



CAPE COD
COMMISSION

2019 Comprehensive Economic Development Strategy

YEAR 2 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

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Regional CEDS Update

In the 2019 CEDS, the region committed to advancing economic resilience, building capacity to withstand shocks and disruptions. The challenges to Cape Cod's sustainability and resiliency are related to its geographic location, development patterns, and demographic profile: climate change; water quality; housing; the seasonality of its economy; demographic diversity; limited developable area and infrastructure; and threats to community character.

The region has a strong tourism and hospitality sector, and its leading industry by employment is Healthcare and Social Services. The Cape's natural environment continues to draw people to the region, and it has a strong small business community and marine science and technology sector. Growing investment in wastewater will reduce environmental degradation of the Cape's coastal embayments and set the region up for future economic development and employment opportunities. There is ongoing discussion in several Cape Cod towns on zoning changes to address the severe housing crisis the region was facing, even before the COVID-19 pandemic.

Since the CEDS was published, the pandemic has had devastating public health and economic consequences. Policymakers sought to balance the economic impacts of shutdowns and closures with the public health impacts and loss of life caused by the virus. Cape Cod businesses were significantly impacted by the business closures due to the nature of the region's industry mix, the timing of the closures and reopening phases, and the seasonality of many businesses. The region is highly dependent on tourism and hospitality; public health concerns, the closure of non-essential businesses in March 2020, and travel restrictions impacted the majority of local businesses.

In addition to the COVID-19 pandemic, climate change continues to threaten Cape Cod, and could result in impacts such as exacerbated flooding and erosion due to sea level rise and changing storm frequency and intensity. These threats can cause loss of life, damage buildings and infrastructure, impair coastal environments, and otherwise impacts a community's economic, social, and environmental well-being. Without addressing climate change and taking action, damage to buildings and land lost to inundation could total \$30 billion by the end of the century.¹

¹ ERG for the Cape Cod Commission. Economic Impacts of Climate Change. 2021. Link: https://www.capecodcommission.org/resource-library/file?url=%2Fdept%2Fcommission%2Fteam%2FWebsite_Resources%2FCAP%2FEconomic+Impacts+of+Climate+Change+on+Cape+Cod-Executive+Summary.pdf

Regional CEDS Performance Measures

Changes in the regional economy are measured through Regional Balanced Economy Benchmarks (which includes EDA Distress Criteria and notes progress on Regional Priority Objectives) and through the Summary of Accomplishments section that follows. The Regional Balanced Economy Benchmarks have been streamlined in order to provide an improved annual data-driven snapshot on the region’s People, Economy, and Place.

REGIONAL BALANCED ECONOMY BENCHMARKS: PEOPLE

Residents

Cape Cod experienced rapid population growth beginning in the 1960s, alongside its increasing appeal as a tourist and retiree destination. By the 2000 Census, Cape Cod had grown over 400%, adding just over 150,000 year-round residents in five decades (from 70,300 to 222,230). In the past 15 years, however, the region has seen a slow but steady population decline, falling from 226,011 in 2003 to 213,496 in 2019 (Figure 1).

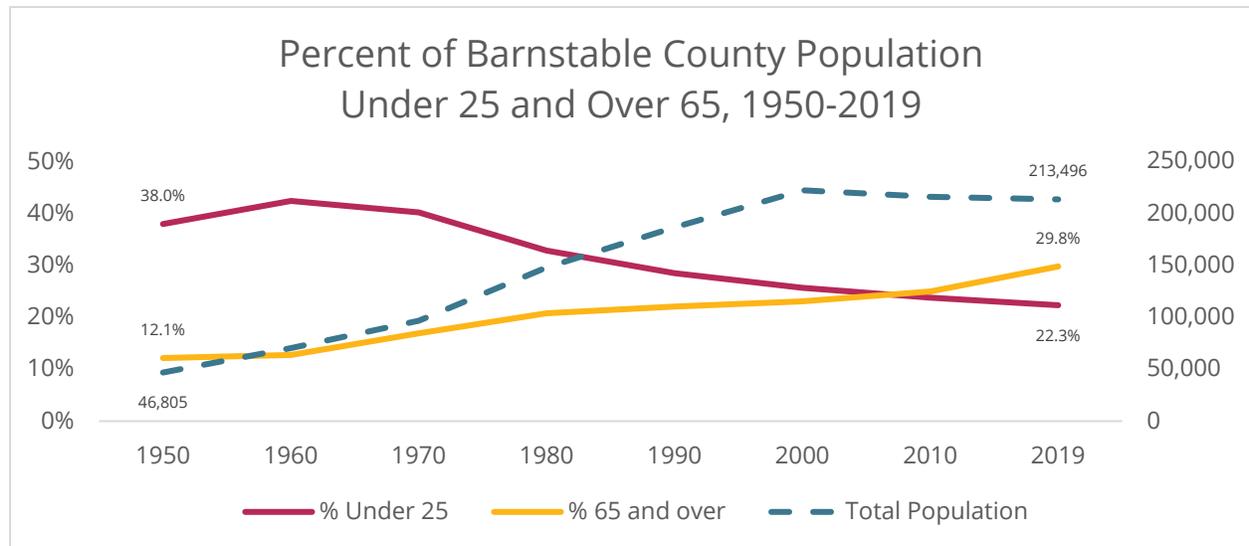


Figure 1. Percent of Barnstable County Population Under 25 and Over 65, 1950–Present. Source: US Decennial Census and American Community Survey 5–Yr Estimates.

There are 149,915 residents under the age of 65, representing 70.2% of the regional population (a 1% decline compared to 2018). Comparatively, in Massachusetts, 83.8% of residents are under 65. Out of the 9,200 residents who moved to Barnstable County (from abroad, another state, or within the state and outside the county), 1,964 people (21.3%) were over 65 years old. The median age in

Barnstable County is 53.3, ranging from 48.3 in the Town of Barnstable to 61.8 in Chatham (compared to 39.5 in Massachusetts).²

From 2014 to 2018, Barnstable County saw 3,720 people move *from* a different state, while 4,546 moved *to* a different state. Within Massachusetts, 4,509 people moved *from* a different county to Barnstable County over the same timeframe, while 5,259 people moved *to* a different county from Barnstable County. In total, Barnstable County saw a net domestic migration loss of 1,582 people, and an additional 1,024 people moved to Barnstable County from abroad.³

Barnstable County is predominantly white (93.4%). Black or African American residents make up 3.9% of the population, American Indian/Alaska Native residents are 1.2%, Asian residents comprise 2.1% of the population; 0.2% of residents identify as Native Hawaiian and Other Pacific Islander and 1.6% of the population is another race; 2.1% are two or more races. For any race, 3.1% of residents consider themselves Hispanic or Latino (Figure 2).⁴

Race in Barnstable County (2019)

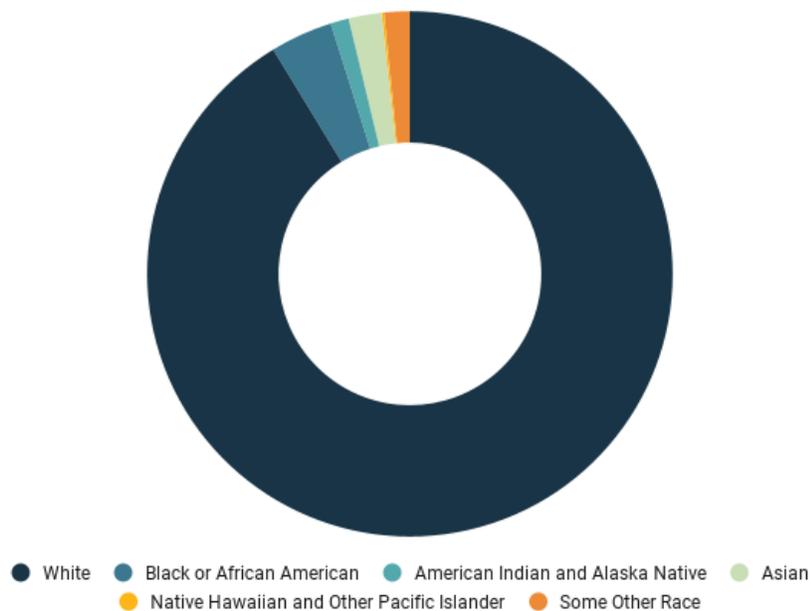


Figure 2. Barnstable County Racial Demographics, 2019. Source: US Census, 2019 ACS 5-Yr Estimates.

As of 2019, the vast majority of Barnstable residents (90.9%) speak only English at home, with other Indo-European languages and Spanish as the second and third most common languages (Figure 3).

² US Census. 2019 American Community Survey 5-Year Estimates. Table ID: B07001 and S0101.

³ US Census. Census Flows Mapper. Accessed May 2021.

⁴ US Census. 2019 ACS 5-Yr Estimate. Table ID: DP05.

There are many Portuguese speakers on Cape Cod; out of the total year-round population, over 10,000 residents reported Portuguese heritage, and over 4,300 reported Brazilian heritage.⁵

Language Spoken at Home in Barnstable County (2019)

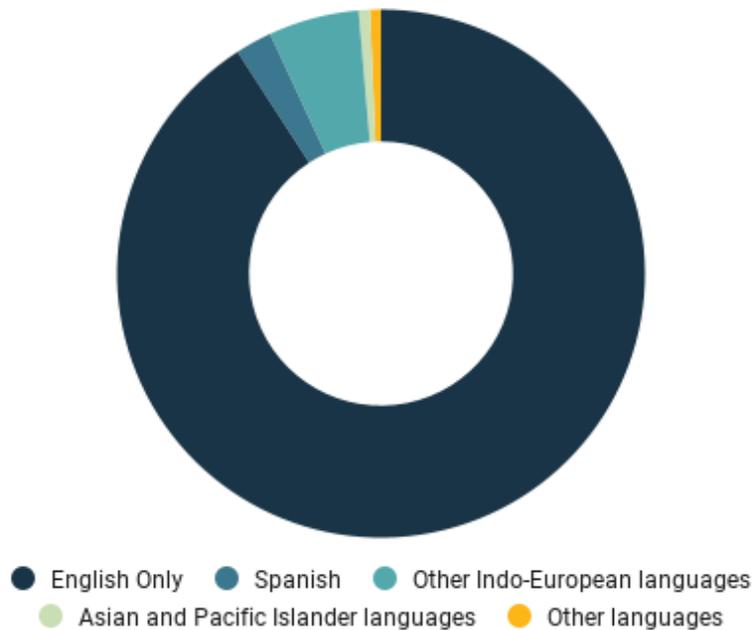


Figure 3. Language Spoken at Home in Barnstable County, 2019. Source: US Census Bureau, 2019 ACS 5-Yr Estimates.

Workforce & Income

According to the most recent American Community Survey data (2019), the labor force participation rate is 59.8% (similar to the 2018 rate of 59.9%).⁶ However, the COVID-19 pandemic has had a severe impact to the region's employment, and it is anticipated that 2020 labor force participation was much lower – see [Employment](#) section below for further detail.

In 2019, there were 103,802 workers over 16 living within Barnstable County; 88,406 of those residents worked within the county (85.2%, down from 97.9% in 2014) and 13,696 (13.2%) worked outside the county, including remote work and commuting off Cape; slightly fewer residents worked out of state in 2019 (1.6% down from 2% in 2014).⁷

⁵ US Census. 2019 ACS 5-Yr Estimate. Table ID: B04006.
⁶ US Census. 2019 ACS 5-Yr Estimate. Table ID: S2301.
⁷ US Census. 2014 and 2019 ACS 5-Yr Estimate. Table ID: B08007.

The median household income (MHI) for Barnstable County is \$74,336, with the MHI in towns ranging from \$59,063 in Provincetown to \$98,827 in Sandwich (Figure 4). Comparatively, the Massachusetts MHI is \$81,215 and the United States MHI is \$62,843. The median household income on Cape Cod has increased 17% from 2014 (\$61,597). Overall, Barnstable County’s reliance on seasonality and tourism likely lowers the MHI relative to the state, but the MHI remains higher than the national median.⁸

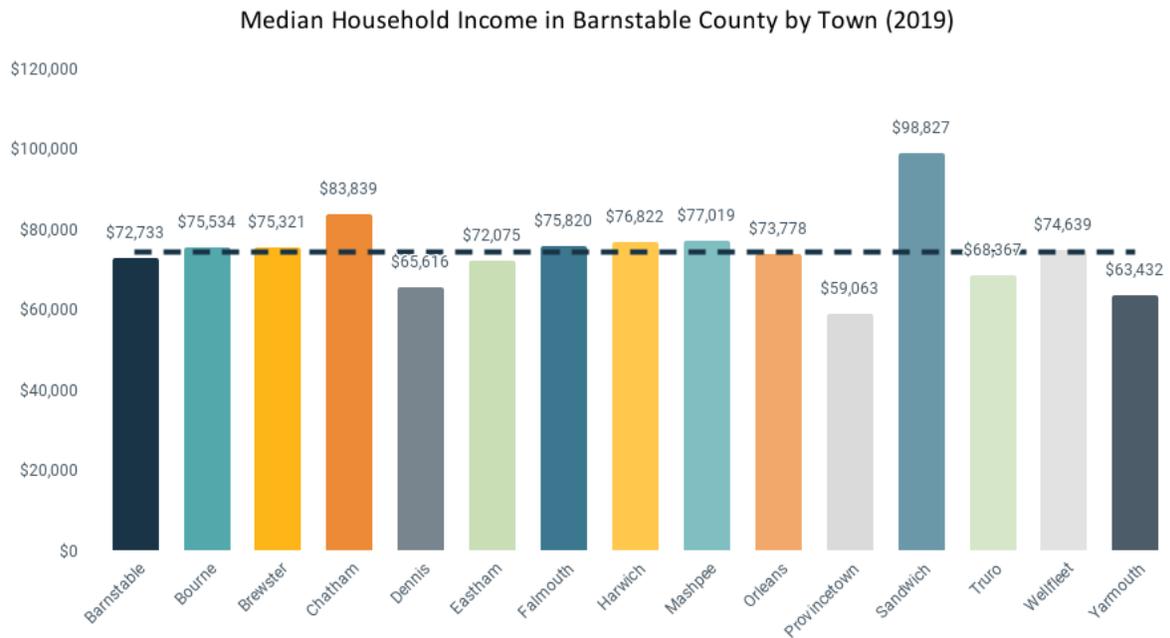


Figure 4. Median Household Income in Barnstable County by Town, 2019. The median income for Barnstable County (indicated as a dotted line) is \$74,336. Source: US Census Bureau

Sandwich has a high MHI likely due to its commute proximity to Boston and Providence, higher average household size (2.57, compared to 1.74 in Provincetown or 2.02 in Dennis), and higher percent share of year-round residents.⁹

While Barnstable County is facing an increasing wealth gap, like much of the United States (evidenced by the increased cost of housing and conversion of property into second homes), the overall trend in the past five years is an increase in the number of households making a higher household income and a decrease in households in the lower income cohort.¹⁰

Low, middle, and high-income ranges for year-round residents were determined based on income summary statistics from the 2019 American Community Survey 5-Year Estimates (low income: \$0 to

⁸ US Census. 2019 ACS 5-Yr Estimate. Table ID: DP03.

⁹ US Census. 2019 ACS 5-Yr Estimate. Table ID: DP04.

