



CAPE COD  
COMMISSION

# 2019 Comprehensive Economic Development Strategy (CEDS)

YEAR 5 ANNUAL REPORT

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

JUNE 2024

Prepared by Cape Cod Commission Staff

## Performance Progress Report

<b>Grantee:</b>	<b>Barnstable County, Cape Cod Commission</b>
<b>Project Title:</b>	Annual CEDS Performance Report
<b>Project Number:</b>	ED21PHI3020005
<b>CEDS Performance Year:</b>	July 1, 2023 – June 30, 2024
<b>Reporting period end date:</b>	June 30, 2024
<b>Report Prepared by:</b>	Cape Cod Commission Staff
<b>Five-year CEDS Time Period:</b>	2019-2024



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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 5 of CEDs implementation (July 1, 2023 - June 30, 2024). 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
- Rob Brennan, President, CapeBuilt Homes
- Amanda Converse, Executive Director, Love Live Local (joined September 2023)
- Kara Galvin, Executive Director, Cape and Islands Workforce Board
- Lisa Guyon, Executive Director, WE CAN (resigned March 2024)
- Cindy Horgan, Executive Director, Cape Cod Children's Place
- Tammi Jacobsen, Director of Workforce Development & Training, Cape Cod Community College
- Alisa Magnotta, Executive Director, Cape Cod Housing Assistance Corporation
- Wendy Northcross, Executive Director, John F. Kennedy Hyannis Museum Foundation, Inc. (joined May 2024)
- Jack Stevenson, President, Mid-Cape Home Centers (joined September 2023)
- Robert "Bert" Talerman, Co-President, Cape Cod Five Cents Savings Bank

- Julie Wake, Executive Director, Arts Foundation of Cape Cod (resigned March 2024)
- Mark Forest, Barnstable County Commissioner
- Harold "Woody" Mitchell, Chair, Cape Cod Commission
- John Ohman, Representative, Barnstable County Assembly of Delegates

## Report on Economic Development Activities

The following section briefly summarizes CEDS Year 5 implementation activities, listing both the activities proposed in the Year 5 Action Plan from the CEDS Year 4 Annual Report and the corresponding activities accomplished by Commission staff in Year 5.

### ADMINISTRATION AND GENERAL PLANNING

#### *Proposed in Year 5 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. Additionally, this year the CEDS will be updated through a comprehensive CEDS planning process.

#### *Accomplished in Year 5:*

The Commission provided administrative and technical support to the BCEDC. The BCEDC met nine times during the fiscal year, on 9/13/2023, 10/11/2023, 11/8/2023, 12/13/2023, 1/10/2024, 2/14/2024, 3/27/2024, 5/14/2024, and 6/12/2024. The nominating committee also met three times on 8/17/2023, 4/26/2024, and 6/7/2024.

During Year 5, there were no new license plate grant funds issued and no new grant applications were submitted for potential EDA funding.

A new CEDS was developed during this timeframe. Extensive input from the BCEDC (the CEDS strategy committee) and from stakeholders shaped the strategy. An economic summit held March 5, 2024 brought nearly 100 people together to begin discussions around shaping the region's economic future. Focus groups on draft actions were convened and helped to refine the CEDS actions. The CEDS was approved by the BCEDC on June 12, 2024 and by the Cape Cod Commission on June 13, 2024 and was then submitted to EDA for review.

### OUTREACH AND INFORMATION SHARING

#### *Proposed in Year 5 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 5:*

The Commission hosted the 2023 OneCape Summit July 31 – August 1 in Harwich, MA, which featured presentations and conversations on the intersection between Cape Cod’s environment and economy. Over 330 people attended the conference with 138 businesses or organizations represented.

Staff continued to update and add to the new Data Cape Cod website providing access to the most current datasets supporting regional planning efforts and economic development. 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/2023-onecape-summit/>.

