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Cape Cod Business Climate Survey

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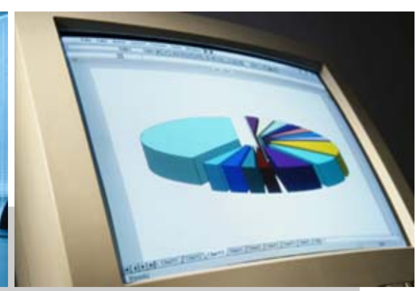

Cape Cod Business Climate Survey

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Report Information

This report is conducted for the Cape Cod Commission. This work would not be possible without considerable cooperation from the Commission's staff, as well as the Cape Cod Chamber of Commerce and the Cape Cod Economic Development Council.

The University of Massachusetts Donahue Institute is the public service, outreach, and economic development unit of the University of Massachusetts President's Office. Established in 1971, the Institute strives to connect the Commonwealth with the resources of the University through services that combine theory and innovation with public and private sector applications.

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Introduction

Background

The Cape Cod Commission (the Commission) is the regional planning agency for Cape Cod. Its mission is to manage growth, protect Cape Cod's unique environment and character, and foster a healthy community for present and future generations.

The Commission contacted the University of Massachusetts Donahue Institute (the Institute) to conduct a survey of the business climate on Cape Cod. The goals of the survey were to better understand the opinions of the business community on development and land use issues, and to understand the cost of doing business in Barnstable County and the impediments to business growth experienced by local businesses.

The survey results presented in this report provide valuable information about the business climate on Cape Cod. The results are intended to support better policymaking and program design that will, in turn, lead to a healthy year-round economy and long-term economic growth. The survey includes questions on:

- Business Environment
- Business Costs
- Education and Workforce Quality
- Capital Availability
- Goods and Services Availability
- Regulatory and Tax Environment
- Business Operations
- Opinions on Development and Development Policies

Research Questions

There are four research questions that have driven this project:

1. What is a typical business on Cape Cod?
2. What are the major obstacles to business growth on Cape Cod?
3. What are the major expenses for business on Cape Cod?
4. Does the business community support the Commission's ideas for economic growth as described in the Regional Policy Plan?

Survey Development

The survey instrument was developed through an iterative process conducted by the Institute and a committee created by the Commission. This committee included representatives from multiple community-based organizations on the Cape. The final version of the survey was completed in late spring of 2011.

Survey Implementation

Once the survey was finalized, Institute staff programmed it for web-based deployment using the website Survey Monkey. All of the businesses on the Cape were invited to participate in this online survey through a customized postcard mailing, which used contact information that was obtained from a commercial business listing service. To avoid the possibility of multiple responses by individual businesses, each postcard provided the addressee with a unique survey access code. Postcards were sent first-class, as this allowed for better control of the mailing and better estimates of response rates. Following the initial mailing and response period, a second mailing to non-respondents was done to boost the survey's overall response rate. Unfortunately, even after the second mailing, the sample was too small to achieve a confidence level of 95% and a margin of error of +/-5 points.

In order to boost the number of responses, an email solicitation was sent to all members of the Cape Cod Chamber of Commerce. Chamber members were asked to use a link embedded in the email to complete the business climate survey. If members had already completed the survey once, they were asked not to complete it a second time. At this point the number of respondents was increased enough to be statistically valid within the prescribed confidence level and margin of error.

In the end, 17,425 businesses were included in the survey sample, and there were 429 responses. Sixteen of those surveys were duplicate responses, however, and were eliminated from the analysis. Therefore, there were 413 unique surveys completed, for a response rate of 2.4%.

Report Contents

The body of this report is an analysis of the survey results. Included in this analysis is a description of overall results, as well as an analysis of several subgroups. The subgroups that are analyzed are the sole-proprietor and self-employed respondents, whose responses are compared with responses from all other businesses. There is also a comparison of responses from family-owned businesses with all other respondents; as well as an analysis of business revenues and changes in the number of employees by business sector.

After the body of the report there are several appendices. Appendix A is a copy of the business climate survey, Appendix B is a complete listing of all survey responses for close-ended questions in the order they were asked on the survey, and Appendix C has all of the open-ended responses from survey respondents.

Overall Survey Results

Research Question #1

What is a typical business on Cape Cod?

Businesses on the Cape tend to be family owned and very small. Half of all businesses have two or fewer year-round, full-time employees. Many operate out of homes. A plurality of businesses earns less than $50,000, and nearly 60% earn less than $250,000. Most businesses are well-established, being 20 years old or older. Ninety percent of businesses are open year-round and 40% say that local residents are their primary customer base, both of which are somewhat surprising, given Cape Cod's reputation as a summer tourist destination.

There is a large variation in the number of employees these businesses have. Half of all businesses have zero employees, which implies that most of the job opportunities on the Cape come from a relatively small number of employers.

Despite the ongoing economic issues at the national level most Cape businesses have the same number of employees as they had a year ago, and expect to have the same number in a year. However, given how small most businesses on the Cape are, it might simply be that there are no employees to cut, unless the business is closed altogether. In any case, it does not appear that Cape businesses expect to grow in the near future.

Barnstable is the Cape town where the largest number of respondents have a business. Twenty-eight percent of respondents had at least one business location in that community. Falmouth and Yarmouth were second and third respectively, at nearly 13% each. Less than 3% of respondents had a business in Truro, the lowest percentage of any town on the Cape.

Table 1. In which of the town(s) on Cape Cod is your business located?

Town*	N=413
Barnstable	**27.6%**
Bourne	6.1%
Brewster	6.8%
Chatham	5.1%
Dennis	11.9%
Eastham	5.3%
Falmouth	12.8%
Harwich	8.2%
Mashpee	6.8%
Orleans	8.7%
Provincetown	4.6%
Sandwich	10.2%
Truro	2.9%
Wellfleet	5.1%
Yarmouth	12.6%

*The figures in this table total more than 100%, because some businesses have multiple locations on the Cape.

Approximately one-third of businesses are organized as a sole proprietorship, which makes this the most common organizational form among Cape businesses. "Schedule S corporation" was second at just under 23%, and "Limited Liability Corporation" was the third most common, at about 15%. Less than 1% of Cape businesses are franchises.

Table 2. How is your business organized?	
Incorporation Method*	N=413
Schedule C Corporation	11.6%
Schedule S Corporation	22.8%
Limited Liability Corporation (LLC)	15.3%
Limited Partnership (LP)	1.5%
Sole Proprietor (self-employed)	**33.4%**
Franchise	0.7%
501c3	8.0%
Other Non-Profit	2.2%
Don't Know	2.9%
Other	3.2%

*The figures in this table add to more than 100%, because business can be incorporated by more than one method.

Three-quarters of the survey respondents were the owners of their business. About 55% of Cape businesses are family owned, and only a little more than 6% have a parent company.

Table 3. What is your position in this business?	
Position	N=367
Owner	**73.4%**
Operator	4.4%
Staff	11.1%
Other	11.1%

Table 4. Is your business family owned?	
Family Owned	N=388
Yes	**54.9%**
No	45.1%

Table 5. Does your business have a parent company?	
Parent Company	N=388
Yes	6.4%
No	**93.6%**

Approximately 34% of businesses are based out of a home, and only 4% operate as a franchise. It is possible for a business to be incorporated under one of several categories while also operating as a franchise. For example, a limited liability corporation can own several franchise restaurants. This likely explains the discrepancy in the percentage of businesses that identify as franchises in Tables 2 and 7.

Table 6. Is your business based out of a home?	
Based out of a home	N=388
Yes	34.3%
No	**64.7%**

Table 7. Does your business operate as a franchise?	
Franchise	N=396
Yes	4.0%
No	**96.0%**

About half of businesses on the Cape were started before 1995, and about half were started after 1995. The oldest business among survey respondents was started in 1887. In fact, six respondents stated that their business was started in the 19th century. Meanwhile, seven of the businesses that responded to the survey were started in 2011, which made them the newest businesses in the sample.

Table 8. In what year was your business established on the Cape?	
Category	N=380
Median	1995
Range	1887-2011

Perhaps surprisingly, given the seasonal nature of the Cape economy, 90% of respondents reported that their business operates year round, and less than 4% of businesses are open six months or less. When in operation, slightly more than 68% of businesses are open 40 hours a week or more (but not 24 hours per day, seven days per week).

Table 9. For what portion of the year does your business operate?	
Portion of Year	N=392
Year Round	**90.1%**
7-11 Months	6.1%
3-6 Months	3.6%
Less Than 3 Months	0.3%

Table 10. When in operation how many hours per week is your business open?	
Hours Per Week	N=392
24 Hours per Day 7 Days a Week	13.8%
40 Hours or More (But Not 24 Hours/Day)	**68.4%**
Less Than 40 Hours a Week	10.5%
Occasional or Irregular Hours	7.4%

A little more than 17% of respondents stated that their business fit into some category other than the ones listed in the survey, representing the largest response for this question. This is somewhat surprising, since the categories used for the survey were created at the federal level to include all types of businesses. Respondents who chose “Other” had the option of creating their own category to describe their business; these responses can be found in Appendix C of this report. The category with the second highest number of responses was “Professional, Scientific and Technical Services”; retail trade had the third largest number of responses, followed by accommodation and food services.

Table 11. In which of the following business sectors would you categorize your business?	
Sector	N=342
Agriculture, Forestry, Fishery, and Hunting	1.0%
Mining, Quarrying, and Oil and Gas Extraction	0.0%
Utilities	0.5%
Construction	7.0%
Manufacturing	1.0%

Wholesale Trade	1.2%
Retail Trade	12.8%
Transportation and Warehousing	1.0%
Information	2.2%
Finance and Insurance	4.4%
Real Estate and Rental and Leasing	3.9%
Professional, Scientific, and Technical Services	13.1%
Management of Companies and Enterprises	0.7%
Educational Services	3.6%
Health Care and Social Assistance	6.3%
Arts, Entertainment, Recreation	4.8%
Accommodation and Food Services	10.2%
Other Services	8.7%
Public Administration	0.5%
Other	**17.2%**

About 59% of businesses own their space and a further 12.5% would like to own it. For those businesses that would like to own their space but currently do not, a description of why they do not own it can be found in Appendix C.

