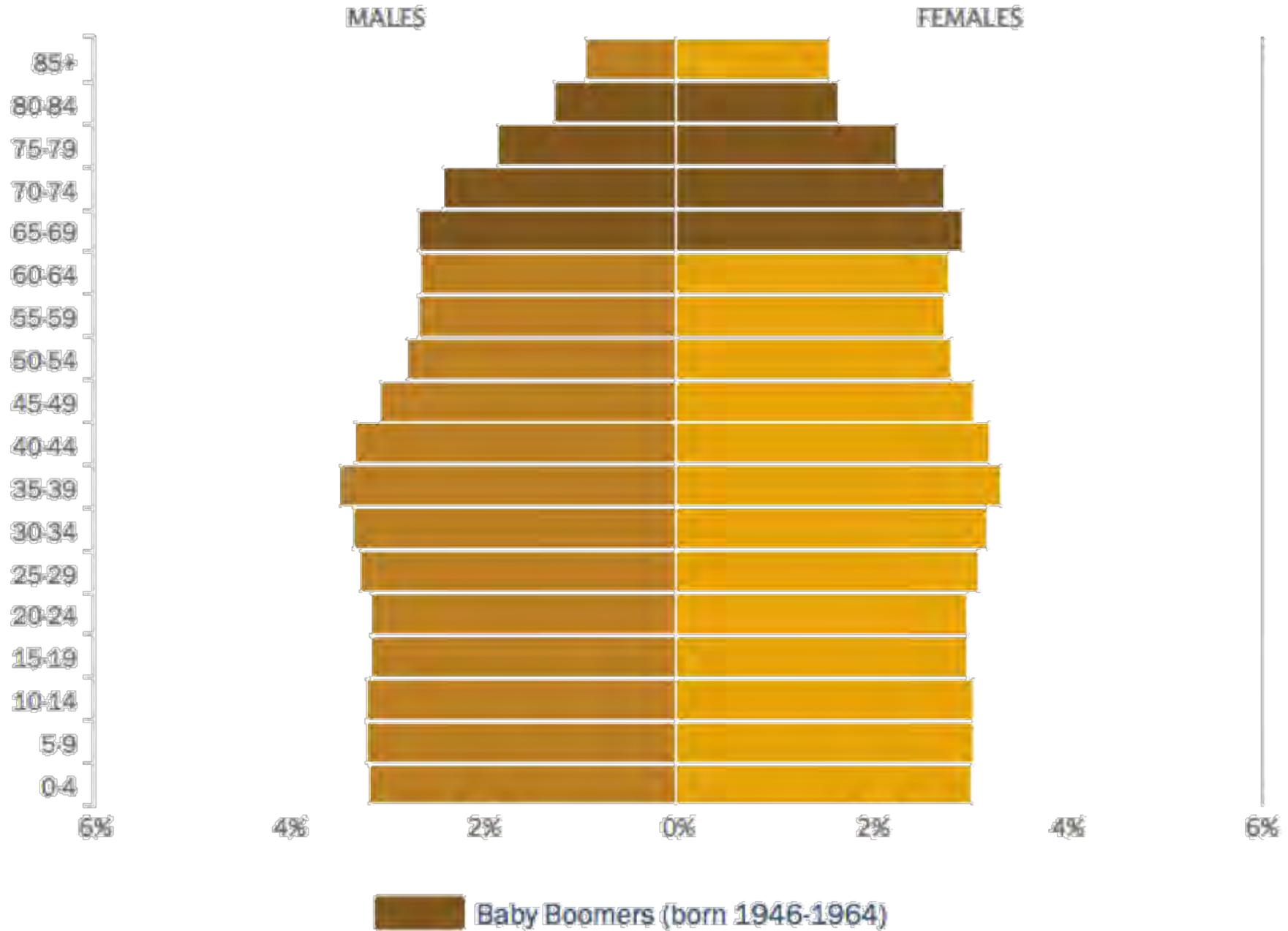
Source: U.S. Census Bureau



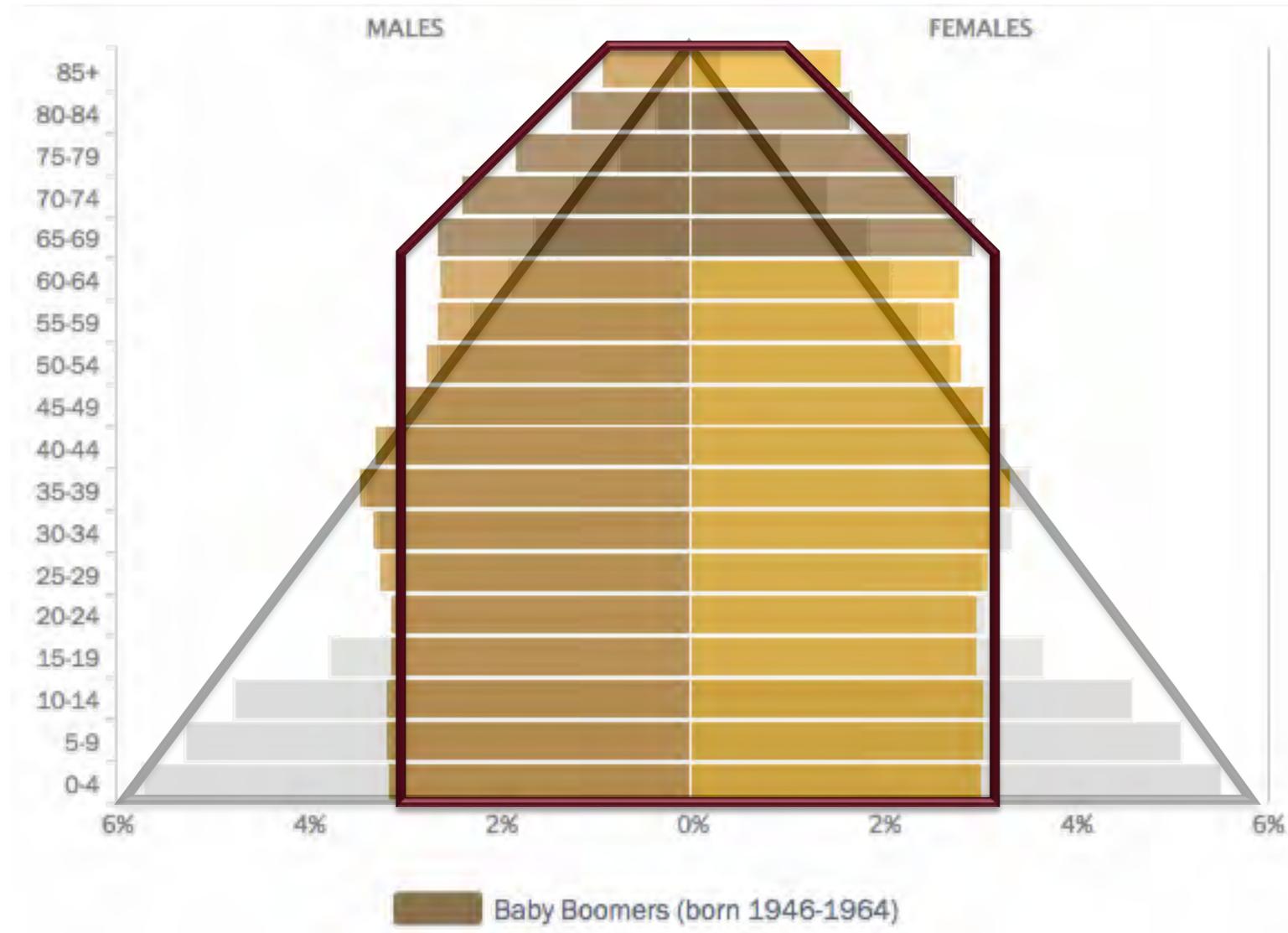
2020

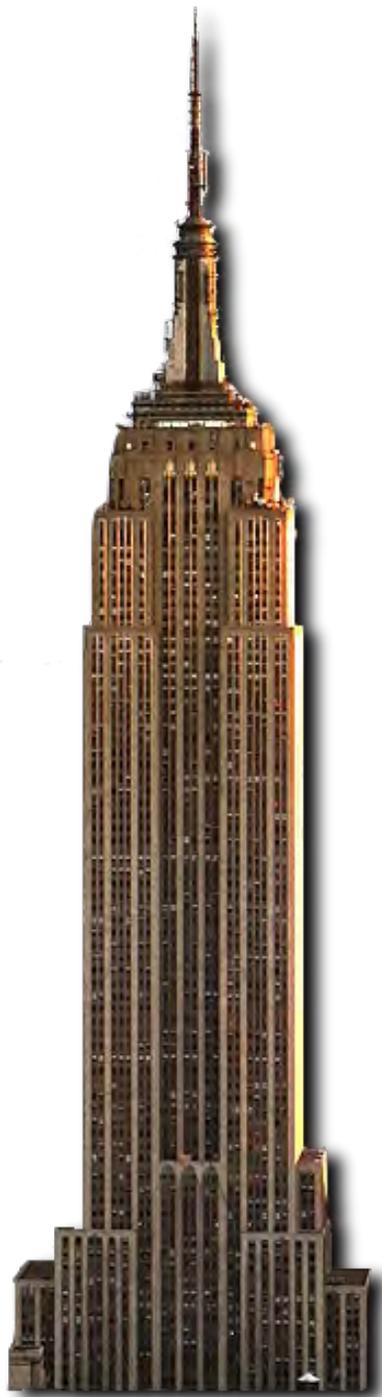


2030



1960 vs. 2030





OLD AGE

MIDLIFE

YOUNG ADULT

YOUTH



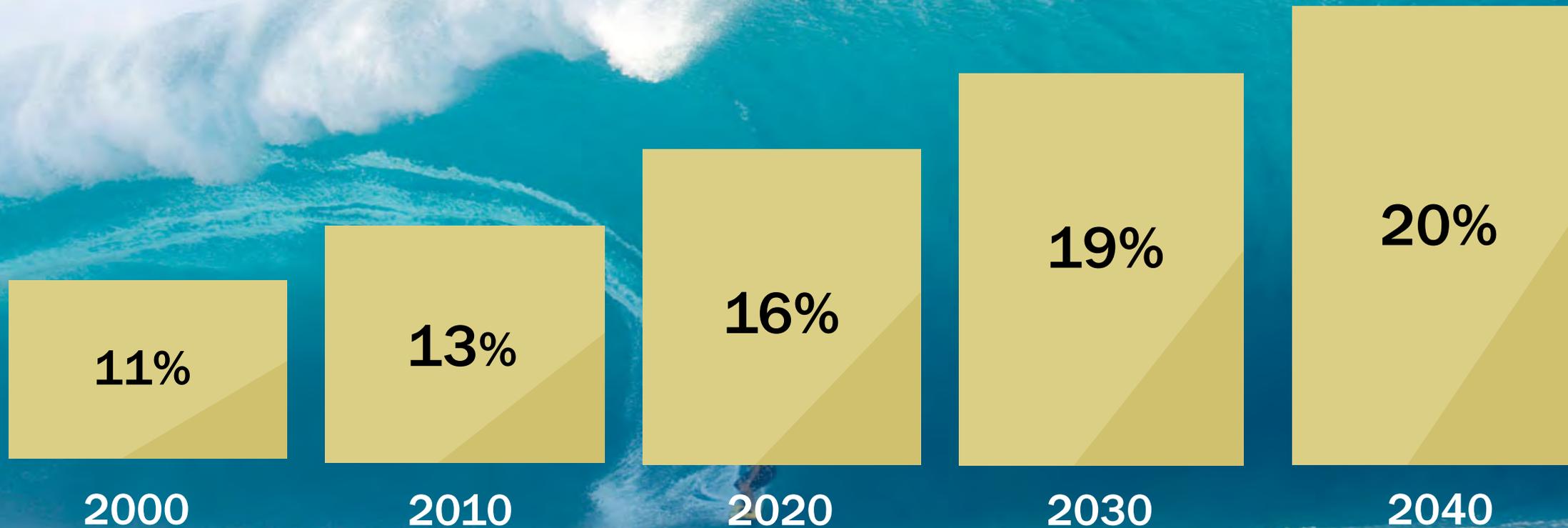
THE AGE SHIFT

The future is
“Older”

In the U.S.
the population over
age 65 will grow
from
54 million
today to
73 million
by 2030



U.S. Population 65+



A satellite view of the state of Florida, showing its characteristic shape and surrounding waters. The word "FLORIDA" is written vertically in large, bold, red letters across the center of the state. To the right of the state, there is a text overlay in white and yellow. The background is a blue-tinted satellite image of the Earth's surface.