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

## **TARGETED TECHNICAL ASSISTANCE**

*Proposed in Year 5 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 5:*

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 the 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 5 Implementation Plan:*

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.

*Accomplished in Year 5:*

Commission staff continued to develop and completed the regional housing strategy during this reporting period. This included continued stakeholder engagement for the regional housing strategy including a second round of meetings with all 15 municipalities to get feedback on draft regional and local recommendations. The meeting attendees included a broad range of representatives such as town staff, administration, committee and board members, and elected representatives.

Other stakeholder groups continued to be convened, including the steering committee and the funding and financing working group. The third and final subregional meetings were held during this time, with joint meetings for the Lower and Outer Cape and Mid and Upper Cape subregions. The meetings brought together a broad range of perspectives to discuss draft recommendations of the strategy and resources to support its implementation. Resources developed included a suite of model bylaws to support greater housing opportunities that towns can tailor to suit their needs, as well as factsheets on over 40 strategies to help address housing affordability and availability challenges. Each factsheet includes general information on the strategy, resources for more information, and a case study or example.

Commission staff continued 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 and updated the housing profiles with the latest available data.

The regional housing strategy, model bylaws, housing profiles, and fact sheets are available here: <https://capecodcommission.org/housing>

## **REGIONAL INFRASTRUCTURE PLANNING INITIATIVE**

### **Freshwater Initiative**

*Proposed in Year 5 Implementation Plan:*

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.

#### *Accomplished in Year 5:*

Commission staff continued to advance the Freshwater Initiative this year. Over this past year, Commission staff worked with the 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, a survey conducted through 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 continued to work on researching and compiling different strategies for supporting freshwater quality and health, identifying 40 strategies that may be appropriate on Cape Cod. Strategies were identified at a variety of scales, including in a pond, on the pond shore, or at the watershed level. Staff completed draft fact sheets for each strategy. Commission staff also met with each of the municipalities to understand their existing efforts, challenges, and successes in terms of freshwater quality. The Association to Preserve Cape Cod, with support from the Commission, continued to carry out the regional pond monitoring program.

Commission staff facilitated stakeholder meetings in March, April, and June for the Freshwater Initiative. Three meetings were held each month, organized around three groundwater lenses in the region. The first meetings worked on establishing a shared understanding of the region's freshwater systems, the Freshwater Initiative, and sharing different stakeholder perspectives. The second series of meetings explored possible strategies for improving and maintaining pond health, as well as discussion around prioritizing future pond management, and the third series of meetings reviewed and solicited feedback on the draft recommendations, implementation plan, and resources under development. Commission staff also convened an end user group to support creation of the water quality data portal, which will be developed over the next six months.

## **INFRASTRUCTURE FUNDING INITIATIVE**

### **Last-Mile Broadband Deployment Strategy and Buildout Fund**

#### *Proposed in Year 5 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. 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.

*Accomplished in Year 5:*

With a consultant, Columbia Telecommunications Corporation, Commission staff continued work on a broadband needs assessment that will be published in summer 2024. The needs assessment process included the collection of speed test data, a residential survey, interviews with internet service providers, a series of stakeholders focus groups, and a variety of technical analyses. Directly relevant to the CEDs, a business focus group discussed the broadband needs and challenges of businesses on Cape Cod and helped inform the assessment. The final report will document the existing conditions for fixed and mobile broadband services and outline a variety of pathways and funding opportunities the region could pursue to address connectivity, affordability, and digital equity challenges faced by the region.

Commission staff also supported specific efforts of communities and organizations looking to advance broadband deployment in the region including the sharing of GIS-based planimetric data to support analyses of potential broadband deployment.