Table12. Which of the following best describes your business' current work space?	
Work Space	N=383
The business owns the space	**58.5%**
The business rents the space but wants to own	12.5%
The business rents the space and does not want to own	29.0%

Businesses on the Cape have about 10 full-time, year-round employees and another 8 full-time seasonal employees on average, but this average masks huge variation. Half of all survey respondents said they had two or fewer full-time, year round employees and zero full-time seasonal employees, while other businesses have up to 500 full-time year-round, and 500 full-time seasonal, employees. It appears that the bulk of employment opportunities on the Cape come from a relatively small number of employers.

Table 13. Please indicate the number of employees your business typically has in each of the following categories.*			
Category		Mean	Range
Part-time	N=259	5.7	0-225
Temporary	N=168	3.7	0-150
Full-time Year-round	N=310	9.9	0-500
Full-time Seasonal	N=168	8.1	0-500
Contractors	N=162	2.2	0-100
Guest/Foreign Workers	N=149	1.8	0-75
Mature/Senior Workers	N=154	2.2	0-150

*One respondent was eliminated from this analysis, because their responses were so much larger than all the others that it was skewing the data.

Almost 68% of respondents reported that they are employing the same number of people as last year, and almost 63% expect to be employing the same number in a year. Nearly four times as many respondents say they expect to increase the number of people they employ in the coming year than say they expect to decrease the number of employees they have. It is important to remember, however, that most businesses on the Cape only employ a very small number of people.

Table 14. Compared to a year ago, has the number of people currently employed by your business increased, decreased, or stayed the same?	
Change in Employee Numbers	N=370
Increased	17.6%
Decreased	14.6%
Stayed the Same	**67.8%**

Table 15. A year from now during the same time period, how many people do you expect to employ?	
Change in Employee Numbers	N=370
More than Currently	19.7%
The Same as Currently	**62.7%**
Fewer than Currently	5.4%
Don't Know	12.2%

Almost one-quarter of businesses earned less than $50,000 last year, and about 57% earned less than $250,000. However, about 20% earned a million dollars or more.

Table 16. What were your business' gross revenues for the last fiscal year?	
Revenues	N=346
Less than $50,000	**23.1%**
$50,000-$99,999	14.7%
$100,000-$249,999	19.1%
$250,000-$499,999	12.7%
$500,000-$749,999	5.8%
$750,000-$999,999	4.6%
$1 Million-$2.5 Million	9.8%
More than $2.5 Million	10.1%

Despite the fact that Cape Cod has a large tourism industry, almost 40% of respondents stated that their primary customer base is comprised of local residents, while about 19% said other businesses were their primary clientele. Only 17% of respondents identified seasonal and short-term visitors as the largest share of their customers. In the narrative section of the survey, respondents made it clear that they served both local residents and tourists.

Table 17. Which of the following best describes your customer base?	
Customers	N=327
Local Residents	**39.7%**
Seasonal/Short-term Visitors	17.2%
Internet	2.9%
Business to Business	19.4%
Other	20.8%

The single largest source of capital for Cape businesses is personal and family savings. Forty-seven percent of businesses have used either personal or family savings as a source of capital for their business. The second largest source of capital is credit cards; about 30% of businesses have used these as a source of capital. Only approximately 7% of businesses have been able to take advantage of a government loan or a government-backed loan.

Table 18. Which of the following were sources of any capital used by your business over the last 5 years?	
Sources of Capital*	N=413
Personal/Family Savings of the Owners	**47.0%**
Personal/Family Home Equity Loan	12.6%
Personal/Business Credit Cards	29.8%
Business Loan from Federal, State, or Local Government	2.2%
Government Guaranteed Loan From a Bank/Financial Institution	4.6%
Non-Government Guaranteed Loan From a Bank/ Financial Institution	14.0%
Loan/Investment from Family or Friends	5.1%
Investment by Venture Capitalists	0.7%
Grants	7.5%
Don't Know	2.4%
None	14.8%
Other	7.0%

*The figures in this table total more than 100%, because businesses had more than one source of capital during the last 5 years.

More than 57% of businesses say they have utilized business resources from their local chamber of commerce or from the Cape Chamber of Commerce, but almost 34% of businesses say they have not utilized any of the resources provided by the various economic development organizations on the Cape.

Table 19. Has your business ever utilized business resources provided by any of the following organizations?	
Organizations*	N=413
Cape Chamber of Commerce	26.9%
Coastal Community Capital	4.8%
Community Development Partnership (a.k.a. Lower Cape CDC)	8.7%
U.S. Small Business Administration	9.2%
Business or Industry Associations	17.7%
Business Incubators	0.7%
Entrepreneurial Networks	8.0%
Regional Technology Development Center (RTDC)	1.2%
Local Chamber of Commerce	**30.5%**
SCORE	14.5%
Cape Cod Economic Development Council	4.4%
None	33.7%

*The figures in this table total more than 100%, because businesses have used more than one of the listed resources.

Nearly 50% of respondents reported that they expect their business to exist on the Cape in 10 years time, and only 15% stated that they expect it won't exist. Among those who said that they do not expect their business to exist in 10 years, most—about 56%—said that the reason it will close is because they will have retired. However, a little more than 30% of businesses that say they will not exist in 10 years say they will have either closed or will have relocated off the Cape; this implies a loss of 800 businesses Cape-wide. Presumably some new businesses will start during this time as well, however, so the net business creation is uncertain.

Table 20. Do you believe your business will exist on Cape Cod in 10 years?	
Response	N=346
Yes	**59.5%**
No	15.3%
Don't know	25.1%

Table 21. If you do not believe your business will exist on Cape Cod in 10 years, why not?*	
Response	N=52
Closing	15.4%
Selling	13.5%
Retiring	**55.8%**
Relocating off Cape Cod	15.4%

*Data in this table represents responses only from those respondents who said they did not expect their business to exist on Cape Cod in 10 years.

Research Question #2

What are the major obstacles to business growth on Cape Cod?

Cape Cod businesses identified four primary issues as impediments to the growth and success of their business. Those issues are the cost of health insurance, the cost of living on Cape Cod (especially the cost of housing), the cost of energy, and the skill level of the workforce.

Cape Cod businesses were asked to identify whether each of several issues was a strength or weakness for the business climate on Cape Cod. Slightly more than 43% indicated that the kindergarten through high school educational system was a strength for businesses, while only about 24% said it was a weakness. However, approximately 44% of respondents stated that the skill level of the workforce was a weakness, and 74% stated that the availability of affordable housing was a weakness.

Table 22. For each of the issues listed below, please indicate whether you believe it is a strength or a weakness for Cape Cod's business climate				
Issue		Strength	Weakness	No Opinion
K-12 Education	N=341	**43.4%**	23.5%	33.1%
Skill Level of Workforce	N=338	28.4%	**44.4%**	27.2%
Availability of Affordable Housing	N=340	8.8%	**73.8%**	17.4%

Fifty-nine percent of respondents identified the cost of health insurance as a significant barrier to their business's success. Similarly, 42% stated that Cape Cod's cost of living was a significant barrier, while 35% identified real estate prices specifically as somewhat of a barrier to business success. Forty percent of businesses said that the cost of energy was somewhat of a barrier to success, and a little over 37% said finding employees with the right skills was somewhat of a barrier.

Interestingly, most respondents do not seem to identify local government issues as an impediment to growth at all. For each question in the survey asking if local policies were an impediment to growth the largest percentage of responses indicated that these policies were not a barrier in any way. Fifty-three percent of respondents said that zoning was not an impediment at all; about 59% said the same for licensing, and 72% for parking regulations. Similarly, almost half of businesses stated that permits and fees, as well as sign codes, were not a barrier. Finally, 42% of respondents said that local taxes were not a barrier.

It should be noted, however, that in the narrative section of the survey several respondents commented that local taxes were too high, and that businesses were hampered by local regulations, both of which discouraged business growth. Some commentators also said that the Cape Cod Commission was itself a barrier to growth. A few suggested that environmental concerns at the Commission were given disproportionate weight to economic development.

Table 23. To what extent, if any, does each of the following issues pose a barrier or impediment to your business' success?

Issue		Significant	Somewhat	None	No Opinion
Zoning	N=338	16.6%	24.0%	**53.3%**	6.2%
Permits/Fees	N=338	19.2%	29.3%	**48.2%**	3.3%
Sign Codes	N=338	21.3%	27.5%	**46.7%**	4.4%
Licensing	N=337	11.0%	24.6%	**58.5%**	5.9%
Cost of Health Insurance	N=340	**59.1%**	20.0%	17.4%	3.5%
Parking Regulations	N=336	10.1%	14.0%	**72.0%**	3.9%
Cost of Business Supplies/Materials	N=339	17.1%	34.8%	**44.8%**	3.2%
Cost of Energy	N=341	32.0%	**40.2%**	25.8%	2.1%
Access to Capital	N=342	23.4%	27.8%	**41.5%**	7.3%
On-line Competition	N=335	9.3%	22.7%	**60.3%**	7.8%
Finding Enough Employees	N=338	10.4%	25.1%	**59.2%**	5.3%
Finding Employees with the Right Skills	N=339	24.2%	**37.2%**	33.9%	4.7%
Cape Cod's Cost of Living	N=339	**42.2%**	41.6%	14.7%	1.5%
Real Estate Prices on Cape Cod	N=339	34.2%	**34.5%**	27.7%	3.5%
Employee Wages	N=339	19.2%	32.4%	**42.5%**	5.9%
Local Taxes	N=338	21.3%	32.5%	**42.0%**	4.1%

Research Question #3

What are the major expenses for business on Cape Cod?