FLORIDA

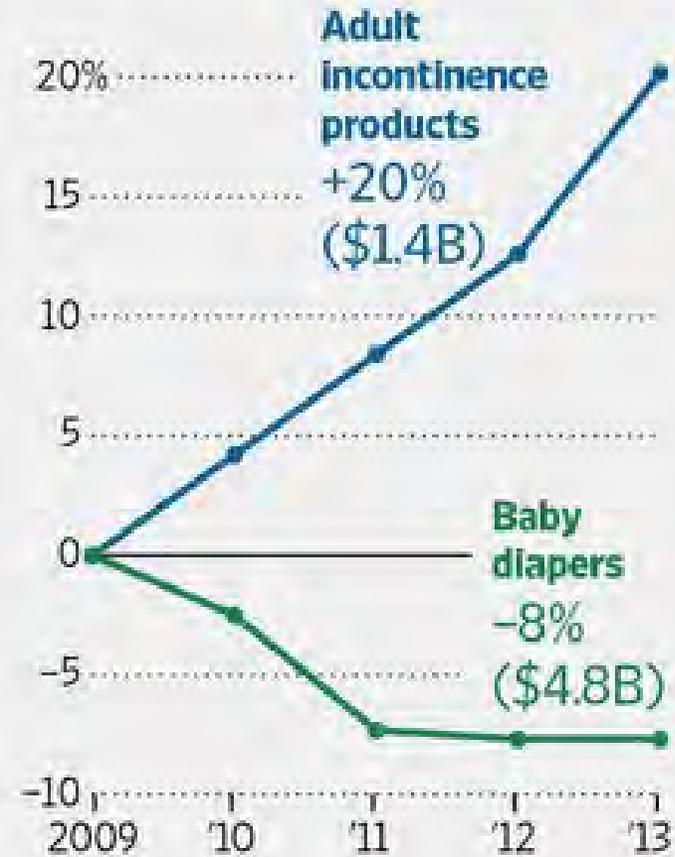
20%

of population is
65+

More proof:

Diverging Trend

Percentage change in U.S. sales from 2009 to 2013

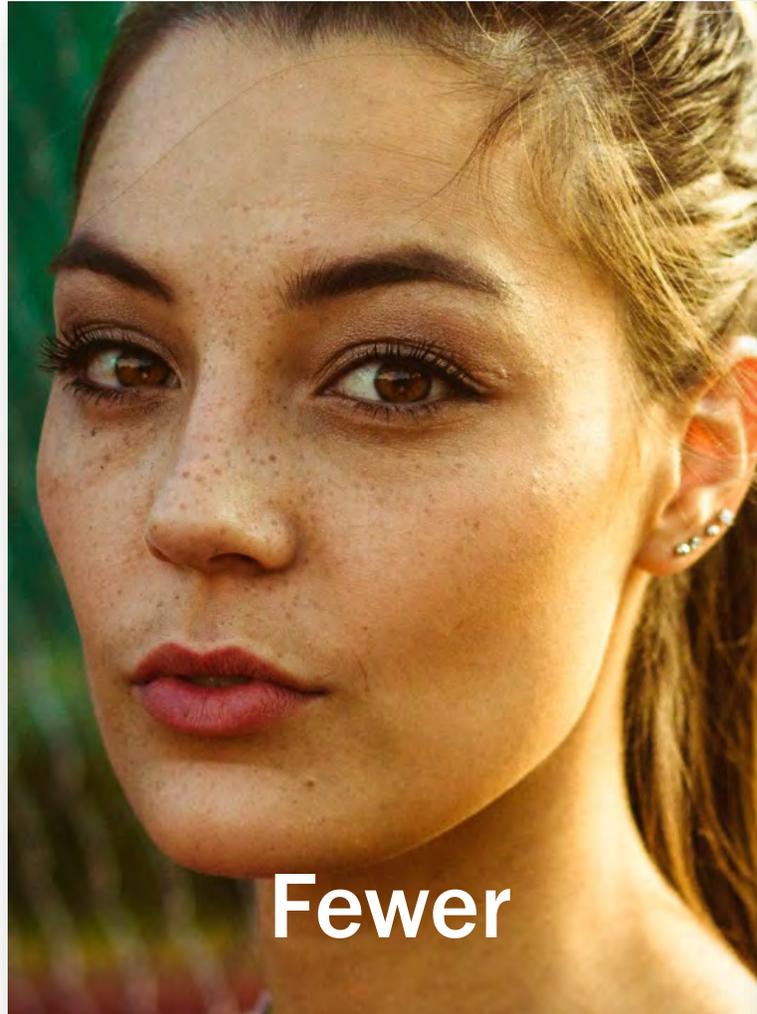


Source: IRI

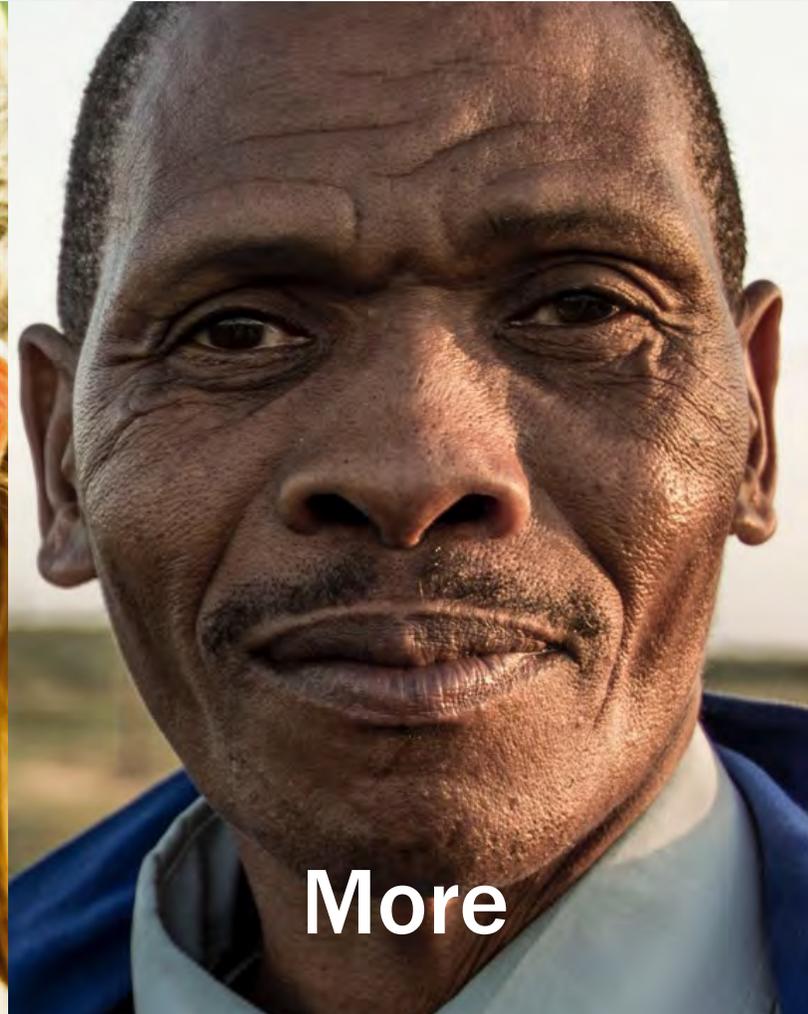
The Wall Street Journal



THERE'S AN AGE SHIFT IN VIRGINIA



Fewer



More

VIRGINIA



The seal of the Commonwealth of Virginia is centered in the background. It features a female figure, Liberty, standing on a globe, holding a staff with a Phrygian cap. The figure is surrounded by a wreath of laurel and oak leaves. The word "VIRGINIA" is inscribed in an arc above the figure, and the motto "SIC SEMPER TYRANNIS" is inscribed in an arc below. The seal is set against a dark red background.

