



CAPE COD
COMMISSION

2019 Comprehensive Economic Development Strategy (CEDS)

YEAR 3 ANNUAL REPORT

APPROVED BY THE BARNSTABLE COUNTY ECONOMIC
DEVELOPMENT COUNCIL AND THE CAPE COD COMMISSION

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Prepared by Cape Cod Commission Staff

Performance Progress Report

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Introduction

The 2019-2024 Cape Cod Comprehensive Economic Development Strategy (CEDS) is a tactical economic development plan consistent with the growth policy and goals of the Regional Policy Plan, which provides a vision of the future and a framework for collaborative action. It includes a comprehensive summary of the region's economy, a five-year action plan, and a framework for evaluating progress on plan implementation.

The 2019-2024 CEDS was approved by the US Economic Development Administration (EDA) on October 6, 2019 and can be accessed here: <https://www.capecodcommission.org/our-work/ceds>.

This CEDS Performance Report accounts for activities conducted during Year 3 of CEDS implementation (July 1, 2021- June 30, 2022). It addresses adjustments to the CEDS strategy, summarizes recent economic development activities, leverages regional benchmarks to evaluate CEDS implementation progress, and outlines next steps for the year ahead.

Adjustment to the Strategy

The Cape Cod Commission (Commission) and CEDS Strategy Committee remain committed to the economic vision for Cape Cod articulated in the 2019-2024 CEDS document: "Cape Cod enjoys a robust year-round economy with a workforce that lives, plays, and shops locally. Our local economy is supported by modern and resilient infrastructure; strategic development of employment and business opportunities; and resolute protection of the natural assets and historical character that define our region."

The Barnstable County Economic Development Council (BCEDC) serves as the CEDS Strategy Committee. There have been two changes to its composition in the past year: Duane Fotheringham, President, Hydroid, left the BCEDC, and Lisa Guyon, Executive Director, WE CAN, joined (appointed 2/16/2022). The current BCEDC members are:

- Rob Brennan, President, CapeBuilt Homes
- Chris Flanagan, Executive Officer, Home Builders & Remodelers
- Mark Forest, Barnstable County Commissioner
- Kara Galvin, Executive Director, Cape and Islands Workforce Board
- Lisa Guyon, Executive Director, WE CAN
- Tammi Jacobsen, Director of Workforce Development & Training, Cape Cod Community College
- Harold "Woody" Mitchell, Chair, Cape Cod Commission
- Alisa Magnotta, Executive Director, Cape Cod Housing Assistance Corporation
- Paul Niedzwiecki, CEO, Cape Cod Chamber of Commerce
- John Ohman, Representative, Barnstable County Assembly of Delegates
- Robert "Bert" Talerman, Co-President, Cape Cod Five Cents Savings Bank
- Julie Wake, Executive Director, Arts Foundation of Cape Cod

Two staff members contributing to economic development and EDA grant activities accepted new positions outside of the Commission during the past year, resulting in reduced staff capacity for CEDS activities. Staff continue to seek out new economic development hires and, in the meantime, adapt to advance CEDS implementation.

Report on Economic Development Activities

The following section briefly summarizes CEDS Year 3 implementation activities, listing both the activities proposed in the Year 3 Action Plan from the CEDS Year 2 Annual Report and the corresponding activities accomplished by Commission staff in Year 3.

ADMINISTRATION AND GENERAL PLANNING

Proposed in Year 3 Action Plan:

Administration and General Planning associated with supporting the CEDS Strategy Committee, providing technical support and pursuing funding in support of CEDS Action Plan implementation.

Accomplished in Year 3:

The Commission provided administrative and technical support to the BCEDC. The BCEDC met 12 times during the fiscal year, on 8/11/2021, 9/8/2021, 10/13/2021, 11/10/2021, 12/8/2021, 1/20/2022, 2/1/2022 (Executive Committee), 2/1/2022 (Nominating Committee), 2/4/2022, 3/9/2022, 5/11/2022, and 6/8/2022.

The Commission, on behalf of the Barnstable County Commissioners and BCEDC, distributed 8 License Plate Grant Fund (LPGF) awards, totaling \$149,750, to support COVID-19 Recovery and Resiliency projects. Grants were awarded to Duffy Health Services (\$20,000), Cape Cod Health Ministry (\$20,000), Cape Cod Young Professionals (\$13,750), Entrepreneurship for All Cape Cod (\$20,000), Downtown Hyannis Community Development Corporation (\$20,000), Housing Assistance Corporation (\$21,618), Town of Harwich (\$17,000), and Cape Cod BMX (\$17,500).

LPGF awards press release is available here: <https://www.capecodcommission.org/about-us/newsroom/license-plate-grant-funds-awarded-for-covid-19-recovery-and-resiliency-projects-2/>.