The expenses that businesses on the Cape appear to be most concerned about are the costs of health insurance, energy, and real estate. The cost of homes on the Cape makes it more difficult for businesses to attract workers, but high real estate prices also make owning or renting business space on the Cape more difficult. Interestingly, respondents do not seem concerned about employee wages, despite the fact that typically this is the single largest expense for businesses. The cost of business supplies also does not seem to be a major concern for respondents.

While it should be noted that a number of respondents expressed concerns about the amount of taxes and fees charged by local government, most respondents do not seem to believe that they are as significant an issue as other costs businesses face.

Research Question #4

Does the business community support the Commission's ideas for economic growth as described in the Regional Policy Plan?

In general, businesses on the Cape do not appear concerned about a lack of development, and seemed more concerned about protecting the Cape's environment. When it comes to transportation infrastructure, approximately 30% of businesses say that Cape Cod needs to make it easier for visitors to travel there without driving, and about 17% say that the current transportation infrastructure is adequate. Only about 20% of respondents indicated that the Cape needs to add to its road and highway capacity.

Table 24. What is your opinion of the transportation infrastructure on Cape Cod?	
Opinion	N=351
Cape Cod's current transportation infrastructure is adequate	17.1%
Cape Cod needs to add capacity to its roads and highways	19.7%
Cape Cod needs to do a better job maintaining its existing roads and highways but does not need to add capacity	23.4%
Cape Cod needs to make it easier for visitors to travel to Cape Cod without driving	**30.5%**
Don't Know/No Opinion	9.4%

Respondents' opinions on transportation infrastructure may reflect limited space in Barnstable County for additional roads and highways, rather than environmental concerns. Businesses' opinions on residential and commercial development as well as the protection of open space, however, suggest that respondents are concerned for the need to protect the Cape's environment.

A little more than 39% of respondents indicated that the current amount of residential development on the Cape is adequate, and about 19% said there is too much. Thirty percent of businesses believe there is not enough residential development, but more than half of those believe that any new development should be limited to specific locations. One possible concern about limiting residential development is the impact of this policy on housing affordability. Survey respondents clearly indicated that real estate prices on the Cape are a concern in terms of business growth, and limiting future housing development would likely only make this issue worse. If future residential development were limited, identifying policies to promote the creation of affordable housing would seem to be an important part of maintaining a strong business climate on the Cape.

Table 25. What is your opinion of residential development on Cape Cod?	
Opinion	N=351
The current amount of residential development on Cape Cod is adequate	**39.3%**
There is too much residential development	19.4%
There is not enough residential development	14.0%
There is not enough residential development, but new development should be limited to specific locations	16.0%
Don't Know/No Opinion	11.4%

Businesses' opinions of commercial development are similar to their opinions of residential development. Most respondents seem intent on controlling future development rather than increasing it. About 42% of businesses said that there is either too much development or that the current amount is adequate. Of those respondents who say that there should be more commercial development on the Cape, most want any new development to be limited to specific locations.

Table 26. What is your opinion of commercial development on Cape Cod?	
Opinion	N=352
The current amount of commercial development is adequate	23.9%
There is too much commercial development	18.2%
There is not enough commercial development, Cape Cod should allow it wherever the market determines it best belongs	23.0%
There is no enough commercial development, but new development should be limited to specific locations	**27.8%**
Don't Know/No Opinion	7.1%

About half of survey respondents stated that Cape Cod needs to protect more open space, while slightly less than 16% said that the amount of open space protected on Cape Cod is limiting development and economic growth. One third of businesses believe that the current amount of protected open space is sufficient.

Table 27. What is your opinion of open space on Cape Cod?	
Opinion	N=354
Cape Cod has protected the right amount of open space	33.3%
Cape Cod needs to protect more open space	**46.3%**
The amount of open space protected on Cape Cod is limiting development and economic growth	15.5%
Don't Know/No Opinion	4.8%

About 46% of businesses reported that there is adequate protection of historic buildings and locations on Cape Cod, and about 29% said that Barnstable County needs to do a better job of protecting historic sites. Only approximately 16% of respondents stated that there is too much protection of historic buildings and locations.

Table 28. What is your opinion of efforts to protect historic buildings and locations on Cape Cod?	
Opinion	N=355
There is adequate protection of historic buildings and locations on Cape Cod	**46.2%**
Cape Cod needs to protect more historic buildings and locations	29.3%
Cape Cod has protected too many historic buildings and locations	16.3%
Don't Know/No Opinion	8.2%

The quality of drinking water and the quality of water in the Cape's ponds and along its coast are something of a concern for businesses, but not a serious problem in their opinion. Thirty-seven percent of businesses stated that the quality of the Cape's drinking water is a moderate problem, but a little more than 34% said that it is not a problem, and only 22% indicated that it is a serious problem. Similarly, a plurality of respondents said that the quality of water in the Cape's ponds and along the coast is a moderate problem. However, a higher percentage of respondents said that the quality of pond water and coastal water is a serious problem than said that the quality of drinking water is a problem.

Table 29. What is your opinion of the quality of drinking water on Cape Cod?	
Opinion	N=350
It is a serious problem	22.0%
It is a moderate problem	**37.1%**
It is not a problem	34.3%
Don't Know/No Opinion	6.6%

Table 30. What is your opinion of water quality in ponds and coastal waters on Cape Cod?	
Opinion	N=353
It is a serious problem	33.1%
It is a moderate problem	**42.2%**
It is not a problem	13.0%
Don't Know/No Opinion	11.6%

One section of the business climate survey asked respondents to indicate what kinds of new commercial development they would support for the Cape. Businesses seem to support development opportunities that either support the Cape as a tourist destination or at least do not harm the natural beauty of Barnstable County. Respondents reported that they would support the creation of a technology firm or a light manufacturing firm, businesses that would not have a large impact on the environment, but would oppose a gravel mining operation. Businesses also said that they would support the development of businesses that serve tourists, such as a large hotel, a conference or cultural center, and a marina. Interestingly, a plurality of respondents indicated that they would oppose the development of a golf course, despite the fact that a course would seem to support tourism. This might be because of the environmental impacts of a golf course, such as the loss of open space, or the impact of the chemicals used to maintain the course on the Cape's water supply. It could also be because there are already a number of courses on the Cape.

Businesses also seem interested in protecting the historic nature of the Cape. They stated that they would oppose the development of either an enclosed mall or a strip mall, as well as the locating of a national fast food chain on the Cape; they would overwhelmingly support the development of a neighborhood business, though.

Table 31. Suppose that each of the following new businesses were being proposed for development on Cape Cod. For each, please indicate if you would support or oppose it.				
Business		Support	Oppose	No Opinion
A technology firm	N=342	**94.2%**	2.0%	3.8%
Light Manufacturing firm	N=342	**84.2%**	7.6%	8.2%
Gravel mining	N=341	21.4%	**53.4%**	25.5%
50+ Room Hotel	N=343	**58.9%**	23.3%	17.8%
A Regional Conference Center	N=339	**78.8%**	11.2%	10.0%
A Regional Cultural Center	N=345	**77.4%**	8.1%	14.5%
A Marina	N=343	**69.7%**	12.8%	17.5%
A Golf Course	N=343	32.9%	**42.6%**	24.5%
A Sports Field/Athletic Complex	N=342	**66.1%**	14.6%	19.3%
A National Fast Food Chain	N=342	25.1%	**50.3%**	24.6%
An Enclosed Shopping Mall	N=341	28.4%	**53.1%**	18.5%
A Strip Mall	N=339	18.9%	**57.8%**	23.3%
A Large Supermarket	N=342	**45.9%**	30.7%	23.4%
A Neighborhood Business	N=343	**96.2%**	1.2%	2.6%

Internet Infrastructure

Survey respondents were asked to describe their business's internet infrastructure. About 80% of businesses have a website, but only about a third of businesses sell anything over the web. Of those businesses that do have internet sales, close to 62% of them make one quarter or less of their total sales via the web.

Table 32. Does your business have a website?	
Response	N=348
Yes	**79.9%**
No	20.1%

Table 33. Does your business sell any products or services over the internet?	
Response	N=348
Yes	35.3%
No	**64.7%**

Table 34. Approximately what percentage of your business' total sales are made over the internet?*	
Response	N=118
1%-25%	**61.9%**
26%-50%	19.5%
51%-75%	10.2%
76%-100%	8.5%

*Data in this table represents responses only from those respondents that said they sold any products or services over the internet.

Business-class internet cable service is the largest type of internet connection among Cape businesses, followed by a Digital Subscriber Line (DSL), wireless via Wi-Fi, and residential-grade internet cable service. Businesses reported overwhelmingly that their current internet connection is sufficient for their needs. This is perhaps not surprising, given the relatively low percentage of sales made via the web by Cape businesses. If businesses were helped to increase their web sales they might see a need to upgrade their connections.

Table 35. What type(s) of internet connection does your business have?	
Response*	N=413
Telephone Dial-up	4.4%
Commercial Satellite (Consumer Grade HughesNet)	0.7%
Dedicated Satellite (Private provider)	0.7%
DSL from Verizon or a 3rd Party	25.9%
Residential Grade Internet Cable Service	15.0%
Business Class Internet Cable Service	**31.0%**
Broadband via a T1 Line	4.6%
Wireless via Wi-Fi	16.5%
Symmetrical High-Speed Wireless (>100Mbs)	1.7%
Symmetrical High-Speed Ethernet (>10Mbs)	0.5%
Symmetrical High-Speed Ethernet (>50Mbs)	0.2%
Symmetrical High-Speed Ethernet (>1Gbs)	0.0%
Fiber or Microwave Wave Length Service	0.2%
Dark Fiber Lease	0.0%
Don't know	3.4%
None	1.2%

*The figures in this table total more than 100%, because respondents have more than one type of internet connection.