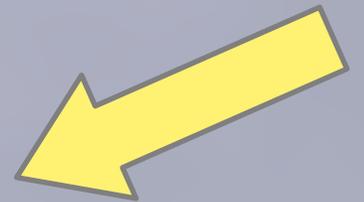
TODAY	2030
8.7	9.3
million	million

+8%

WHAT ARE THE COMPONENTS OF THAT GROWTH?

AGES	2020	2030
0-19	2,158,779	2,286,031
20-64	5,213,777	5,322,253
65+	1,352,448	1,723,381
TOTAL	8,655,021	9,331,666

+7.8%



WHAT ARE THE COMPONENTS OF THAT GROWTH?

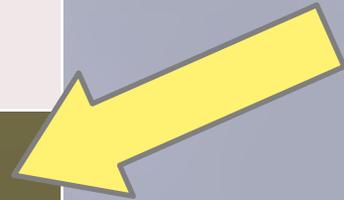
AGES	2020	2030	Change
0-19	2,158,779	2,286,031	+127,252
20-64	5,213,777	5,322,253	+108,476
65+	1,352,448	1,723,381	+370,933
TOTAL	8,655,021	9,331,666	+676,645

Source: SIR analysis of current Census data from Cooper Center on Demographics, UVA



55% OF VIRGINIA POPULATION CHANGE IS 65+

AGES	2020	2030	Change
0-19	2,158,779	2,286,031	+127,252
20-64	5,213,777	5,322,253	+108,476
65+	1,352,448	1,723,381	+370,933
TOTAL	8,655,021	9,331,666	+676,645



YORK COUNTY IS ALSO GROWING

AGES	2020	2030
5-19	14,704	15,808
20-64	39,167	39,602
65+	11,723	15,707
TOTAL	69,582*	75,492*

* INCLUDES 0-4

+8.5%

AND, YORK COUNTY IS ALSO GROWING OLDER

AGES	2020	2030	Change
5-19	14,704	15,808	+1,104
20-64	39,167	39,602	+435
65+	11,723	15,707	+3,984
TOTAL	69,582*	75,492*	+5,910*

* INCLUDES 0-4

JUST 1% INCREASE IN 20-64 SEGMENT

AGES	2020	2030	Change
5-19	14,704	15,808	+1,104
20-64	39,167	39,602	+435
65+	11,723	15,707	+3,984
TOTAL	69,582*	75,492*	+5,910*

* INCLUDES 0-4

THESE NUMBERS TELL A DIFFERENT STORY

AGES	2020	2030	
5-19	14,704	15,808	+7.5%
20-64	39,167	39,602	+1.1%
65+	11,723	15,707	+34.0%
TOTAL	69,582*	75,492*	+8.5%

* INCLUDES 0-4

OUR GROWTH ISN'T MORE BABIES BEING BORN





OUR GROWTH ISN'T MORE PEOPLE COMING HERE

IT'S MORE PEOPLE LIVING LONGER



Projected growth each year between 2020-2030

INCREASE OF



**SCHOOL AGED
PEOPLE**

INCREASE OF

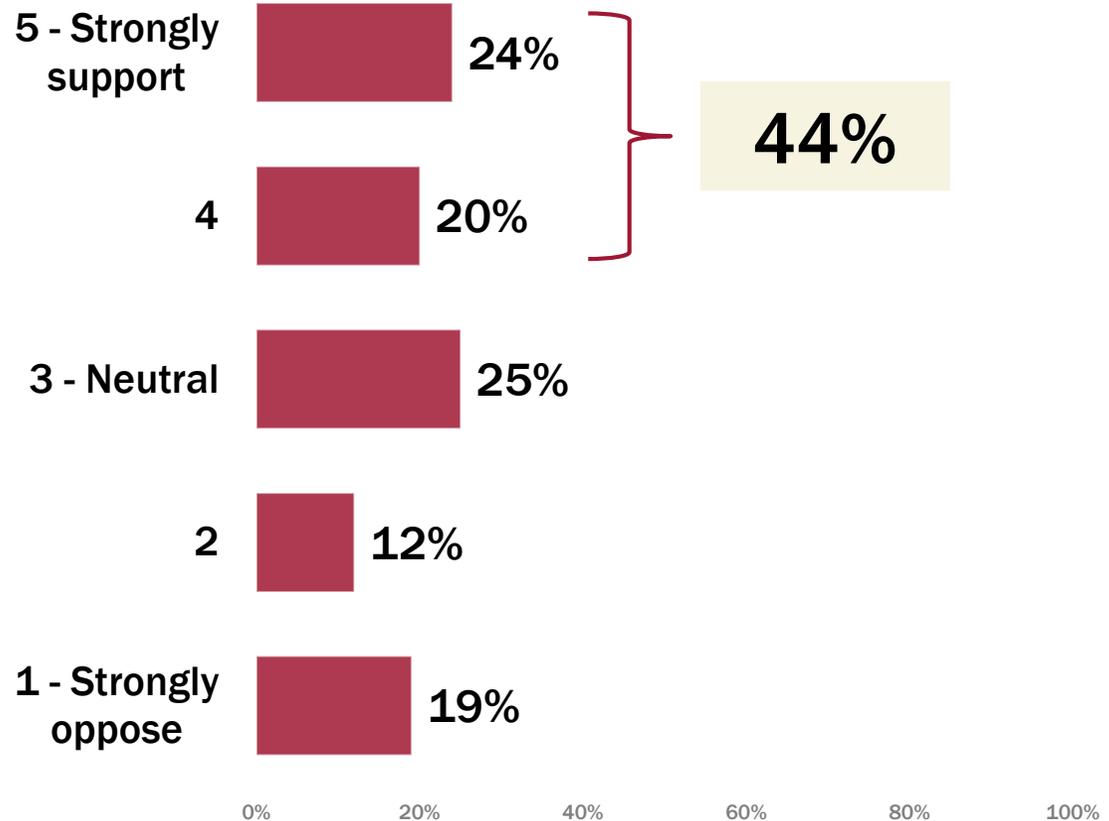
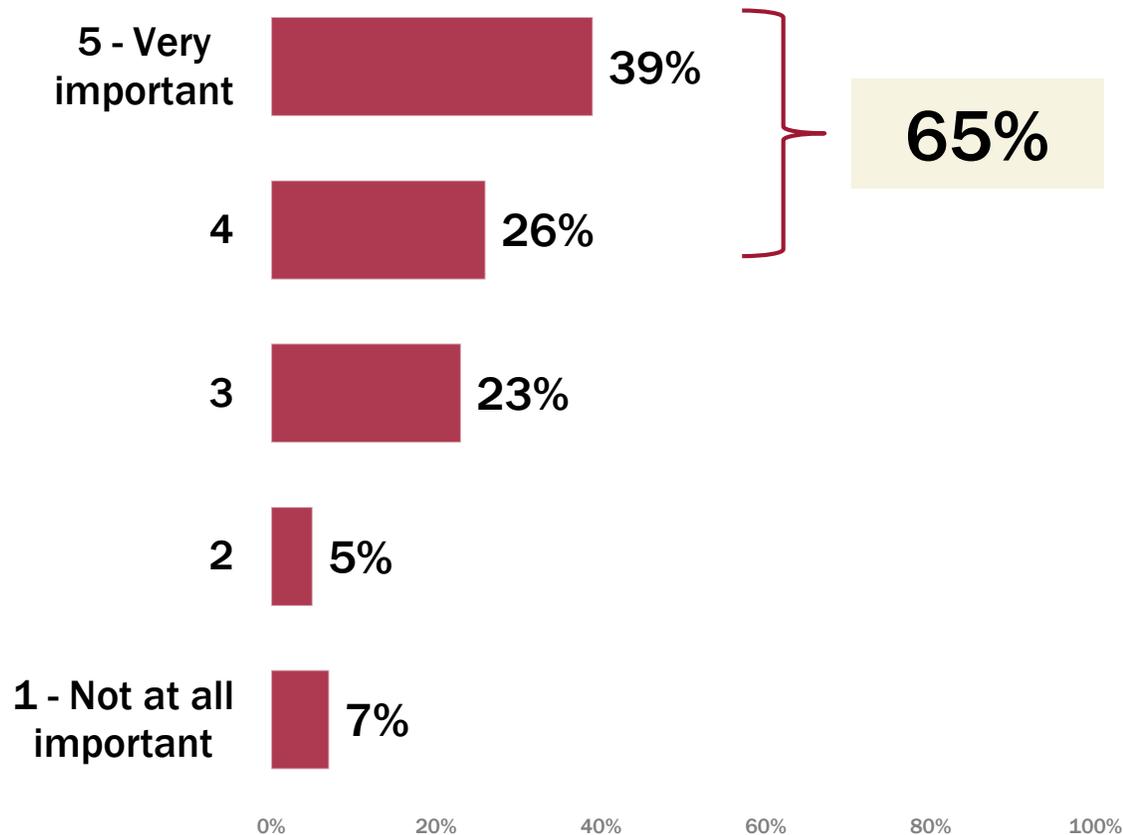


**PEOPLE
AGE 65+**

Residents say balanced population growth is important. But they are less supportive of some efforts that could help encourage balanced growth.

