



CAPE COD
COMMISSION

2019 Comprehensive Economic Development Strategy (CEDS)

YEAR 4 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 4 of CEDs implementation (July 1, 2022 - June 30, 2023). 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 several changes to its composition in the past year. The current BCEDC members are:

- Greg Bilezikian, Executive Director, Bilezikian Family Foundation (beginning January 2023)
- Rob Brennan, President, CapeBuilt Homes
- Chris Flanagan, Executive Officer, Home Builders & Remodelers (until January 2023)
- Kara Galvin, Executive Director, Cape and Islands Workforce Board
- Lisa Guyon, Executive Director, WE CAN
- Cindy Horgan, Executive Director, Cape Cod Children's Place (beginning January 2023)
- Tammi Jacobsen, Director of Workforce Development & Training, Cape Cod Community College
- Alisa Magnotta, Executive Director, Cape Cod Housing Assistance Corporation
- Paul Niedzwiecki, CEO, Cape Cod Chamber of Commerce (resigned 9/14/22)
- Robert "Bert" Talerman, Co-President, Cape Cod Five Cents Savings Bank
- Julie Wake, Executive Director, Arts Foundation of Cape Cod
- Mark Forest, Barnstable County Commissioner

- Harold "Woody" Mitchell, Chair, Cape Cod Commission
- John Ohman, Representative, Barnstable County Assembly of Delegates

Two new staff members contributing to economic development and EDA grant activities were hired at the Commission beginning in September 2022 and October 2022. These two staff members filled roles vacated during the previous year.

Report on Economic Development Activities

The following section briefly summarizes CEDs Year 4 implementation activities, listing both the activities proposed in the Year 4 Action Plan from the CEDs Year 3 Annual Report and the corresponding activities accomplished by Commission staff in Year 4.

ADMINISTRATION AND GENERAL PLANNING

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

The Commission provided administrative and technical support to the BCEDC. The BCEDC met 8 times during the fiscal year, on 9/14/2022, 11/16/2022, 12/14/2022, 1/11/2023, 2/8/2023, 4/12/2023, 5/10/2023, and 6/7/2023. The executive and nominating committees also met during this time: 10/6/2022 (executive committee), 1/11/2023 (nominating committee), and 4/25/2023 (executive committee).

During Year 4, there were no new license plate grant funds issued but staff continued to administer the program and reviewed progress and final reports from previous round recipients including: Cape Cod Young Professionals, Duffy Health Center, Housing Assistance Corporation, Town of Harwich, and Association to Preserve Cape Cod.

During this time, no new grant applications were submitted for potential EDA funding.

OUTREACH AND INFORMATION SHARING

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

The Commission hosted the 2022 OneCape Summit on August 1-2 in Harwich, MA, which featured presentations and conversations on the intersection between Cape Cod's environment and economy. Over 300 people attended the conference with 135 businesses or organizations represented.

Staff continued to update and add to the new Data Cape Cod website providing access to an expanded series of datasets supporting regional planning efforts, economic development, and recovery from the COVID-19 pandemic. Over the past year, updates included several new data stories across different issue areas such as [housing](#), [transportation safety](#), and [historic preservation](#).

Staff worked with the University of Massachusetts Donahue Institute (UMDI) and the Center for Public Opinion at UMass Lowell to develop a regional housing needs assessment. This project included a resident survey to better understand Cape Cod residents' housing situations and satisfaction with their current housing. The regional housing needs assessment includes population and housing unit supply and demand projections over the next couple of decades, which will be informative in the development of the regional housing strategy. Staff also worked with Utile and Outwith Studio to develop and launch a housing preference survey to support the regional housing strategy.

Staff continued to provide routine presentations on the regional economy and to support research assistance to regional partners.

OneCape Summit schedule and details are available here:
<https://onecape.capecodcommission.org/2022-onecape-summit/>.

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

TARGETED TECHNICAL ASSISTANCE

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

The Commission provided support and guidance for towns in updating their LCPs and assisting communities in developing new zoning 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.