OUTREACH AND INFORMATION SHARING

Proposed in Year 3 Action Plan:

Outreach and Information Sharing with regional stakeholders, local officials, municipal staff and appointed board members, industry practitioners, and community activities through sharing

presentations, data dashboards and analysis on DataCapeCod.org, and in person meetings, once safe to do so.

Accomplished in Year 3:

The Commission hosted the 2021 OneCape Summit virtually on August 23-24, which featured presentations and conversations focused on the intersection between Cape Cod's environment and economy.

Staff completed efforts to streamline StatsCapeCod and Data Cape Cod into a single portal, providing access to an expanded series of datasets supporting regional planning efforts, economic development, and recovery from the COVID-19 pandemic.

Staff also made presentations to different groups on the region's economy and CEDs, including to non-profits and businesses, research and education institutions, and government entities.

OneCape Summit schedule and details are available here:

<https://onecape.capecodcommission.org/onecape2021/>.

Updated Data Cape Cod is available here: <https://datacapecod.org/>.

TARGETED TECHNICAL ASSISTANCE

Proposed in Year 3 Action Plan:

Targeted Technical Assistance to Towns, providing Local Comprehensive Plans (LCP) development support, helping with project-based research and data analysis, and developing recommendations that align with regional priorities.

Accomplished in Year 3:

The Commission provided support and guidance for towns in updating their LCPs and assisting communities in developing new zoning and design guidelines to foster development that aligns with their community's vision. Staff provided technical assistance to other regional stakeholders, primarily by facilitating access to demographic and economic data and/or creating data visualizations to communicate quantitative information in accessible formats. Staff also continued to provide regulatory review of large-scale projects.

Additionally, staff supported the following grant applications from regional partners, including through the provision of CEDs consistency letters: Mashpee Wampanoag Tribe EDA American Rescue Plan Indigenous Communities Program application (submitted March 31, 2022), and Lower Cape Community Development Partnership EDA American Rescue Plan Economic Adjustment application (submitted March 31, 2022). Staff also met with several regional entities to discuss potential applications for EDA funding which have not yet been pursued or to develop applications that have not yet been submitted.

Regulatory Review process and project details can be accessed here:

<https://www.capecodcommission.org/regulatory>.

LAST-MILE BROADBAND DEPLOYMENT STRATEGY AND BUILDOUT FUND

Proposed in Year 3 Action Plan:

The COVID-19 pandemic highlighted the need for expanded broadband availability across Cape Cod. The Commission will support research and education on broadband needs, coordination on policies that facilitate regional broadband implementation, and identification and pursuit of potential funding sources.

Accomplished in Year 3:

The COVID-19 pandemic and structural shifts in remote access to employment, public meeting, healthcare, and many services that followed highlighted the need for expanded broadband availability across Cape Cod. The Commission developed a scope of work and Request for Proposals (RFP) for a consultant to conduct a comprehensive study of commercial internet availability for residential, commercial, institutional and municipal properties and of areas with limited or insufficient cellular data service within Barnstable County, and to establish recommendations for network upgrades and/or expansion. Pending funding availability, the Commission anticipates issuing this RFP in FY2023.

REGIONAL HOUSING PLAN

Proposed in Year 3 Action Plan:

Commission staff will build off the Year 2 data collection efforts to develop a regional housing plan that increases access to affordable and diverse housing that addresses Cape Cod's lack of diversity and affordability issues in the region, which the pandemic has significantly exacerbated in the past year.

Accomplished in Year 3:

Commission staff continued to conduct extensive research on regional housing plans across the nation, further gather data as a foundation for the plan, and worked on visualizing the available data. Additionally, staff facilitated the contracting of a consultant to carry out an update and expansion of the 2017 Regional Housing Market Analysis, which will provide vital and timely information on the housing challenges facing the region.

Also during this year, the Commission received \$250,000 in funding from the Commonwealth of Massachusetts to undertake a review of parcels that would be suitable for development and redevelopment of housing and develop a process for increasing accessibility of requests for

proposals to develop a range of housing types across Cape Cod. Work on this project will support the regional housing plan and will be carried out in the coming year.

Regional Housing Market Analysis details can be accessed here:

<https://www.capecodcommission.org/our-work/housing-market-analysis/>.

WORKFORCE AND BUSINESS RETENTION PROGRAM

Proposed in Year 3 Action Plan:

The Commission will expand the ongoing economic recovery efforts to address the workforce and business retention issues in the region. Many of these issues contributed to the severity of the economic impacts of the pandemic on Cape Cod (such as childcare, housing, and healthcare), and the Commission will support development of a framework document that outlines potential strategies for retention.

Accomplished in Year 3:

The Commission's COVID-19 economic recovery efforts have expanded to include an Early Education and Childcare Needs Assessment serving as a foundation for improving the accessibility of services in the region. The survey-based project has been advanced in collaboration with the Rennie Center for Education Research & Policy and will conclude in June 2022 with a report detailing existing levels of provision and needs, identifying any gaps in services, and exploring potential mitigating strategies.