Q15. ... how important do you feel is for York County to focus on encouraging and attracting a balanced population growth in the next 20 years (such as younger families)?

Q16. One way to encourage population growth in York County would be to **rezone some of the vacant land for residential use**. This rezoning could also help attract new businesses and commercial establishments.



3

AGE SHIFTS SCHOOLS

The priority among residents is schools. The key will be less focus on more schools but better schools.

Schools are the most important across segments

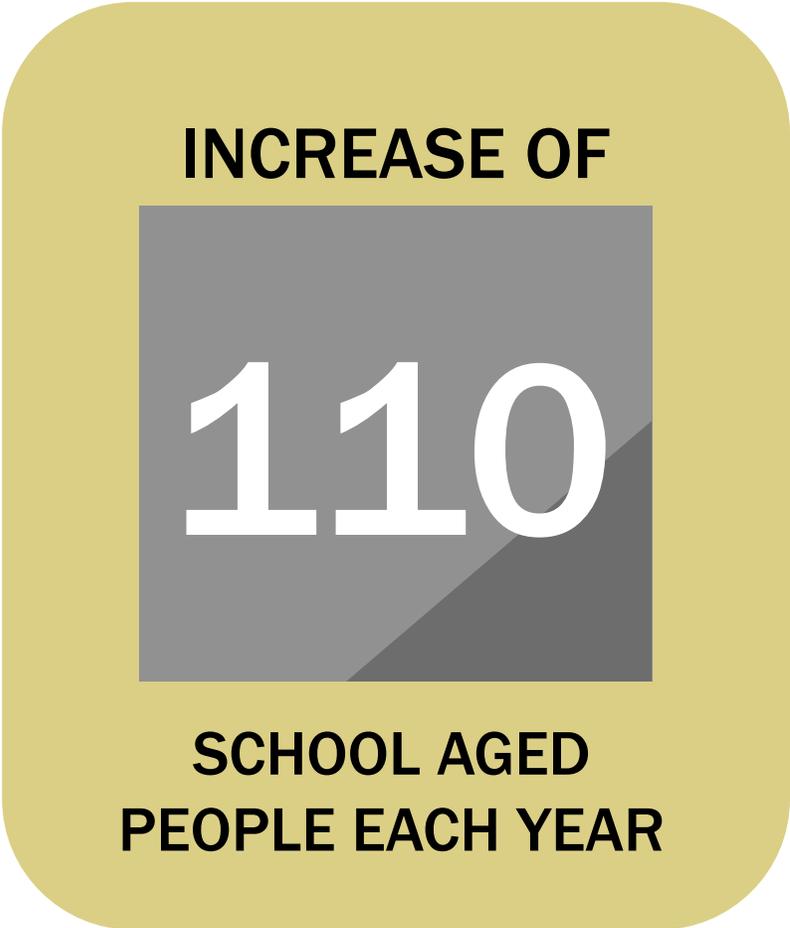
	GENERATION			RACE		LOCATION	
	Millennials or younger	Gen X	Boomers +	White	Minority	Upper York	Lower York
1	Schools						
2	Flooding and sea level rise mitigation	Flooding and sea level rise mitigation	Roads	Flooding and sea level rise mitigation	Roads	Roads	Flooding and sea level rise mitigation
3	Parks for active recreation	Roads	Flooding and sea level rise mitigation	Roads	Flooding and sea level rise mitigation	Parks for active recreation	Roads
4	Sidewalks	Parks for active recreation	Fire Stations	Parks for active recreation	Sidewalks	Fire Stations	Parks for active recreation
5	Roads	Access to water	Parks for active recreation	Bike Paths	Parks for passive recreation	Flooding and sea level rise mitigation	Bike Paths

THESE NUMBERS TELL A DIFFERENT STORY

AGES	2020	2030	
5-19	14,704	15,808	+7.5%
20-64	39,167	39,602	+1.1%
65+	11,723	15,707	+34.0%
TOTAL	69,582*	75,492*	+8.5%

* INCLUDES 0-4

Projected growth each year between 2020-2030



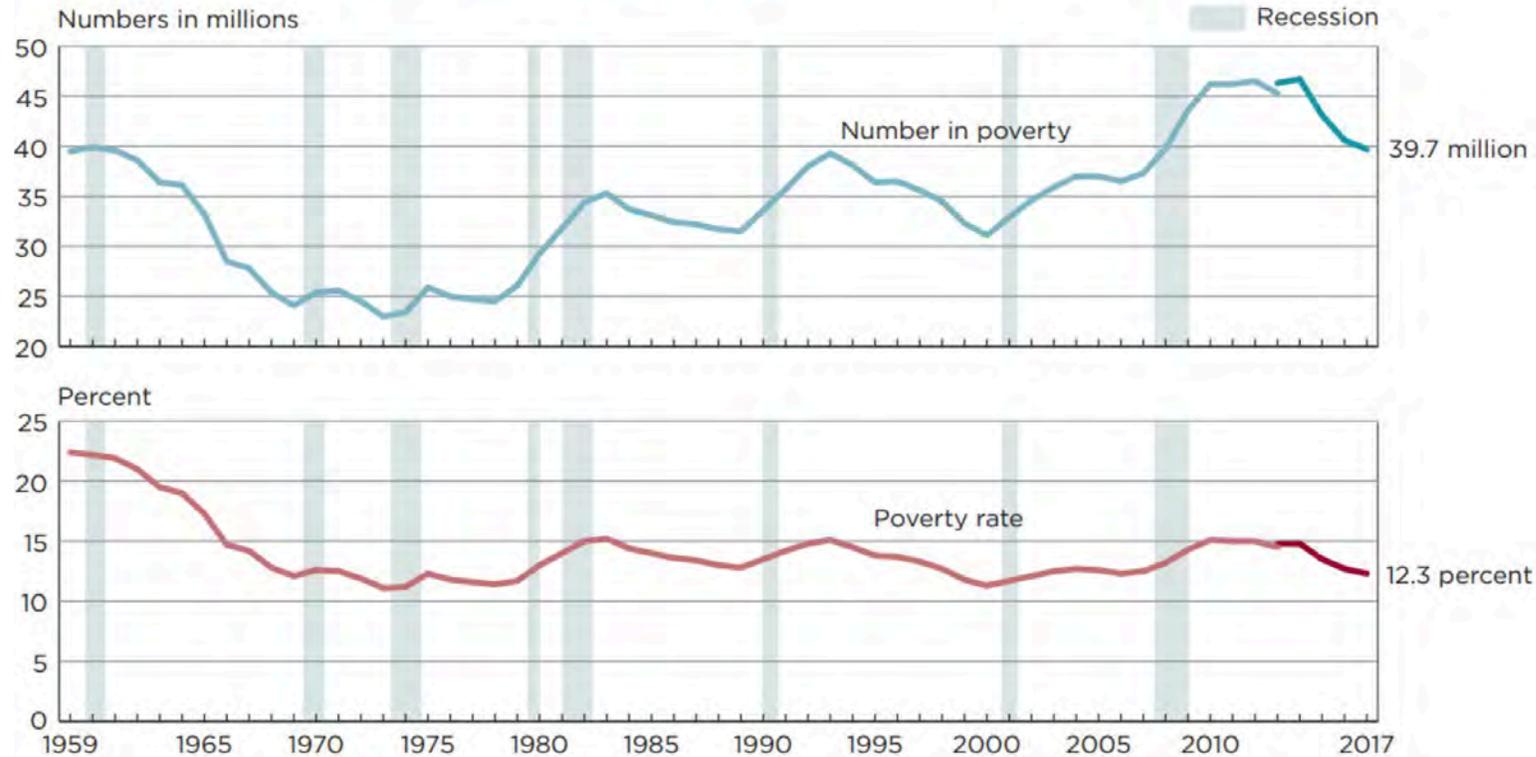
**So, it may not necessarily mean
build MORE schools but rather
IMPROVE current schools.**