Regulatory review process and project details can be accessed here:

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

HOUSING ACCESS & AFFORDABILITY INITIATIVE

Regional Housing Strategy

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

Commission staff secured over \$900,000 in ARPA funds from Barnstable County to support development of the regional housing strategy. To support development of the strategy, Commission staff collected baseline data, including development of housing profiles for each town in the region, as well as one for the county. These profiles include housing data as well as related demographic and economic data and information to characterize the current housing landscape and challenges across the region. In addition to the baseline data gathered by staff, UMass Donahue Institute conducted a housing needs assessment which provides data on current and projected housing needs and Utile and Outwith Studio conducted a zoning analysis to better understand existing land use regulations as they relate to the provision of housing.

Commission staff also carried out significant stakeholder engagement for the regional housing strategy. Over the winter of 2022-2023, Commission staff met with all 15 municipalities to hear from them about local priorities, successes, and challenges in their communities with regard to housing affordability and availability. The meeting attendees included a broad range of representatives such as town staff, administration, committee and board members, and elected representatives.

Beginning in March, other stakeholder groups were convened, including the steering committee and the funding and financing working group. Additionally, beginning in April, the first subregional stakeholder meetings were held. These were the first in a series of meetings for each subregion of Cape Cod, bringing together a broad range of perspectives to discuss the housing challenges facing

the region and to identify and discuss possible strategies for addressing those challenges. Development of the regional housing strategy will continue throughout the summer with more opportunities for public engagement and further identification and prioritization of strategies for the region's communities. Staff anticipates completing the strategy in late 2023.

Commission staff have also been working on a housing suitability analysis which will identify parcels of land in the region that are more suitable for housing development or redevelopment. The analysis will rely on the identification of certain criteria that can be used in a GIS analysis.

Housing profiles are available here: <https://capecodcommission.org/our-work/housing-profiles>

More information about the regional housing strategy is available here:
<https://capecodcommission.org/housing>

REGIONAL INFRASTRUCTURE PLANNING INITIATIVE

Freshwater Initiative

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

Commission staff continued to advance the freshwater initiative this year, securing approximately \$2.5 million in funding from Barnstable County. Over this past year, the Commission contracted with a consultant, Eastern Research Group (ERG), to carry out multiple surveys and an economics impact analysis to better understand the economic values of the region's freshwater resources. This included a survey of both visitors and residents in the region about what mattered most to them regarding ponds in the region. It will also include a survey conducted throughout the summer of people who are at ponds throughout the Cape as well as a third survey to understand what people would prioritize spending on related to ponds and freshwater resources on the Cape. Commission staff also worked on researching and compiling different strategies for supporting freshwater quality and health and initiated meetings with each of the 15 municipalities to understand their existing efforts, challenges, and successes in terms of freshwater quality. Commission staff also worked with the Association to Preserve Cape Cod to launch the regional pond monitoring program, including identifying a representative selection of ponds to monitor as part of the program. Monitoring and data collection began in April. A broader stakeholder engagement process is anticipated for the fall.

INFRASTRUCTURE FUNDING INITIATIVE

Last-Mile Broadband Deployment Strategy and Buildout Fund

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

Commission staff secured \$400,000 in funding through Barnstable County's allocation of ARPA funds for a fixed and mobile broadband network assessment. The Commission contracted with a consultant, Columbia Telecommunications Corporation, to complete the assessment. The majority of the work will be completed within the next reporting period.

LAND USE PLANNING FOR ECONOMIC RESILIENCE

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

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. Over this past year, Commission staff concluded the literature review for this project, identified and developed a local commercial and mixed-use development typology for the region, including local examples. Commission staff conducted site visits for each of the local commercial and mixed-use development types in the region to better understand their characteristics. Commission staff analyzed cell phone data and conducted interviews with local real estate agents, property managers, business owners and others familiar with the developments. Based on this information and research, Commission staff identified what was important for commercial and mixed-use developments to weather the impacts of the COVID-19 pandemic and other trends taking root before the pandemic. Supporting this project is development of a mixed-use model bylaw incorporating the best practices, which towns can tailor to suit their needs.

EARLY EDUCATION AND CHILDCARE NEEDS ASSESSMENT

Proposed in Year 4 Implementation Plan:

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.

Accomplished in Year 4:

The Commission partnered with Barnstable County and the Rennie Center for Education Research and Policy to complete an Early Education and Childcare Needs Assessment for the region. The findings of this were presented at the OneCape Summit and the BCEDC is considering childcare as critical to the economic sustainability and viability of the region. The Cape Cod Chamber of Commerce convened a childcare task force to, in part, consider implementation of recommendations from the Needs Assessment. Commission staff is participating on the task force.