## 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.

<b>PEOPLE</b>		
<i>Residents</i>		
Related Data Cape Cod Dashboards: - Year-Round Population ( <a href="https://datacapecod.org/pf/barnstable-county-year-round-population/">https://datacapecod.org/pf/barnstable-county-year-round-population/</a> )		
Total Population	229,436	
<i>US Census Bureau, American Community Survey (ACS) 2022 5-Year Estimates, <a href="#">Table DP05</a>.</i>		
Population Change (2012-2022)	13,415	6.2%
<i>US Census Bureau, ACS 2012 and 2022 5-Year Estimates, <a href="#">Table DP05</a>.</i>		
Median Age (Years)	54.5	
Race		
White	201,599	87.9%
Black or African American	6,515	2.8%
American Indian and Alaska Native	1,007	0.4%
Asian	3,421	1.5%
Native Hawaiian and Other Pacific Islander	20	0.0%
Some other race	5,007	2.2%
Two or more races	11,867	5.2%
Ethnicity		
Hispanic or Latino	8,047	3.5%
Not Hispanic or Latino	221,389	96.5%
<i>US Census Bureau, ACS 2022 5-Year Estimates, <a href="#">Table DP05</a>.</i>		
Language Spoken at Home for Population 5 Years and Older		
Speak only English	198,041	89.4%
Spanish	5,137	2.3%
Other Indo-European languages	14,912	6.7%
Asian and Pacific Island languages	1,736	0.8%
Other languages	1,604	0.7%
<i>US Census Bureau, ACS 2022 5-Year Estimates, <a href="#">Table S1601</a>.</i>		

<i>Workforce &amp; Income</i>		
Related Data Cape Cod Dashboards:		
- Household Income ( <a href="https://datacapecod.org/pf/household-income/">https://datacapecod.org/pf/household-income/</a> )		
- Labor Force and Earnings ( <a href="https://datacapecod.org/pf/labor-force-and-earnings/">https://datacapecod.org/pf/labor-force-and-earnings/</a> )		
- Employment & Wages by Industry ( <a href="https://datacapecod.org/pf/employment-wages-by-industry/">https://datacapecod.org/pf/employment-wages-by-industry/</a> )		
- Employment & Wages by Occupation ( <a href="https://datacapecod.org/pf/employment-and-wages-by-occupation/">https://datacapecod.org/pf/employment-and-wages-by-occupation/</a> )		
Labor force participation rate (16 Years and Older)	59.7%	
Median Household Income		
County Median Household Income	\$90,447	
State Median Household Income	\$96,505	
Country Median Household Income	\$75,149	
<i>US Census Bureau, ACS 2022 5-Year Estimates, Table DP03.</i>		
Low-Income Households (Less than \$50,000)	26,505	26.5%
Change in Low-Income Households (2017-2022)	-8,718	-32.9%
Middle-Income Households (\$50,000 to \$124,999)	37,190	37.2%
Change in Middle-Income Households (2017-2022)	-2,908	-7.8%
High-Income Households (\$125,000+)	36,274	36.3%
Change in High-Income Households (2017-2022)	16,584	45.7%
<i>US Census Bureau, ACS 2017 and 2022 5-Year Estimates, Table B19001.</i>		
Total Annual Wages in County	\$5,691,199,794	
Change in Total Wages in County (2020-2021)	\$431,358,709	7.6%
<i>US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Total Covered, All Industry Aggregations, Barnstable County, Massachusetts, 2021 and 2022.</i>		
<i>Vulnerable Populations</i>		
Related Data Cape Cod Dashboards:		
- Vulnerable Populations on Cape Cod ( <a href="https://datacapecod.org/pf/vulnerable-populations-on-cape-cod/">https://datacapecod.org/pf/vulnerable-populations-on-cape-cod/</a> )		
- Environmental Justice Populations ( <a href="https://datacapecod.org/pf/environmental-justice-populations/">https://datacapecod.org/pf/environmental-justice-populations/</a> )		
- Unemployment ( <a href="https://datacapecod.org/pf/unemployment/">https://datacapecod.org/pf/unemployment/</a> )		
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		