Early Education and Childcare Needs Assessment details are available here:

<https://capecodcommission.org/our-work/childcare>.

REGIONAL CAPITAL PLAN

Proposed in Year 3 Action Plan:

Commission staff will begin to develop a framework for a regional capital plan that identifies the key needs, priorities, and funding options for capital infrastructure across Cape Cod, seeking efficiencies, economies of scale, and improved coordination to address key structural challenges in the region.

Accomplished in Year 3:

Commission staff have started developing a framework for a regional capital plan. The Commission will continue to advance the planning process for plan development and seek additional funding for analyses to support the plan.

MODEL BYLAWS FOR ZONING/DESIGN

Proposed in Year 3 Action Plan:

Commission staff will build on efforts from Year 1 and Year 2 to support adoption of form-based code, hybrid zoning, and/or design guidelines that address individual towns' land use planning needs. Model bylaws intended to reduce the impacts of climate change will be a focus, including reducing impacts to development in the floodplain (such as land subject to coastal storm flowage) and reducing barriers to implementation of renewable (solar) energy.

Accomplished in Year 3:

Commission staff completed a model coastal resiliency bylaw in partnership with the Urban Harbors Institute (UHI) at the University of Massachusetts Boston; Noble, Wickersham, and Heart, LLP; Woods Hole Group; and the towns of Bourne, Sandwich, Brewster, and Eastham. The bylaw serves as a resource to towns seeking to improve coastal resilience. Commission staff also prepared a model solar bylaw for large-scale ground-mounted solar photovoltaic installations, which provides guidance to Cape communities as they seek to enhance renewable energy opportunities in appropriate areas. Commission staff also furthered work on the West Chatham Neighborhood Center draft zoning bylaw, which could serve as an example to other towns of incorporating elements of form-based code into more traditional zoning.

Coastal Resiliency Bylaw details are available here: <https://www.capecodcommission.org/our-work/coastal-resiliency-bylaw>.

Model Large-Scale Solar Bylaw details are available here: <https://www.capecodcommission.org/our-work/model-solar-bylaw/>.

West Chatham Neighborhood Center bylaw information is available here: <https://www.chatham-ma.gov/376/West-Chatham-Neighborhood-Center-Zoning-> .

WATER QUALITY PLANNING

Proposed in Year 3 Action Plan:

Commission staff will continue to support towns' implementation of and pursuit of funding for local water quality plans. In Year 3, the Commission will also work with regional partners on a Ponds Initiative that will create a plan to support water protection and increase the protection of freshwater resources on Cape Cod.

Accomplished in Year 3:

Commission staff completed an update to the Cape Cod Pond and Lake Atlas and have developed a scope of work for the Freshwater Initiative, a planning process that will result in a plan for protecting, preserving, and restoring freshwater resources across the region. In addition, Commission staff continued to provide administrative and technical support to the Cape Cod and Islands Water Protection Fund (CCIWPF), which provides subsidies to local water quality and

wastewater projects. The CCIWPF awarded over \$27 million in subsidies for local projects in June 2022.

Cape Cod Pond and Lakes Atlas details are available here: <https://www.capecodcommission.org/our-work/ponds-and-lakes/>.

Cape Cod and Islands Water Protection Fund details are available here: <https://capecodcommission.org/our-work/cape-cod-and-islands-water-protection-fund>.

SURVEYS OF NEW HOMEOWNERS AND SECOND HOMEOWNERS ON CAPE COD

Proposed in Year 3 Action Plan:

Commission staff will work with a consultant to survey new and second homeowners in Year 3 to understand how the pandemic influenced the real estate market, and long-term economic and demographic impacts of the region's unprecedented real estate market.

Accomplished in Year 3:

The Commission collaborated with the University of Massachusetts Donahue Institute (UMDI) and the Center for Public Opinion at UMass Lowell to complete surveys of new and second homeowners on Cape Cod. Results provide important baseline information for the changes and activity in the region during the pandemic.

New and Second Homeowner Survey details are available here: <https://datacapecod.org/pf/homeowner-surveys>.

LAND USE PLANNING FOR ECONOMIC RESILIENCE

Proposed in Year 3 Action Plan:

Commission staff will also pursue funding for a project, Land Use Planning for Economic Resiliency, to develop best practices for fostering successful mixed-use and commercial spaces.

Accomplished in Year 3:

The Commission received funding for the Land Use Planning for Economic Resilience Project through a \$144,043 grant from the Massachusetts Executive Office of Energy and Environmental Affairs. Preliminary activities have centered on research of mixed-use and commercial properties trends, identification of property typologies and local examples, and initial analysis of commercial and mixed-use property type performance. The project is slated for completion in 2023 and will culminate in a zoning and land use regulations guide and support for best practices implementation in Cape Cod towns.