More information about the Early Education and Childcare Needs Assessment is available here:

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

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	227,942	
<i>US Census Bureau, American Community Survey (ACS) 2021 5-Year Estimates, Table DP05.</i>		
Population Change (2010-2021)	10,459	4.8%
<i>US Census Bureau, ACS 2010 and 2021 5-Year Estimates, Table DP05.</i>		
Median Age (Years)	53.9	
<i>US Census Bureau, ACS 2021 5-Year Estimates, Table DP05.</i>		
Race		
White	202,569	88.9%
Black or African American	6,654	2.9%
American Indian and Alaska Native	1,179	0.5%
Asian	3,633	1.6%
Native Hawaiian and Other Pacific Islander	19	0.0%
Some other race	4,734	2.1%
Two or more races	9,154	4.0%
<i>US Census Bureau, ACS 2021 5-Year Estimates, Table DP05.</i>		
Ethnicity		
Hispanic or Latino	7,811	3.4%
Not Hispanic or Latino	220,131	96.6%
<i>US Census Bureau, ACS 2021 5-Year Estimates, Table DP05.</i>		
Language Spoken at Home		
Speak only English	197,089	89.7%
Spanish	5,075	2.3%
Other Indo-European languages	14,475	6.6%
Asian and Pacific Island languages	1,542	0.7%

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Other languages	1,563	0.7%
<i>US Census Bureau, ACS 2021 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)	59.9%	
<i>US Census Bureau, ACS 2021 5-Year Estimates, Table S2301.</i>		
Median Household Income in the past 12 months (in 2021 inflation-adjusted dollars)		
County Median Household Income	\$82,619	
State Median Household Income	\$89,026	
Country Median Household Income	\$69,021	
<i>US Census Bureau, ACS 2021 5-Year Estimates, Table B19013.</i>		
Low-Income Households (\$0-\$49,999)	28,951	29.5%
Change in Low-Income Households (2016-2021)	-7,531	-20.6%
Middle-Income Households (\$50,000 to \$124,999)	37,704	38.4%
Change in Middle-Income Households (2016-2021)	-1,860	-4.7%
High-Income Households (\$125,000+)	31,508	32.1%
Change in High-Income Households (2016-2021)	13,203	72.1%
<i>US Census Bureau, ACS 2016 and 2021 5-Year Estimates, Table B19001.</i>		
Total Annual Wages in County	\$5,259,841,085	
Change in Total Wages in County (2020-2021)	\$500,877,464	10.5%
<i>US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Total Covered, All Industry Aggregations, Barnstable County, Massachusetts, 2020 and 2021.</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 (EJ) Block Groups	14	93%
Barnstable		
Block Groups	12	31.6%
Residents	15,825	32.4%
Bourne		

Block Groups	3	18.8%
Residents	2,106	10.3%
Brewster		
Block Groups	1	11.1%
Residents	503	4.9%
Chatham		
Block Groups	1	12.5%
Residents	596	9.0%
Dennis		
Block Groups	4	22.2%
Residents	3921	26.7%
Eastham		
Block Groups	2	33.3%
Residents	1,519	26.4%
Falmouth		
Block Groups	5	19.2%
Residents	5,861	18.0%
Harwich		
Block Groups	1	8.3%
Residents	565	4.2%
Mashpee		
Block Groups	2	22.2%
Residents	2109	13.3%
Orleans		
Block Groups	1	14.3%
Residents	872	13.8%
Provincetown		
Block Groups	1	20.0%
Residents	664	18.1%
Sandwich		
Block Groups	1	6.7%
Residents	797	3.8%
Truro		
Block Groups	1	33.3%
Residents	892	36.3%
Yarmouth		
Block Groups	6	27.3%
Residents	5,719	22.9%