Table 36. Is your internet connection sufficient for your needs?	
Response	N=337
Yes	**89.3%**
No	10.7%

Given that businesses had already said that their current internet connection is sufficient, it is not surprising that they also indicated, for each broadband service listed, that they either have it and it is sufficient or they do not have it but do not need it.

Table 37. For each of the following broadband services, please indicate whether or not your business currently has the service

Service		Have, and is sufficient	Have, but needs improvement	Do not have, but need it	Do not have, do not need
Basic Web and Email	N=333	**82.3%**	14.4%	0.9%	2.4%
Host your own Web and Email Server	N=317	36.9%	7.9%	9.8%	**45.4%**
Provide Guest or Customer Connectivity to the Internet	N=320	31.9%	8.8%	4.7%	**54.7%**
Web-based Store with shopping cart that can process credit card transactions and sales; and/or provide on-line availability and reservations	N=321	15.3%	6.5%	12.5%	**65.7%**

Perform File Transfer Protocol (FTP) Services	N=310	22.3%	6.8%	8.4%	**62.6%**
Telecommuting	N=319	26.3%	10.3%	7.8%	**55.5%**
Participate in On-line Meetings	N=320	33.1%	11.9%	10.0%	**45.0%**
Upload or Publish Content to Customers or Vendors	N=321	34.9%	15.3%	8.4%	**41.4%**
Perform Interactive Business/Professional Transactions, (e.g. real-time accounting, medical records, equipment control, etc.)	N=319	23.2%	7.8%	7.5%	**61.4%**

Environmental Issues

Finally, survey participants were asked about a few environmental issues. About 5% of businesses indicated that they still use a cesspool or cesspit for waste water treatment. Cape-wide this translates to about 889 businesses. Most businesses either use a standard title 5 system or have access to some kind of treatment facility.

Table 38. What type of waste water disposal system does your business currently have?	
Waste water system	N=333
Standard Title 5	**62.2%**
Municipal Sewer	13.5%
Innovative Alternative	1.8%
Neighborhood Waste Water Treatment	2.7%
Cesspool/Cesspit	5.1%
Don’t Know	14.7%

More than 72% of respondents indicated that they are interested or very interested in on-site renewable energy generation. This is likely either due to the cost of energy, which businesses already said is a concern for them, or to environmental concerns, or both.

Table 39. How interested are you in on-site renewable energy generation?	
Response	N=335
Very Interested	**39.4%**
Interested	32.8%
Not Very Interested	19.1%
Not at all Interested	8.7%

Almost 62% of businesses said that they use green or sustainable business practices, and nearly 44% of those that did also reported that they would be interested in a green business certification program.

Table 40. Does your business currently utilize green/sustainability practices?	
Response	N=338
Yes	**61.5%**
No	28.4%
Don’t Know	10.1%

Table 41. Would your business participate in a green business certification program?*	
Response	N=207
Yes	**43.5%**
No	27.1%
Don't Know	29.5%

*Data in this table represents responses only from those respondents that said they currently utilize green/sustainability practices.

Subgroup Analysis: Sole Proprietors versus Other Businesses

The following compares the responses of businesses that are organized as a sole proprietorship with the responses of all other business types for several key survey questions.

The distribution of locations across the Cape is similar for sole proprietorships as compared to all other businesses. The town of Barnstable has the most of each type of business, though a higher percentage of non-sole proprietorships have a location there.

Table 42. In which of the town(s) on Cape Cod is your business located?		
	Sole Proprietor	Non-Sole Proprietor
Town*	N=136	N=277
Barnstable	20.6%	31.1%
Bourne	5.2%	6.5%
Brewster	9.6%	5.4%
Chatham	5.9%	4.7%
Dennis	13.2%	11.2%
Eastham	5.9%	5.1%
Falmouth	16.2%	11.2%
Harwich	8.8%	7.9%
Mashpee	9.6%	5.4%
Orleans	6.6%	9.8%
Provincetown	3.7%	5.1%
Sandwich	12.5%	9.0%
Truro	4.4%	2.2%
Wellfleet	5.2%	5.1%
Yarmouth	11.8%	13.0%

*The figures in this table total more than 100% because some businesses have multiple locations on the Cape.

A somewhat higher percentage of sole proprietorships are family owned as compared to other business organization types. More than 61% of sole proprietorships are family owned, compared to less than 52% of other business types.

Table 43. Is your business family owned?		
	Sole Proprietor	Non-Sole Proprietor
Family Owned	N=132	N=256
Yes	**61.4%**	**51.6%**
No	38.6%	48.4%

There is a large difference between the two business types in the percentage based out of a home. Approximately 68% of sole proprietorships are based out of someone's home, while only about 17% of non-sole proprietorships are based in a home.

Table 44. Is your business based out of a home?		
	Sole Proprietor	Non-Sole Proprietor
Based out of a home	N=136	N=258
Yes	**67.6%**	16.7%
No	32.4%	**83.3%**

There does not appear to be much of a difference in the average age of sole proprietorships versus other businesses. On average sole proprietorships were started in 1998, while all other businesses were started, on average, in 1993. The range of years for business creation is also very similar for both business types.

Table 45. In what year was your business established on the Cape?		
	Sole Proprietor	Non-Sole Proprietor
Category	N=132	N=249
Median	1998	1993
Range	1890-2011	1887-2011

Sole proprietorships and non-sole proprietorships operate for a similar portion of the year. Ninety-one percent of sole proprietorship are open year-round, while for other businesses that figure is about 90%.

Table 46. For what portion of the year does your business operate?		
	Sole Proprietor	Non-Sole Proprietor
Portion of Year	N=134	N=258
Year Round	**91.0%**	**89.5%**
7-11 Months	5.2%	6.6%
3-6 Months	3.0%	3.9%
Less Than 3 Months	0.7%	0.0%

There does not appear to be much of a difference, either, in the business sector of the two types being compared. For sole proprietorships the largest business sector is professional, scientific, and technical services, followed by other services, other business sectors, and retail trade. For other business types retail trade is the largest, followed by accommodation and food services, other business sectors, and professional, scientific, and technical services.

Table 47. In which of the following business sectors would you categorize your business?		
	Sole Proprietor	Non-Sole Proprietor
Sector	N=135	N=258
Agriculture, Forestry, Fishery, and Hunting	2.2%	0.4%
Mining, Quarrying, and Oil and Gas Extraction	0.0%	0.0%
Utilities	0.0%	0.8%
Construction	9.6%	6.2%
Manufacturing	2.2%	0.4%
Wholesale Trade	0.7%	1.6%
Retail Trade	11.1%	**14.7%**
Transportation and Warehousing	0.0%	1.6%
Information	2.2%	2.3%
Finance and Insurance	5.2%	4.3%
Real Estate and Rental and Leasing	3.7%	4.3%

Professional, Scientific, and Technical Services	**14.8%**	13.2%
Management of Companies and Enterprises	0.7%	0.8%
Educational Services	3.0%	4.3%
Health Care and Social Assistance	7.4%	6.2%
Arts, Entertainment, Recreation	5.9%	4.7%
Accommodation and Food Services	5.9%	13.6%
Other Services	12.6%	7.4%
Public Administration	0.0%	0.4%
Other	12.6%	13.2%

Non-sole proprietorships have many more employees on average than sole proprietorships. On average non-sole proprietorships employ about 14 people full-time, year-round, and 14 more full-time seasonally. Sole proprietorships employ one person full-time, year-round, and average less than one full-time seasonal employee. The results are similar for all other categories of employees.

Table 48. Please indicate the number of employees your business typically has in each of the following categories.*

Category	Category	N	Mean	Range
Part-time	Sole Proprietor	88	0.6	0-4
	Non-Sole Proprietor	171	8.4	0-225
Temporary	Sole Proprietor	71	0.6	0-16
	Non-Sole Proprietor	97	5.9	0-150
Full-time Year-round	Sole Proprietor	104	1.2	0-12
	Non-Sole Proprietor	206	14.3	0-500
Full-time Seasonal	Sole Proprietor	69	0.2	0-5
	Non-Sole Proprietor	99	13.6	0-500
Contractors	Sole Proprietor	74	0.9	0-10
	Non-Sole Proprietor	88	3.2	0-100
Guest/Foreign Workers	Sole Proprietor	67	0.03	0-1
	Non-Sole Proprietor	82	3.3	0-75
Mature/Senior Workers	Sole Proprietor	65	0.1	0-1
	Non-Sole Proprietor	89	3.7	0-150

A majority of both types of businesses have the same number of employees as they had a year ago and do not expect the number of employees they have to change in the next year, though fewer sole proprietorships expect to change their employee numbers in the coming year than non-sole proprietorships. This is likely due to the fact that sole proprietorships have so few employees to begin with.

Table 49. Compared to a year ago, has the number of people currently employed by your business increased, decreased, or stayed the same?

	Sole Proprietor	Non-Sole Proprietor
Change in Employee Numbers	N=128	N=242
Increased	7.0%	23.1%
Decreased	10.2%	16.9%
Stayed the Same	**82.8%**	**59.9%**

Table 50. A year from now during the same time period, how many people do you expect to employ?		
	Sole Proprietor	Non-Sole Proprietor
Change in Employee Numbers	N=128	N=242
More than Currently	8.6%	25.6%
The Same as Currently	**68.8%**	**59.5%**
Fewer than Currently	3.9%	6.2%
Don't Know	18.8%	8.7%

Non-sole proprietorships earn more on average than sole proprietorships. Close to half of all sole proprietorships earn less than $50,000, while for other business types more than 80% earn $100,000 or more.