¹⁰ FRED. Income Inequality in Barnstable County, MA. 2010-2021. Link: <https://fred.stlouisfed.org/series/2020RATIO025001>

\$49,999; middle-income: \$50,000 to \$124,999; high-income is \$125,000+). Out of the 94,323 occupied households in Barnstable County, 31,181 are in the low-income cohort (33.1%, down from 40.9% in 2014); 39,124 are in the middle-income cohort (41.5%, the same percent share as 2014); and 24,018 are in the high-income cohort (25.5%, up from 17.5% in 2014).¹¹

In 2019, the median earnings for full-time, year-round workers were \$56,290 compared to \$62,870 in Massachusetts and \$48,851 in the United States. (The County's median earnings are increased from \$54,913 in 2018).^{12,13} Those who were self-employed in their own incorporated business on Cape Cod earned a median income of \$54,948; residents who were self-employed in their own non-incorporated business or as an unpaid family worker earned a median income of \$31,215.¹⁴

The Massachusetts minimum wage is \$13.50; for full-time employment of 40 hours a week, the annual wages are \$28,080.¹⁵ For the Barnstable County population over 16 with earnings (a total of 118,754), there are 6,491 who are making under \$25,000 a year (5.4% of the total).¹⁶

The total personal income for Barnstable County was \$16.5 billion in 2019 (up from \$16.0 billion in 2018, and a 24% increase from \$13.3 billion in 2014).¹⁷ Of that \$16.5 billion, just over half (\$8.5 billion) comes from residents' net earnings and 19% (\$3.1 billion) are from personal current transfer receipts.¹⁸ In Massachusetts, residents' net earnings in 2019 were \$335.2 billion (65.5% of the total) and personal current transfer receipts were \$71.4 billion (13.9% of the total). The difference in ratio of earnings to total personal income reflects the high median age of Barnstable County residents, as a higher share of total personal income is derived from retirement income including Social Security benefits.

The inflow of earnings to Barnstable County in 2019 was \$1.93 billion, up from \$1.85 billion in 2018, and the outflow of earnings was \$760 million (up from \$724 million).¹⁹ Based on the Quarterly Census of Employment and Wages conducted by the US Bureau of Labor Statistics (BLS), the total wages for the 9,621 establishments in Barnstable County, across all industries and business ownership types was \$4.88 billion in 2019, an increase from \$4.35 billion in 2016.²⁰

¹¹ US Census. 2014 and 2019 ACS 5-Yr Estimates. Table ID: B19001.

¹² Note: Earnings – primarily wages and salary from a job – are just one kind of income. Other sources of income include Social Security payments, pensions, child support public assistance, annuities, money derived from rental properties, interest, and dividends. Source: <https://www.census.gov/newsroom/blogs/random-samplings/2010/09/income-vs-earnings.html>

¹³ US Census. 2019 ACS 5-Yr Estimate. Table ID: S2001.

¹⁴ US Census. 2019 ACS 5-Yr Estimate. Table ID: S2418. Civilian Employed Population, 16 Years and Older.

¹⁵ US Dept of Labor. Minimum Wage Laws. Link: <https://www.dol.gov/agencies/whd/minimum-wage/state#ma>

¹⁶ US Census. 2019 ACS 5-Yr Estimate. Table ID: S2001.

¹⁷ US Bureau of Economic Analysis, CAINC1 Personal Income Summary, 2014-2019. Note: Personal income is income received from all sources, including wages and salaries, bonuses, rental income, personal current transfer receipts, and more

¹⁸ US Bureau of Economic Analysis, CAINC5N Personal Income by Major Component and Earnings by NAICS Industry. 2018.

¹⁹ US Bureau of Economic Analysis. CAINC91 Gross Flow of Earnings. 2018-2019.

²⁰ US Bureau of Labor Statistics QCEW. Total Covered, High-Level Industries, Barnstable County. 2016-2019 Annual Averages.

On Cape Cod, the top five industries by employment in 2019 were Health Care and Social Assistance, Accommodation and Food Services, Retail Trade, Educational Services, and Construction (see [Industries](#)).²¹ Average annual wages for Cape Cod's top five industries ranged from \$28,756 in Accommodation and Food Services to \$63,492 in Construction. The average annual wages for Construction and Health Care and Social Assistance workers were slightly above Cape Cod's median earnings of \$56,290, while the average annual wages for the other top four industries for employment on the Cape fell below the County's median annual earnings.

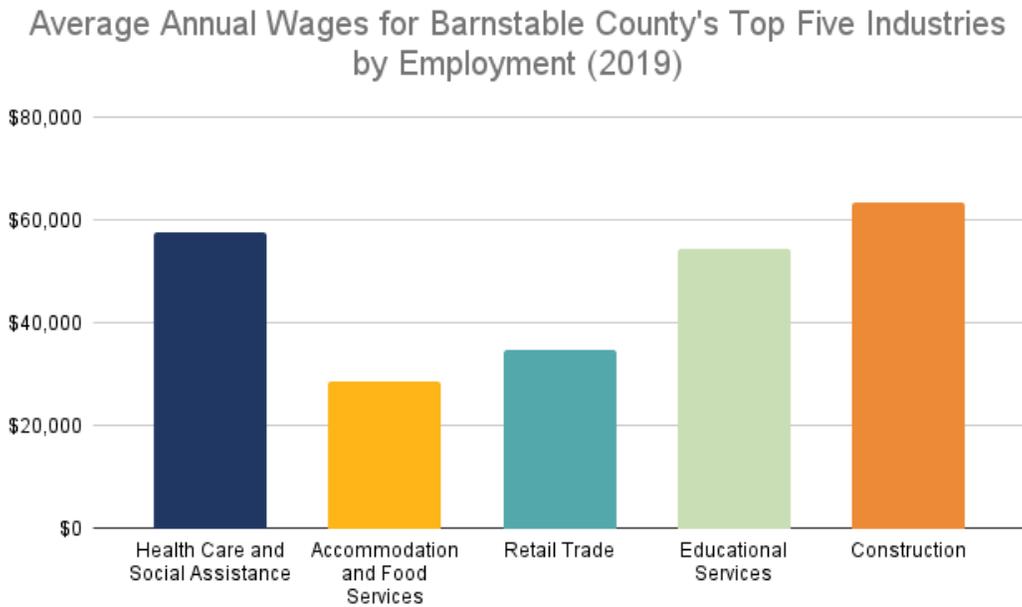


Figure 5. Average Annual Wages for Barnstable County's Top Five Industries by Employment. Source: MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data.

²¹ MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data.

Vulnerable Populations

Cape Cod’s economic challenges have increased the vulnerability of some of its year-round population. Employment opportunities that are year-round or pay wages that allow someone to rent or own a home in Barnstable County can be difficult to find. The seasonal jobs in tourism and hospitality often do not provide a living wage, or the income needed to meet the cost of living in the region, and residents may hold several jobs at once to afford to live on Cape Cod. This new section for CEDS Performance Measures looks at vulnerable populations through five measures: environmental justice, poverty, homelessness, and US EDA’s Distress Criteria.

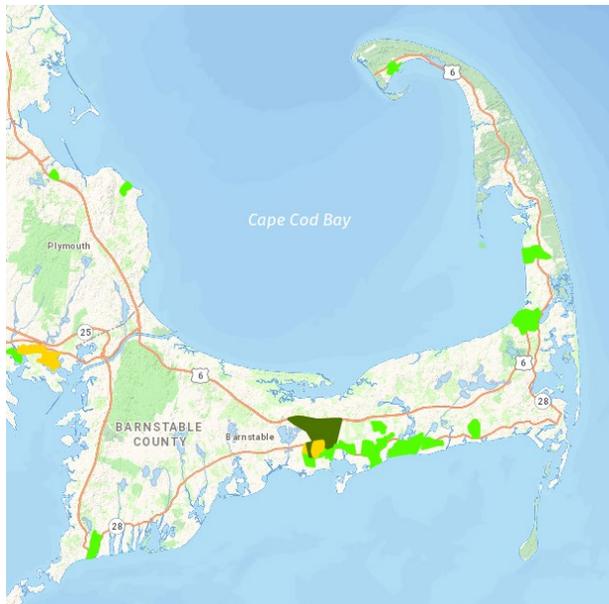


Figure 6. Environmental Justice Communities on Cape Cod, based on US Census 2010. Yellow Census tracts qualify due to share of minority residents; lime green tracts qualify due to income; dark green tracts qualify due to both share of minority residents and income. Source: OLIVER: MassGIS's Online Mapping Tool.

Cape Cod is home to several Environmental Justice (EJ) communities, defined by the Massachusetts Office of Energy and Environmental Affairs as areas with high minority, non-English speaking, and/or low-income populations (for more information on language spoken at home, see [Residents](#) section). In Barnstable County, there are eight towns with Environmental Justice Block Groups, a designation conferred on neighborhoods where any of the following are true:

- 1) Block group whose annual median household income is equal to or less than 65 percent of the statewide median (\$62,072 in 2010), or
- 2) 25% or more of the residents identify as a race other than white, and 25% or more of households have no one over the age of 14 who speaks English only or very well.

The Barnstable County community with the highest percentage of residents living within an Environmental Justice Block Group as of the 2010 U.S. Decennial Census was Provincetown, where 37.90% of residents lived in one of the town's two designated areas, and the community with the greatest total number of residents living in Environmental Justice Block Groups was Barnstable, where 8,838 lived in one of the town's eight designated areas.

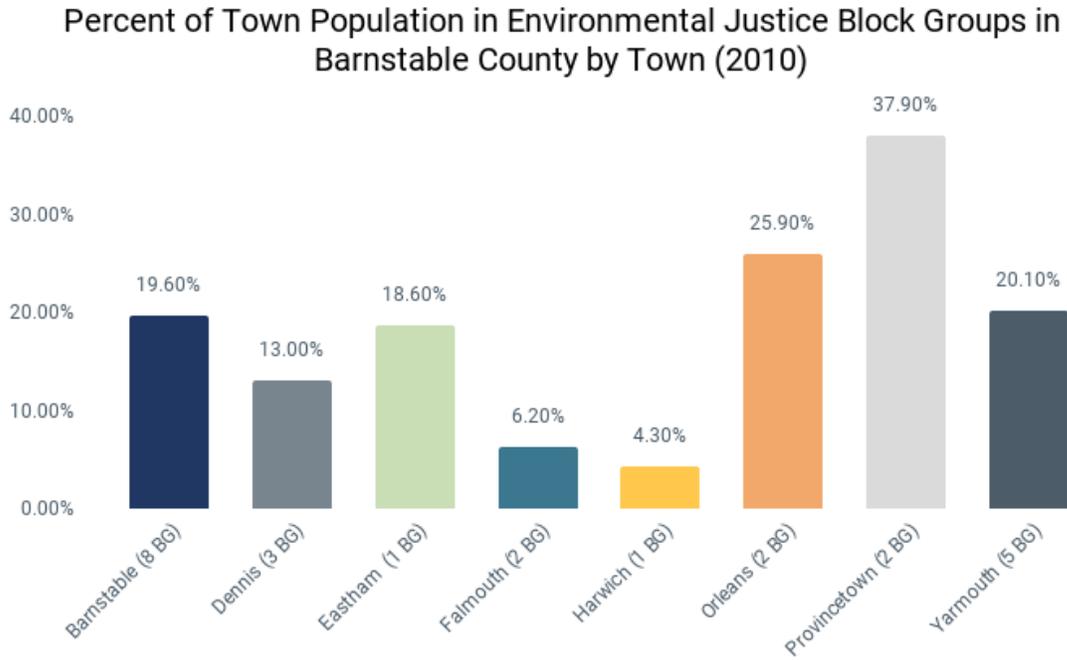


Figure 7. Percent of Town Population in Environmental Justice Block Groups in Barnstable County by Town, 2010. Source: Massachusetts Executive Office of Energy and Environmental Affairs, Environmental Justice Populations in Massachusetts.

In Barnstable County, 6.5% of the year-round population lives below the federal poverty level (13,529 residents) (Figure 8), compared to 10.3% of Massachusetts and 13.4% of the US.²² The 2020 federal poverty level is \$26,200 for a family of four; the living wage for Barnstable County for a family of four with two working adults is \$25.04 an hour, or approximately \$52,083 per working adult.²³

²² 2019 ACS 5-Yr Estimate. Table ID: S1701.

²³ MIT Living Wage Calculator. <https://livingwage.mit.edu/> Accessed June 2021.

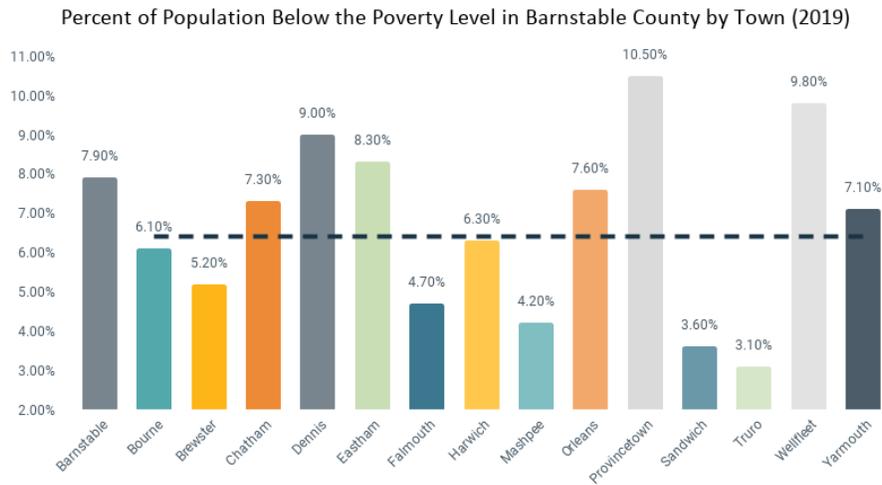


Figure 8. Percent of Population Below the Poverty Level in Barnstable County by Town, 2019. Source: US Census Bureau.

The region’s vulnerable populations are especially housing insecure (for more information on the unaffordability of housing on Cape Cod, see the [Housing](#) section). Wages have not kept up with the increase in housing costs, a trend further exacerbated by the pandemic. The lack of housing affordability is a national trend, but Cape Cod’s seasonal and second homeowner economy drives housing costs and incomes even further apart.

Every year, the Cape and Islands Regional Network on Homelessness conducts the annual Point in Time Count that counts the number of people experiencing homelessness in emergency shelters, transitional housing, on the street, in cars, in abandoned buildings, and in other places not meant for human habitation. The information is reported regionally, including Cape Cod, Martha’s Vineyard, and Nantucket, and indicates that 343 people (adults and children, sheltered and unsheltered) were considered homeless during the January 2021 count (an increase from 336 in January 2020).²⁴

EDA DISTRESS CRITERIA

The US EDA measures distress on a census tract level with two criteria:

- An unemployment rate that, averaged over the most recent 24-month period for which data are available, is at least 1% greater than the national unemployment rate for the same period, or

²⁴ 2021 Annual Point in Time Count. Cape and Islands Regional Network on Homelessness. Link: <http://www.bchumanservices.net/library/2021/04/2021-PIT-Press-Release-FINAL.pdf>

- A per capita income that, for the most recent period for which data is available, is 80% or less of the national average per capita income for the same time period

While Barnstable County region-wide has higher per capita income, its unemployment rate exceeds national averages, due in part to the seasonality of the economy but more recently further exacerbated by the economic impacts of the COVID-19 pandemic (Table 1). This past year, the county's per capita money income (PCMI) rose about \$2,000 from \$42,578 last year, similar to the increase in the US, and per capita personal income increased \$2,679 for the county.^{25,26}

	Barnstable County	US	Threshold Calculations
24-Month Average Unemployment Rate US BLS; period ending March 2021	7.42	6.14	1.28
2019 Per Capita Money Income ACS 5-Yr Estimate	\$44,505	\$34,103	130.50%
2019 Per Capita Personal Income US BEA	\$77,435	\$56,490	137.08%

Table 1. StatsAmerica County-Based Distress Tool. Accessed May 2021.

Based on long-term unemployment rates and per capita income, there are eleven individual Census tracts on Cape Cod that qualify as distressed (Table 2). Those with a higher unemployment rate have a threshold calculation over 1; those with a lower PCMI have a threshold calculation below 80. These tracts are home to 36,513 people, or around 17% of the region's year-round population; they are located in Provincetown, Truro, Harwich, Dennis, Barnstable, Falmouth, and Mashpee, as well as Joint Base Cape Cod.