<i>Massachusetts Executive Office of Energy and Environmental Affairs, List of Massachusetts Cities & Towns with Environmental Justice Populations, 2020, updated November 2022.</i>		
County Population Below Federal Poverty Level	16,289	7.2%
State Population Below Federal Poverty Level	668,780	9.9%
Country Population Below Federal Poverty Level	40,661,636	12.6%
<i>US Census Bureau, ACS 2021 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.</i>		
County 24-Month Average Unemployment Rate	5.06%	
Country 24-Month Average Unemployment Rate	4.05%	
<i>US Economic Development Administration (EDA), StatsAmerica, Measuring Distress County Tool, April 2023.</i>		
Distressed Income Tracts Based on 2021 Unemployment Rate	12	
Distressed Income Tracts Population & Unemployment Rate	46,451	
Provincetown (Census Tract 101.00)	3,664	10.2%
Eastham (Census Tract 103.06)	3,080	11.1%
Orleans (Census Tract 105.00)	2,962	7.7%
Brewster (Census Tract 108.00)	4,919	15.8%
Harwich (Census Tract 110.02)	4,604	7.8%
Dennis (Census Track 116.00)	3,003	8.7%
Yarmouth (Census Tract 120.01)	5,978	7.9%
Yarmouth (Census Tract 120.02)	3,265	10.0%
Yarmouth (Census Tract 121.02)	3,269	7.4%
Barnstable (Census Tract 125.02)	3,709	8.6%
Barnstable (Census Tract 141.00)	797	9.8%
Falmouth (Census Tract 144.02)	7,201	7.3%
<i>US Economic Development Administration (EDA), StatsAmerica, Measuring Distress Tract Tool, April 2023. Code of Federal Regulations, Title 13, Chapter III, Part 301, Subpart C. Economic Distress Levels. 2020 Census Demographic Data Map Viewer.</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 April 2023	104,366	
Change in Employed Population (April 2022-2023)	1,218	1.2%
<i>FRED, Employed Persons in Barnstable County, MA, April 2023.</i>		
Unemployment April 2023	3,859	3.6%
Change in Unemployment (April 2022-2023)	-1,290	-25.0%
State Unemployment April 2023	2.6%	
Change in State Unemployment (April 2022-2023)	-12.5%	
<i>Massachusetts Department of Economic Research, Labor Force and Unemployment Data, Barnstable County, April 2022 - April 2023.</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 2021 (thousands of chained 2012 dollars)	\$12,083,714	
Change in County GDP (2001-2021)	\$1,005,196	9.1%
Top 3 Industries by Gross Domestic Product		
Finance, insurance, real estate, rental, and leasing	\$3,618,138	
Educational services, health care, and social assistance	\$1,296,702	
Professional and business services	\$1,253,771	
<i>US Bureau of Economic Analysis, CAGDP9 Real GDP by county and metropolitan area, Barnstable County, 2021.</i>		
Annual meals tax collected (2022)	\$9,721,900	
Change in annual meals tax collected (2021-2022)	\$1,129,961	13.2%
Annual room tax collected (2022)	\$42,032,891	
Change in annual room tax collected (2021-2022)	\$5,198,101	14.1%
<i>Massachusetts Department of Revenue, Local Option Meals & Rooms Tax Distributions, calendar year 2021 and 2022 distributions for Barnstable County towns.</i>		

Establishments for All Industries and Ownership Types	9,908	
Change in Establishments, All Industries and Ownership Types (2016-2021)	462	4.9%
Top 3 Industries by Employment		
Health Care and Social Assistance		
Average Monthly Employment	14,826	
Total Wages	\$961,253,564	
Retail Trade		
Average Monthly Employment	14,723	
Total Wages	\$629,147,218	
Accommodation and Food Services		
Average Monthly Employment	14,190	
Total Wages	\$511,755,625	
Top 3 Industries by Average Weekly Wages		
Finance and Insurance		
Average Monthly Employment	2,163	
Average Weekly Wages	\$2,119	
Utilities		
Average Monthly Employment	411	
Average Weekly Wages	\$1,864	
Mining, Quarrying, and Oil and Gas Extraction		
Average Monthly Employment	86	
Average Weekly Wages	\$1,572	
<i>Massachusetts Department of Economic Research, Employment and Wages (ES-202) data, Barnstable County, 2021.</i>		
Industries by Average Annual Employment Location Quotients for Private Industry		
Core Industries		
Arts, Entertainment, and Recreation		
Average Annual Employment Location Quotient	2.19	
Annual Average Employment	2,749	
5-Year Change in Employment	-4.4%	
Total Establishments	254	
Accommodation and Food services		
Average Annual Employment Location Quotient	1.83	
Annual Average Employment	14,167	
5-Year Change in Employment	-12.5%	
Total Establishments	1,076	
Construction		
Average Annual Employment Location Quotient	1.43	