Table 51. What were your business' gross revenues for the last fiscal year?		
	Sole Proprietor	Non-Sole Proprietor
Revenues	N=121	N=225
Less than $50,000	**45.5%**	11.1%
$50,000-$99,999	26.4%	8.4%
$100,000-$249,999	17.4%	**20.0%**
$250,000-$499,999	6.6%	16.0%
$500,000-$749,999	0.8%	8.4%
$750,000-$999,999	1.7%	6.2%
$1 Million-$2.5 Million	1.7%	14.2%
More than $2.5 Million	0.0%	15.6%

Both business types serve similar customers. Local residents are the primary customer base for all businesses on the Cape. Seasonal or short-term visitors might be somewhat more important to non-sole proprietorships, but other categories of customers are very similar.

Table 52. Which of the following best describes your customer base?		
	Sole Proprietor	Non-Sole Proprietor
Customers	N=125	N=240
Local Residents	**49.6%**	**42.5%**
Seasonal/Short-term Visitors	12.8%	22.9%
Internet	3.2%	3.3%
Business to Business	22.4%	21.7%
Other	12.0%	9.6%

Personal and family savings is the largest source of capital for both sole proprietorships and non-sole proprietorships, but it is more important for sole proprietorships than for other business types. Both business types appear to use credit cards for capital at similar rates, but sole proprietorships are much less likely to use non-government guaranteed loans from banks.

Table 53. Which of the following were sources of any capital used by your business over the last 5 years?		
	Sole Proprietor	Non-Sole Proprietor
Sources of Capital*	N=136	N=277
Personal/Family Savings of the Owners	**61.0%**	**40.1%**
Personal/Family Home Equity Loan	8.8%	14.4%
Personal/Business Credit Cards	30.9%	29.2%
Business Loan from Federal, State, or Local Government	1.5%	2.5%

Government Guaranteed Loan From a Bank/Financial Institution	0.7%	6.5%
Non-Government Guaranteed Loan From a Bank/ Financial Institution	3.7%	19.1%
Loan/Investment from Family or Friends	2.9%	6.1%
Investment by Venture Capitalists	0.0%	1.1%
Grants	0.7%	10.8%
Don’t Know	0.7%	3.3%
None	17.7%	13.4%
Other	0.7%	10.1%

Subgroup Analysis: Family Owned Businesses versus Other Businesses

This next section of the report compares survey results for family-owned businesses with results for all other businesses.

In terms of location, family-owned businesses do not differ significantly from other businesses. The town of Barnstable has the largest share of both, with about 28% of family-owned businesses and 29% of other businesses. For family-owned businesses, Yarmouth was the second most frequent location, followed by Falmouth. For other businesses Dennis was the second most common location, followed by Falmouth.

Table 54. In which of the town(s) on Cape Cod is your business located?

	Family Owned	Non-Family Owned
Town*	N=213	N=175
Barnstable	**27.7%**	**29.1%**
Bourne	5.2%	6.9%
Brewster	7.0%	7.4%
Chatham	4.7%	6.3%
Dennis	10.8%	13.7%
Eastham	5.2%	6.3%
Falmouth	12.7%	13.1%
Harwich	8.0%	9.7%
Mashpee	6.1%	8.0%
Orleans	11.3%	5.7%
Provincetown	1.4%	8.6%
Sandwich	10.3%	10.9%
Truro	1.9%	4.6%
Wellfleet	4.2%	6.9%
Yarmouth	14.1%	11.4%

Family-owned businesses do not appear to be much more likely than other businesses to be based out of a home. Thirty-eight percent of family-owned businesses are based out of a home, while for other businesses about 31% are based out of a home.

Table 55. Is your business based out of a home?

	Family Owned	Non-Family Owned
Based out of a home	N=213	N=173
Yes	38.0%	30.6%
No	**62.0%**	**69.4%**

There is no difference in the average age of family-owned businesses and other businesses. On average both groups were started in 1995.

Table 56. In what year was your business established on the Cape?		
	Family Owned	Non-Family Owned
Category	N=205	N=167
Median	1995	1995
Range	1887-2011	1890-2011

Family-owned businesses and other businesses also operate for a very similar portion of the year. About 90% of both of these business types operate year-round.

Table 57. For what portion of the year does your business operate?		
	Family Owned	Non-Family Owned
Portion of Year	N=211	N=172
Year-Round	**90.0%**	**89.5%**
7-11 Months	6.6%	5.8%
3-6 Months	2.8%	4.7%
Less Than 3 Months	0.5%	0.0%

There does appear to be a difference in the business sectors of family-owned businesses compared to non-family businesses. Nineteen percent of family businesses are retail, compared to only about 8% of non-family-owned businesses. There is also a higher percentage of family-owned businesses in the construction and accommodation and the food service industries.

Table 58. In which of the following business sectors would you categorize your business?		
	Family Owned	Non-Family Owned
Sector	N=211	N=172
Agriculture, Forestry, Fishery, and Hunting	0.9%	1.2%
Mining, Quarrying, and Oil and Gas Extraction	0.0%	0.0%
Utilities	0.5%	0.6%
Construction	10.4%	4.1%
Manufacturing	0.5%	1.7%
Wholesale Trade	0.9%	1.7%
Retail Trade	**19.0%**	7.6%
Transportation and Warehousing	1.4%	0.6%
Information	1.9%	2.9%
Finance and Insurance	3.8%	5.2%
Real Estate and Rental and Leasing	4.7%	3.5%
Professional, Scientific, and Technical Services	12.3%	**15.1%**
Management of Companies and Enterprises	0.9%	0.6%
Educational Services	2.4%	5.2%
Health Care and Social Assistance	3.8%	10.5%
Arts, Entertainment, Recreation	3.3%	7.6%
Accommodation and Food Services	13.7%	7.6%
Other Services	7.6%	10.5%
Public Administration	0.0%	0.6%
Other	11.8%	13.4%

Family-owned and non-family-owned businesses employ about the same number of year-round, full-time staff: each employs about 11 people. Non-family-owned businesses employ more full-time seasonal staff on average. This might be somewhat surprising, considering that family-owned businesses are more likely to be in the retail and the food service and accommodation business sectors, which on the Cape are highly seasonal businesses. Perhaps non-family-owned businesses in tourism-related industries tend to be larger operations than family-owned (think large hotels or resorts versus bed and breakfasts or motels).

Table 59. Please indicate the number of employees your business typically has in each of the following categories.*

Category	Category	N	Mean	Range
Part-time	Family Owned	137	5.6	0-225
	Non-Family Owned	115	6.2	0-125
Temporary	Family Owned	99	2.5	0-90
	Non-Family Owned	62	5.7	0-150
Full-time Year-round	Family Owned	170	9.7	0-500
	Non-Family Owned	133	10.6	0-300
Full-time Seasonal	Family Owned	102	3.6	0-50
	Non-Family Owned	59	16.9	0-500
Contractors	Family Owned	90	1.4	0-20
	Non-Family Owned	65	3.4	0-100
Guest/Foreign Workers	Family Owned	88	1.5	0-40
	Non-Family Owned	54	2.6	0-75
Mature/Senior Workers	Family Owned	87	1.2	0-20
	Non-Family Owned	60	3.8	0-150

Both family-owned and other business types largely have the same number of employees as they did a year ago, and expect to have the same number a year from now. There does not appear to be much difference between the groups in terms of the change in the number of employees in the last year, or the expected change in the year to come.

Table 60. Compared to a year ago, has the number of people currently employed by your business increased, decreased, or stayed the same?

	Family Owned	Non-Family Owned
Change in Employee Numbers	N=203	N=160
Increased	17.2%	18.1%
Decreased	11.8%	18.8%
Stayed the Same	**70.9%**	**63.1%**

Table 61. A year from now during the same time period, how many people do you expect to employ?

	Family Owned	Non-Family Owned
Change in Employee Numbers	N=203	N=160
More than Currently	17.2%	22.5%
The Same as Currently	**66.5%**	**58.8%**
Fewer than Currently	5.4%	5.6%
Don't Know	10.8%	13.1%

A higher percentage of non-family-owned businesses earn less than $50,000 than family-owned businesses, which is surprising. Family-owned businesses have a higher percentage in the $1 million to $2.5 million dollar range than non-family-owned.

Table 62. What were your business' gross revenues for the last fiscal year?		
	Family Owned	Non-Family Owned
Revenues	N=184	N=154
Less than $50,000	**19.6%**	**26.6%**
$50,000-$99,999	15.8%	13.6%
$100,000-$249,999	17.4%	20.8%
$250,000-$499,999	12.5%	13.0%
$500,000-$749,999	7.6%	3.9%
$750,000-$999,999	3.8%	5.2%
$1 Million-$2.5 Million	13.0%	6.5%
More than $2.5 Million	10.3%	10.4%

Family-owned and other business types have broadly the same customer profile. Both groups listed local residents as their primary customer base.

Table 63. Which of the following best describes your customer base?		
	Family Owned	Non-Family Owned
Customers	N=197	N=161
Local Residents	**44.7%**	**45.3%**
Seasonal/Short-term Visitors	21.8%	17.4%
Internet	2.5%	4.3%
Business to Business	19.8%	24.2%
Other	11.2%	8.7%

Family-owned businesses appear to use personal and family savings as a source of capital more often than other businesses, though it is the largest source of capital for both groups. Both groups use other sources of capital at very similar rates, except for grants and other sources. Sixteen percent of non-family-owned business have received a grant, versus less than 2% of family-owned businesses, and 12% of non-family-owned businesses reported that they have accessed capital from some source other than those listed here, while less than 4% of family-owned businesses indicated this.