Census Tract	Town	2019 Unemployment Rate	Threshold Calculation	2019 PCMI	Threshold Calculation	2019 Population
101	Provincetown	7.4	2.1	\$58,325	171	2,973
102.08	Truro	8.6	3.3	\$44,416	130.2	1,112
110.02	Harwich	8.7	3.4	\$39,297	115.2	4,059
112	Harwich	8.7	3.4	\$45,297	132.8	3,321
116	Dennis	6.8	1.5	\$36,036	105.7	3,001
126.01	Barnstable	6.7	1.4	\$32,004	93.8	3,356
126.02	Barnstable	4.4	-0.9	\$25,361	74.4	5,055

²⁵ StatsAmerica. Barnstable County Distress Criteria Statistical Report. June 2021. Link: <https://www.statsamerica.org/distress/distress.aspx>

²⁶ Note: Per Capita Money Income is from the American Community Survey, and Per Capita Personal Income comes from the US Bureau of Economic Analysis. The ACS figure includes cash sources of income; the BEA figure includes cash income as well as insurance, transfer payments, dividends, interest, and rent. Link: <https://www.statsamerica.org/distress/help.aspx>

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Census Tract	Town	2019 Unemployment Rate	Threshold Calculation	2019 PCMI	Threshold Calculation	2019 Population
141	Joint Base Cape Cod	6.3	1	\$21,691	63.6	949
145	Falmouth	8.7	3.4	\$35,106	102.9	5,508
151	Mashpee	6.4	1.1	\$52,962	155.3	3,872
153	Barnstable	6.9	1.6	\$24,086	70.6	3,297
	<i>Median</i>	<i>6.9</i>	<i>Median</i>	<i>\$36,036</i>	<i>Total</i>	<i>36,503</i>

Table 2. Barnstable County Distressed Census Tracts. Source: StatsAmerica Tract-Based Distress Tool, US Census 2019 ACS 5-Yr Estimates.

Compared to the region as a whole, residents in distressed Census tracts are more likely to be Black (7% versus 2.9%), and twice as likely to be Hispanic or Latino (6.2% versus 3.1%). They are younger than the average Cape Cod resident – the median age is 48.2 compared to 52.8 for the County. The residents in these areas are more likely to rent (14.5% versus 11.6%) and are much more likely to be living in multi-family units (13.1% versus 7.5%). The housing stock is also slightly older, with 16.8% of homes being built before 1940 (compared to 12.4% region wide).

Just under 9% of the residents of these Census tracts live in poverty, and 5.2% of family households live in poverty; regionally, the percent shares are 6.4% and 4.1% respectively. These areas are home to 18,067 employed civilians over 16; fewer are in management and professional occupations (30.9% versus 38.3%), while more are in service occupations (27.1% versus 20.8%) and construction/extraction/maintenance occupations (11.9% versus 9.9% regionwide). These residents on average also have a lower education attainment – 43.3% have an associate’s, bachelor’s, or graduate/professional degree, compared to 53.2% region-wide.²⁷

Census tract 141, Joint Base Cape Cod, is a non-traditional tract on the Cape. JBCC is a “full scale, joint-use base home to five military commands training for missions at home and overseas.”²⁸ There are a small number of year-round residences, and the small sample size may affect the threshold calculations.

REGIONAL BALANCED ECONOMY BENCHMARKS: ECONOMY

Employment

REGIONAL PRIORITY OBJECTIVES: EDUCATION AND WORKFORCE DEVELOPMENT FOR WAGE GROWTH

²⁷ StatsAmerica Measuring Distress: Tract-Based Tool. Accessed June 2021. Link: http://www.statsamerica.org/distress/tract_distress.aspx

²⁸ Joint Base Cape Cod. <https://www.massnationalguard.org/JBCC/>

The employed population in Barnstable County for March 2021 was 98,851, up from a low of 75,701 in April 2020. The number of employed persons was 101,221 in March 2019.²⁹

Unemployment due to COVID-19 continues to affect all industries and all occupations throughout the nation. Barnstable County saw a 21.6% unemployment rate in May 2020, compared to 15.9% in Massachusetts and 14.7% in the US as a whole.³⁰ In May 2021, Barnstable County continues to have a higher unemployment rate, with a 7.2% rate in the County compared to 5.9% in Massachusetts and 5.7% in the US as a whole.³¹

The Standard Occupational Classification (SOC) system is a federal statistical standard to classify workers into occupational categories. For the civilian employed population over 16 in Barnstable County, the SOC occupations with the highest median earnings in 2019 were Computer and Mathematical Occupations; Law Enforcement Workers including Supervisors; Architecture and Engineering Occupations; Life, Physical, and Social Science occupations; and Health Diagnosing and Treating Practitioners and other technical occupations (Table 3).³²

		Computer and Mathematical Occupations	Law Enforcement Workers Including Supervisors	Architecture and Engineering Occupations	Life, Physical, and Social Science Occupations	Health Diagnosing and Treating Practitioners and other technical occupations
Barnstable County	Median Earnings	\$82,774	\$81,500	\$79,083	\$73,917	\$72,930
	Total Jobs	1,721	1,248	1,355	1,241	5,258
	Percent of Total	1.6%	1.2%	1.3%	1.2%	5.0%
Massachusetts	Median Earnings	\$94,326	\$82,267	\$88,045	\$69,721	\$78,406
	Total Jobs	235,678	31,057	85,285	475,274	177,573
	Percent of Total	6.5%	0.9%	2.4%	13.1%	4.9%

Table 3. Occupation Earnings and Percent of Total Employment. Source: 2019 ACS 5-yr Estimates.

The 2019 CEDS encourages the growth of employment in science, technology, engineering, and mathematics (STEM) sectors. The SOC Policy Committee recommended a standard classification for

²⁹ FRED. Employed Persons in Barnstable County, MA. Accessed June 2021. Link: <https://fred.stlouisfed.org/series/LAUCN250010000000005>

³⁰ MA Dept. of Unemployment Assistance, Economic Research Department. Labor market Information. <https://lmi.dua.eol.mass.gov/LMI/LaborForceAndUnemployment#>. Rates not seasonally adjusted.

³¹ MA Dept. of Unemployment Assistance, Economic Research Department. Labor market Information. <https://lmi.dua.eol.mass.gov/LMI/LaborForceAndUnemployment#>. Rates not seasonally adjusted.

³² US Census. 2019 ACS 5-Yr Estimates. Table ID: S2401.

STEM (Life and Physical Science, Engineering, Mathematics, and Information Technology; Social Science) and STEM-related (Architecture; Healthcare) occupations.³³ In May 2020 employment in these occupations totaled 8,790 employees in Barnstable County Metropolitan Statistical Area. The STEM occupation with the most employees was Registered Nurse (2,380). Median wages ranged from \$35,870 (Dietetic Technicians) to \$188,250 (Family Medicine Physicians).³⁴

Industries

REGIONAL PRIORITY OBJECTIVES: EXPANSION OF THE BLUE ECONOMY; BUSINESS DEVELOPMENT FOR WAGE AND JOB GROWTH

The Gross Domestic Product (Real GDP) for Barnstable County in 2019 was \$13.6 billion, up from \$10.6 billion in 2001.³⁵ The 2018 Regional Policy Plan outlines four core economic development principles, including “expanding opportunity and regional wealth by increasing exports, substituting imports locally, and fostering local ownership.” Based on the most recent Economic Census (2017), the total of sales, value of shipments, or revenue across all industries was \$16.3 billion. This reflects an increase of 21.6% compared to 2012 (\$13.44 billion). The number of firms with paid employees increased 1.4% to 7,390 over the same five-year timeframe.³⁶

Based on the US BLS Quarterly Census of Employment and Wages, there were 9,621 establishments on Cape Cod for all industries and ownership types in 2019, an increase of 4.6% since 2014 (9,191 establishments). The top three biggest industries by employment in the region are Health Care and Social Assistance (16,840 people or 17.2% of average monthly employment), Accommodation and Food Services (16,382 people, or 16.7%), and Retail Trade (15,330 people, or 15.7%).³⁷

In addition to accommodation and food services and retail, the third significant industry in the region that relies on a strong tourism and hospitality sector is arts, entertainment, and recreation, with 3.9% of average monthly employment (Table 4).

Tourism-Reliant Industry	Average Monthly Employment	Total Wages
Accommodation and Food services	16,328	\$469 million
Retail Trade	15,330	\$531 million

³³ STEM Definition Options, 2018. Link: https://www.bls.gov/soc/Attachment_C_STEM_2018.pdf Data Source: US Bureau of Labor Statistics. Link: <https://www.bls.gov/oes/tables.htm>

³⁴ Occupational Employment and Wage Statistics, May 2019.

³⁵ FRED. <https://fred.stlouisfed.org/series/REALGDPALL25001>

³⁶ Note: This data is collected every five years; starting in 2002, data for Wholesale Trade and Education Services for Barnstable County have not been disclosed to avoid exposing confidential information for individual businesses.

³⁷ MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2014 and 2019 data. Link: <https://lmi.dua.eol.mass.gov/LMI/EmploymentAndWages>

Arts, Entertainment, and Recreation	3,832	\$126 million
Total	97,962	\$4.88 billion

Table 4. Employment and Wages for Cape Cod's Primary Tourism-Reliant Industries. 2019. Source: MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data.

Because of its significant tourism and hospitality sector, the region brings in a disproportionate percent share of the state's meals and rooms tax. In 2019, a short-term rental tax went into effect for rooms being rented for 31 days or less that significantly increased the rooms tax liability for FY20. Despite the impacts of the pandemic on travel, especially in the second quarter of 2020, the tax liability nearly doubled year-over-year as a result.³⁸

In FY20, annual meals tax liability for Barnstable County totaled \$6,725,870, a 12.2% decrease from FY19. The annual rooms tax liability for Barnstable County totaled \$19,123,102 for FY20, a 29.6% increase over FY19.³⁹

Town	Meals Tax Liability			Rooms Tax Liability		
	FY19	FY20	Percent Change	FY19	FY20	Percent Change
Barnstable	\$1,611,580	\$1,407,616	-12.7%	\$3,050,051	\$3,177,205	4.2%
Bourne	\$460,191	\$417,045	-9.4%	\$82,424	\$263,391	219.6%
Brewster	\$177,743	\$153,796	-13.5%	\$1,212,285	\$1,438,682	18.7%
Chatham	\$475,326	\$406,924	-14.4%	\$1,472,339	\$1,856,518	26.1%
Dennis	\$613,518	\$539,108	-12.1%	\$489,292	\$1,186,289	142.5%
Eastham	\$131,656	\$119,439	-9.3%	\$285,512	\$673,655	135.9%
Falmouth	\$987,418	\$865,942	-12.3%	\$1,228,513	\$1,441,316	17.3%
Harwich	\$450,966	\$388,771	-13.8%	\$689,228	\$860,304	24.8%
Mashpee	\$421,717	\$369,194	-12.5%	\$105,611	\$344,442	226.1%
Orleans	\$331,421	\$284,912	-14.0%	\$229,192	\$686,159	199.4%
Provincetown	\$666,090	\$566,271	-15.0%	\$2,250,078	\$2,911,625	29.4%
Sandwich	\$430,549	\$360,934	-16.2%	\$256,284	\$400,657	56.3%
Truro	\$62,187	\$57,320	-7.8%	\$370,698	\$599,991	61.9%
Wellfleet	\$247,007	\$226,289	-8.4%	\$121,529	\$451,427	271.5%
Yarmouth	\$638,899	\$562,309	-12.0%	\$2,910,939	\$2,831,441	-2.7%
Barnstable County	\$7,706,268	\$6,725,870	-12.2%	\$14,753,975	\$19,123,102	29.6%

Table 5. Rooms and Meals Tax Liability for Barnstable County, FY19-FY20. Source: MA Department of Revenue, Division of Local Services.

³⁸ MA Division of Local Services. Data Analytics and Resource Bureau. Rooms and Meal Tax Liabilities by Month. Accessed June 2021. Link: <https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=LocalOptions.MealsRoomsTaxCollected>

³⁹ Municipal Databank, MA Dept of Revenue Division of Local Services. <https://www.mass.gov/municipal-databank-data-analytics-including-cherry-sheets>

Based on the 2019 ES-202 data, the five highest wage industries in Barnstable County range from Finance and Insurance to Public Administration (Table 6).

High-Wage Industry	Average Monthly Employment	Average Weekly Wages
Finance and Insurance	2,312	\$1,863
Utilities	447	\$1,830
Mining, Quarrying, and Oil and Gas Extraction	99	\$1,515
Professional and Technical Services	4,727	\$1,439
Public Administration	5,479	\$1,409
Total for All Industries	97,962	\$962

Table 6. Employment and Wages for Cape Cod's High-Wage Industries. 2019. Source: MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data.

Location quotients (LQs) are a quantitative way to determine the “industry specializations” of an area, compared with the rest of the United States, and can help identify the core and emerging industries in a region. In Barnstable County, the three private industries with the highest Annual Average Employment LQs for 2020 are:⁴⁰

- Arts, Entertainment, and Recreation (LQ of 2.11)
- Accommodation and Food Services (LQ of 1.71)
- Retail Trade (LQ of 1.51)

Core and emerging private industries were identified by comparing the 2020 LQs by Industry, using Annual Average Employment, the five-year percent change in that LQ, and the percentage of overall county employment. The three “core” industries for Barnstable County have an LQ of 1.0 or higher and employ more than 10% of the total County workforce, and the three “emerging” Industries have shown growth over five years (2016-2020) in Barnstable County, and have a relatively high LQ compared to the rest of the US (Table 7, Figure 9). The 2020 annual average employment reflects some of the impacts of the pandemic, and the five-year change in employment indicates a loss across nearly every sector for private industry.

⁴⁰ US Bureau of Labor Statistics. Quarterly Census of Employment and Wages. 2020. Link: <https://www.bls.gov/cew/downloadable-data-files.htm>



2019 CEDS YEAR 2 ANNUAL REPORT

	Location Quotient	Annual Average Employment (2020, Private)	5-Yr Change in Employment	% of Private Employment	Total Establishments
Core Industries					
Accommodation and Food Service	1.71	11,713	-27.7%	16.34%	1,079
Retail Trade	1.51	13,733	-11.4%	19.16%	1,370
Health Care and Social Assistance	1.24	14,934	-10.8%	20.84%	1,163
Emerging Industries					
Arts, Entertainment, and Recreation	2.11	2,248	-21.9%	3.14%	253
Construction	1.4	6,232	9.3%	8.70%	1,335
Utilities	0.9	303	-1.6%	0.42%	15

Table 7. Barnstable County Core and Emerging Industries (2020). Source: MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data.