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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 &amp; Towns with Environmental Justice Populations, 2020, last <a href="#">updated November 2022</a>.</i>		
County Population Below Federal Poverty Level	15,911	7.0%
State Population Below Federal Poverty Level	672,361	9.9%



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Country Population Below Federal Poverty Level	40,521,584	12.5%	
<i>US Census Bureau, ACS 2022 5-Year Estimates, Table S1701.</i>			
Total Homeless Persons (Jan. 2023)	427		
Change (Feb. 2022 – Jan. 2023)	30	7.6%	
<i>Cape and Islands Regional Network on Homelessness, Annual Point in Time Count, 2023. Count of homeless persons includes both the Cape &amp; Islands.</i>			
County 24-Month Average Unemployment Rate	4.25%		
Country 24-Month Average Unemployment Rate	3.64%		
Distressed Income Tracts Based on Unemployment Rate and/or Per Capita Income	15		
Population, Unemployment Rate, and Per Capita Income for Distressed Census Tracts	55,995 (Total Population)		
Provincetown (Census Tract 101.00)	3,630	<b>8%</b>	\$50,951
Eastham (Census Tract 103.04)	2,739	<b>6%</b>	\$45,558
Eastham (Census Tract 103.06)	2,985	<b>10%</b>	\$45,928
Brewster (Census Tract 108.00)	4,987	<b>14%</b>	\$52,708
Harwich (Census Tract 110.02)	4,220	<b>12%</b>	\$46,891
Dennis (Census Tract 114.00)	3,575	<b>6%</b>	\$34,365
Dennis (Census Track 116.00)	2,649	<b>13%</b>	\$39,815
Yarmouth (Census Tract 120.01)	6,050	<b>8%</b>	\$41,545
Yarmouth (Census Tract 120.02)	2,714	<b>9%</b>	\$37,340
Barnstable (Census Tract 125.02)	3,458	<b>8%</b>	\$36,893
Barnstable (Census Tract 126.01)	3,211	<b>6%</b>	\$38,880
Barnstable (Census Tract 141.00)	766	<b>9%</b>	\$36,845
Barnstable (Census Tract 143.00)	3,748	<b>7%</b>	\$53,542
Falmouth (Census Tract 144.02)	7,399	<b>9%</b>	\$43,423
Barnstable (Census Tract 153.00)	3,864	2%	<b>\$29,088</b>
<i>NERDE Census Tract Distress Statistics Map Selector, May 2024. US Census Bureau, ACS 2022 5-Year Estimates, Table DP03. Bold indicates the reason for a tract being deemed distressed.</i>			

<b>ECONOMY</b>		
<i>Employment</i>		
Related Data Cape Cod Dashboards:		
- Labor Force & Earnings ( <a href="https://datacapecod.org/pf/labor-force-and-earnings/">https://datacapecod.org/pf/labor-force-and-earnings/</a> )		
- Unemployment ( <a href="https://datacapecod.org/pf/unemployment/">https://datacapecod.org/pf/unemployment/</a> )		
Employed Population April 2024	107,128	
Change in Employed Population (April 2023-2024)	3,887	3.8%
<i>FRED, Employed Persons in Barnstable County, April 2024.</i>		