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Land Use Planning for Economic Resilience press release is available here:

<https://www.capecodcommission.org/about-us/newsroom/cape-cod-commission-receives-grant-funds-to-support-environmental-and-economic-resilience/>.

Evaluation of Progress on Action Plan & Goals

The following table includes the latest data related to regional benchmarks outlined in the CEDS and indicative of progress toward CEDS implementation. Progress toward achieving specific activity goals based on the CEDS Action Plan and previous CEDS Performance Reports is detailed above.

PEOPLE		
<i>Residents</i>		
Related Data Cape Cod Dashboards: - Year-Round Population (https://datacapecod.org/pf/barnstable-county-year-round-population/)		
Total Population	213,505	
<i>US Census Bureau, American Community Survey (ACS) 2020 5-Year Estimates, Table DP05.</i>		
Population Change (2010-2020)	-3,978	-1.8%
<i>US Census Bureau, ACS 2010 and 2020 5-Year Estimates, Table DP05.</i>		
Median Age (Years)	53.7	
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table DP05.</i>		
Race		
White	192,844	90.3%
Black or African American	6,098	2.9%
American Indian and Alaska Native	1,142	0.5%
Asian	3,088	1.4%
Native Hawaiian and Other Pacific Islander	136	0.1%
Some other race	3,266	1.5%
Two or more races	6,931	3.2%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table DP05.</i>		
Ethnicity		
Hispanic or Latino	6,915	3.2%
Not Hispanic or Latino	206,590	96.8%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table DP05.</i>		
Language Spoken at Home		
Speak only English	186,341	90.6%
Spanish	4,283	2.1%
Other Indo-European languages	12,006	5.8%
Asian and Pacific Island languages	1,341	0.7%
Other languages	1,730	0.8%

<i>US Census Bureau, ACS 2020 5-Year Estimates, Table S1601.</i>		
Workforce & Income		
Related Data Cape Cod Dashboards:		
- Household Income (https://datacapecod.org/pf/household-income/)		
- Labor Force and Earnings (https://datacapecod.org/pf/labor-force-and-earnings/)		
- Employment & Wages by Industry (https://datacapecod.org/pf/employment-wages-by-industry/)		
- Employment & Wages by Occupation (https://datacapecod.org/pf/employment-and-wages-by-occupation/)		
Labor force participation rate (16 Years and Older)	59.8%	
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table S2301.</i>		
Median Household Income		
County Median Household Income	\$76,863	
State Median Household Income	\$84,385	
Country Median Household Income	\$64,994	
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table B19013.</i>		
Low-Income Residents (\$0-\$49,999)	30,362	31.7%
Change in Low-Income Residents (2015-2020)	-7,348	-19.5%
Middle-Income Residents (\$50,000 to \$124,999)	38,139	39.8%
Change in Middle-Income Residents (2015-2020)	-1,206	-3.1%
High-Income Residents (\$125,000+)	27,358	28.5%
Change in High-Income Residents (2015-2020)	9,996	57.6%
<i>US Census Bureau, ACS 2015 and 2020 5-Year Estimates, Table B19001.</i>		
Total Wages in County	\$4,758,963,621	
Change in Total Wages in County (2019-2020)	-\$122,785,017	-2.5%
<i>US Bureau of Labor Statistics Quarterly Census of Employment and Wages, Total Covered, All Industry Aggregations, Barnstable County, Massachusetts, 2019 and 2020. Link: https://data.bls.gov/cew/apps/data_views/data_views.htm#tab=Tables.</i>		
Vulnerable Populations		
Related Data Cape Cod Dashboards:		
- Vulnerable Populations on Cape Cod (https://datacapecod.org/pf/vulnerable-populations-on-cape-cod/)		
- Environmental Justice Populations (https://datacapecod.org/pf/environmental-justice-populations/)		
- Unemployment (https://datacapecod.org/pf/unemployment/)		
Towns with Environmental Justice Block Groups	13	86.7%
Barnstable		
Block Groups	9	23.7%

Residents	10,371	23.4%
Bourne		
Block Groups	4	25.0%
Residents	3,279	16.5%
Brewster		
Block Groups	2	22.2%
Residents	920	9.4%
Chatham		
Block Groups	1	12.5%
Residents	548	9.1%
Dennis		
Block Groups	4	22.2%
Residents	3,850	27.6%
Eastham		
Block Groups	3	50.0%
Residents	1,758	35.9%
Falmouth		
Block Groups	6	23.1%
Residents	8,464	27.2%
Harwich		
Block Groups	1	8.3%
Residents	450	3.7%
Mashpee		
Block Groups	2	25.0%
Residents	3,822	27.0%
Orleans		
Block Groups	1	14.3%
Residents	913	15.7%
Provincetown		
Block Groups	2	40.0%
Residents	994	33.4%
Sandwich		
Block Groups	1	6.7%
Residents	949	4.5%
Yarmouth		
Block Groups	6	27.3%
Residents	6,248	26.8%