Table 64. Which of the following were sources of any capital used by your business over the last 5 years?		
	Family Owned	Non-Family Owned
Sources of Capital*	N=213	N=175
Personal/Family Savings of the Owners	**57.7%**	**38.9%**
Personal/Family Home Equity Loan	16.4%	9.1%
Personal/Business Credit Cards	33.3%	29.1%
Business Loan from Federal, State, or Local Government	2.3%	2.3%
Government Guaranteed Loan From a Bank/Financial Institution	5.6%	3.4%
Non-Government Guaranteed Loan From a Bank/ Financial Institution	15.5%	13.1%
Loan/Investment from Family or Friends	5.2%	5.1%
Investment by Venture Capitalists	0.0%	1.7%
Grants	1.4%	16.0%
Don't Know	1.4%	4.0%
None	15.5%	14.9%
Other	3.8%	12.0%

Subgroup Analysis: Total Business Revenues and Change in Employment by Business Sector

The final section of this report analyzes revenues and change in employee numbers by business sector. For each analysis below only the most common business sectors are included.

Revenues are analyzed by examining the percentage of businesses in each sector that earned less than $50,000, between $50,000 and $250,000, and $250,000 or more. Accommodation and food services, construction, and retail trade were first, second and third respectively, in terms of the percentage of businesses earning $250,000 or more. Arts, entertainment, and recreation, followed by other business sectors, and then health care and social assistance, had the highest percentage of businesses earning less than $50,000.

Table 65. Total Revenues by Business Sector

Business Sector	Less than $50k	$50k-$249,999	$250k and higher
Construction	20.8%	16.7%	**62.5%**
Retail Trade	14.9%	31.9%	**53.2%**
Finance and Insurance	17.6%	35.3%	**47.1%**
Real Estate	14.3%	35.7%	**50.0%**
Professional, Scientific and Technical	18.8%	**47.9%**	33.3%
Educational Services	14.3%	**57.1%**	28.6%
Healthcare and Social Assistance	26.1%	30.4%	**43.5%**
Arts, Entertainment, and Recreation	**52.9%**	17.6%	29.4%
Accommodation and Food Service	8.1%	24.3%	**67.6%**
Other	**42.4%**	36.4%	21.2%
Total	23.1%	33.8%	**43.1%**

Half or more of businesses in every sector indicated that the number of employees they have is unchanged from a year ago. The sectors with the highest percentage of respondents who said that they have increased their employee numbers in the last year are finance and insurance, healthcare and social assistance, and arts, entertainment and recreation. The sectors with the largest percentage of businesses saying they have decreased their employees are construction, educational services, and arts, entertainment, and recreation.

Table 66. Change in Employee Numbers Over the Last Year by Business Sector

Business Sector	Increased	Decreased	Stayed the Same
Construction	6.9%	37.9%	**55.2%**
Retail Trade	19.6%	21.6%	**58.8%**
Finance and Insurance	33.3%	11.1%	**55.6%**
Real Estate	7.1%	7.1%	**85.7%**
Professional, Scientific and Technical	13.7%	9.8%	**76.5%**
Educational Services	21.4%	28.6%	**50.0%**
Healthcare and Social Assistance	26.9%	15.4%	**57.7%**
Arts, Entertainment, and Recreation	22.2%	27.8%	**50.0%**
Accommodation and Food Service	22.5%	7.5%	**70.0%**

Other	18.8%	12.5%	**68.8%**
Total	17.6%	14.6%	**67.8%**

A plurality of businesses in every sector stated that they expect to have the same number of employees in a year as they have now. The sectors that said they are most likely to increase the number of employees they have in the next year are professional, scientific, and technical services, educational services, and construction. The sectors with the highest percentage of respondents saying they expect to have fewer employees in a year are healthcare and social assistance, retail trade, and accommodation and food service.

Table 67. Anticipated Change in Employee Numbers Over the Next Year by Business Sector

Business Sector	More	The Same	Fewer	Don't Know
Construction	24.1%	**51.7%**	6.9%	17.2%
Retail Trade	13.7%	**60.8%**	7.8%	17.6%
Finance and Insurance	17.6%	**64.7%**	5.9%	11.8%
Real Estate	21.4%	**71.4%**	0.0%	7.1%
Professional, Scientific & Technical	37.3%	**56.9%**	2.0%	3.9%
Educational Services	35.7%	**50.0%**	7.1%	7.1%
Healthcare and Social Assistance	20.0%	**64.0%**	12.0%	4.0%
Arts, Entertainment, and Recreation	16.7%	**61.1%**	5.6%	16.7%
Accommodation and Food Service	12.2%	**78.0%**	7.3%	2.4%
Other	15.2%	**48.5%**	6.1%	30.3%
Total	19.7%	**62.7%**	5.4%	12.2%

Appendix A: Cape Cod Business Climate Survey

Cape Cod Business Climate Survey
Introduction

We greatly appreciate and value the time that every respondent has committed to participate in this survey.

Your experiences and opinions will help us better understand the business climate on Cape Cod. Results of the survey will inform local and regional planning and economic development efforts to facilitate and achieve a healthy business climate.

The survey is being administered by the University of Massachusetts Donahue Institute. The survey is completely confidential; your individual responses will not be shared with anyone. It should take about 10 minutes to complete. The survey asks you to describe your business, asks about your opinion of various issues related to development on the Cape, and about certain environmental issues on Cape Cod. When completing the survey please do not use the back arrow on your internet browser.

The Cape Cod Business Climate Survey is sponsored by the Cape Cod Chamber of Commerce, the Community Development Partnership, the Falmouth Economic Development and Industrial Corporation, the Yarmouth Area Chamber of Commerce, Cape and Plymouth Business Magazine, and the Cape Cod Commission.

If you have any questions or concerns about the survey, please call Joe Wyman at the UMass Donahue Institute at (413) 587-2401.

Again, thank you in advance for your time and participation!

1. In which Cape Cod town(s) is your business located? (Choose all that apply)
   a. Barnstable
   b. Bourne
   c. Brewster
   d. Chatham
   e. Dennis
   f. Eastham
   g. Falmouth
   h. Harwich
   i. Mashpee
   j. Orleans
   k. Provincetown
   l. Sandwich
   m. Truro
   n. Wellfleet
   o. Yarmouth

2. How is your business organized?
    a. Schedule C corporation
    b. Schedule S corporation
    c. Limited Liability Corporation (LLC)
    d. Limited Partnership (LP)
    e. Sole Proprietor (self-employed)
    f. Franchise
    g. 501c3
    h. Other non-profit
    i. Don’t know
    j. Other _______________

3. What is your position in this business?
    a. Owner
    b. Operator
    c. Staff
    d. Other _______________

4. Is your business family owned?
    a. Yes
    b. No

5. Does your business have a parent company?
    a. Yes
    b. No

6. Is your business based out of a home?
    a. Yes
    b. No

7. Does your business operate as a franchise?
    a. Yes
    b. No

8. In what year was your business established on Cape Cod? _______________

9. For what portion of the year does your business operate?
    a. Year round
    b. 7-11 months
    c. 3-6 months
    d. Less than 3 months

10. When in operation, how many hours per week is your business open?
    a. 24 hours a day 7 days per week
    b. 40 hours or more (but not 24 hours per day)
    c. Less than 40 hours a week
    d. Occasional or irregular hours

11. In which of the following business sectors would you categorize your business?
    a. Agriculture, Forestry, Fishery, and Hunting
    b. Mining, Quarrying, and Oil and Gas Extraction
    c. Utilities
    d. Construction
    e. Manufacturing
    f. Wholesale trade
    g. Retail trade
    h. Transportation and Warehousing
    i. Information
    j. Finance and Insurance
    k. Real Estate and Rental and Leasing
    l. Professional, Scientific, and Technical Services
    m. Management of Companies and Enterprises
    n. Educational Services
    o. Health Care and Social Assistance
    p. Arts, Entertainment, Recreation
    q. Accommodation and Food Services
    r. Other Services
    s. Public Administration
    t. Other ___________________

12. Which of the following best describes your business' current work space?
    a. The business owns the space (please skip to question 14)
    b. The business rents the space, but wants to own
    c. The business rents the space, and does not want to own

13. If you would like to own your business' space but do not currently, what is preventing you from doing so? ___________________

14. Please indicate the number of employees your business typically has in each of the following categories:
    a. Part-time employees____
    b. Temporary staff___
    c. Full-time year round employees____
    d. Full-time seasonal staff____
    e. Contractors____
    f. Guest/foreign workers_____
    g. Mature/senior workers_____

15. Compared to a year ago, has the number of people currently employed by your business increased, decreased, or stayed the same?
    a. Increased
    b. Decreased
    c. Stayed the same

16. A year from now during the same time period, how many people do you expect to employ?
    a. More than currently
    b. The same as currently
    c. Fewer than currently
    d. Don't know

17. What were your business' gross revenues for the last fiscal year?
    a. Less than $50,000
    b. $50,000 -$99,999
    c. $100,000-$249,999
    d. $250,000-$499,999
    e. $500,000-$749,999
    f. $750,000-$999,999
    g. $1 million-$2.5 million
    h. More than $2.5 million

18. Which of the following best describes your business' **primary** customer base?
    a. Local residents
    b. Seasonal/Short-term visitors
    c. Internet
    d. Business to business
    e. Other ___________________

19. Which of the following was a source of any capital used by your business over the last 5 years? (Choose all that apply)
    a. Personal/family savings of the owner(s)
    b. Personal/family home equity loan
    c. Personal/business credit cards
    d. Business loan from federal, state, or local government
    e. Government guaranteed business loan from a bank or other financial institution
    f. Non-government guaranteed business loan from bank/financial institution
    g. Loan/investment from family or friends
    h. Investment by venture capitalists
    i. Grants
    j. Don't know
    k. None
    l. Other __________________

20. Has your business ever utilized business resources provided by any of the following organizations? (Choose all that apply)
    a. Cape Cod Chamber of Commerce
    b. Coastal Community Capital
    c. Community Development Partnership (a.k.a. Lower Cape CDC)
    d. U.S. Small Business Administration
    e. Business or industry associations
    f. Business incubators
    g. Entrepreneurial networks
    h. Regional Technology Development Center (RTDC)
    i. Local chamber of commerce

j. SCORE
k. Cape Cod Economic Development Council
l. None

21. For each of the issues listed below, please indicate whether you believe it is a strength or a weakness for Cape Cod's business climate.