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Unemployment Rate April 2024	4.2%	
Unemployed April 2024	4,640	
Change in Unemployed (April 2023-2024)	424	10.1%
Unemployment Rate April 2024 for Massachusetts	3.1%	
Unemployed April 2024 for Massachusetts	109,225	
Change in Unemployed for the State (April 2023-2024)	-12,394	-10.2%
<i>Massachusetts Department of Economic Research, <a href="#">Labor Force and Unemployment Data, Barnstable County, April 2022 - April 2023.</a></i>		
<b>Industries</b>		
<p>Related Data Cape Cod Dashboards:</p> <ul style="list-style-type: none"> <li>- Employment &amp; Wages by Industry (<a href="https://datacapecod.org/pf/employment-wages-by-industry/">https://datacapecod.org/pf/employment-wages-by-industry/</a>)</li> <li>- Employment &amp; Wages by Occupation (<a href="https://datacapecod.org/pf/employment-and-wages-by-occupation/">https://datacapecod.org/pf/employment-and-wages-by-occupation/</a>)</li> <li>- Business Establishment Size &amp; Age (<a href="https://datacapecod.org/pf/establishment-size-age/">https://datacapecod.org/pf/establishment-size-age/</a>)</li> <li>- Local Option Taxes (<a href="https://datacapecod.org/pf/local-option-taxes/">https://datacapecod.org/pf/local-option-taxes/</a>)</li> <li>- Self-Employment (<a href="https://datacapecod.org/pf/self-employment/">https://datacapecod.org/pf/self-employment/</a>)</li> <li>- Regional Wealth (<a href="https://datacapecod.org/pf/regional-wealth/">https://datacapecod.org/pf/regional-wealth/</a>)</li> <li>- Location Quotients for Private Industry (<a href="https://datacapecod.org/pf/location-quotients-for-private-industry/">https://datacapecod.org/pf/location-quotients-for-private-industry/</a>)</li> </ul>		
County GDP 2022 (current dollars)	\$16,351,415,000	
Change in County GDP (2017-2022, chained 2017 dollars)	\$1,006,949,000	7.9%
Top 3 Industries by Gross Domestic Product 2022 (current dollars)		
Real estate and rental and leasing	\$4,352,874,000	
Health care and social assistance	\$1,484,647,000	
Professional and business services	\$1,461,295,000	
<i>US Bureau of Economic Analysis, <a href="#">CAGDP2 Gross domestic product (GDP) by county and metropolitan area and CAGDP9 Real GDP by county and metropolitan area, Barnstable County, 2022.</a></i>		
Annual meals tax collected (2023)	\$10,280,034	
Change in annual meals tax collected (2022-2023)	\$558,134	5.7%
Annual room tax collected (2023)	\$46,477,239	
Change in annual room tax collected (2021-2022)	\$4,444,348	10.6%
<i>Massachusetts Department of Revenue, <a href="#">Local Option Meals &amp; Rooms Tax Distributions, calendar year 2022 and 2023 distributions for Barnstable County towns.</a></i>		
Establishments for All Industries and Ownership Types	10,088	
Change in Establishments, All Industries and Ownership Types (2017-2022)	587	6.2%
Top 3 Industries by Employment		
Accommodation and Food Services		
Average Monthly Employment	15,533	
Total Wages	\$583,533,058	

Health Care and Social Assistance	
Average Monthly Employment	14,806
Total Wages	\$1,011,030,944
Retail Trade	
Average Monthly Employment	14,751
Total Wages	\$649,098,103
Top 3 Industries by Average Weekly Wages	
Finance and Insurance	
Average Monthly Employment	2,139
Average Weekly Wages	\$2,204
Utilities	
Average Monthly Employment	416
Average Weekly Wages	\$2,107
Mining, Quarrying, and Oil and Gas Extraction	
Average Monthly Employment	86
Average Weekly Wages	\$1,712
<i>Massachusetts Department of Economic Research, <a href="#">Employment and Wages (ES-202) data</a>, Barnstable County, 2022 Annual Report.</i>	
Industries by Average Annual Employment Location Quotients for Private Industry	
Core Industries <i>Industries with the highest LQ in the region in 2022</i>	
Arts, Entertainment, and Recreation	
Average Annual Employment Location Quotient	2.08
Annual Average Employment	3,035
5-Year Change in Employment	0.6%
Total Establishments	266
Accommodation and Food services	
Average Annual Employment Location Quotient	1.83
Annual Average Employment	15,501
5-Year Change in Employment	-5.5%
Total Establishments	1,095
Retail Trade	
Average Annual Employment Location Quotient	1.51
Annual Average Employment	14,723
5-Year Change in Employment	-4.9%
Total Establishments	1,348
Emerging Industries <i>Industries with the largest percentage increase in average annual employment between 2017 and 2022 and with an LQ below 1.0</i>	