<i>MA Executive Office of Energy and Environmental Affairs, List of Massachusetts Cities & Towns with Environmental Justice Populations, 2020. Link: https://www.mass.gov/doc/massachusetts-cities-towns-with-environmental-justice-populations/download.</i>		
County Population below Federal Poverty Level	14,176	6.7%
State Population Below Federal Poverty Level	653,454	9.8%
Country Population Below Federal Poverty Level	40,910,326	12.8%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table S1701.</i>		
Total Homeless Persons (Feb. 2022)	397	
Change (Jan.2021-Feb.2022)	54	15.7%
<i>Cape and Islands Regional Network on Homelessness, Annual Point in Time Count, 2022. Count of homeless persons includes both the Cape & Islands. Link: http://www.bchumanservices.net/library/2022/04/2022-Annual-Point-in-Time-Count-Results.pdf.</i>		
24-Month Average Unemployment Rate	8.4%	
Country 24-Month Average Unemployment Rate	6.7%	
<i>US Economic Development Administration (EDA), StatsAmerica, Measuring Distress-County Tool, May 2022. Link: https://www.statsamerica.org/distress/.</i>		
Distressed Income Tracts	13	
Distressed Income Tracts Population	47,494	
Provincetown (Census Tract 101.00)	3,664	7.7%
Truro (Census Tract 102.08)	2,454	5.2%
Eastham (Census Tract 103.06)	3,080	6.5%
Orleans (Census Tract 104.00)	3,345	7.0%
Orleans (Census Tract 105.00)	2,962	6.2%
Brewster (Census Tract 108.00)	4,919	10.4%
Harwich (Census Tract 110.02)	4,604	9.7%
Yarmouth (Census Tract 120.02)	3,265	6.9%
Barnstable (Census Tract 126.01)	3,298	6.9%
Barnstable (Census Tract 126.02)	5,668	11.9%
Barnstable (Census Tract 141.00)	797	1.7%
Falmouth (Census Tract 145.00)	5,481	11.5%
Barnstable (Census Tract 153.00)	3,957	8.3%
<i>US Economic Development Administration (EDA), StatsAmerica, Measuring Distress-Tract Tool, May 2022. Link: https://www.statsamerica.org/distress/distract.aspx. Code of Federal Regulations, Title 13, Chapter III, Part 301, Subpart C. Economic Distress Levels.</i>		

ECONOMY		
<i>Employment</i>		
Related Data Cape Cod Dashboards: - Labor Force & Earnings (https://datacapecod.org/pf/labor-force-and-earnings/) - Unemployment (https://datacapecod.org/pf/unemployment/)		
Employed Population Mar. 2022	101,678	
Change in Employed Population (March 2021-2022)	3,830	3.9%
<i>FRED, Employed Persons in Barnstable County, MA, March 2022. Link: https://fred.stlouisfed.org/series/LAUCN250010000000005.</i>		
Unemployment Mar. 2022	6,454	5.9%
Change in Unemployment (Mar. 2021-2022)	-3,542	-35.4%
State Unemployment Mar. 2022	3.8%	
Change in State Unemployment (Mar. 2021-2022)	-43.3%	
<i>MA Dept. of Unemployment Assistance, Economic Research Department, Labor market Information. Link: https://lmi.dua.eol.mass.gov/LMI/LaborForceAndUnemployment#.</i>		
<i>Industries</i>		
Related Data Cape Cod Dashboards: - Employment & Wages by Industry (https://datacapecod.org/pf/employment-wages-by-industry/) - Employment & Wages by Occupation (https://datacapecod.org/pf/employment-and-wages-by-occupation/) - Business Establishment Size & Age (https://datacapecod.org/pf/establishment-size-age/) - Local Option Taxes (https://datacapecod.org/pf/local-option-taxes/) - Self-Employment (https://datacapecod.org/pf/self-employment/) - Regional Wealth (https://datacapecod.org/pf/regional-wealth/) - Location Quotients for Private Industry (https://datacapecod.org/pf/location-quotients-for-private-industry/)		
County GDP (thousands of chained 2012 dollars)	\$ 11,278,337	
Change in County GDP (2001-2020)	\$ 199,819	1.8%
Top 3 Industries by Gross Domestic Product		
Finance, insurance, real estate, rental, and leasing	\$ 3,471,654	
Educational services, health care, and social assistance	\$ 1,224,561	
Professional and business services	\$ 1,081,397	
<i>US Bureau of Economic Analysis, CAGDP9 Real GDP by county and metropolitan area, Barnstable County, 2020. Link: https://apps.bea.gov/iTable/iTable.cfm?reqid=70&step=1#reqid=70&step=1</i>		
Annual meals tax collected (2021)	\$8,591,939	
Change in annual meals tax collected (2020-2021)	\$2,648,956	44.6%
Annual room tax collected (2021)	\$36,834,790	
Change in annual room tax collected (2020-2021)	\$13,464,074	57.6%