Location Quotients for Private Industry, Barnstable County (2020)

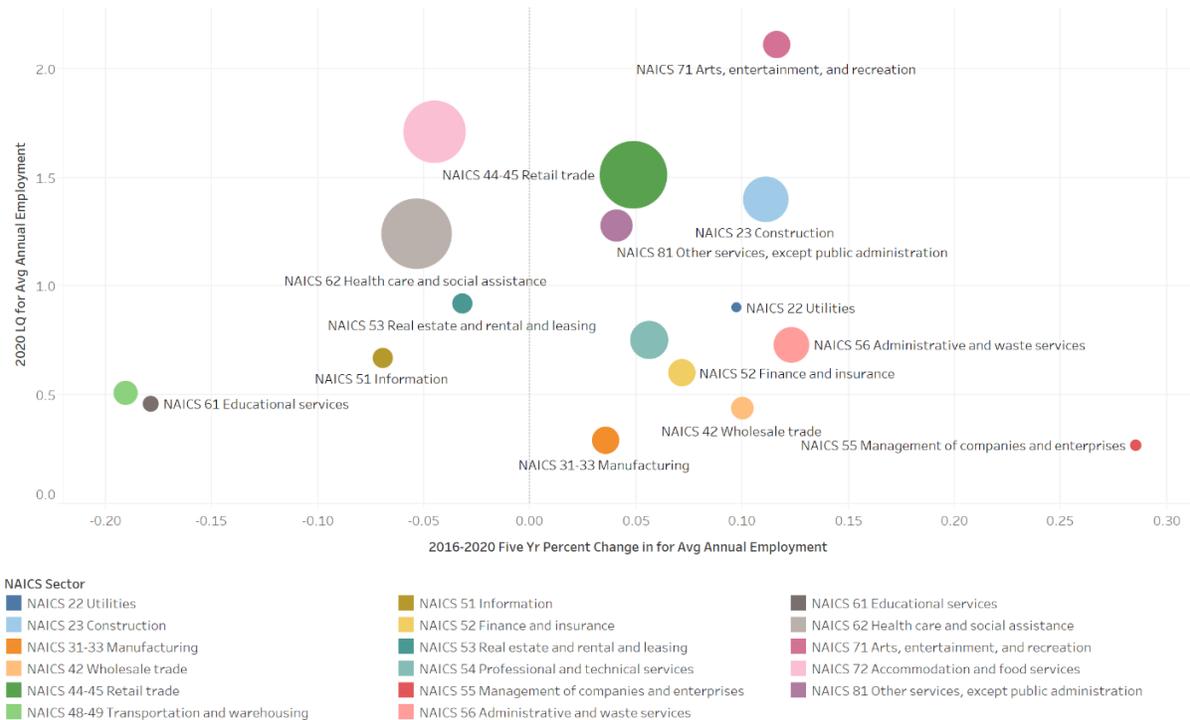


Figure 9. 2020 Location Quotient Analysis, Private Industry, Barnstable County. The y-axis is the LQ by NAICS industry; the x-axis is the five-year percent change in the LQ for annual average employment. The size of the bubble reflects annual average employment.

Another projected area of growth for Cape Cod is the region’s blue economy. In 2017, Cape Cod’s Blue Economy Foundation created an Implementation Report with an action plan to foster growth in the region’s water-based economy.⁴¹ The Foundation used North American Industry Classification System (NAICS) codes to determine which industries are “dark blue” – those that directly depend on our water resources – and “medium blue” – those that rely upon or are located in the region because of the water resources, but are not directly dependent on them.

Using the Blue Economy Foundation’s classifications and 2019 ES-202 data, there were 724 dark blue establishments (up 4.6% from 2018), and 1,795 medium blue establishments (up 2.5% from 2018) (Table 8).⁴² The average monthly employment is 6,800 for dark blue industries, ranging from 4,957 in January to 10,112 in July (a 104% seasonal change). For medium blue industries, the average monthly employment is 22,828, ranging from 17,054 in January to 32,763 in July (a 92% seasonal change).

	Number of Establishments	January Employment	July Employment	Total Wages	Avg. Monthly Employment	Avg. Weekly Wages	% Employment
Dark Blue	724	4,957	10,112	\$340.1 million	6,800	\$1,089	7.0%
Medium Blue	1,795	17,054	32,763	\$904.7 million	22,828	\$1,099	23.4%

Table 8. Employment and Wages for Dark and Blue Businesses, Barnstable County, 2019. Source: MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data.

In 2019, the Public Policy Center at UMass Dartmouth published “Charting the Course: A Regional Assessment of the Marine Science and Technology Sector in Southeastern New England.” The report looks at Barnstable County through the South Coast to Narragansett Bay in Rhode Island. The high opportunity areas of growth for the Blue Economy in this region include aquaculture, offshore communications, offshore wind, and sustainable seafood. These opportunity areas have high regional growth prospects and higher regional strength and capacity.⁴³

Seasonality

Because of its reliance on summer tourism and second homeowners, Cape Cod has a highly seasonal economy. This impacts workforce opportunities for year-round residents, as some

⁴¹ Cape Cod Blue Economy Foundation Implementation Report. 2017. <https://www.bluecapecod.org/wp-content/uploads/2019/07/Cape-Cod-Blue-Economy-Project-Implementation-Plan-012219.pdf>

⁴² Note: In last year’s medium blue establishment count of 3,164, all retail businesses were included; to reduce double counting across categories of blue economy, they will be excluded going forward.

⁴³ Charting the Course, 2019. Public Policy Center at UMass Dartmouth. <http://publicpolicycenter.org/wp/wp-content/uploads/Charting-the-Course-PPC.pdf>

businesses are only open for part of the year, and many of the jobs in the top employment industries for Barnstable County (accommodations, food, and retail) pay lower wages.

The monthly employment graph illustrates the seasonality of the Cape’s economy, with peak employment occurring in July each year, and an annual low in February. The total labor force in 2020 was 108,128, down 3.1% over five years and 2.6% over 10 years (Figure 10).⁴⁴



Figure 10. Employed Persons in Barnstable County, MA. 2011-2021. Source: FRED, Federal Reserve Bank of St. Louis.

Based on the US Bureau of Labor Statistics’ Local Area Unemployment Statistics, Barnstable County had an unemployment rate of 10.1% in January 2021 (with 10,828 unemployed) and 9.3% in July 2020 (with 10,698 unemployed).⁴⁵ Statewide unemployment rates were 7.8% in January 2021 and 9.8% in July 2020. Though Barnstable County’s employment is typically subject to seasonal fluctuations, the COVID-19 pandemic disrupted those patterns and kept unemployment rates higher than usual across the state throughout 2020 and into 2021.

For comparison, in January 2020, Barnstable County had an unemployment rate of 6.1% (with 6,648 unemployed) and 2.8% in July 2019 (with 3,609 unemployed).⁴⁶ Compared to statewide unemployment rates of 3.4% in January and 3.1% in July, Barnstable County’s employment was much more subject to seasonal fluctuations. Seasonal jobs were estimated based on the 2019 annual Wage and Employment data (ES-202) shared by the MA Department of Unemployment Assistance. Across all high-level NAICS industries, there were 28,958 more jobs in Barnstable County

⁴⁴ StatsAmerica. USA Counties in Profile. 2020. Link: <https://www.statsamerica.org/USCP/>

⁴⁵ US Bureau of Labor Statistics, Local Area Unemployment Statistics, 2021. Note: County-level data is not available seasonally adjusted.

⁴⁶ Note: County-level data is not available seasonally adjusted.

in July 2019 compared to January 2019, a 33.5% increase. One industry—Educational Services—had 1,070 fewer jobs in July compared to January.⁴⁷

The peak number of monthly seasonal visitors was about 6.1 million people, compared to Cape Cod’s year-round population of 213,690.⁴⁸ Cape Cod Commission staff leverage traffic counts to estimate visitation rates, especially looking at the Sagamore and Bourne bridges as driving is the primary mode of transportation for people visiting Cape Cod. Figure 11 below shows a typical year (2019) in blue, and 2020, and associated COVID-19 impacts, in yellow. In July, Cape Cod typically sees over 150,000 cars crossing both bridges per day.

Cape Cod Daily Traffic Crossings, Sagamore and Bourne Bridges

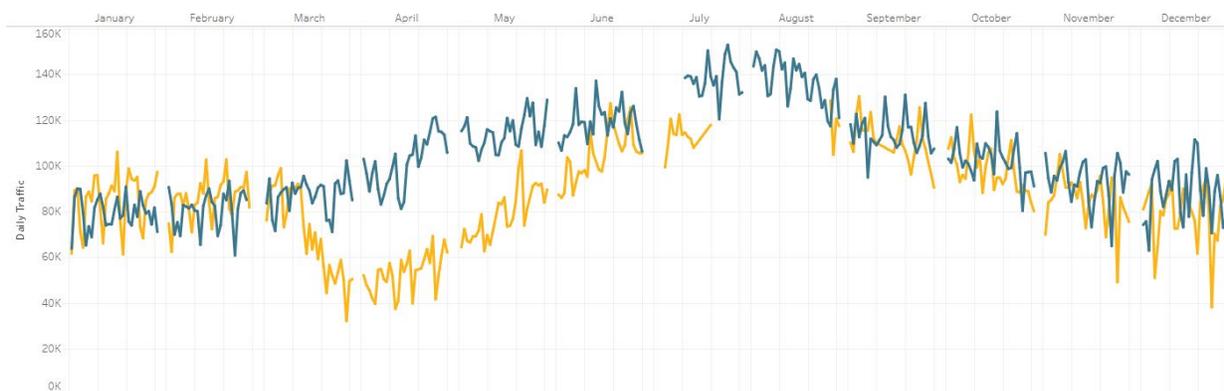


Figure 11. Cape Cod Daily Traffic Trends over the Sagamore and Bourne Bridges. Source: Cape Cod Commission. www.datacapecod.com

Small Businesses

Cape Cod is characterized by a strong small business economy. Across all sectors, the 2019 US Census County Business Patterns data indicate that 79.6% of all business establishments on Cape Cod have less than ten employees (6,909 out of a total of 8,679 businesses), and 61.6% have less than five (5,342).⁴⁹ In Massachusetts, 71.4% of businesses have under ten employees and 53% have less than five. Compared with 2014, the number of businesses with less than ten employees has

⁴⁷ M MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data. Link: <https://lmi.dua.eol.mass.gov/lmi/EmploymentAndWages#>

⁴⁸ Note: Estimate based on rounded bridge crossing numbers for the Sagamore Bridge (2017) and the Bourne Bridge (2019), using the most recent full data sets available from MassDOT. Assumed Average Vehicle Occupancy was 1.48 based on CCC Estimate. Year-Round Population: 2019 ACS 5-yr Estimate.

⁴⁹ Note: the number of establishments on Cape Cod differs by data source; the US Bureau of Labor Statistics publishes a quarterly count of employment and wages reported by employers covering more than 95% of US jobs; and the US Census County Business Patterns is an annual series that provides subnational economic data by industry, though it has a higher margin of error.

increased on Cape Cod by 170 establishments (from 6,739). The percent share is about the same at 80.3%.⁵⁰

There are well over 1,000 retail establishments on Cape Cod. One growing challenge these establishments have faced over the years is competition from “big box” stores such as Walmart, whose economies of scale tend to allow them to offer more competitive pricing on their goods. Out of the 1,408 retail establishments based on the 2019 County Business Patterns data from the Census, 53 establishments (3.8%) have 50 or more employees. The majority are small establishments with less than five employees (773, or 54.9% of the total).⁵¹

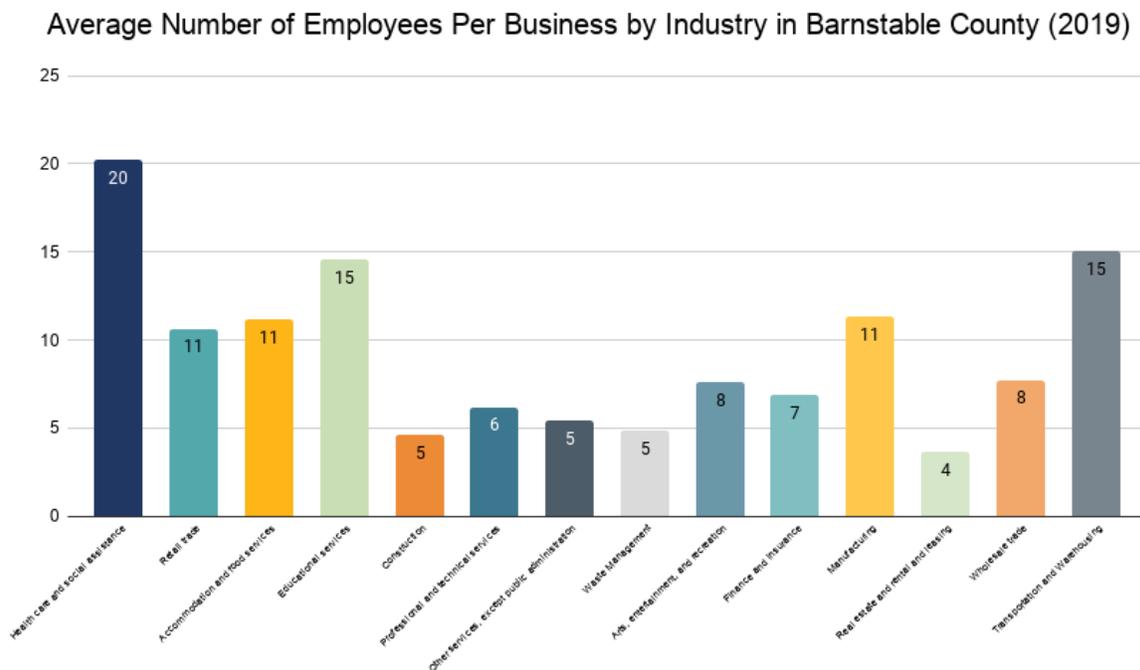


Figure 12. US Census, American Community Survey, 2019 American Community Survey, Table CBP2019

American Community Survey collects information on self-employment; out of 105,715 civilian employees in Barnstable County, 18,535 (17.5%) were self-employed in 2019 (in either incorporated or unincorporated businesses).⁵² People self-employed in their own incorporated business earned a median income of \$54,948 in 2019, with women earning \$50,137 as a median compared to \$83,659 for men.⁵³ People self-employed in their own not incorporated business or unpaid family workers

⁵⁰ US Census. 2019 County Business Patterns, Barnstable County. Table ID: CB1900CBP.

⁵¹ Ibid.

⁵² US Census. 2019 ACS 5-Yr Estimates. Table ID: S2408.

⁵³ US Census Bureau. 2019 American Community Survey (ACS) 5-Year Estimates. Table ID: S2419.

earned a median income of \$31,215 in 2019, with women's earnings amounting to 61.9% of men's earnings.⁵⁴

Cape Cod has seen a slight decline in the number of new businesses starting, likely due to the pandemic. In 2020, 2,252 firms were less than a year old, compared to 2,767 in 2019.⁵⁵ The age of businesses by sector indicates more business creation in Construction and Accommodations and Food Service; Finance and Insurance and Educational Services had older firms on average (Figure 13). The majority of businesses in each sector - over 66% in each - have been operating for over 11 years on average.

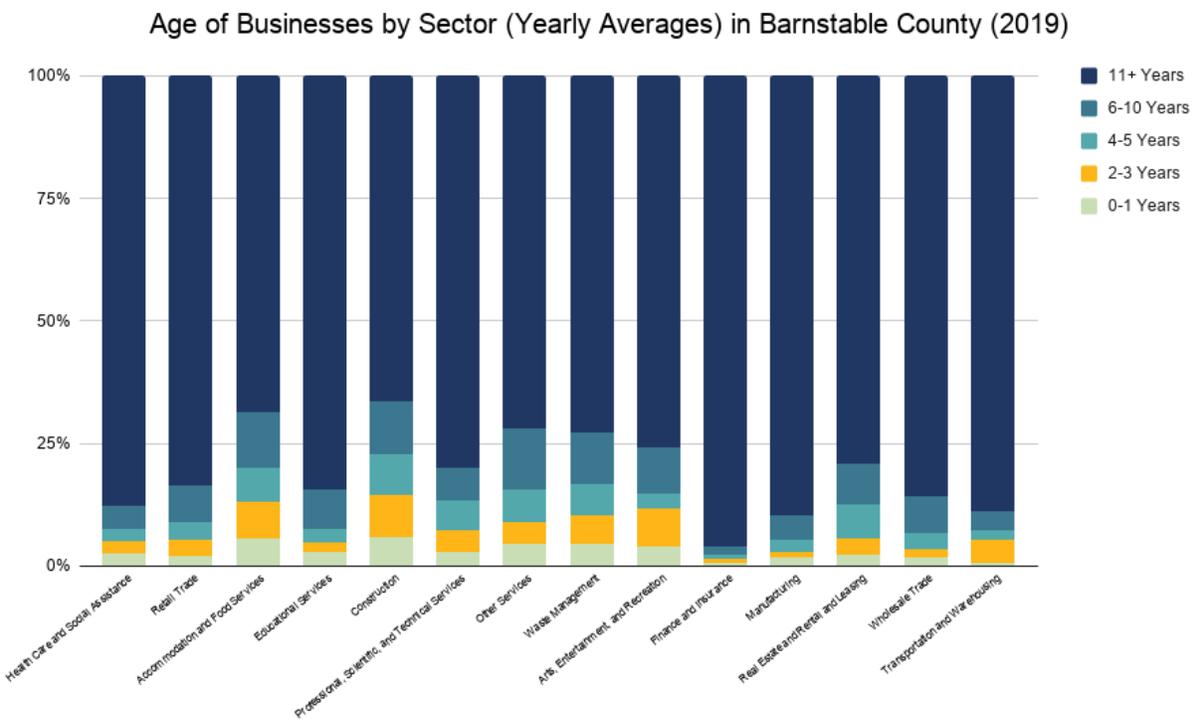


Figure 13. Age of Business by Industry Sector. Source: US Census Bureau for Economic Studies LEHD QWI Explorer, 2019.