Issue	Strength	Weakness	Neutral/No Opinion
K-12 education			
Skill level of workforce			
Availability of affordable housing			

22. What is your opinion of the transportation infrastructure on Cape Cod?
    a. Cape Cod's current transportation infrastructure is adequate
    b. Cape Cod needs to add capacity to its roads and highways
    c. Cape Cod needs to do a better job maintaining its existing roads and highways, but does not need to add capacity
    d. Cape Cod needs to make it easier for visitors to travel to Cape Cod without driving
    e. Don't know/No opinion

23. What is your opinion of residential development on Cape Cod?
    a. The current amount of residential development is adequate
    b. There is too much residential development
    c. There is not enough residential development
    d. There is not enough residential development, but new development should be limited to specific locations
    e. Don't know/No opinion

24. What is your opinion of commercial development on Cape Cod?
    a. The current amount of commercial development is adequate
    b. There is too much commercial development
    c. There is not enough commercial development; Cape Cod should allow it wherever the market determines it best belongs
    d. There is not enough commercial development, but new development should be limited to specific locations
    e. Don't know/No opinion

25. What is your opinion of open space on Cape Cod
    a. Cape Cod has protected the right amount of open space
    b. Cape Cod needs to protect more open space
    c. The amount of open space protected on Cape Cod is limiting development and economic growth
    d. Don't know/No opinion

26. What is your opinion of efforts to protect historic buildings and locations on Cape Cod
    a. There is adequate protection of historic buildings and locations on Cape Cod
    b. Cape Cod needs to protect more historic buildings and locations
    c. Cape Cod has protected too many historic buildings and locations
    d. Don't know/No opinion

27. What is your opinion of the quality of drinking water on Cape Cod?
    a. It is a serious problem
    b. It is a moderate problem
    c. It is not a problem
    d. Don't know/No opinion

28. What is your opinion of water quality in ponds and coastal waters on Cape Cod
    a. It is a serious problem
    b. It is a moderate problem
    c. It is not a problem
    d. Don't know/No opinion

29. Suppose that each of the following new businesses was being proposed for development on Cape Cod. For each, please indicate if you would support or oppose it.

	Support	Oppose	Neutral/No Opinion
A technology firm			
Light manufacturing firm			
Gravel mining			
50+ room hotel			
A regional conference center			
A regional cultural center			
A marina			
A golf course			
A sports field/athletic complex			
A national fast food chain			
An enclosed shopping mall			
A strip mall			
A large supermarket			
A neighborhood business			

30. To what extent, if any, does each of the following issues pose a barrier or impediment to your business' success?

Issue	Significant Barrier	Somewhat of a barrier	Not a barrier	Don't know/No opinion
Zoning				
Permits/Fee				
Sign Codes				
Licensing				
Cost of health Insurance				
Parking regulations				
Cost of business supplies/materials				
Cost of energy				
Access to capital				
On-line competition				
Finding enough employees				

Finding employees with the right skills				
Cape Cod's cost of living				
Real estate prices on Cape Cod				
Employee Wages				
Local taxes				

31. Are there any other barriers or impediments to your businesses success?
____
____
____

32. What, if anything, could local/county government do to support your businesses growth?
____
____
____

33. Do you believe your business will still exist on Cape Cod in 10 years?
    a. Yes
    b. No
    c. Don't know

34. If no, why not?
    a. Closing
    b. Selling
    c. Retiring
    d. Relocating off Cape Cod

35. Does your business have a web site?
    a. Yes
    b. No

36. Does your business sell any product(s) or services over the Internet?
    a. Yes
    b. No (Go to Q. 38)

37. Approximately what percentage of your business' total sales was made over the Internet?
    a. 1%-25%
    b. 26%-50%
    c. 51%-75%
    d. 76%-100%

38. What type(s) of internet connection does your business have?

Type of Connectivity	
Telephone Dial-up	
Commercial Satellite (Consumer Grade HughesNet)	
Dedicated Satellite (Private provider)	
DSL from Verizon or a 3rd party	

Residential Grade Internet Cable Service	
Business Class Internet Cable service	
Broadband via a T1 line	
Wireless via Wi-Fi	
Symmetrical High-Speed Wireless (>100Mbs)	
Symmetrical High-Speed Ethernet (> 10Mbs)	
Symmetrical High-Speed Ethernet (> 50Mbs)	
Symmetrical High-Speed Ethernet (> 1Gbs)	
Fiber or Microwave Wave Length service	
Dark Fiber Lease	
Don't Know	
None	

39. Is your internet connection sufficient for your needs
    a. Yes
    b. No

40. For each of the following broad band services, please indicate whether or not your business currently has the service.

Service	Have	Have but needs improvement	Do not have, but need it	Do not have, do not need
Basic Web and Email				
Host your own Web and email server				
Provide guest or customer connectivity to the Internet				
Web-based store with shopping cart and process credit card transactions and sales, and/or provide online availability and reservations				
Perform File Transfer Protocol (FTP) services				
Telecommuting				
Participate in on-line meetings				
Upload or publish content to customers or vendors				
Perform interactive business/professional transactions (e.g., real- time accounting, medical records, equipment control, etc.)				

41. What type of waste water disposal system does your business currently use?
    a. Standard title 5
    b. Municipal sewer
    c. Innovative/Alternative
    d. Neighborhood wastewater treatment
    e. Cesspool/cesspit
    f. Don't know
    g. Other ________________

42. How interested are you in on-site renewable energy generation?
    a. Very interested
    b. Interested
    c. Not very interested
    d. Not at all interested

43. Does your business currently utilize green/sustainability practices?
    a. Yes
    b. No
    c. Don’t know

44. If yes, would your business participate in a green business certification program?
    a. Yes
    b. No
    c. Don’t know

Thank you for your participation! The University of Massachusetts Donahue Institute and sponsoring organizations appreciate your input and time.

Appendix B: Survey Frequencies

Table 1. In which of the town(s) on Cape Cod is your business located?	
Town*	N=413
Barnstable	27.6%
Bourne	6.1%
Brewster	6.8%
Chatham	5.1%
Dennis	11.9%
Eastham	5.3%
Falmouth	12.8%
Harwich	8.2%
Mashpee	6.8%
Orleans	8.7%
Provincetown	4.6%
Sandwich	10.2%
Truro	2.9%
Wellfleet	5.1%
Yarmouth	12.6%

*The figures in this table total more than 100% because some businesses have multiple locations on the Cape.

Table 2. How is your business organized?	
Incorporation Method*	N=413
Schedule C Corporation	11.6%
Schedule S Corporation	22.8%
Limited Liability Corporation (LLC)	15.3%
Limited Partnership (LP)	1.5%
Sole Proprietor (self-employed)	33.4%
Franchise	0.7%
501c3	8.0%
Other Non-Profit	2.2%
Don’t Know	2.9%
Other	3.2%

*The figures in this table add to more than 100% because business can be incorporated by more than one method.

Table 3. What is your position in this business?	
Position	N=367
Owner	73.4%
Operator	4.4%
Staff	11.1%
Other	11.1%

Table 4. Is your business family owned?	
Family Owned	N=388
Yes	54.9%
No	45.1%

Table 5. Does your business have a parent company?	
Parent Company	N=388
Yes	6.4%
No	93.6%

Table 6. Is your business based out of a home?	
Based out of a home	N=388
Yes	34.3%
No	64.7%

Table 7. Does your business operate as a franchise?	
Franchise	N=396
Yes	4.0%
No	96.0%

Table 8. In what year was your business established on the Cape?	
Category	N=380
Median	1995
Range	1887-2011

Table 9. For what portion of the year does your business operate?	
Portion of Year	N=392
Year Round	90.1%
7-11 Months	6.1%
3-6 Months	3.6%
Less Than 3 Months	0.3%

Table 10. When in operation how many hours per week is your business open?	
Hours Per Week	N=392
24 Hours Per Day 7 Day A Week	13.8%
40 Hours or More (But Not 24 Hours/Day)	68.4%
Less Than 40 Hours A Week	10.5%
Occasional or Irregular Hours	7.4%

Table 11. In which of the following business sectors would you categorize your business?	
Sector	N=342
Agriculture, Forestry, Fishery, and Hunting	1.0%
Mining, Quarrying, and Oil and Gas Extraction	0.0%
Utilities	0.5%
Construction	7.0%
Manufacturing	1.0%
Wholesale Trade	1.2%
Retail Trade	12.8%
Transportation and Warehousing	1.0%
Information	2.2%
Finance and Insurance	4.4%
Real Estate and Rental and Leasing	3.9%
Professional, Scientific, and Technical Services	13.1%
Management of Companies and Enterprises	0.7%
Educational Services	3.6%
Health Care and Social Assistance	6.3%
Arts, Entertainment, Recreation	4.8%
Accommodation and Food Services	10.2%
Other Services	8.7%
Public Administration	0.5%
Other	17.2%

Table12. Which of the following best describes your business' current work space?	
Work Space	N=383
The business owns the space	58.5%
The business rents the space but wants to own	12.5%
The business rents the space and does not want to own	29.0%

Table 13. Please indicate the number of employees your business typically has in each of the following categories.*			
Category		Mean	Range
Part-time	N=259	5.7	0-225
Temporary	N=168	3.7	0-150
Full-time Year-round	N=310	9.9	0-500
Full-time Seasonal	N=168	8.1	0-500
Contractors	N=162	2.2	0-100
Guest/Foreign Workers	N=149	1.8	0-75
Mature/Senior Workers	N=154	2.2	0-150

*One respondent was eliminated from this analysis, because their responses were so much larger than all the others that it was skewing the data.