4

**WEALTH/POVERTY
SHIFT
MODERATELY-PRICED
HOUSING**

U.S. POVERTY RATE AND PEOPLE

Figure 4.
Number in Poverty and Poverty Rate: 1959 to 2017



**Number of people
up from 25 to
40 million over last
40 years**

**Rate stable for
last 40 years**

HOUSING & TRANSPORTATION COSTS

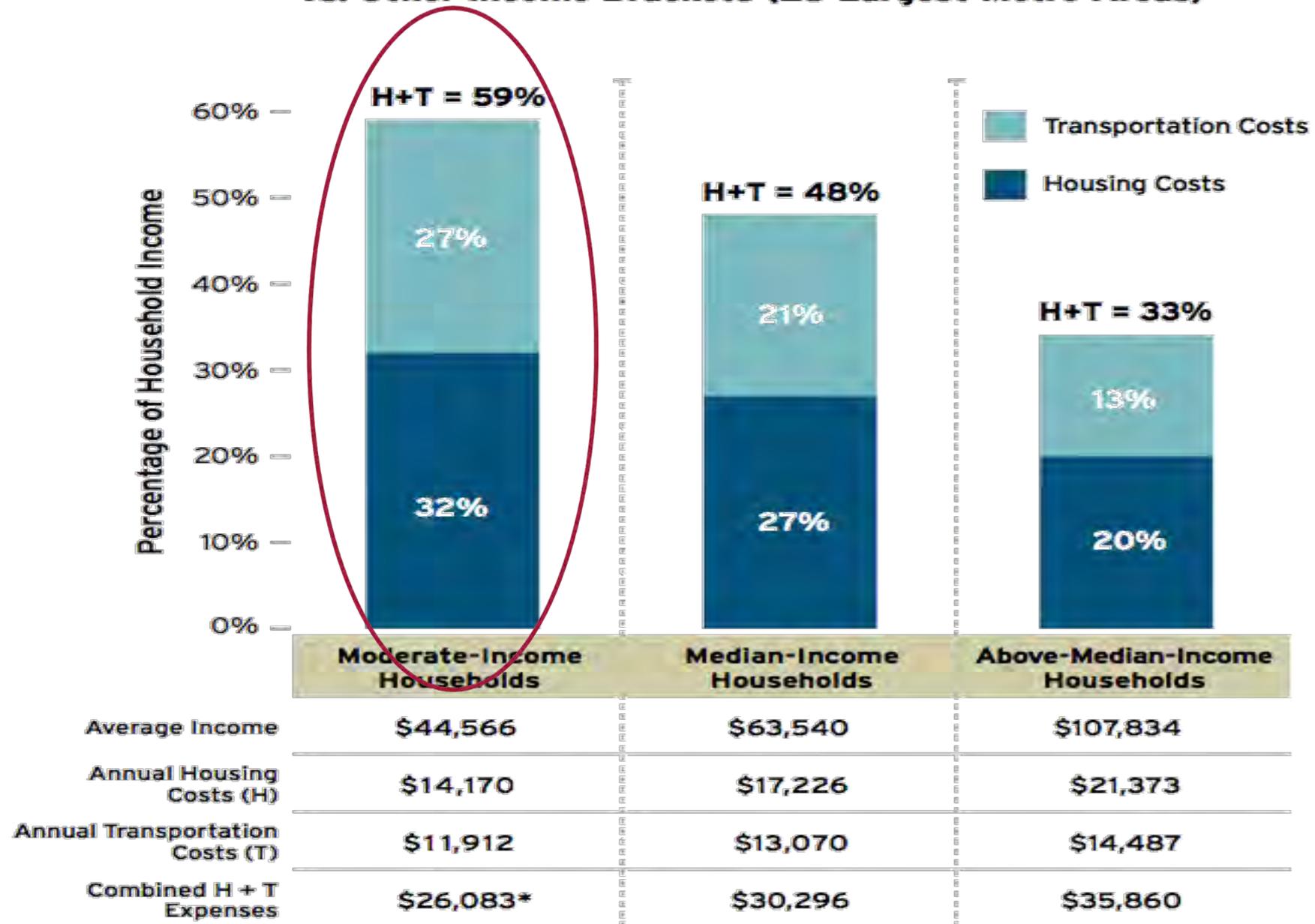
HALF

Of HH annual expenditures

Source: Bureau of Labor Statistics



Combined Cost Burdens for Moderate-Income Households vs. Other Income Brackets (25 Largest Metro Areas)



Wage Growth Tracker, Weighted Series

three-month moving average of median wage growth



2000



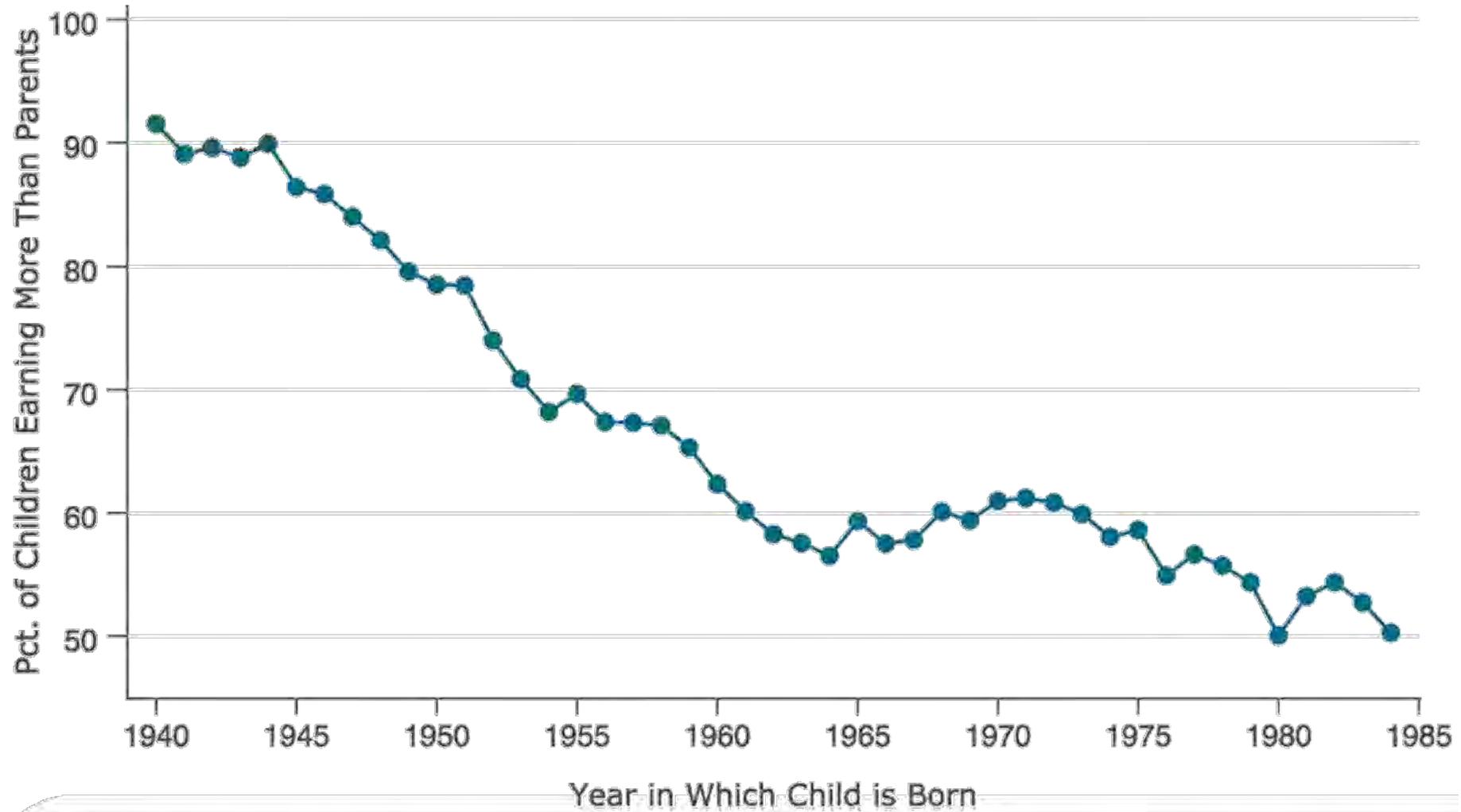
2018

Sources: Current Population Survey, Bureau of Labor Statistics and author's calculations



The Fading American Dream

Percent of Children Earning More than their Parents, by Year of Birth



Source: Stanford University



ON THE EDGE:

Life has gotten harder for millions of Americans

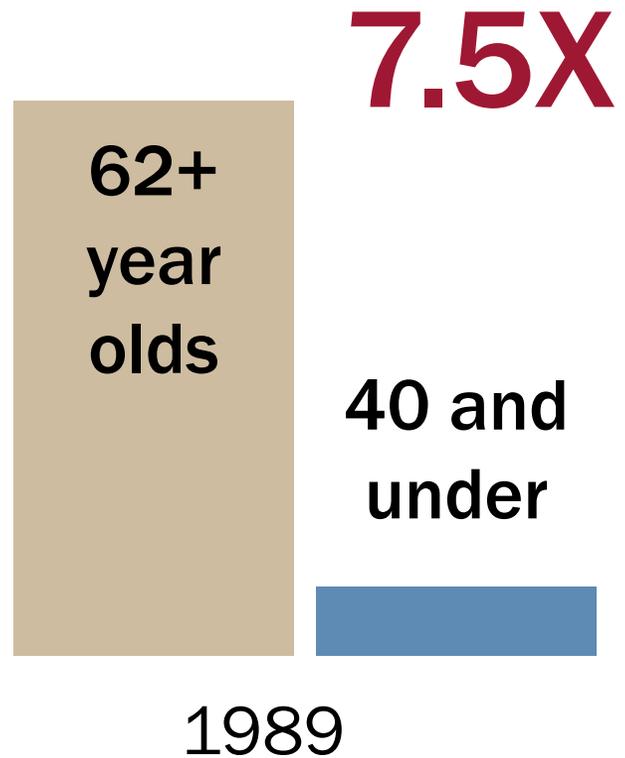
40%

live paycheck to paycheck
struggling to meet basic
needs – buying food,
covering rent.