Barnstable County has a marginally greater share of new businesses that have been in operation for less than a year than either Massachusetts or the United States as a whole. In 2019, 3.48% of firms in Barnstable County had been in operation for a year or less, compared to 3.03% in Massachusetts and 3.38% in the United States.⁵⁶

⁵⁴ US Census Bureau. 2019 American Community Survey (ACS) 5-Year Estimates. Table ID: S2418.

⁵⁵ US Census Bureau. Quarterly Workforce Indicators. 2019, 2020. Link: qwiexplorer.ces.census.gov.

⁵⁶ US Census Bureau. Quarterly Workforce Indicators. 2019. Link: qwiexplorer.ces.census.gov.

Barnstable County also has a marginally smaller share of firms aged 11 or more years than the state or the country, though this share is growing slightly faster in Barnstable County than in the other two geographies. In 2014, 79.35% of Barnstable County private sector firms had been in operation for 11 or more years, compared to 82.87% in Massachusetts and 80.72% in the United States as a whole. By 2020, 80.37% of Barnstable County private sector firms had been in operation for 11 or more years, compared to 82.92% in Massachusetts and 81.01% in the United States.⁵⁷

REGIONAL BALANCED ECONOMY BENCHMARKS: PLACE

Housing

REGIONAL PRIORITY OBJECTIVE: HOUSING DIVERSITY AND AFFORDABILITY

Housing affordability is one of the top challenges in Barnstable County, as the housing market currently doesn't meet the region's needs. Lower than average wages, higher than average building and land costs, a lack of choice, limited supply, and the demand for seasonal and short-term rental housing makes housing for the current and future year-round population a high-priority challenge.⁵⁸ The COVID-19 pandemic also continues to have an outsized impact on the region's housing market, with median sales price climbing 16.8% year-over-year in 2020. In April 2021, the median sales price was \$625,000 for 307 homes sold, compared to \$439,900 for 265 homes sold in April 2020.⁵⁹

According to the 2019 American Community Survey 5-Yr Estimates, Barnstable County has 163,557 housing units total. There are 94,323 occupied households in Barnstable County; of these, 75,287 (79.8%) are owner-occupied and 19,036 (20.2%) are renter-occupied, reflecting a decline of about 250 year-round housing units since 2018. The owner-renter mix of occupied units by town ranges from 9.3% renter-occupied in Eastham to 27.6% in Bourne.⁶⁰

⁵⁷ US Census Bureau. Quarterly Workforce Indicators. 2014, 2019. Link: qwiexplorer.ces.census.gov.

⁵⁸ 2018 RPP Update, Cape Cod Commission. www.capecodcommission.org/rpp

⁵⁹ Cape Cod and Islands Association of Realtors. "Local Market Update: April 2021". Link: <http://capecod.stats.10kresearch.com/docs/lmu/x/BarnstableCounty?src=page>

⁶⁰ Additional information on housing diversity is available at www.datacapecod.com/housing.

Tenancy in Barnstable County (2019)

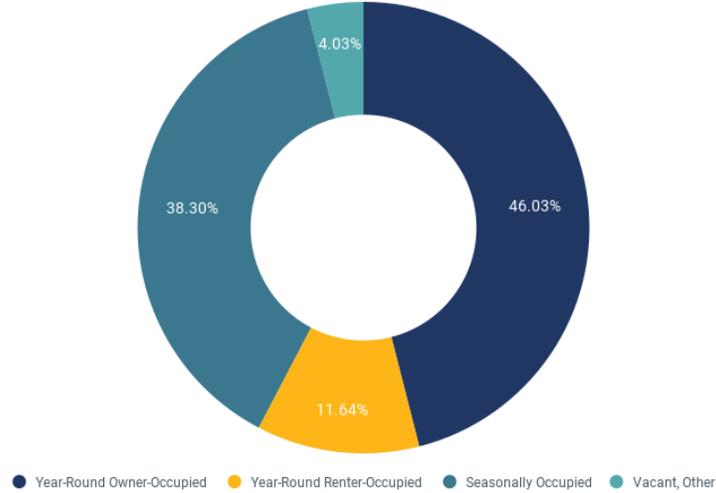


Figure 14. US Census, American Community Survey, 2019 American Community Survey 5-Year Estimates, Tables DP04 and B25004.

Tenancy Across Barnstable County's Towns (2019)

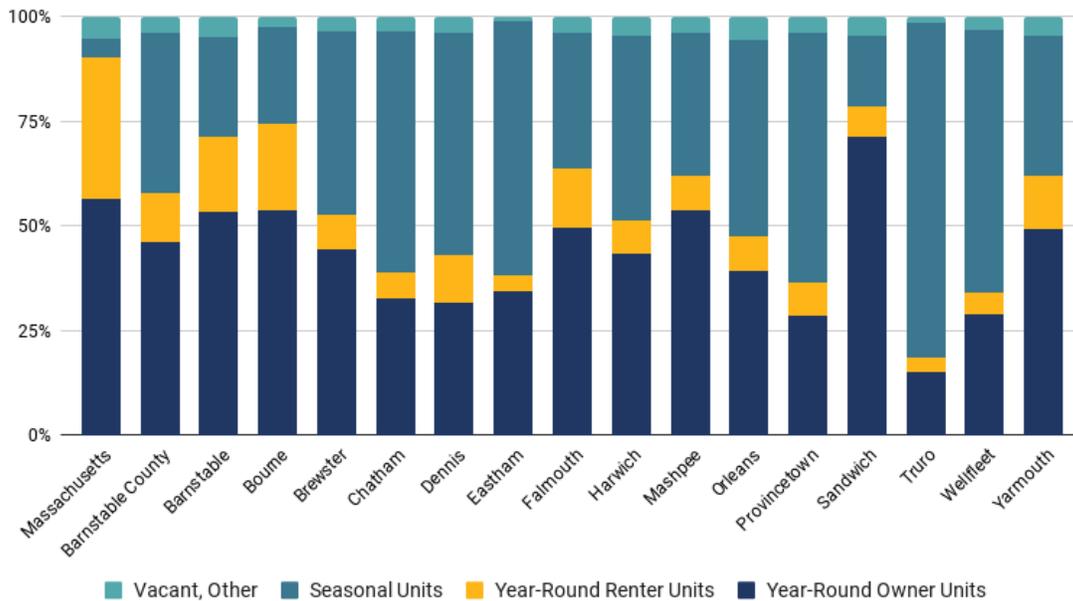


Figure 15. US Census, American Community Survey, 2019 American Community Survey 5-Year Estimates, Table DP04 and B25004.

Cape Cod’s housing stock is dominated by single family homes—133,537 detached single-family units make up 82% of the total housing stock, compared to 52% for the state. There are 28,861 multi-family homes (one attached unit or more), or 17.6% of all housing units. Housing options between single-family homes and mid-rise apartments, the so-called “missing middle housing,” would provide much needed housing units for the region’s workforce and provide opportunities for retirees to downsize, while protecting and enhancing Cape Cod’s environment and character.⁶¹

The region is also heavily impacted by its high rate of seasonal homes, which reduces availability of housing to the year-round workforce. The demand for seasonal and retiree housing significantly increases the cost of homeownership, and many property owners can make more money renting out their property short-term over the summer rather than renting it out-year-round, and smaller homes are being torn down to build larger seasonal homes for part-time residents.⁶² For additional information on the impact of second homeownership on Cape Cod’s housing stock, see the [Seasonality](#) section below.

⁶¹ Cape Cod Commission. “Community Resiliency by Design.” <https://storymaps.arcgis.com/stories/75d9538dced244fca275db7dc4add9d4>

⁶² Cape Cod Commission. 2018 Regional Policy Plan Update. www.capecodcommission.org/rpp

HOW MANY EARNERS? BARNSTABLE COUNTY

Using average annual wages for the region's top employment sectors, this is the number of wage earners per industry needed to buy or rent at median values.

TO OWN
\$410,000*



\$46/hr
\$96,000/yr

TO RENT
\$1,300/m[^]



\$25/hr
\$52,000/yr

RANK	SECTOR	TO OWN	TO RENT
1	Health Care & Social Assistance 17.2% OF ALL EMPLOYMENT	1.7 \$28/hr 	0.9 \$28/hr 
2	Accommodation & Food Services 16.7% OF ALL EMPLOYMENT	3.3 \$14/hr 	1.8 \$14/hr 
3	Retail Trade 15.7% OF ALL EMPLOYMENT	2.8 \$17/hr 	1.5 \$17/hr 
4	Educational Services 7.5% OF ALL EMPLOYMENT	1.8 \$26/hr 	1.0 \$26/hr 
5	Construction 7.1% OF ALL EMPLOYMENT	1.5 \$31/hr 	0.8 \$31/hr 

Numbers have been rounded. Sources: 2019 American Community Survey 5-year Estimates; 2019 ES-202 Monthly Employment and Wages from the MA Dept of Unemployment Assistance Economic Research Division, Cape Cod & Islands Association of Realtors, and Crane/EPR. *\$410,000 was the median sales price in 2019 according to the Cape Cod & Islands Association of Realtors. 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. Estimates also used an average of the Cape town's property tax rates that does not reflect locally-adopted residential tax exemptions, an insurance rate of \$4/\$1000, and a mortgage insurance rate of \$45/\$100,000. ^Median gross rent is from 2019 American Community Survey data (\$1,311 rounded to \$1,300). This analysis assumes housing costs should not exceed 30% of income.

Figure 16. US Census 2019 American Community Survey 5-Year Estimates; MA Dept of Unemployment Assistance, Division of Economic Research, ES-202 2019 data; Cape Cod and Islands Association of Realtors; and Crane/EPR.

The median home price on Cape Cod in 2020 was \$479,000, up from \$410,000 in 2019. The 2020 median home price ranges from \$370,000 in Yarmouth to \$826,500 in Chatham.⁶³ These home prices are unattainable for many Barnstable County residents working in the region's top industries. In order to own a median priced home, for example, employees in the Accommodation and Food Services industry would need 3.3 earners in the household to make it affordable based on 2019 data (spending a maximum of 30% of their total income on housing) (Figure 16).

High demand for housing by both year-round residents and second-home owners combined with low average wages on Cape Cod results in a housing market that is unaffordable for many year-round residents. About 33,250 Barnstable County households experience housing cost stress,

⁶³ Cape Cod and Islands Association of Realtors Annual Report on the Cape Cod Housing Market, 2020. <http://capecod.stats.10kresearch.com/docs/ann/2020/x/report?src=page>

meaning they spend more than US Dept. of Housing and Urban Development (HUD) recommended 30% of their income on housing costs (Table 9).⁶⁴

Barnstable County Housing Cost Burden Overview	Owner	Renter	Total
Cost Burden <=30%	50,895	10,205	61,100
Cost Burden >30% to <=50%	13,425	4,885	18,310
Cost Burden >50%	10,150	4,790	14,940
Cost Burden not available	385	270	655
Total	74,860	20,150	95,010

Table 9. Housing Cost Burden for Barnstable County residents by Ownership. Source: US Department of Housing and Urban Development (HUD) Comprehensive Housing Affordability Strategy (CHAS). 2017.

The most recent figures from HUD reflect an increase in housing cost burden over time, though renters and homeowners were not affected equally. For homeowners, the number paying more than 50% of their income fell by about 500 households. Conversely, the number of renters paying more than 50% of their income rose by about 190 households.

In every town on Cape Cod, the median household income (MHI) is less than what is needed to avoid housing cost stress if purchasing a median priced home. The difference between MHI and annual income needed to afford a home comfortably – spending 30% or less on housing costs – varies town by town from over \$21,000 to more than \$100,000 (Table 10).

Town	Median Sales Price (2020)	Annual Income for Median Sales Price to be Affordable (30% of Income)	Median Household Income (2019)	Difference Between MHI and Annual Income Needed for Affordability
Barnstable County	\$479,000	\$112,208	\$74,336	-\$37,872
Barnstable	\$449,000	\$102,720	\$72,733	-\$29,987
Bourne	\$440,000	\$106,343	\$75,534	-\$30,809
Brewster	\$470,000	\$110,169	\$75,321	-\$34,848
Chatham	\$826,500	\$183,817	\$83,839	-\$99,978
Dennis	\$385,000	\$86,962	\$65,616	-\$21,346
Eastham	\$529,750	\$125,249	\$72,075	-\$53,174
Falmouth	\$545,000	\$127,598	\$75,820	-\$51,778
Harwich	\$490,000	\$114,880	\$76,822	-\$38,058
Mashpee	\$462,000	\$108,797	\$77,019	-\$31,778
Orleans	\$752,500	\$174,524	\$73,778	-\$100,746
Provincetown	\$695,500	\$155,431	\$59,063	-\$96,368

⁶⁴ HUD CHAS Data for Barnstable County. 2017. <https://www.huduser.gov/portal/datasets/cp.html>

Town	Median Sales Price (2020)	Annual Income for Median Sales Price to be Affordable (30% of Income)	Median Household Income (2019)	Difference Between MHI and Annual Income Needed for Affordability
Sandwich	\$465,000	\$117,034	\$98,827	-\$18,207
Truro	\$632,500	\$142,452	\$68,367	-\$74,085
Wellfleet	\$571,000	\$129,670	\$74,639	-\$55,031
Yarmouth	\$370,000	\$87,944	\$63,432	-\$24,512

Table 10. Income Needed for Median Sales Price to be Affordable vs. Median Household Income, Barnstable County, 2019-2020. Source: Cape Cod and Islands Association of Realtors; 2019 ACS 5-Yr Estimate; NerdWallet Mortgage Cost Calculator; 2017 Housing Market Study⁶⁵

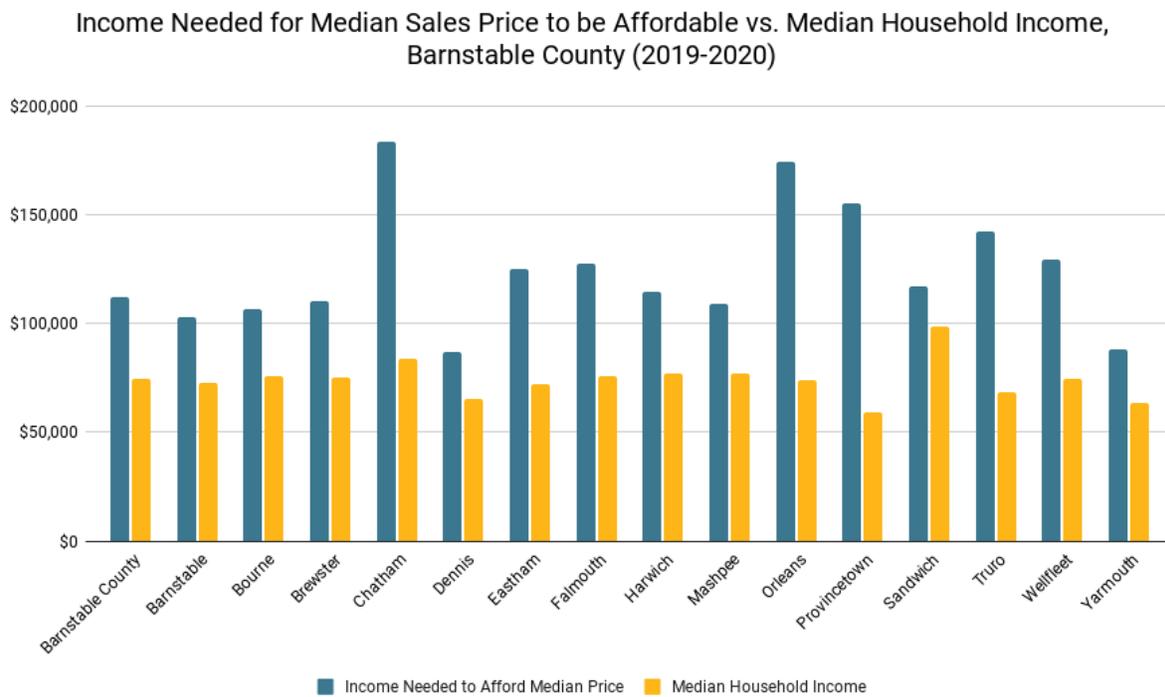


Figure 17. Income Needed for Median Sales Price to be Affordable vs. Median Household Income, Barnstable County, 2019-2020. Source: Cape Cod and Islands Association of Realtors; 2019 ACS 5-Yr Estimate; NerdWallet Mortgage Cost Calculator; 2017 Housing Market Study⁶⁶

⁶⁵ 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. Estimates included local tax rates, including best available information on locally-adopted residential tax exemptions, an insurance rate of \$4/\$1000, and a mortgage insurance rate of \$45/\$100,000. This analysis assumes housing costs should not exceed 30% of income.