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Management of Companies and Enterprises		
Average Annual Employment Location Quotient	0.3	
5-Year Change in Location Quotient	42.9%	
Annual Average Employment	470	
5-Year Change in Employment	44.6%	
Total Establishments	32	
Professional, Scientific, and Technical Services		
Average Annual Employment Location Quotient	0.73	
Annual Average Employment	4,853	
5-Year Change in Employment	14.9%	
Total Establishments	971	
Administrative, Support, Waste Management, and Remediation Services		
Average Annual Employment Location Quotient	0.7	
Annual Average Employment	4,198	
5-Year Change in Employment	7.8%	
Total Establishments	789	
<i>US Bureau of Labor Statistics, <a href="#">Quarterly Census of Employment and Wages</a>, 2017 and 2022 annual averages data for Barnstable County.</i>		
<b>Seasonality</b>		
Related Data Cape Cod Dashboards: - Traffic Trends ( <a href="https://datacapecod.org/pf/cape-cod-traffic-trends/">https://datacapecod.org/pf/cape-cod-traffic-trends/</a> ) - Unemployment ( <a href="https://datacapecod.org/pf/unemployment/">https://datacapecod.org/pf/unemployment/</a> )		
Unemployment January 2024	6,015	5.5%
State Unemployment January 2024	3.5%	
Unemployment July 2023	3,848	3.1%
State Unemployment July 2023	3.5%	
<i>Massachusetts Department of Economic Research, <a href="#">Labor Force and Unemployment Data, Barnstable County, April 2023 – April 2024</a>.</i>		
Jobs January 2023	85,026	
Jobs July 2023	110,884	
Seasonal Change in Jobs (January vs. July)	25,858	30.4%
<i>US Bureau of Labor Statistics, <a href="#">Quarterly Census of Employment and Wages</a>, 2023 quarterly employment data.</i>		
Total Trips over the Canal Bridges (July 2022)	Approx. 4.0 million trips	
Total Trips over the Canal Bridges (July 2023)	Approx. 4.0 million trips	
<i>MassDOT and Cape Cod Commission data. Approximately 40-60% of trips were likely made by seasonal visitors.</i>		



<i>Small Businesses</i>		
Related Data Cape Cod Dashboards: - Business Establishment Size & Age ( <a href="https://datacapecod.org/pf/establishment-size-age/">https://datacapecod.org/pf/establishment-size-age/</a> )		
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 <a href="#">2016</a> and <a href="#">2021</a>. Data for 2022 not yet available.</i>		
County Employment in Establishments with < 19 Employees (Q2 2023)	26,567	36.1%
State Employment in Establishments with < 19 Employees (Q2 2023)	580,862	18.3%
County Employment in Firms Less Than 1 Year Old	3,013	4.1%
County Change in Employment in Firms Less Than 1 Year Old (Q2 2022 vs. Q2 2023)	328	
State Employment in Firms Less Than 1 Year Old	78,349	2.5%
County Employment in Firms 11 or More Years Old	56,469	X%
County Change in Employment in Firms 11 or More Years Old (Q2 2022 vs. Q2 2023)	368	
State Employment in Firms 11 or More Years Old	2,602,025	82.3%
<i>US Census Bureau, <a href="#">Quarterly Workforce Indicators</a>, All Private Ownership, Q2 2022 and Q2 2023 averages, Barnstable County and Massachusetts.</i>		
Self-Employed Civilian Population 16 Years and Over	16,545	
Self-employed in own incorporated business workers	6,213	5.5%
Self-employed in own not incorporated business workers and unpaid family workers	10,332	9.1%
<i>US Census Bureau, ACS 2022 5-Year Estimates, <a href="#">Table S2408</a>. Percent is percent of total civilian employed population 16 years and over.</i>		