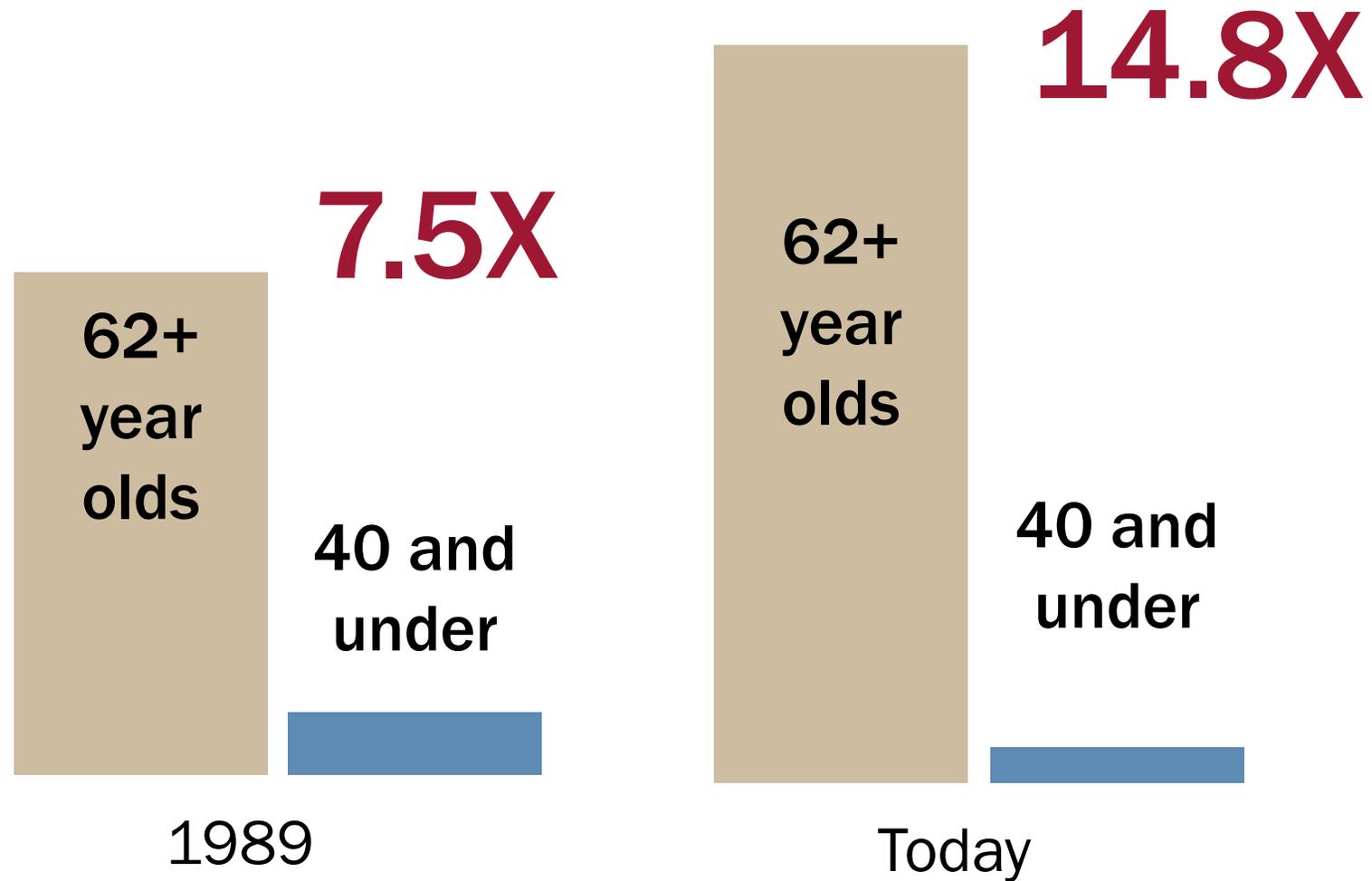
40%

can't cover
a \$400 emergency expense.

The “Wealth Gap”



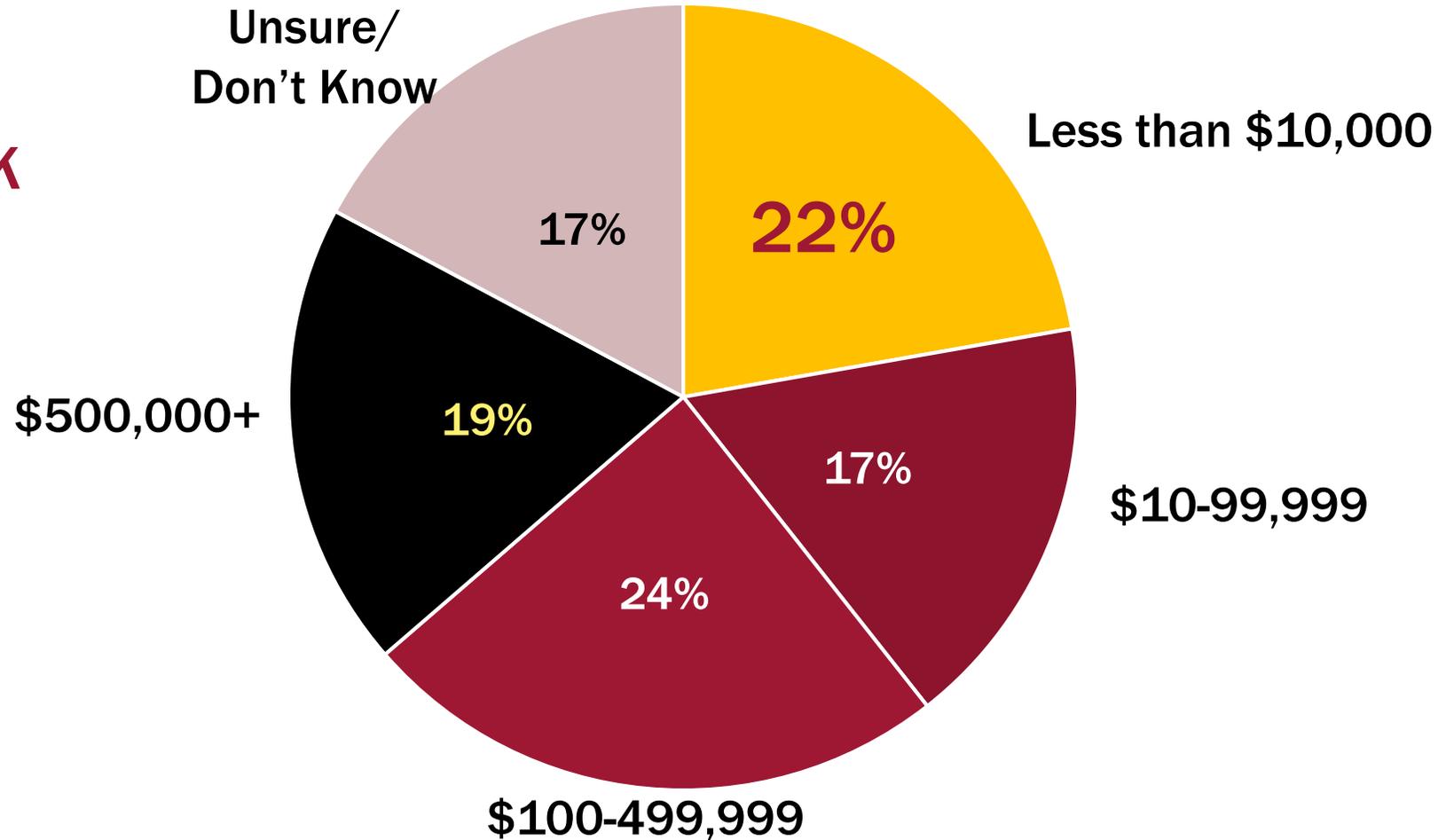
The “Wealth Gap”



1 in 5 BOOMERS Have Less Than \$10K Saved

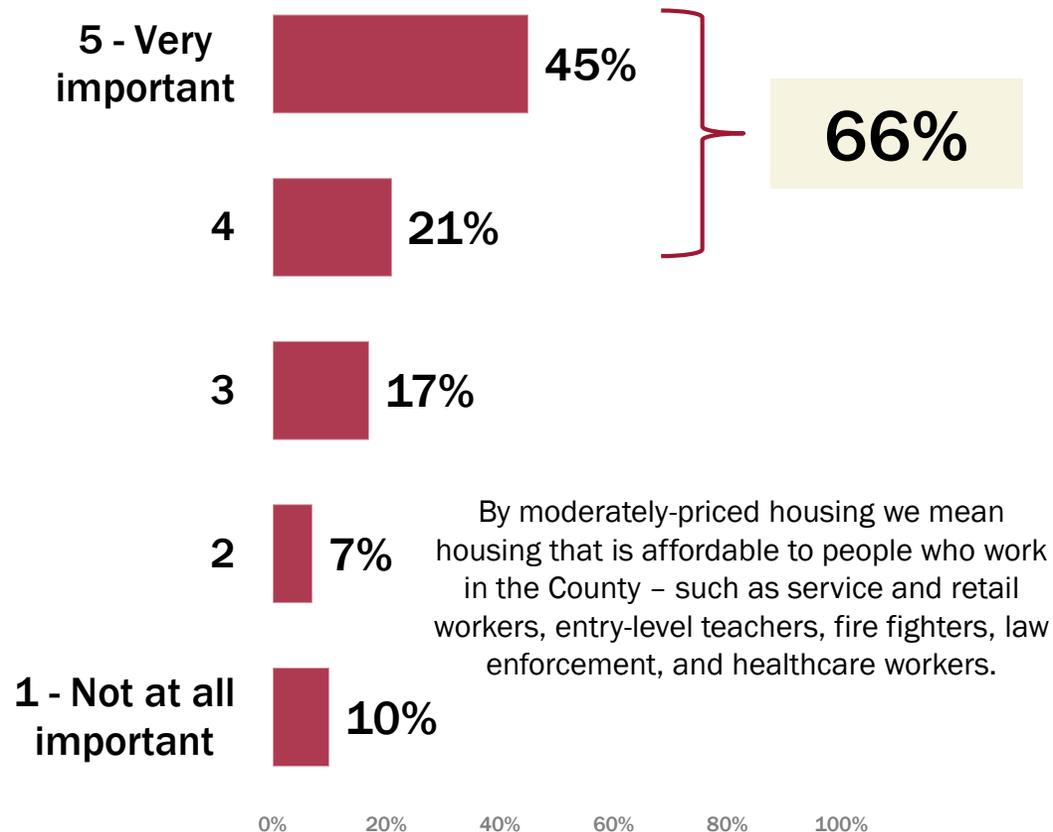
About how much would you say you have saved for retirement?