⁶⁶ See footnote 65.

While those earning below the median household income throughout the region struggle to afford housing, even those earning the median household income and above frequently cannot afford current market prices for housing ownership. In some instances, such as in Provincetown, those earning up to 200% of median household income cannot affordably purchase a home at the town’s median sales price of \$695,500.

The region has a limited amount of subsidized housing to help low- and moderate-income residents secure housing. The Massachusetts Subsidized Housing Inventory (SHI) measures a community’s stock of low- or moderate-income housing for the purposes of M.G.L. Chapter 40B (the Comprehensive Permit Law). Chapter 40B creates an affordable housing subsidy by granting developers a density bonus through the waiver of local zoning and other regulations—provided a certain number of developed units are affordable—unless and until a town reaches a goal of 10% affordable units in their town. Orleans and Provincetown 9% or more affordable. On average, only 5.35% of the Cape’s housing inventory is affordable, up from 5.35% in 2017 (Table 11).

Town	2020 SHI Units	% of Total
Barnstable	1,487	7.2%
Bourne	591	6.9%
Brewster	268	5.6%
Chatham	176	5.1%
Dennis	390	5.1%
Eastham	119	4.5%
Falmouth	1,070	7.2%
Harwich	333	5.4%
Mashpee	343	5.3%
Orleans	296	9.0%
Provincetown	206	9.7%
Sandwich	314	3.8%
Truro	25	2.3%
Wellfleet	38	2.5%
Yarmouth	599	5.0%
Barnstable County	6,255	5.6% (avg)

Table 11. MA Subsidized Housing Inventory by Town in Barnstable County, December 2020. Source: MA Dept of Housing and Community Development.

One of the major drivers of the region’s housing crisis is the number of homes used seasonally and the propensity of second homeowners to rent their homes on a short-term basis in the summer and shoulder season months rather than year-round. There are 69,234 vacant housing units on Cape Cod, and 62,643 of those, or 38.3% of all housing units, are designated for seasonal, recreational, or

occasional use. At the state level, only 4.4% of the housing stock is for seasonal use. The concentration of seasonal homes by town ranges from 17% in Sandwich to 80% in Truro (Figure 18).

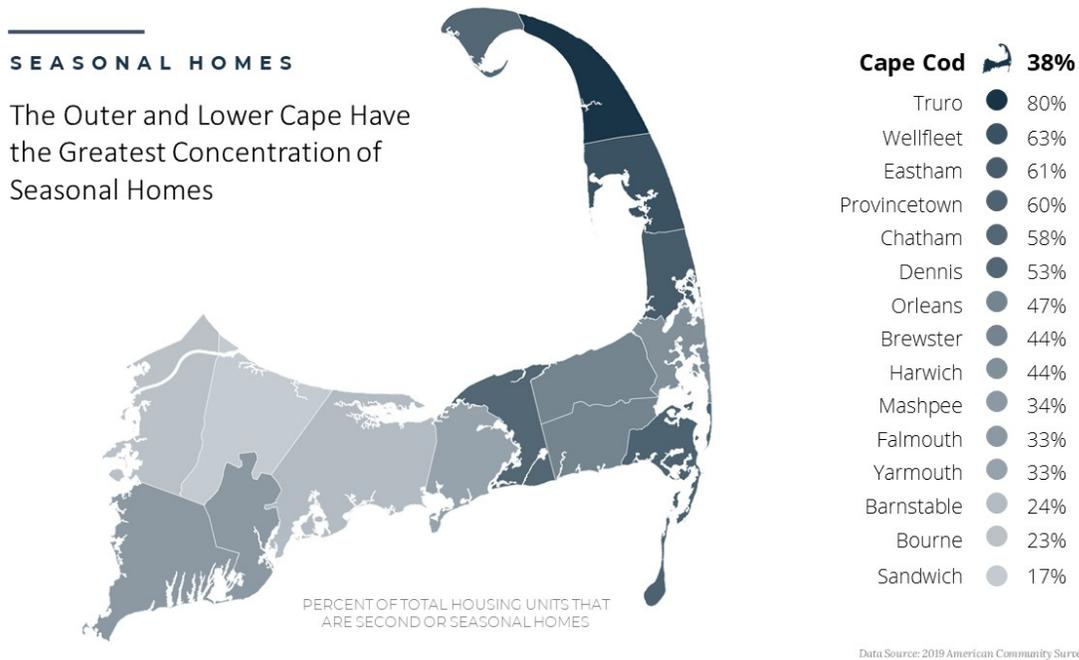


Figure 18. Share of Seasonal Homes by Town on Cape Cod. Source: 2019 American Community Survey 5-Year Estimates.

Transportation

Cape Cod is a heavily automobile-oriented region. Residents who do not have access to their own vehicle must rely on public transit, walking, or friends and family to travel to and from work, school, grocery stores, and medical appointments. The Cape Cod Regional Transit Authority offers on-demand and fixed-route services, and tracks employment near fixed-route services to ensure workers are able to reach employment hubs. In FY2018, 28,288 jobs were located within 10-minute walk of fixed-route services.⁶⁷

Out of the 103,802 workers over 16 in Barnstable County, 35.3% commute to work in less than 15 minutes. The mean travel time to work is 23.9 minutes, compared to 30.2 for the state. On Cape Cod, 7.3% of residents work from home, compared to 5.2% statewide.⁶⁸

⁶⁷ Cape Cod Regional Transit Authority. Comprehensive Regional Transit Plan 2020. Link: http://capecodrta.org/downloads/CCRTA_CRTPLAN.pdf

⁶⁸ US Census. 2019 ACS 5-yr Estimate. Table ID: S0801.

Of the Barnstable County residents who are employed, just over half both live and work within the County, rather than commuting elsewhere for work. There are 63,128 (52.3%) people who both live and work in Barnstable County; another 24,322 (20.1%) people who are employed in the County, but live off-Cape; and another 33,211 (27.5%) who live on-Cape, but work off-Cape.

In 2018, 65.53% of the County's employed residents both lived and worked within the County, while only 34.47% commuted outside of the County for employment. Barnstable County's labor force relies, primarily, on the County's residents, rather than on employees who commute into the County from elsewhere. In 2018, 72.2% of the County's labor force lived within the County, while only 27.8% lived outside of the County.⁶⁹

Community Character

REGIONAL PRIORITY OBJECTIVES: INFRASTRUCTURE IN ACTIVITY CENTERS; ZONING AND REGULATORY REFORM FOR SMART GROWTH/ACTIVITY CENTERS; LAST MILE BROADBAND-FINANCING STRATEGY

The Commission works to protect the significant historical assets throughout the region, both through planning efforts and through the agency's regulatory program. Cape Cod's historic resources are tangible connections to the region's agricultural heritage, maritime history, artist colonies, and unique past, and play a key role in attracting and retaining residents and visitors. Many of the region's historic structures are at risk, however, as 44% of inventoried structures over 100 years old are not protected.⁷⁰

- Total inventoried buildings/structures: 13,030
- Number of inventoried structures in Local Historic Districts: 4,931
- Number of inventoried structures in National Register Districts (not in LHDs): 1,480
- Number of inventoried structures with Preservation Restrictions (not on National Register or within a Local Historic District): 5
- Number of inventoried structures with no protections: 6,614
- Number of inventoried structures with no protections with construction dates pre-1800: 321
- Number of inventoried structures with no protections with construction dates 1800-1899: 2,051
- Number of inventoried structures with no protections with construction dates 1900-1949: 2,516

There are approximately 21,000 parcels in Barnstable County that were developed before 1950, or about 13% of the total parcels.⁷¹

⁶⁹ Source: US Census On the Map. 2018.

⁷⁰ Massachusetts Historical Commission data (May 2021).

⁷¹ Cape Cod Commission Cape-wide Parcel Data Set.

Summary of Accomplishments

The following briefly summarize CEDS Activities during Year 2 of the plan.

ACTIVITY: ADMINISTRATION AND GENERAL PLANNING		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
CEDS Strategy Committee Support and Administration	The Commission provided administrative and technical support to the Barnstable County Economic Development Council (BCEDC), an 14-member board that advises the Barnstable County Board of Regional Commissioners, and serves as the CEDS Strategy Committee. The BCEDC met virtually six times, with its committees (Grants Committee, Nominating Committee, and the Executive Committee) meeting an additional three times.	BCEDC Support - Ongoing
	The BCEDC awarded License Plate Grant Fund Program grants in 2020 to six projects to address the economic need of local and regional governmental entities and non-profits during the COVID-19 pandemic. The grant recipients were Love Live Local (\$25,000), Cape Cod Community College (\$24,802), Arts Foundation of Cape Cod (\$25,000), Cape Cod Young Professionals (\$11,545), Lower Cape Community Development Corporation (\$25,000), and Sustainable Cape: Center for Agricultural Preservation and Education (\$25,000). For additional information on the project recipients, more details are available here . The 2021 request for proposals for the License Plate Grant Fund Program was released in May 2021.	2020 License Plate Grants – Awarded August 2020 2021 License Plate Grants – RFP Released May 2021
CEDS Project/ Initiatives Funding	<p>Commission staff supported two grant applications to the US EDA Economic Adjustment Assistance CARES Act Recovery Assistance Program:</p> <ul style="list-style-type: none"> The Cape Cod Chamber of Commerce applied for funding for marketing and promotion of the region as a safe travel destination for residents of designated lower-risk states, with the ultimate aim of mitigating increased unemployment rates and lost revenues in the region's tourism industries (submitted October 5, 2020). The CONNECT Partnership, a regional consortium of universities, applied for funding for workforce development and training for the blue economy to support the development of diverse, year-round employment opportunities (submitted October 6, 2020). 	US EDA Economic Adjustment Assistance CARES Act Recovery Assistance Program Grant Applications (2) – Submitted October 2020

ACTIVITY: ADMINISTRATION AND GENERAL PLANNING		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
	<p>Commission staff supported one application to the US EDA Economic Adjustment Assistance SPRINT Challenge Program:</p> <ul style="list-style-type: none"> The Cape Cod Chamber of Commerce applied for funding for a Blue Innovation Wheelhouse to capitalize on regional resources and facilitate regional entrepreneurship (submitted December 3, 2020). <p>The Commission and town partners applied to the MA Executive Office of Energy and Environmental Affairs Planning Assistance Grants program. The proposed project aims to analyze different types of commercial and mixed-use spaces across Cape Cod and, with the resulting insights, formulate municipal guidance for leveraging land use and zoning tools to sustain local economies and foster resilient development patterns (submitted May 28, 2021).</p> <p>Commission staff also provided supported to some communities in their applications to the MA Executive Office of Housing and Economic Development's Community One Stop for Growth program.</p>	<p>US EDA EAA SPRINT Challenge Program Grant Application – Submitted December 2020</p> <p>MA EOEEA Planning Assistance Grants Program Grant Application – May 2021</p> <p>MA EOHED Community One Stop for Growth Grant Applications – June 2021</p>
Increase Financial Resources for the Region	Commission staff supported multiple grants from federal and state agencies between July 2020 and June 2021. For more details, see table Increased Financial Resources for the Region .	Ongoing
Developments of Regional Impact regulatory review	Over the past year, the Commission continued its regulatory review program. Projects submitted ranged in nature from residential developments to utility scale solar projects. Multiple projects are seeking review as development agreements.	DRI review – Ongoing
Regional Policy Plan (RPP) updates and implementation	<p>The Cape Cod Regional Policy Plan is the framework for economic development planning on Cape Cod, providing guidance on balancing economic development and the protection and preservation of the Cape's resources and heritage. The 2018 Regional Policy Plan provides the basis for the 2019 CEDS and can be accessed here: http://www.capecodcommission.org/rpp.</p> <p>The 2018 RPP's goal for the economy is to promote a sustainable regional economy comprised of a broad range of businesses</p>	Regional Policy Plan (RPP) Implementation – Ongoing

ACTIVITY: ADMINISTRATION AND GENERAL PLANNING		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
	providing employment opportunities to a diverse workforce, and its growth policy states: "Growth should be focused in centers of activity and areas supported by adequate infrastructure and guided away from areas that must be protected for ecological, historical, or other reasons. Development should be responsive to context allowing for the restoration, preservation, and protection of the Cape's unique resources while promoting economic and community resilience."	