<i>MA Department of Revenue, "Local Option Meals & Rooms" and "Local Tax Options," 2021. Links: https://dlsgateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=Local_Option_Meals_Rooms and https://dlsgateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=LocalOptions.Room_Tax_Impact_Fee</i>		
Establishments for All Industries and Ownership Types	9,647	
Change in Est., All Industries and Ownership Types (2015-2020)	394	4.3%
Top Industries by Employment		
Health Care and Social Assistance		
Average Monthly Employment	15,121	
Total Wages	\$947,473,583	
Retail Trade		
Average Monthly Employment	13,762	
Total Wages	\$543,681,788	
Accommodation and Food Services		
Average Monthly Employment	11,765	
Total Wages	\$371,060,457	
Top Industries by Average Weekly Wages		
Finance and Insurance		
Average Monthly Employment	2,233	
Average Weekly Wages	\$1,939	
Utilities		
Average Monthly Employment	399	
Average Weekly Wages	\$1,882	
Mining, Quarrying, and Oil and Gas Extraction		
Average Monthly Employment	90	
Average Weekly Wages	\$1,532	
<i>MA Department of Unemployment Assistance, Division of Economic Research, ES-202 2015 and 2020 data. Link: https://lmi.dua.eol.mass.gov/lmi/employmentandwages</i>		
Industries by Average Annual Employment Location Quotients		
Core Industries		
Arts, Entertainment, and Recreation		
Average Annual Employment Location Quotient	2.11	
Annual Average Employment	2,248	
5-Year Change in Employment	-11.6%	
Total Establishments	252	
Accommodation and Food services		
Average Annual Employment Location Quotient	1.71	
Annual Average Employment	11,698	
5-Year Change in Employment	4.5%	
Total Establishments	1,075	

Retail Trade		
Average Annual Employment Location Quotient	1.51	
Annual Average Employment	13,724	
5-Year Change in Employment	-4.1%	
Total Establishments	1,365	
Emerging Industries		
Transportation and Warehousing		
Average Annual Employment Location Quotient	0.51	
Annual Average Employment	1,761	
5-Year Change in Employment	21.5%	
Total Establishments	142	
Educational Services		
Average Annual Employment Location Quotient	0.46	
Annual Average Employment	770	
5-Year Change in Employment	17.9%	
Total Establishments	104	
Information		
Average Annual Employment Location Quotient	0.67	
Annual Average Employment	1,120	
5-Year Change in Employment	11.8%	
Total Establishments	163	
<i>US Bureau of Labor Statistics, Employment and Wages Data Viewer, 2015 and 2020. Link: https://data.bls.gov/cew/apps/data_views/data_views.htm#tab=Tables.</i>		
Seasonality		
Related Data Cape Cod Dashboards:		
- Traffic Trends (https://datacapecod.org/pf/cape-cod-traffic-trends/)		
- Unemployment (https://datacapecod.org/pf/unemployment/)		
Unemployment Jan. 2022	8,312	7.7%
State Unemployment Jan. 2022	4.8%	
Unemployment Jul. 2021	6,649	5.3%
State Unemployment Jul. 2021	5.7%	
<i>US Bureau of Labor Statistics, Local Area Unemployment Statistics, "Labor force data by county, not seasonally adjusted, February 2021–March 2022" and "Local Area Unemployment Statistics: Massachusetts." Links: https://www.bls.gov/lau/#cntyaa and https://data.bls.gov/pdq/SurveyOutputServlet.</i>		
Jobs Jan. 2021	79,166	
Jobs Jun. 2021	100,024	
Seasonal Change in Jobs (Jun.-Jan.)	20,858	26.3%