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Annual Average Employment	6,725	
5-Year Change in Employment	18.0%	
Total Establishments	1,401	
Emerging Industries		
Management of Companies and Enterprises		
Average Annual Employment Location Quotient	0.31	
Annual Average Employment	457	
5-Year Change in Employment	47.6%	
Total Establishments	31	
Wholesale Trade		
Average Annual Employment Location Quotient	0.45	
Annual Average Employment	1,618	
5-Year Change in Employment	1.4%	
Total Establishments	263	
Utilities		
Average Annual Employment Location Quotient	0.91	
Annual Average Employment	316	
5-Year Change in Employment	2.6%	
Total Establishments	15	
<i>US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2016 and 2021 annual averages data for Barnstable County.</i>		
Seasonality		
Related Data Cape Cod Dashboards: - Traffic Trends (https://datacapecod.org/pf/cape-cod-traffic-trends/) - Unemployment (https://datacapecod.org/pf/unemployment/)		
Unemployment January 2023	7,233	6.7%
State Unemployment January 2023	4.1%	
Unemployment July 2022	4,318	3.5%
State Unemployment July 2022	3.9%	
<i>Massachusetts Department of Economic Research, Labor Force and Unemployment Data, Barnstable County, April 2022 – April 2023.</i>		
Jobs January 2022	83,464	
Jobs July 2022	110,517	
Seasonal Change in Jobs (January vs. July)	27,053	32.4%
<i>Massachusetts Department of Economic Research, Employment and Wages (ES-202) data, Barnstable County.</i>		
Total Trips over the Canal Bridges (July 2022)	Approx. 4.0 million trips	
Total Trips over the Canal Bridges (July 2021)	Approx. 4.5 million trips	

<i>MassDOT and Cape Cod Commission data. 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/)		
County Establishments with < 10 Employees	7,091	81.2%
State Establishments with < 10 Employees	132,824	73.8%
Change in County Establishments with < 10 Employees (2016-2021)	188	2.7%
<i>US Census Bureau, County Business Patterns 2016 and 2021.</i>		
County Employment in Firms Less Than 1 Year Old	2,795	3.9%
County Change in Employment in Firms Less Than 1 Year Old (2021-2022)	2	
State Employment in Firms Less Than 1 Year Old	88,312	2.8%
Country Employment in Firms Less Than 1 Year Old	3,775,129	3.0%
County Employment in Firms 11 or More Years Old	55,099	77.0%
County Change in Employment in Firms Less Than 1 Year Old (2021-2022)	-3,112	
State Employment in Firms 11 or More Years Old	2,545,955	82.0%
Country Employment in Firms 11 or More Years Old	100,995,213	80.6%
<i>US Census Bureau, Quarterly Workforce Indicators, All Private Ownership, 2021 and 2022, Barnstable County, Massachusetts, and United States.</i>		
Self-Employed Residents	17,365	
Self-employed in own incorporated business workers	6,431	37.0%
Self-employed in own not incorporated business workers and unpaid family workers	10,934	63.0%
<i>US Census Bureau, ACS 2021 5-Year Estimates, Table S2408.</i>		

PLACE
Housing
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/)