<b>PLACE</b>
<i>Housing</i>
Related Data Cape Cod Dashboards: - Housing Characteristics ( <a href="https://datacapecod.org/pf/housing-characteristics/">https://datacapecod.org/pf/housing-characteristics/</a> ) - Real Estate Trends ( <a href="https://datacapecod.org/pf/real-estate-trends/">https://datacapecod.org/pf/real-estate-trends/</a> ) - Housing Affordability ( <a href="https://datacapecod.org/pf/housing-affordability/">https://datacapecod.org/pf/housing-affordability/</a> ) - How Many Earners? ( <a href="https://datacapecod.org/pf/housing-how-many-earners/">https://datacapecod.org/pf/housing-how-many-earners/</a> ) - Homeowner Surveys ( <a href="https://datacapecod.org/pf/homeowner-surveys/">https://datacapecod.org/pf/homeowner-surveys/</a> )



**2019 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)**  
YEAR 5 ANNUAL REPORT

Median Sales Price (April 2024)	\$809,250	
Change in Median Sales Price (April 2023 – April 2024)	\$46,750	6.1%
<i>Cape &amp; Islands Association of Realtors, <a href="#">Local Market Updates, April 2024</a>, price for single-family homes.</i>		
Housing Units	165,068	
Occupied Housing Units	99,969	
Owner-Occupied	81,334	81.4%
Renter-Occupied	18,635	18.6%
Change in Occupied Housing Units (2017-2022)	4,958	5.2%
Detached, Single-Family Homes	134,853	81.7%
State Detached Single-Family Homes	1,544,717	51.5%
Households Experiencing Housing Cost Stress (Spending 30% or More of Income on Housing)		
Owner-Occupied with a Mortgage	17,715	36.8%
Change, Owner-Occupied with a Mortgage (2017-2022)	-1,395	-7.3%
Owner-Occupied without a Mortgage	5,631	17.2%
Change, Owner-Occupied without a Mortgage (2017-2022)	-132	-2.3%
Renter-Occupied	9,832	58.0%
Change, Renter-Occupied (2017-2022)	-342	-3.4%
<i>US Census Bureau, ACS <a href="#">2022</a> and <a href="#">2017</a> 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 (2022)	\$91,438	
Difference Between MHI and Annual Income Needed to Affordably Purchase a Single-Family Home	≈\$119,000	
<i>Cape Cod and Islands Association of Realtors; 2022 ACS 5-Year Estimates; 2022 Cape Cod Housing Needs Assessment.</i>		
Units Designated for Seasonal, Recreational, or Occasional Use	58,696	35.6%
State Units, Seasonal, Recreational, or Occasional Use	118,461	3.9%
Country Units, Seasonal, Recreational, or Occasional Use	4,959,188	3.5%
<i>US Census Bureau, ACS 2022 5-Year Estimates, Tables <a href="#">B25004</a> and <a href="#">DP04</a>.</i>		
<b>Transportation</b>		
Related Data Cape Cod Dashboards: - Traffic Trends ( <a href="https://datacapecod.org/pf/cape-cod-traffic-trends/">https://datacapecod.org/pf/cape-cod-traffic-trends/</a> ) - Crash Dashboard ( <a href="https://datacapecod.org/pf/cape-cod-crash-dashboard/">https://datacapecod.org/pf/cape-cod-crash-dashboard/</a> )		
Workers over 16	111,344	
Commute of Less than 15 Minutes	34.6%	
Mean Travel Time to Work (Minutes)	25.0	