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<i>MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2021 data. Link: https://lmi.dua.eol.mass.gov/lmi/employmentandwages. NB: July 2021 data not yet available.</i>		
Total Trips over the Canal Bridges (Jul. 2021)	Approx. 6.7 million	
Total Trips over the Canal Bridges (Jul. 2020)	Approx. 6.1 million	
<i>MassDOT and Cape Cod Commission, 2021. Estimate based on rounded bridge crossing numbers for the Sagamore and Bourne Bridges (2021) in peak month (July) and assumed Average Vehicle Occupancy of 1.48 based on CCC Estimate. Approximately 40-60% of trips were likely made by seasonal visitors.</i>		
Small Businesses		
Related Data Cape Cod Dashboards: - Business Establishment Size & Age (https://datacapecod.org/pf/establishment-size-age/)		
Establishments with < 10 Employees	6,858	80.1%
State Establishments with < 10 Employees	128,170	71.4%
Change in Establishments with < 10 Employees (2015-2020)	4	0.1%
Average Firm Size by Industry (Top 5 Industries by Number of Employees)		
Health care and social assistance	21	
Retail trade	11	
Accommodation and food services	11	
Construction	5	
Professional, scientific, and technical services	6	
<i>US Census Bureau, County Business Patterns by Employment Size Class and Legal Form of Organization, 2015 and 2020.</i>		
Firms Less Than 1 Year Old	2,078	3.1%
Change in Firms Less Than 1 Year Old (2020-2021)	-225	-9.8%
State Firms Less Than 1 Year Old	76,795	2.6%
Country Firms Less Than 1 Year Old	3,429,550	2.9%
Firms 11 or More Years Old	52,832	79.4%
Change in Firms 11 or More Years Old (2020-2021)	-3,245	-5.8%
State Firms 11 or More Years Old	2,427,444	83.4%
Country Firms 11 or More Years Old	97,005,040	81.7%
<i>US Census Bureau, Quarterly Workforce Indicators, All Private Ownership, 2020 and 2021. Link: qwiexplorer.ces.census.gov.</i>		
Top Industries by Rate of Establishments Born During the Previous 12 Months		
Administrative and support and waste management and remediation services	15.2	
Construction	12.3	
Agriculture, forestry, fishing and hunting	12.3	
Real estate and rental and leasing	10.4	
Wholesale trade	9.5	

<i>US Census Bureau, "Business Dynamics Statistics: Establishment Age," 2019.</i>		
Self-Employed Residents	16,629	
Self-employed in own incorporated business workers	5,807	34.9%
Self-employed in own not incorporated business workers and unpaid family workers	10,822	65.1%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table S2408.</i>		

PLACE		
<i>Housing</i>		
Related Data Cape Cod Dashboards: - Housing Characteristics (https://datacapecod.org/pf/housing-characteristics/) - Real Estate Trends (https://datacapecod.org/pf/real-estate-trends/) - Housing Affordability (https://datacapecod.org/pf/housing-affordability/) - How Many Earners? (https://datacapecod.org/pf/housing-how-many-earners/) - Homeowner Surveys (https://datacapecod.org/pf/homeowner-surveys/)		
Median Sales Price (Mar. 2022)	\$651,000	
Change in Median Sales Price (Mar. 2021-2022)	-\$2,500	-0.4%
<i>Cape & Islands Association of Realtors, "Local Market Updates," 2021-2022.</i>		
Housing Units	164,064	
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table DP04.</i>		
Occupied Housing Units	95,859	
Owner-Occupied	76,319	79.6%
Renter-Occupied	19,540	20.4%
Change in Occupied Housing Units (2019-2020)	1,536	1.6%
<i>US Census Bureau, ACS 2019 and 2020 5-Year Estimates, Table B25003.</i>		
Detached, Single-Family Homes	133,926	81.6%
State Detached Single-Family Homes	1.5M	52.1%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table DP04.</i>		
Households Experiencing Housing Cost Stress (Spending 30% or More of Income on Housing)		
Owner-Occupied with a Mortgage	17,574	37.5%
Change, Owner-Occupied with a Mortgage (2019-2020)	-623	-3.4%
Owner-Occupied without a Mortgage	5,291	18.2%
Change, Owner-Occupied without a Mortgage (2019-2020)	67	1.3%
Renter-Occupied	10,010	56.2%
Change, Owner-Occupied (2019-2020)	531	5.6%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table DP04.</i>		



2019 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)
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Estimated Annual Income for Median Sales Price for a Single-Family Home to be Affordable (2020)	\$119,000	
Median Household Income (2020)	\$76,863	
Difference Between MHI and Annual Income Needed to Affordably Purchase a Single-Family Home	≈\$42,000	
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table S1901; Cape Cod & Islands Association of Realtors; Crane/EPR. Estimates assumed a 10% down payment and a 4.125% 30-year loan and used the NerdWallet mortgage calculator to estimate the monthly principal and interest payment. Calculations also used an insurance rate of \$4/\$1,000 and a mortgage insurance rate of \$45/\$100,000. This analysis assumes housing costs should not exceed 30% of income. Due to Census data release schedules, this figure still represents 2020 conditions; please note the median sales price has only increased in 2021 and 2022 to date.</i>		
Units Designated for Seasonal, Recreational, or Occasional Use	61,473	37.5%
State Units, Seasonal, Recreational, or Occasional Use	123K	4.2%
Country Units, Seasonal, Recreational, or Occasional Use	5.3M	3.8%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Tables B25004 and DP04.</i>		
Transportation		
Related Data Cape Cod Dashboards: - Traffic Trends (https://datacapecod.org/pf/cape-cod-traffic-trends/) - Crash Dashboard (https://datacapecod.org/pf/cape-cod-crash-dashboard/)		
Workers over 16	103,882	
Commuter of Less than 15 Minutes	33.8%	
Mean Travel Time to Work (Minutes)	25.2	
State Mean Travel Time to Work (Minutes)	30.0	
Population Working from Home	9,765	9.4%
State Population Working from Home	294K	8.3%
<i>US Census Bureau, ACS 2020 5-Year Estimates, Table S0801.</i>		
Population Living and Working in County	63,771	
Change in Population Living and Working in County (2018-2019)	643	1.0%
Population Living Outside County, Working in County <i>Percent reflects share of people employed in county.</i>	24,085	27.4%
Change in Pop. Living Outside, Working in County (2018-2019)	-237	-1.0%
Population Living in County, Working Outside County <i>Percent reflects share of people living in county.</i>	33,310	34.30%
Change in Pop. Living in, Working Outside County (2018-2019)	99	0.3%
<i>US Census, On the Map, 2019.</i>		
Community Character		