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Median Sales Price (April 2023)	\$760,000	
Change in Median Sales Price (April 2022 – April 2023)	\$33,500	4.6%
<i>Cape & Islands Association of Realtors, Local Market Updates, April 2023, price for single-family homes.</i>		
Housing Units	164,523	
Occupied Housing Units	98,163	
Owner-Occupied	79,299	80.8%
Renter-Occupied	18,864	19.2%
Change in Occupied Housing Units (2020-2021)	2,304	2.4%
Detached, Single-Family Homes	133,926	81.4%
State Detached Single-Family Homes	1,541,923	51.7%
Households Experiencing Housing Cost Stress (Spending 30% or More of Income on Housing)		
Owner-Occupied with a Mortgage	18,019	37.2%
Change, Owner-Occupied with a Mortgage (2020-2021)	445	2.5%
Owner-Occupied without a Mortgage	5,344	17.6%
Change, Owner-Occupied without a Mortgage (2020-2021)	53	1.0%
Renter-Occupied	9,863	52.2%
Change, Renter-Occupied (2020-2021)	-147	-1.5%
<i>US Census Bureau, ACS 2021 and 2020 5-Year Estimates, Table DP04.</i>		
Estimated Annual Income for Median Sales Price for a Single-Family Home to be Affordable (2022)	\$210,000	
Median Household Income (2020)	\$82,619	
Difference Between MHI and Annual Income Needed to Affordably Purchase a Single-Family Home	≈\$127,000	
<i>Cape Cod and Islands Association of Realtors; 2021 ACS 5-Year Estimates; 2022 Cape Cod Housing Needs Assessment. 2021 data is the most recent available for median household income; while it is possible it increased in 2022, it has not closed the gap between what is needed to affordably purchase a single-family home. Affordably purchase means a household spends 30% of income or less on housing costs.</i>		
Units Designated for Seasonal, Recreational, or Occasional Use	59,794	36.3%
State Units, Seasonal, Recreational, or Occasional Use	121,692	4.1%
Country Units, Seasonal, Recreational, or Occasional Use	5,092,152	3.6%
<i>US Census Bureau, ACS 2021 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	110,350	

Commute of Less than 15 Minutes	34.6%	
Mean Travel Time to Work (Minutes)	25.0	
State Mean Travel Time to Work (Minutes)	29.6	
Population Working from Home	11.5%	
State Population Working from Home	11.9%	
<i>US Census Bureau, ACS 2021 5-Year Estimates, Table S0801.</i>		
Population Living and Working in County	55,846	
Change in Population Living and Working in County (2019-2020)	-7,925	-12.4%
Population Living Outside County, Working in County <i>Percent reflects share of people employed in county.</i>	21,575	27.9%
Change in Pop. Living Outside, Working in County (2019-2020)	-2,510	-10.4%
Population Living in County, Working Outside County <i>Percent reflects share of people living in county.</i>	31,222	35.9%
Change in Pop. Living in, Working Outside County (2019-2020)	-2,088	-6.3%
<i>US Census, On the Map, Barnstable County Inflow/Outflow data, 2019 and 2020.</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	13,831	
Inventoried structures in LHD	4,967	
Inventoried structures in NRD (and not in LHDs)	1,603	
Inventoried structures with PR (not on NR or LHD)	5	
Inventoried structures with no protections	7,256	
Inventoried structures with no protections, constructed pre-1800	317	
Inventoried structures with no protections, constructed 1800-1899	2,161	
Inventoried structures with no protections, constructed 1900-1949	2,801	
Parcels developed before 1950	Approx. 21,000	13%
<i>MassGIS, MHC Historic Inventory, May 2023; Cape Assessors' Data</i>		

Schedule of Goals for the Next Year

In Year 5 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. Additionally, this year the CEDS will be updated through a comprehensive CEDS planning process.
- **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 5 Implementation Plan:

- **Housing Access & Affordability Initiative:** The Commission will advance and complete a regional housing strategy to address the housing supply, affordability, and availability issues facing the region. This will include further stakeholder engagement, regional affordable housing entities research, identifying new financing mechanisms for housing challenges in the region, and priority strategies for implementation. The regional strategy will also result in residential design guidelines for housing development other than single-family homes and model bylaws. Additionally, it will result in a decision support tool to advance housing efforts in the region with the attributes of the tool to be defined through the stakeholder process and planning process. Staff will continue to conduct and complete 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, and model requests for proposals.
- **Regional Infrastructure Planning Initiative:** Commission staff will continue to advance the Freshwater Initiative. 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. Over the next year, robust stakeholder engagement will further identify appropriate strategies for the different freshwater resources and different communities in the region

and will incorporate information from the economic analysis and surveys to better inform the outcomes of the initiative. Monitoring of a representative sample of ponds will also continue, establishing consistent year-over-year data for the region's freshwater resources.

- **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. Working with Columbia Telecommunications Corporation, Commission staff will complete 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 establish recommendations for network upgrades and/or expansion.

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