**Add in the
“unsure/DK
group”?
2 in 5?**

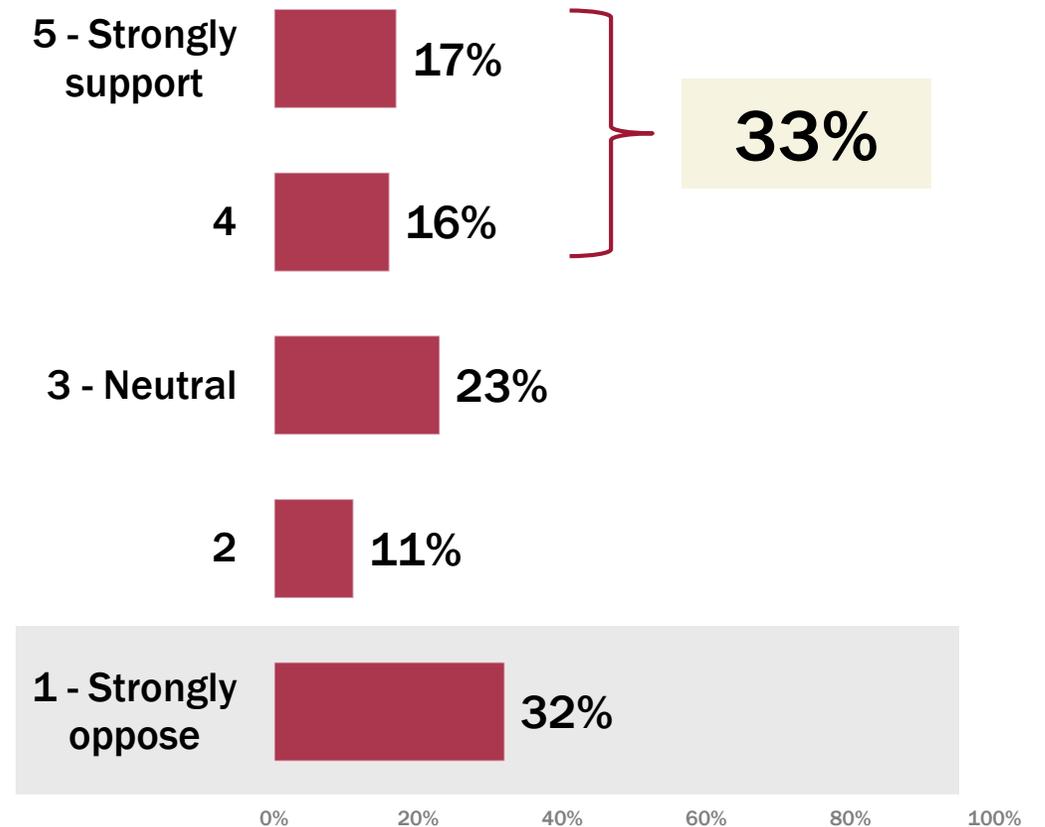


Residents say it is important for York to focus on moderately-priced housing. But, they are less supportive of some efforts that could help encourage the development of this housing.

Q13. How important do you feel it is for York County to focus on encouraging the development of moderately-priced housing in the next 20 years?



Q14. One way to encourage the development of moderately-priced housing in York County would be to increase the permitted number of homes per acre in some areas.



5

WORKPLACE SHIFTS HOME BASED BUSINESSES

WORK/LIFE BALANCE MATTERS



91%

**of young people (18-35)
expect to stay in a job for
less than three years.**

Source: Future Workplace



15-20

**JOBS ACROSS THEIR
WORKING LIFE**

Source: Future Workplace





LESS LOYAL



It's a
FREELANCE
world

A person's hands are holding a white rectangular sign in front of a city skyline. The sign has the words "THE GIG ECONOMY" printed in a bold, dark red, sans-serif font. The background shows several tall buildings under a bright blue sky with scattered white clouds. The perspective is from a low angle, looking up at the buildings and the sign.

**THE GIG
ECONOMY**

The GIG Economy by the numbers

56.7

million

US workers

are 1099

?

million

projected

by 2025

14.7

million

**Full-time US workers
freelance on the side**

42%

**of those under 35
freelance**



**Work is no longer
TIED TO PLACE**

OFFICE SQUARE FOOTAGE PER WORKER

225 sq. ft.



2010

176 sq. ft.



TODAY

Source: CoreNet Global



OFFICE SQUARE FOOTAGE PER WORKER

225 sq. ft.



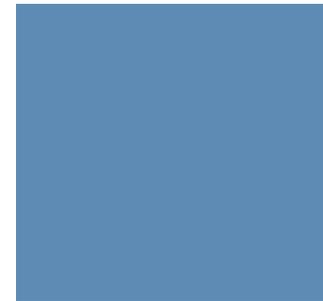
2010

176 sq. ft.



TODAY

<100 sq. ft.



FUTURE?

Source: CoreNet Global



61%

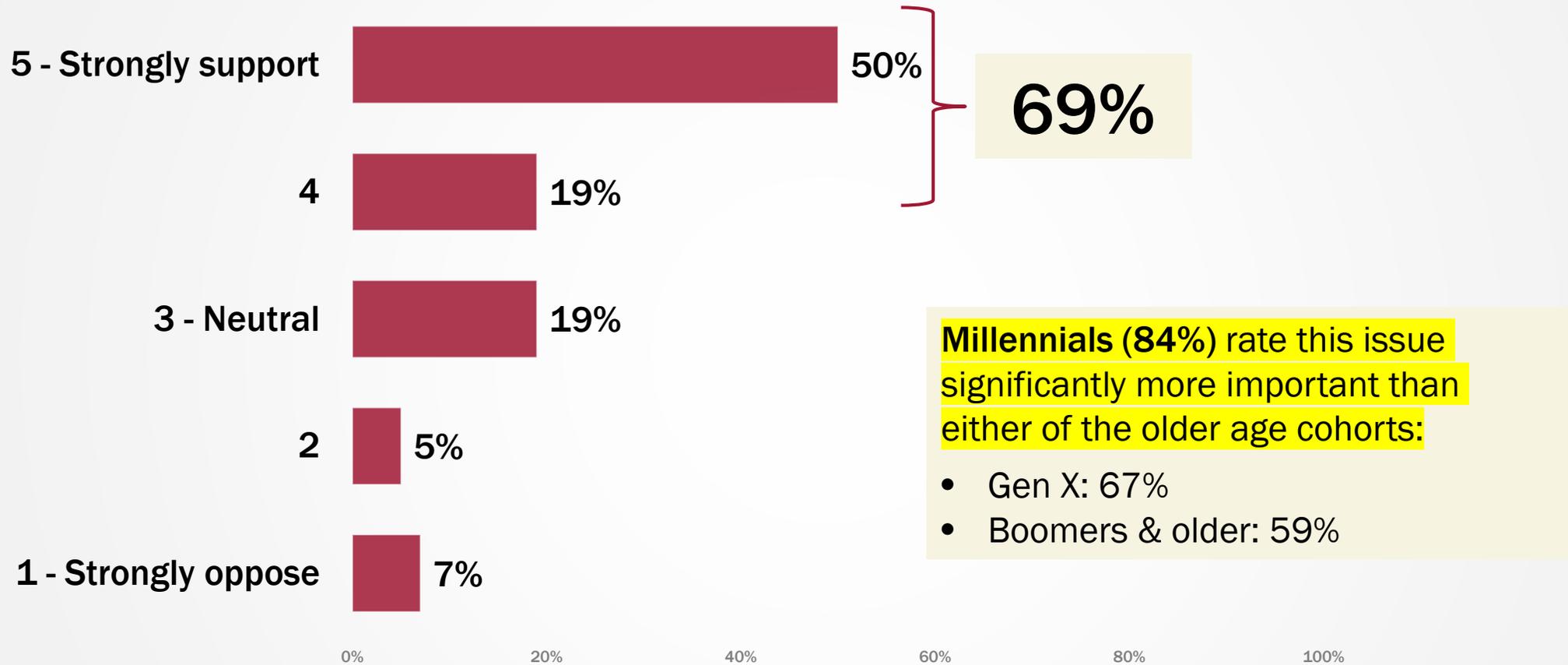
of full-time freelancers would consider **moving to a different city** for a tax break of less than \$5,000.