State Mean Travel Time to Work (Minutes)	29.4	
Population Working from Home	13.1%	
State Population Working from Home	14.6%	
<i>US Census Bureau, ACS 2022 5-Year Estimates, Table S0801.</i>		
Jobs in the County Filled by Workers Living in the County	58,261	
Change 2020 - 2021	2,415	4.3%
Jobs in the County Filled by Workers Living Outside of the County	23,119	
<i>Percent reflects share of people employed in Barnstable County.</i>	28.4%	
Change 2020 - 2021	1,544	7.2%
Jobs Outside of the County Filled by Workers Living in the County	33,988	
<i>Percent reflects share of employed persons living in Barnstable County.</i>	36.8%	
Change 2020 - 2021	2,766	8.9%
<i>US Census, On the Map, Barnstable County Inflow/Outflow data, 2020 and 2021 for All Jobs.</i>		
<b>Community Character</b>		
Related Data Cape Cod Dashboards: - Cape Cod Chronology Viewer ( <a href="https://datacapecod.org/pf/cape-cod-chronology-viewer/">https://datacapecod.org/pf/cape-cod-chronology-viewer/</a> )		
Total Cape Cod Structures in MHC Historic Inventory	13,877	
Inventoried structures in LHD	4,994	
Inventoried structures in NRD (and not in LHDs)	1,601	
Inventoried structures with PR (not on NR or LHD)	5	
Inventoried structures with no protections	7,277	
Inventoried structures with no protections, constructed pre-1800	318	
Inventoried structures with no protections, constructed 1800-1899	2,172	
Inventoried structures with no protections, constructed 1900-1949	2,812	
Parcels developed before 1950	Approx. 21,000	13%
<i>MassGIS, MHC Historic Inventory, April 2024; Cape Assessors' Data</i>		

## Schedule of Goals for the Next Year

This next year will be Year 1 of a new CEDS, the 2024 Cape Cod CEDS. In Year 1 of implementation of the new CEDS, the Commission will continue to advance:

- **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 are included in the 2024 CEDS Year 1 Implementation Plan:

- **Incentivize Year-Round Housing:** The Commission will work with partners to initiate a comprehensive analysis of short-term rentals on Cape Cod, including a town-by-town analysis. The study should provide an understanding of the existing landscape of short-term rentals in each town, impacts on town budgets and revenues, impacts on the year-round housing market, and the efficacy and cost-effectiveness of these programs relative to developing or redeveloping new housing. The study should also identify what level of incentives would be likely to foster participation in programs that convert short-term rentals to long-term housing. This study will lay the groundwork for understanding what type of program would be most effective in incentivizing year-round housing.
- **Simplify Appropriate Housing Development:** Commission staff will work with a consulting team to develop housing plans that can be pre-reviewed or pre-approved by local communities to help facilitate appropriate housing development.
- **Invest in Water Quality and Wastewater Infrastructure:** To ensure the Cape Cod and Islands Water Protection Fund continues to provide substantial subsidies to local water quality and wastewater projects, the Commission will continue to provide administrative and technical support to the Management Board. This will include maintaining an up-to-date understanding of anticipated local expenditures on wastewater projects across the region over the next five years.

- **Invest in Broadband Infrastructure:** The Commission will complete the assessment of broadband needs and opportunities in the region that is currently underway. The assessment will provide recommendations for improving broadband infrastructure and affordability for Cape Cod, and Commission staff will begin to communicate and increase awareness of those recommendations.
- **Advocate for Replacement of the Canal Bridges:** Commission staff will continue working with a consultant to finalize the economic impacts analysis on potential Canal bridge closures for the purposes of maintenance and rehabilitation. This information will be leveraged to communicate the need to replace the bridges. The Commission will continue to support investments for the purposes of constructing new canal bridges and engage in providing feedback on design and proactive efforts to mitigate construction and maintenance impacts, as necessary and appropriate.

## CAPE COD COMMISSION

3225 MAIN STREET • P.O. BOX 226 • BARNSTABLE, MASSACHUSETTS 02630  
(508) 362-3828 • Fax (508) 362-3136 • [www.capecodcommission.org](http://www.capecodcommission.org)