Related Data Cape Cod Dashboards: - Cape Cod Chronology Viewer (https://datacapecod.org/pf/cape-cod-chronology-viewer/)		
Total Cape Cod Structures in MHC Historic Inventory	13,361	
Inventoried structures in LHD	4,963	
Inventoried structures in NRD (and not in LHDs)	1,518	
Inventoried structures with PR (not on NR or LHD)	5	
Inventoried structures with no protections	6,875	
Inventoried structures with no protections, constructed pre-1800	319	
Inventoried structures with no protections, constructed 1800-1899	2,132	
Inventoried structures with no protections, constructed 1900-1949	2,675	
Parcels developed before 1950	Approx. 21,000	13%
<i>MassGIS, "MHC Historic Inventory," 2022. Link: https://www.mass.gov/info-details/massgis-data-mhc-historic-inventory; Cape Assessors' Data</i>		

Schedule of Goals for the Next Year

In Year 4 of CEDS implementation, the Commission will continue to advance the following:

- **Administration and General Planning:** Activities will include administrative support for the BCEDC, providing technical support related to CEDS objectives, and pursuing funding in support of CEDS Action Plan implementation.
- **Outreach and Information Sharing:** Outreach efforts to regional stakeholders will include data collection, analysis, and visualization; the development and dissemination of research and planning reports; and presentations on a range of economic and community development issues.
- **Targeted Technical Assistance:** Assistance to towns, non-profits, and other regional partners will include support for LCP development, project-based research and data analysis, and developing and implementing recommendations in alignment with regional priorities.

The following Regional Initiatives and Projects listed in the 2019 CEDS Action Plan will be included in the Year 4 Implementation Plan:

- **Housing Access & Affordability Initiative:** The Commission will advance a regional housing strategy to address the housing supply, affordability, and availability issues facing the region, with initial activities including data review, stakeholder engagement, and regional affordable housing entities research. Staff will conduct a regional housing suitability analysis to identify

parcels that would be suitable for development or redevelopment of housing, with activities including GIS analysis, stakeholder engagement, and development of a mapping application, model requests for proposals, and a project website. Staff will also collaborate with a consultant to carry out an update and expansion of the 2017 Regional Housing Market Analysis.

- **Regional Infrastructure Planning Initiative:** Commission staff will advance the Freshwater Initiative, a project related to the Cape-wide Drinking Water Plan. The Initiative will produce a comprehensive analysis of collected pond monitoring data on nutrients and other water quality parameters, assess the overall health of Cape Cod's freshwater pond network, and identify larger regional trends in pond water quality.
- **Infrastructure Funding Initiative:** Commission staff will advance the Last-Mile Broadband Deployment Strategy and Buildout Fund project through continued support for research, regional analyses, and education on broadband needs, coordination on policies that facilitate regional broadband implementation, and identification and pursuit of potential funding sources. Anticipated activities include releasing a request for proposals (RFP) for a comprehensive study of commercial internet availability for residential, commercial, institutional, and municipal properties and of areas with limited or insufficient cellular data service within Barnstable County, and to establish recommendations for network upgrades and/or expansion.

The following projects, while not initially included in the CEDs Action Plan, will be advanced in alignment with CEDs priorities and broader COVID-19 economic recovery efforts:

- **Land Use Planning for Economic Resilience:** The project will be carried out in Year 4 with development of a zoning and land use regulations guide and support for best practices implementation in Cape Cod towns.
- **Early Education and Childcare Needs Assessment:** The survey-based needs assessment will conclude in June 2022 with a report detailing existing levels of provision and needs, identifying gaps in services, and exploring potential mitigating strategies. In Year 4 of CEDs implementation, the report's recommendations will be assessed and a framework for implementation by a range of regional stakeholders will be developed.

CAPE COD COMMISSION

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