**Home based businesses may be a
big differentiator for York County**

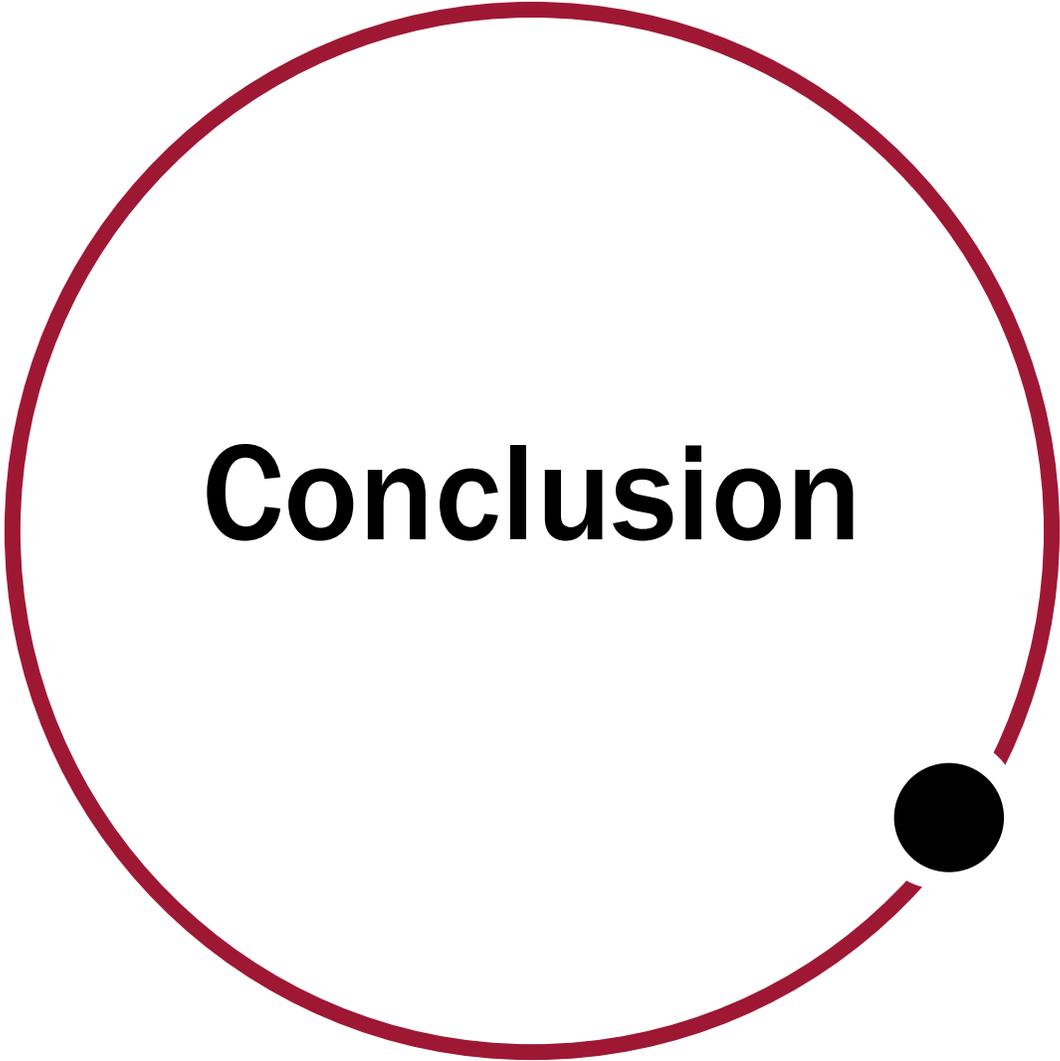
...

(if the numbers make sense for the County)

More than two thirds of residents support the growth of home-based businesses in York County



Q18. Home-based businesses are thriving in York County. Two thirds of business licenses are for businesses located in homes. Please tell me whether you support or oppose the growth of home-based businesses in York County. NOTE: Don't know/unsure responses removed for analysis.

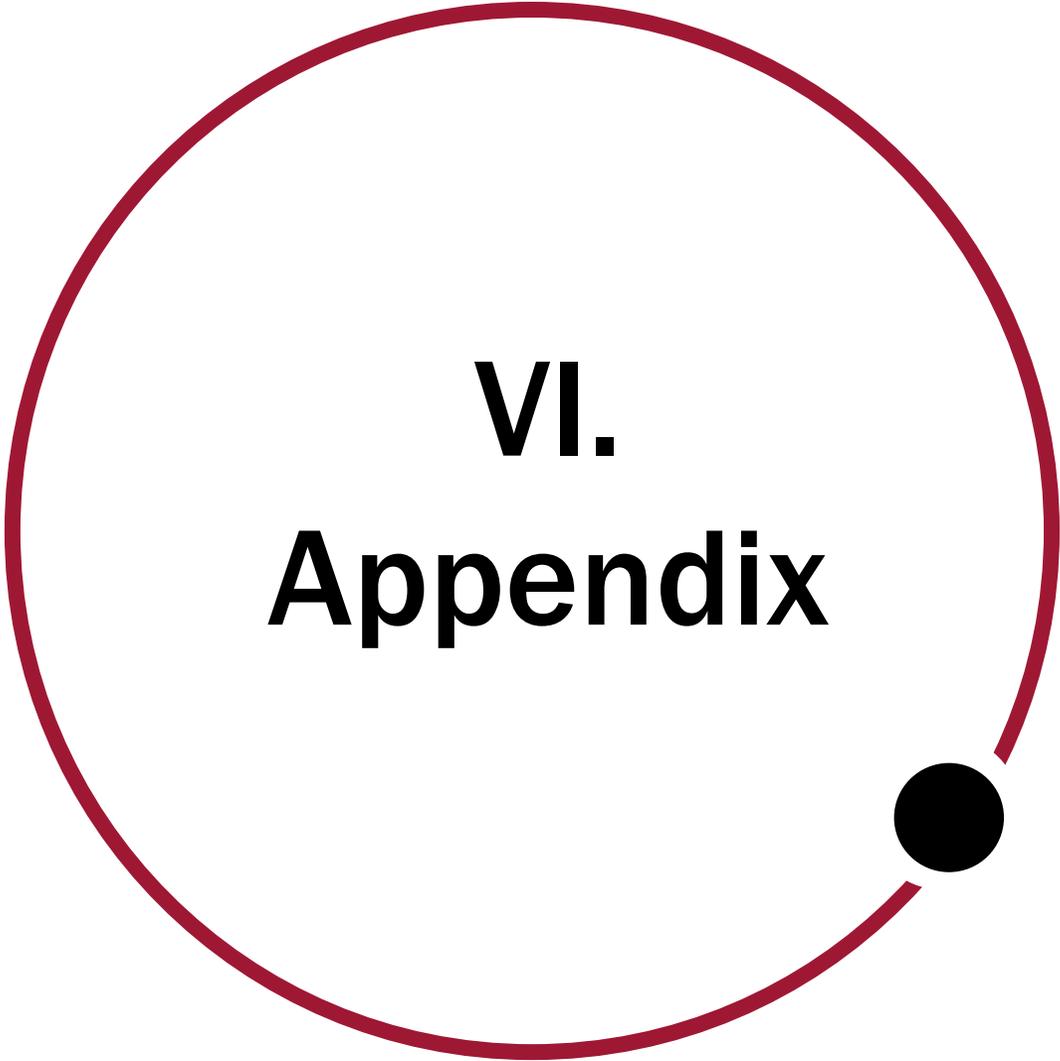


Conclusion

SIR's Conclusion

- York County will benefit from the golden crescent and will continue to see population growth.
- Yet, this growth is coming from more older people rather than younger people.
- To ensure that York remains attractive to younger people and prepares for more older people, higher density areas may need to be strongly considered. While residents support the need for a balanced population growth, there will be work to educate and build support for higher density and mixed use developments.
- Home based businesses could be a great opportunity for York County. People support it and it is in line with the growing trend of freelancing, especially among younger populations. If it financially works for the County to provide ways to support further growth in this area, it could make great sense for the community.
- Schools are important for all residents. Maintaining and improving schools should be the focus before building additional schools. Population projections show minimal growth in school-age children.

Questions



VI.
Appendix

IMPORTANCE OF FUTURE SERVICES/FACILITIES

Significant differences in importance by segment

DEMOGRAPHIC	GROUP	MORE LIKELY TO WANT (OVER OTHER DEMOGRAPHIC SEGMENTS):	
GENERATION	Millennials or younger	<ul style="list-style-type: none"> • Parks for active recreation • Sidewalks • Transit 	
	Gen X	<ul style="list-style-type: none"> • Parks for active recreation • Bike paths • Sidewalks • Access to water 	<ul style="list-style-type: none"> • Community center • Indoor sports facility • Athletic fields
	Boomers +	<ul style="list-style-type: none"> • Transit services 	
RACE	Minority	<ul style="list-style-type: none"> • Schools • Sidewalks • Senior center • Parks for passive recreation 	<ul style="list-style-type: none"> • Indoor sports facility • Athletic fields • Transit services
LOCATION	Upper York	<ul style="list-style-type: none"> • Fire Stations • Public Libraries • Indoor sports facility • Transit services 	

There are some significant differences in the importance ratings of facilities or infrastructure between selected groups

FACILITY OR INFRASTRUCTURE	GROUP	IMPORTANT ("4" & "5")
SCHOOLS	White	74%
	Minority	88%
PARKS FOR ACTIVE RECREATION	Millennials or younger	72%
	Gen X	71%
	Boomers +	56%
FIRE STATIONS	Upper York	69%
	Lower York	57%
BIKE PATHS	Millennials or younger	56%
	Gen X	68%
	Boomers +	56%

There are some significant differences in the importance ratings of facilities or infrastructure between selected groups

FACILITY OR INFRASTRUCTURE	GROUP	IMPORTANT ("4" & "5")
SIDEWALKS	Male	54%
	Female	65%
	Millennials or younger	72%
	Gen X	64%
	Boomers +	46%
	White	57%
	Minority	72%
ACCESS TO NATURAL WATER BODIES	Millennials or younger	53%
	Gen X	69%
	Boomers +	50%
SENIOR CENTERS	White	54%
	Minority	69%

There are some significant differences in the importance ratings of facilities or infrastructure between selected groups

FACILITY OR INFRASTRUCTURE	GROUP	IMPORTANT ("4" & "5")
COMMUNITY CENTER	Male	50%
	Female	63%
	Millennials or younger	49%
	Gen X	65%
	Boomers +	54%
PARKS FOR PASSIVE RECREATION	White	50%
	Minority	71%
PUBLIC LIBRARIES	Upper York	63%
	Lower York	46%

There are some significant differences in the importance ratings of facilities or infrastructure between selected groups

FACILITY OR INFRASTRUCTURE	GROUP	IMPORTANT ("4" & "5")
ATHLETIC FIELDS	Millennials or younger	33%
	Gen X	48%
	Boomers +	35%
	White	34%
	Minority	58%
INDOOR SPORTS FACILITY	Upper York	53%
	Lower York	42%
	Millennials or younger	42%
	Gen X	53%
	Boomers +	34%
	White	40%
	Minority	57%

There are some significant differences in the importance ratings of facilities or infrastructure between selected groups

FACILITY OR INFRASTRUCTURE	GROUP	IMPORTANT ("4" & "5")
TRANSIT SERVICES	Upper York	56%
	Lower York	40%
	Millennials or younger	46%
	Gen X	34%
	Boomers +	46%
	White	38%
	Minority	58%