ACTIVITY: OUTREACH AND INFORMATION SHARING		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
Presentations on economic topics	Commission staff presented information on regional demographic trends, economic challenges, and COVID-19 response actions and resources to members of the 2020 Community Leadership Institute (CLI).	CLI Presentation – September 2020
	Commission staff presented “Visualizing the Local and Regional Impacts of COVID-19 on a Seasonal Economy” at the Southern New England – American Planning Association (SNEAPA) virtual conference. The presentation introduced Tableau as a data visualization tool and provided an overview of how the Commission is visualizing economic data during the COVID-19 pandemic.	SNEAPA Presentation – October 2020
	Commission staff presented information on Data Cape Cod to the Chatham Board of Selectmen, including the COVID-19 map-based data viewer, the business impact survey results, and traffic impacts. The presentation also described the Commission's COVID-19 Municipal Planning Strategies Toolkit.	Chatham Presentation – November 2020
	Commission staff provided an overview of the agency's role in regional economic development to the Cape Leadership Institute, and shared demographic trends that are being tracked in StatsCapeCod and Data Cape Cod.	CLI Presentation – February 2021
	Commission staff presented to the Lower Cape Community Development Partnership (CDP) on its research into demographics and economic changes in Barnstable County during the COVID-19	CDP Presentation – February 2021

ACTIVITY: OUTREACH AND INFORMATION SHARING

Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
	<p>pandemic. Focus areas included traffic changes, real estate impacts, and elevated residential utilities use.</p> <p>Commission staff presented an overview of how the agency is analyzing data to understand the population shifts in the region due to the COVID-19 pandemic at the National Planning Conference (NPC).</p> <p>Commission staff presented an economic overview of the Cape Cod region to the Cape Cod & Islands Association of Realtors (CCIAOR) Leadership Academy.</p> <p>The Commission’s executive director conducted a series of presentations to Select Boards and Town Council in each of the Cape’s 15 towns during this reporting period. These town-specific presentations described 2020 highlights, including key data points from Data Cape Cod, and articulated 2021 priorities, including the homeowner survey, regional housing plan, and regional capital infrastructure plan.</p> <p>Commission staff also provided data and analysis to the press by request, including information on the economic impacts of the COVID-19 pandemic, demographics and population shifts, housing and real estate, school enrollment, and income. The Commission published nine press releases and 26 newsletter articles related to economic development (out of 17 and 55 total, respectively).</p>	<p>NPC Presentation – May 2021</p> <p>CCIAOR Presentation- May 2021</p> <p>Executive director/Select Boards/Town Council series – February - June 2021</p> <p>Press Data Inquiries, press releases, and newsletter articles – Ongoing</p>
<p>Economic data collection, analysis, and visualization</p>	<p>Commission staff worked with the Cape Cod Chamber of Commerce to conduct two business impact surveys during this reporting period (three total) capturing the state of Cape Cod small businesses throughout the pandemic. Survey 1 received 370 responses, Survey 2 received 405, and Survey 3 received 450. Commission staff analyzed survey results, developed online dashboards of the data, and will be sharing a cumulative technical report on the three business impact surveys.</p> <ul style="list-style-type: none"> • Survey 1 results: https://datacapecod.com/business-impact-survey/ • Survey 2 results: https://datacapecod.com/second-business-impact-survey/ • Survey 3 results: 	<p>Survey 2 – August/ September 2020</p> <p>Survey 3 – January 2021</p> <p>Technical Report – Ongoing</p>

ACTIVITY: OUTREACH AND INFORMATION SHARING		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
	<p>https://datacapecod.com/third-business-impact-survey/</p> <p>Commission staff continued to update Data Cape Cod, a resource launched in May 2020 to provide information on the region's demographics and economy, with particular attention to the impacts of the pandemic. The project features dashboards built in Tableau and Power BI, with those added during the reporting period including the three business impact survey dashboards, a vaccine planning resource, and a Cape Cod real estate resource. Commission staff also developed Tableau dashboards documenting population and demographic shifts on Cape Cod during the COVID-19 pandemic, leveraging data sources including USPS change of address forms and residential utilities usage to analyze and visualize trends in new and year-round population shifts. These visualizations are expected to be published within the next reporting period.</p> <ul style="list-style-type: none"> • Data Cape Cod: https://datacapecod.com/ <p>Commission staff continue to maintain and update the geographic profiles, maps, and economic benchmarks of the STATSCapeCod tool, which provides a virtual data center for better understanding Cape Cod's demographics and economy. Staff are working in collaboration with the Indiana Business Research Center on a streamlined version of the tool that incorporates the most recent available data.</p> <ul style="list-style-type: none"> • STATSCapeCod: https://www.statscapecod.org/ 	<p>Data Cape Cod updates – Ongoing</p> <p>Demographic data visualization – Ongoing</p> <p>STATSCapeCod updates – Ongoing</p>
Surveys & Town data requests	<p>Commission staff collected survey data for several other initiatives, including:</p> <ul style="list-style-type: none"> • 2 Orleans Wayfinding Plan Public Surveys • Ponds Groups Questionnaire • Cape Cod Climate Action Plan Stakeholder Survey <p>These surveys informed local planning and economic recovery work and provided data to town staff working to understand the impacts of COVID-19, challenges of navigating Orleans downtown, water quality monitoring efforts, and local climate change perceptions and challenges.</p> <p>Commission staff provided assistance with developing visualizations to communicate housing data for the Town of Wellfleet and provided data to the Town of Barnstable on business establishments in the</p>	<p>Support ongoing</p>

ACTIVITY: OUTREACH AND INFORMATION SHARING		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
	<p>Hyannis area to facilitate their Local Rapid Recovery Planning program work. Staff also provided economic data points to support the local hazard mitigation plan update for Provincetown.</p> <p>During this past year, the Commission also worked on obtaining updated planimetric data and ortho-imagery for the region to assist towns in future GIS analyses.</p>	

ACTIVITY: TARGETED TECHNICAL ASSISTANCE TO TOWNS		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
Local Comprehensive Plan (LCP) development	Commission staff continued to assist towns in developing and updating their Local Comprehensive Plans. This included attending LCP committee meetings to provide guidance, individual meetings with Town staff to provide support, and developing maps to facilitate the Town of Barnstable's LCP update (a project also supported through District Local Technical Assistance Funds). ⁷² The Commission will continue to provide help to towns as they develop and update their LCPs.	Support ongoing
RESET program and individual RESET projects	There were no requests during this reporting period.	N/A
District Local Technical Assistance (DLTA)	The Commission supports towns through DLTA projects, based on annual municipal requests for assistance. The DLTA Program is funded annually by the Commonwealth of Massachusetts to help municipalities with sustainable development and to encourage communities to form partnerships to achieve planning and development goals consistent with state and regional priorities. During the second half of 2020 and first half of 2021, some of the projects supported through DLTA have included support for new zoning or other regulations, project feasibility studies, support for an open space and recreation plan, support for housing production plans, a survey of new homeowners to better understand the driving forces behind home sales in the region during the COVID-19 pandemic, and updating the Ponds and Lakes Atlas.	Ongoing

⁷² The District Local Technical Assistance Program is funded annually by the Commonwealth of Massachusetts to help municipalities with sustainable development and to encourage communities to form partnerships to achieve planning and development goals consistent with state and regional priorities.

ACTIVITY: TARGETED TECHNICAL ASSISTANCE TO TOWNS		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
Water quality plan development	Commission staff assisted the Town of Truro in planning efforts related to septic inputs and stormwater runoff to Pilgrim Pond, the development of a private well sampling plan, and public outreach to residents within the watershed.	Truro TA – October 2020- June 2021
	Commission staff organized a Responsible Management Entity Working Group, which explores the administrative and logistical issues related to establishing a Responsible Management Agency, a requirement for using decentralized wastewater treatment systems to meet nutrient reduction obligations under a watershed permit or Comprehensive Waste Management Plan (CWMP).	Responsible Management Entity Group – Ongoing
	Commission staff have supported the Town of Bourne's CWMP process by providing resources during the procurement process and continues to provide support as required.	Bourne TA – Ongoing
	Commission staff provides input and feedback on the Pleasant Bay Alliance's implementation of the Pleasant Bay Watershed Permit, and provides technical assistance in the form of local ordinance review to identify opportunities for improving nutrient management through local regulations.	Pleasant Bay Alliance – September 2020- June 2021
	Commission staff have supported the Town of Wellfleet and its consultants during the development of a Targeted Watershed Management Plan for Wellfleet Harbor.	Wellfleet TA – Ongoing
	Commission staff issued a 208 consistency determination for the Barnstable CWMP. In addition, the Commission issued 208 consistency determinations for Cape Cod projects listed on the 2021 Clean Water Intended Use Plan for State Revolving Fund loans. Towns with listed projects include Barnstable, Chatham, Falmouth, and Mashpee.	
Town Economic Development Technical Assistance Requests	During this time, Commission staff helped the Town of Orleans hold a virtual SWOT (strengths, weaknesses, opportunities, and threats) workshop to position the town to undertake development of an economic development strategy that will help the community attract and support small businesses and sustain its economy.	Orleans SWOT Workshop – April 2021

ACTIVITY: REGIONAL PROJECTS AND INITIATIVES		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
COMPREHENSIVE AND ACTIVITY CENTER PLANNING		
Model bylaws for zoning and design	<p>Commission staff supported the West Chatham Neighborhood Center zoning project through:</p> <ul style="list-style-type: none"> public outreach in the form of an online survey (more than 100 respondents) and a community forum (more than 60 attendees) planning board presentations on form-based code, survey development, and public input draft bylaw development with appropriate building scale and building and parking setbacks, and an accompanying project webpage Project site: https://www.chatham-ma.gov/planning-board/pages/west-chatham-neighborhood-center-zoning-initiative-information 	<p>Chatham Survey – September 2020</p> <p>Chatham draft bylaw – Ongoing</p>
	<p>Commission staff continued to work with the town of Chatham to draft and revise zoning incentives to preserve historic buildings, including developing graphics to illustrate preservation options.</p>	<p>Chatham Historic Preservation Incentives Support - Ongoing</p>
	<p>Commission staff worked with town of Harwich planning staff and Planning Board members to develop zoning for the West Harwich Special District/District of Critical Planning Concern. New zoning included context-sensitive dimensional requirements and limits on building scale, as well as incentives for reuse of historic buildings. The new zoning was adopted in Fall 2020. Commission staff is also working with the Planning Board on design guidelines to support the new zoning.</p>	<p>West Harwich Special District New Zoning – Fall 2020; Design guidelines development - Ongoing</p>
	<p>Commission staff worked to develop design guidelines for historic and non-historic buildings in the floodplain, in collaboration with Barnstable County Extension. Staff conducted site visits to photograph existing buildings in flood hazard areas, interviewed town staff and design professionals about issues of concern, and prepared draft design strategies including landscape solutions, building retrofit, and building elevation.</p>	<p>Floodplain Design Guidelines Development – Ongoing</p>
<p>Commission staff worked with regional partners to develop a model bylaw for coastal resiliency, focused on impacts to development in the floodplain for four towns: Bourne, Sandwich, Brewster, and</p>	<p>Coastal Resiliency Bylaw – June 2021</p>	

ACTIVITY: REGIONAL PROJECTS AND INITIATIVES		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
	Eastham. The project was supported by a MA EOEEA grant and will be completed in June 2021.	
Zoning analysis tools	Commission staff continue to work with towns to develop and maintain online tools that increase public access to and comprehension of local regulations. These efforts include ongoing support for towns' online zoning tools, which distills the site selection process to show users where their project is permitted. During this reporting period, the Town of Sandwich launched their online zoning portal: https://sandwich.opencounter.com/	Sandwich Open Counter – Launched summer 2020
Expedited Permitting	Commission staff are updating the Commission's Economic Development Resource Guide to incorporate material related to economic resilience and recovery, including guidance for responding to the lasting economic effects of the COVID-19 pandemic. This guide is intended for use by municipal staff and is anticipated to be completed in summer 2021.	Economic Development Resource Guide Development – Ongoing
HOUSING ACCESS AND AFFORDABILITY INITIATIVE		
Regional Housing Plan	Commission staff reviewed local housing production plans and local, state, and federal resources for housing. They are undertaking a nationwide field scan of regional housing plans to identify strategies, tools, and metrics for supporting the development of attainable and workforce housing in the region.	Regional housing research – Ongoing
Housing affordability resource development program	<p>Commission staff supported the development of the Tenant Based Rental Assistance program (TBRA), a housing affordability initiative responding to the effects of the COVID-19 pandemic.</p> <p>Commission staff are currently developing a Housing Resource Guide to provide guidance to local partners.</p> <p>Commission staff began developing a study of new homeowners in the Cape Cod region by outlining a potential scope of work and survey logistics. The survey aims to collect information on people who bought homes in Barnstable County during the COVID-19 pandemic and will be conducted in the summer of 2021.</p>	<p>TBRA support - Ongoing</p> <p>Housing Resource Guide – Ongoing</p> <p>New homeowner study – Ongoing</p>

ACTIVITY: REGIONAL PROJECTS AND INITIATIVES

Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
CLIMATE CHANGE INNOVATION INITIATIVE		
Climate change mitigation and adaptation planning	<p>Commission staff completed a greenhouse gas emissions inventory providing a detailed description of regional sources of carbon emissions to support the development of policies to reduce them.</p> <ul style="list-style-type: none"> Inventory: https://capecodcommission.org/our-work/greenhouse-gas-emissions-inventory/ <p>Commission staff completed the development of a Large-Scale Solar Screening Tool, a web-based application intended to offer guidance on appropriate siting of solar energy infrastructure on the Cape.</p> <ul style="list-style-type: none"> Siting tool: https://www.capecodcommission.org/our-work/solar-screening-tool/ <p>Commission staff completed an Electric Vehicle Charging Station analysis, a web-based application that identifies potential locations appropriate for EV charging stations. Commission staff continue to update and maintain this.</p> <ul style="list-style-type: none"> EV Charging Station StoryMap: https://storymaps.arcgis.com/stories/ed59c9714aff4b1298d31d77fd0d915 <p>Commission staff continue to collaborate with communities on the Municipal Vulnerability Preparedness (MVP) Program process and coordinated with the state to host an MVP informational session (February 23, 2021).</p> <p>Commission staff completed a draft of the region's first-ever climate action plan (CAP) and released the draft for public comment in April 2021. The CAP reflects input gathered from a wide range of stakeholders, the Commission's regional greenhouse gas emissions inventory, an economic and fiscal impact analysis, and a legal and policy analysis. It sets actionable goals for the region intended to foster collaborative, targeted action to address climate change in measurable ways.</p> <ul style="list-style-type: none"> Draft Climate Action Plan: https://www.capecodcommission.org/our-work/climate-action-plan <p>Commission staff continued to participate in the Southeast New England Program for Coastal Watershed Restoration (SNEP) efforts to identify research priorities for the region and collaborate with other aligned organizations. Activities included supporting the development of an Integrated Ecosystem Services Framework for the SNEP region.</p> <p>Commission staff are developing a model solar bylaw to provide guidance to communities seeking to enhance renewable energy opportunities in their communities. Activities include reviewing existing solar bylaws in Massachusetts, including models developed by the state and other regions, and drafting a model bylaw that is suited to the Cape and its unique assets.</p>	<p>Emissions Inventory – Launched February 2021</p> <p>Solar Screening Tool – Launched January 2021</p> <p>EV Charging Station StoryMap – Launched August 2020; ongoing maintenance</p> <p>MVP Informational Session – February 2021</p> <p>Draft CAP – Released for public comment April 2021</p> <p>SNEP Framework support - concluded November 2020</p> <p>Model solar bylaw – Ongoing</p>

ACTIVITY: REGIONAL PROJECTS AND INITIATIVES

Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
LOCAL BUSINESS DEVELOPMENT INITIATIVE		
COVID-19 recovery and resiliency	<p>Commission staff collaborated with small business consultant Revby to develop a series of virtual workshops that support business owners in navigating the economic impacts of the pandemic and planning for future resiliency. The webinars responded to small business and non-profit needs identified through the three business impact surveys, and culminated in a series of industry-specific recovery and resiliency toolkits for small businesses and non-profits. They included an initial webinar on COVID-19 funding resources (February 18), a first round of industry-specific workshops focused on effective pandemic-response strategies (March 1-8), and a second round of industry-specific workshops focused on the content of business toolkits to foster improved recovery from the impacts of the COVID-19 pandemic and better future business resiliency (April 26-May 4). In total, the webinars attracted 191 registrants across the industries of Food Service & Restaurants, Accommodations, Retail and Product-Based, Arts, Culture, and Recreation, and Service-Based businesses.</p> <ul style="list-style-type: none"> Business recovery planning resources: https://capecodcommission.org/our-work/business-recovery-planning/ <p>The COVID-19 Recovery and Resiliency Toolkits, which span a broad range of subject areas including online sales and marketing, risk assessment, and collaboration/networking practices.</p> <p>Commission staff and Revby facilitated a train-the-trainer session with municipal and local chambers of commerce staff in order to equip local planners and leaders to leverage the toolkits in support of their small businesses and non-profits.</p>	<p>Workshop 1 – 2/18/2021</p> <p>Workshop 2 – 3/1/2021</p> <p>Workshop 3 – 3/2/2021</p> <p>Workshop 4 – 3/3/2021</p> <p>Workshop 5 – 3/4/2021</p> <p>Workshop 6 – 3/8/2021</p> <p>Workshop 7 – 4/26/2021</p> <p>Workshop 8 – 4/28/2021</p> <p>Workshop 9 – 4/29/2021</p> <p>Workshop 10 – 5/3/2021</p> <p>Workshop 11 – 5/4/2021</p> <p>Train-the-trainer – 6/14/2021</p> <p>Toolkits – June 2021</p>

ACTIVITY: REGIONAL PROJECTS AND INITIATIVES		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
BLUE ECONOMY SECTOR DEVELOPMENT INITIATIVE		
Regional harbor and dredge services	<p>Commission staff and the Urban Harbors Institute at UMass Boston compiled a report on the economic impact of Cape Cod Harbors, relying on a survey of business owners located near or reliant on six harbors across four towns: Provincetown Harbor, Sesuit Harbor in Dennis, Stage Harbor and Aunt Lydia's Cove (Fish Pier) in Chatham, and Great Harbor and Inner Harbor in Falmouth. The report revealed that maintaining and/or enhancing harbor functionality should be a priority to secure and improve economic benefits for coastal communities.</p> <ul style="list-style-type: none"> Report: https://capecodcommission.org/our-work/harbor-study/ 	Report completed - October 2020
TRANSPORTATION AND AIR QUALITY IMPROVEMENT		
Complete regional multi-use path	<p>Commission staff supported planning and implementation activities related to the development of a regional multi-use path from Woods Hole to Bourne to Provincetown, with connections to all 15 Cape Cod towns. Activities completed during this reporting period include:</p> <ul style="list-style-type: none"> meetings with Town of Barnstable officials to plan a connection to the Hyannis Transportation Center from the planned Cape Cod Rail Trail extension finalization of Orleans' Complete Streets Prioritization Plan and public outreach and interactive mapping in support of Bourne and Falmouth's Complete Streets efforts Cape Cod Metropolitan Planning Organization (MPO) approval of the Transportation Improvement Program (TIP) including related paths and projects 	Multi-use path development - Ongoing
Hyannis access build out	<p>Commission staff continue to implement the 2013 Hyannis Access Study recommendations. Hyannis Access Study Phase I, centered on the intersection of Route 28 and Yarmouth Road, was advertised for construction bids in 2020. The project, representing an over \$20 million investment, is expected to enter the next phase later in 2021.</p>	Hyannis Access Study implementation - Ongoing
Canal bridges	<p>Commission staff continued to support upgrades to the Sagamore and Bourne bridges – projects with the ultimate aim of reducing traffic congestion, maintenance costs, and disruption. Staff have participated and engaged with MA Department of Transportation (MassDOT) and the Army Corps of Engineers, and will continue this engagement throughout the planning process.</p>	Sagamore and Bourne bridges updates - Ongoing
Public Transit Expansion Feasibility	<p>Commission staff collaborated with the Cape Cod Regional Transit Authority (CCRTA) to launch SMART DART, a pilot demand-response service that can be hailed with a mobile application. The service is</p>	SMART DART - Launched September 2020

ACTIVITY: REGIONAL PROJECTS AND INITIATIVES		
Task	Benefits/Outcome/Impacts/Deliverables	Milestone Date
	intended to complement existing CCRTA services, expand transportation options, and improve overall system efficiency. SMART DART launch press release: https://www.capecodcommission.org/about-us/newsroom/cape-cod-regional-transit-authority-launches-smartdart-service/	
INFRASTRUCTURE FUNDING INITIATIVE		
Expand infrastructure planning	Commission staff continue to pursue new and existing funding streams for wastewater, energy, and other infrastructure development with regional reach. Activities included providing administrative support to the Cape Cod and Islands Water Protection Fund Management Board and contracting with a financial advisor to support the board's initial subsidy recommendations. Cape Cod and Islands Water Protection Fund Management Board site: https://capecodcommission.org/our-work/cape-cod-and-islands-water-protection-fund/ Two MassTrails grants were awarded to Cape Cod communities in July 2020: \$100,000 was allocated toward the design of the Bourne Rail trail, and \$180,950 was allocated toward the design of the Cape Cod Rail Trail Extension Phase 3, located in the Towns of Yarmouth and Barnstable.	New and existing funding streams pursuit – Ongoing MassTrails Grants – Awarded July 2020
REGIONAL INFRASTRUCTURE PLANNING INITIATIVE		
Cape-wide drinking water plan (now Water Quality Planning)	Commission staff developed a scope of work for efforts to address freshwater quality in ponds and lakes throughout the region. Tasks include updating the 2003 Ponds and Lakes Atlas, using GIS analyses to understand pond watershed development patterns and water quality impacts, exploring the use of remote sensing for pond water quality analysis, engaging stakeholders, completing an economic and fiscal impact analysis, better understanding the legal and jurisdictional considerations around management of freshwater resources, and developing a database of strategies to address freshwater quality in ponds and lakes.	Scope of work – Completed April 2021

Increased Financial Resources for the Region

During this reporting period, Commission staff pursued a goal of regional collaboration and joint commitment to supports its ongoing engagement of CEDS stakeholders and implementation of

CEDS projects. Progress on this goal is measured through the financial resources being leveraged to implement the CEDS and any forums established to foster regional partnerships.

Funding for CEDS implementation secured by Commission staff included the region’s EDA Planning Grant; EDA Resilience Grant; and the EDA CARES Act Grant, which was awarded in 2021. Additionally, the Commission managed 14 grants over the past year, worth a total of \$3,740,472. (Table 15).

Federal Granting Agency	Project	Award Period	Grant Award
Federal Highway/Federal Transit through Mass DOT	Combined Transportation and Transit Planning	10/1/20 - 9/30/2021	\$784,274
Federal Highway Administration through Mass DOT	Bicycle Rack Program	4/7/20 - 12/31/2021	\$80,000
Economic Development Administration (EDA)	Partnership Planning Grant/Comprehensive Economic Development Strategy Planning	7/1/18 - 6/30/2021	\$210,000
Economic Development Administration (EDA)	Cape Cod Resiliency Initiative	4/14/20 - 4/13/2022	\$1,050,000
Economic Development Administration (EDA)	Cape Cod Economic Recovery and Resilience Planning (CARES Act)	7/1/2020 - 6/30/2022	\$400,000
Environmental Protection Agency (EPA) through Restore America's Estuaries	Southeast New England Program (SNEP)/Watershed Grant	9/1/18 - 6/30/2021	\$399,998
Environmental Protection Agency (EPA) through University of Southern Maine	Technical Assistance Network for the Southeast New England Program (SNEP)	10/1/19 - 9/30/2024	\$190,000
			\$3,114,272
State Granting Agency	Project	Award Period	Grant Award
Department of Housing and Community Development	District Local Technical Assistance (DLTA)	1/1/20 - 12/31/2020	\$192,999
Department of Housing and Community Development	District Local Technical Assistance (DLTA)	1/1/21 - 12/31/2021	\$192,999
Executive Office of Energy and Environmental Affairs (EOEEA)	Model Coastal Resiliency Bylaw	11/1/19 - 6/30/2021	\$145,200
MassDOT through Town of Orleans	Complete Streets Program	6/11/19 - 12/31/2020	\$25,015

Federal Granting Agency	Project	Award Period	Grant Award
MassDOT through Town of Bourne	Complete Streets Program	11/20/2020 - 12/30/2021	\$19,987
MassDOT through Town of Brewster	Complete Streets Program	9/23/2020 - 7/1/2022	\$24,995
			\$626,200

Table 12. Federal and State Grants Awarded to the Cape Cod Commission, July 2020-June 2021.

Challenges and Mitigation

In terms of plan implementation and administration, Commission staff continue to work uninterrupted and fully remotely since the start of the COVID-19 pandemic in March 2020 due to public health concerns related to risk of exposure to the virus. Project activities requiring participation from partners beyond the Commission staff, including municipal staff, small business owners, and consultants, continue to be done virtually. Commission staff have acquired the skills and technology demanded by this transition and continue to expand the Commission's capacity to hold productive virtual conversations and presentations, leveraging chat, polling, and Q&A functions to facilitate virtual interaction.

The pandemic exacerbated many of the economic challenges Cape Cod was already facing, including impacts to employment and housing. This led to an unanticipated re-prioritization of the Commission's economic development workplan; staff focused on collecting information on the economic impacts of the pandemic and providing technical assistance to towns and small businesses who were especially affected by COVID-19. As a result, the timeframe of the Regional Housing Plan, Regional Capital Plan, and Workforce and Business Retention Program was moved out to Year 3; the Commission has increased staff capacity to implement some of these initiatives, and the plans and programs can now integrate lessons learned during the COVID-19 pandemic.

The Commission is proposing two adjustments to the 2019 CEDS going forward, including a streamlining of the evaluation process outlined in Chapter 5. Some data points initially identified in the CEDS Evaluation chapter were aspirational, and are not tracked with a frequency that facilitates effective evaluation (e.g., planimetric data). The streamlined regional benchmarks are now categorized into three main themes: Economy, People, and Place. The regional benchmarks now track annual progress towards achieving the CEDS vision, goals, and objectives, and will be integrated into one centralized data portal in Year 3. This evaluation structure has been leveraged in

this Annual Report, and the revised data points are described in the Regional CEDS Performance Measures section.

The second adjustment to the 2019 CEDS is two new additions to the CEDS Action Plan, identified in the Year 3 implementation plan below: New Homeowner and Second Homeowner Surveys and Land Use Planning for Economic Resiliency. These additions are being proposed due to significant regional need in response to the COVID-19 pandemic, and fit within the existing regional priorities identified through the 2019 CEDS stakeholder outreach process (Economy and Housing goals).

Next Steps

During Year 3 of the 2019 CEDS Implementation, the Commission staff will continue to participate in:

- **Administration and General Planning** associated with supporting the CEDS Strategy Committee, providing technical support and pursuing funding in support of CEDS Action Plan implementation;
- **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.com, and in-person meetings, once safe to do so;
- **And Targeted Technical Assistance to Towns**, providing LCP development support, helping with project-based research and data analysis, and developing recommendations that align with regional priorities.

The following Regional Initiatives and Projects listed in the 2019 CEDS Action Plan will be included in the Year 3 Implementation Plan:

- **Last-Mile Broadband Deployment Strategy and Buildout Fund:** 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.
- **Regional Housing 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.
- **Workforce and Business Retention Program:** 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.

- **Regional Capital 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.
- **Model Bylaws for Zoning/Design:** 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.
- **Water Quality Planning:** Commission staff will continue to support town's 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.

Two projects have been proposed in response to the COVID-19 pandemic (and not previously listed in the CEDS Action Plan). The first is conducting **Surveys of New Homeowners and Second Homeowners on Cape Cod**. 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. 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.

Client Success Stories

During this reporting period, significant milestones/successes by task include:

- **Administration and General Planning:**
 - Awarding License Plate Grants to six applicants for a total of \$136,347: Love Live Local; Cape Cod Community College; Arts Foundation of Cape Cod; Cape Cod Young Professionals; Lower Cape Community Development Corporation; Sustainable Cape: Center for Agricultural Preservation and Education. These projects will support

economic recovery from the pandemic, addressing a range of issues including the healthcare workforce, small business support, and food insecurity.

- During the pandemic, the towns of Barnstable and Eastham were awarded Local Rapid Recovery Planning Grants from the Mass Downtown Initiative. The Town of Provincetown received \$75,000 to support Provincetown Commons EforAll Cape Cod, a free one-year inclusive Business Accelerator that will provide seed funding for 13 new businesses and facilitated monthly discussion sessions to support existing business owners.
- Mass Growth Capital Corporation awarded 490 businesses on Cape Cod \$24,520,000 in funding through its COVID-19 Small Business Grant program.
- Several towns received MassDOT Shared Streets and Spaces grant during this reporting period. The Town of Barnstable was awarded a grant for \$58,300 to enhance pedestrian spaces along a new walkway in downtown Hyannis. The Town of Harwich received \$142,021 to support a series of quick-build projects to better protect pedestrians while businesses expanded outdoors. The Town of Orleans received \$251,143 to construct new sidewalk and safer crossings to support the Orleans Farmer's Market, which was a key destination during the public health crisis. The Town of Dennis received \$25,000 to calm traffic and improve parking and pedestrian access to the village center and support small business expansion during the pandemic. The Town of Provincetown received funding to support increased public health measures and social distancing, such as hand wash stations and public eating facilities.

- **Outreach and Information Sharing:** Commission staff increased online outreach and information sharing during the pandemic, including virtual presentations to regional stakeholders and decisionmakers and creating Data Cape Cod, as part of its Regional Economic Resiliency Information Clearinghouse project.

- **Targeted Technical Assistance to Towns:** The Commission awarded DLTA funds to 7 towns and 2 regional projects in 2021, for a total of \$192,999. Commission staff provided ongoing support to six towns on water quality planning and planned and facilitated an economic development SWOT workshop for the Town of Orleans.

- **Regional Project and Initiative Implementation:**
 - **Regulating for Housing and Economic Diversity:** Cape Cod Commission staff assisted with the development of a Tenant Based Rental Assistance Program (TBRA) to facilitate Barnstable County HOME Consortium funding of a TBRA program. The Housing Assistance Corp. (HAC) administered the TBRA program which assists

households earning up to 60% area median income who have experienced financial hardship due to the pandemic. To date, HAC has administered HOME funds to assist 11 applicants providing a total of \$54,025 in rental assistance.

- Climate Change Mitigation and Adaption Planning: The Commission helped the Town of Eastham and Town of Provincetown update their Multi-hazard Mitigation Plans for FEMA approval. The Commission released the Draft Climate Action Plan, which includes actions local government and non-governmental organizations can take to mitigate climate change and its challenges.
- Workforce and Business Retention Program: The Cape and Islands Workforce Development Board convened a group of regional economic stakeholders to develop a 2020 update to their Regional Workforce Blueprint. The Blueprint is anticipated to be published in 2021.

EDA Assistance Needed

The Commission appreciates the continued guidance and support from US EDA staff as the agency prepared funding applications with our regional partners for federal grant applications.

We would support attending regular meetings with staff from US EDA (and potentially other Economic Development District staff) as we continue to work towards economic recovery from the COVID-19 pandemic. A regular meeting schedule would provide an opportunity to learn from other EDD's efforts and regularly touch base with EDA staff to discuss potential projects within our region.

Press Engagements/Opportunities

The Commission shares regular press releases and articles through its newsletter, available at <https://capecodcommission.org/about-us/newsroom/>.

In the short-term, we anticipate opportunities for press engagements as the final Cape Cod Climate Action Plan is released (the public comment period on the plan was completed June 1, 2021). In addition, the Commission will highlight EDA's investment through the April 2020 Resiliency Grant, which is supporting analyses that advance understanding of environmental and economic resilience challenges and actions.

Commission staff will continue to share data and presentations through its Outreach and Information Sharing task in the Planning Grant and will continue to highlight the US EDA investment through the efforts funded under the June 2020 CARES Act grant. This includes publication of

business recovery toolkits that can be leveraged by Cape Cod small business owners to address the acute and long-term impacts of the pandemic.

Additional anticipated press engagements and opportunities associated with regional projects and initiatives include:

- Regional Housing Plan: press release and newsletter articles; interview opportunities for print, radio, and television; social media campaign highlighting engagement opportunities for and eventual contents of the plan
- Workforce and Business Retention Plan Framework: press release and newsletter articles; social media campaign highlighting contents of the framework and its development
- Regional Capital Plan: press release and newsletter articles; interview opportunities for print, radio, and television; social media campaign highlighting engagement opportunities for and eventual contents of the plan
- New and Second Homeowners Surveys: press release and newsletter articles; interview opportunities for print, radio, and television, including regional and national press outlets; social media campaign highlighting engagement opportunities for and eventual contents of the plan

CAPE COD COMMISSION

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