Table 14. Compared to a year ago, has the number of people currently employed by your business increased, decreased, or stayed the same?	
Change in Employee Numbers	N=370
Increased	17.6%
Decreased	14.6%
Stayed the Same	67.8%

Table 15. A year from now during the same time period, how many people do you expect to employ?	
Change in Employee Numbers	N=370
More than Currently	19.7%
The Same as Currently	62.7%
Fewer than Currently	5.4%
Don’t Know	12.2%

Table 16. What were your business’ gross revenues for the last fiscal year?	
Revenues	N=346
Less than $50,000	23.1%
$50,000-$99,999	14.7%
$100,000-$249,999	19.1%
$250,000-$499,999	12.7%
$500,000-$749,999	5.8%
$750,000-$999,999	4.6%
$1 Million-$2.5 Million	9.8%
More than $2.5 Million	10.1%

Table 17. Which of the following best describes your customer base?	
Customers	N=327
Local Residents	39.7%
Seasonal/Short-term Visitors	17.2%
Internet	2.9%
Business to Business	19.4%
Other	20.8%

Table 18. Which of the following were sources of any capital used by your business over the last 5 years?	
Sources of Capital*	N=413
Personal/Family Savings of the Owners	47.0%
Personal/Family Home Equity Loan	12.6%
Personal/Business Credit Cards	29.8%
Business Loan from Federal, State, or Local Government	2.2%
Government Guaranteed Loan From a Bank/Financial Institution	4.6%
Non-Government Guaranteed Loan From a Bank/ Financial Institution	14.0%
Loan/Investment from Family or Friends	5.1%
Investment by Venture Capitalists	0.7%
Grants	7.5%
Don't Know	2.4%
None	14.8%
Other	7.0%

*The figures in this table total more than 100%, because businesses had more than one source of capital during the last 5 years.

Table 19. Has your business ever utilized business resources provided by any of the following organizations?	
Organizations*	N=413
Cape Chamber of Commerce	26.9%
Coastal Community Capital	4.8%
Community Development Partnership (a.k.a. Lower Cape CDC)	8.7%
U.S. Small Business Administration	9.2%
Business or Industry Associations	17.7%
Business Incubators	0.7%
Entrepreneurial Networks	8.0%
Regional Technology Development Center (RTDC)	1.2%
Local Chamber of Commerce	30.5%
SCORE	14.5%
Cape Cod Economic Development Council	4.4%
None	33.7%

*The figures in this table total more than 100%, because businesses have used more than one of the listed resources.

Table 20. For each of the issues listed below, please indicate whether you believe it is a strength or a weakness for Cape Cod's business climate				
Issue		Strength	Weakness	No Opinion
K-12 Education	N=341	43.4%	23.5%	33.1%
Skill Level of Workforce	N=338	28.4%	44.4%	27.2%
Availability of Affordable Housing	N=340	8.8%	73.8%	17.4%

Table 21. What is your opinion of the transportation infrastructure on Cape Cod?	
Opinion	N=351
Cape Cod's current transportation infrastructure is adequate	17.1%
Cape Cod needs to add capacity to its roads and highways	19.7%
Cape Cod needs to do a better job maintaining its existing roads and highways but does not need to add capacity	23.4%
Cape Cod needs to make it easier for visitors to travel to Cape Cod without driving	30.5%
Don't Know/No Opinion	9.4%

Table 22. What is your opinion of residential development on Cape Cod?	
Opinion	N=351
The current amount of residential development on Cape Cod is adequate	39.3%
There is too much residential development	19.4%
There is not enough residential development	14.0%
There is not enough residential development, but new development should be limited to specific locations	16.0%
Don't Know/No Opinion	11.4%

Table 23. What is your opinion of commercial development on Cape Cod?	
Opinion	N=352
The current amount of commercial development is adequate	23.9%
There is too much commercial development	18.2%
There is not enough commercial development, Cape Cod should allow it wherever the market determines it best belongs	23.0%
There is no enough commercial development, but new development should be limited to specific locations	27.8%
Don't Know/No Opinion	7.1%

Table 24. What is your opinion of open space on Cape Cod?	
Opinion	N=354
Cape Cod has protected the right amount of open space	33.3%
Cape Cod needs to protect more open space	46.3%
The amount of open space protected on Cape Cod is limiting development and economic growth	15.5%
Don't Know/No Opinion	4.8%

Table 25. What is your opinion of efforts to protect historic buildings and locations on Cape Cod?	
Opinion	N=355
There is adequate protection of historic buildings and locations on Cape Cod	46.2%
Cape Cod needs to protect more historic buildings and locations	29.3%
Cape Cod has protected too many historic buildings and locations	16.3%
Don't Know/No Opinion	8.2%

Table 26. What is your opinion of the quality of drinking water on Cape Cod?	
Opinion	N=350
It is a serious problem	22.0%
It is a moderate problem	37.1%
It is not a problem	34.3%
Don't Know/No Opinion	6.6%

Table 27. What is your opinion of water quality in ponds and coastal waters on Cape Cod?	
Opinion	N=353
It is a serious problem	33.1%
It is a moderate problem	42.2%
It is not a problem	13.0%
Don't Know/No Opinion	11.6%

Table 28. Suppose that each of the following new businesses were being proposed for development on Cape Cod. For each, please indicate if you would support or oppose it.

Business		Support	Oppose	No Opinion
A technology firm	N=342	94.2%	2.0%	3.8%
Light Manufacturing firm	N=342	84.2%	7.6%	8.2%
Gravel mining	N=341	21.4%	53.4%	25.5%
50+ Room Hotel	N=343	58.9%	23.3%	17.8%
A Regional Conference Center	N=339	78.8%	11.2%	10.0%
A Regional Cultural Center	N=345	77.4%	8.1%	14.5%
A Marina	N=343	69.7%	12.8%	17.5%
A Golf Course	N=343	32.9%	42.6%	24.5%
A Sports Field/Athletic Complex	N=342	66.1%	14.6%	19.3%
A National Fast Food Chain	N=342	25.1%	50.3%	24.6%
An Enclosed Shopping Mall	N=341	28.4%	53.1%	18.5%
A Strip Mall	N=339	18.9%	57.8%	23.3%
A Large Supermarket	N=342	45.9%	30.7%	23.4%
A Neighborhood Business	N=343	96.2%	1.2%	2.6%

Table 29. To what extent, if any, does each of the following issues pose a barrier or impediment to your business' success?					
Issue		Significant	Somewhat	None	No Opinion
Zoning	N=338	16.6%	24.0%	53.3%	6.2%
Permits/Fees	N=338	19.2%	29.3%	48.2%	3.3%
Sign Codes	N=338	21.3%	27.5%	46.7%	4.4%
Licensing	N=337	11.0%	24.6%	58.5%	5.9%
Cost of Health Insurance	N=340	59.1%	20.0%	17.4%	3.5%
Parking Regulations	N=336	10.1%	14.0%	72.0%	3.9%
Cost of Business Supplies/Materials	N=339	17.1%	34.8%	44.8%	3.2%
Cost of Energy	N=341	32.0%	40.2%	25.8%	2.1%
Access to Capital	N=342	23.4%	27.8%	41.5%	7.3%
On-line Competition	N=335	9.3%	22.7%	60.3%	7.8%
Finding Enough Employees	N=338	10.4%	25.1%	59.2%	5.3%
Finding Employees with the Right Skills	N=339	24.2%	37.2%	33.9%	4.7%
Cape Cod's Cost of Living	N=339	42.2%	41.6%	14.7%	1.5%
Real Estate Prices on Cape Cod	N=339	34.2%	34.5%	27.7%	3.5%
Employee Wages	N=339	19.2%	32.4%	42.5%	5.9%
Local Taxes	N=338	21.3%	32.5%	42.0%	4.1%

Table 30. Do you believe your business will exist on Cape Cod in 10 years?	
Response	N=346
Yes	59.5%
No	15.3%
Don't know	25.1%

Table 31. If you do not believe your business will exist on Cape Cod in 10 years, why not?*	
Response	N=52
Closing	15.4%
Selling	13.5%
Retiring	55.8%
Relocating off Cape Cod	15.4%

*Data in this table represents responses only from those respondents who said they did not expect their business to exist on Cape Cod in 10 years.

Table 32. Does your business have a website?	
Response	N=348
Yes	79.9%
No	20.1%

Table 33. Does your business sell any products or services over the internet?	
Response	N=348
Yes	35.3%
No	64.7%

Table 34. Approximately what percentage of your business' total sales are made over the internet?*	
Response	N=118
1%-25%	61.9%
26%-50%	19.5%
51%-75%	10.2%
76%-100%	8.5%

*Data in this table represents responses only from those respondents that said they sold any products or services over the internet.

Table 35. What type(s) of internet connection does your business have?	
Response*	N=413
Telephone Dial-up	4.4%
Commercial Satellite (Consumer Grade HughesNet)	0.7%
Dedicated Satellite (Private provider)	0.7%
DSL from Verizon or a 3rd Party	25.9%
Residential Grade Internet Cable Service	15.0%
Business Class Internet Cable Service	31.0%
Broadband via a T1 Line	4.6%
Wireless via Wi-Fi	16.5%
Symmetrical High-Speed Wireless (>100Mbs)	1.7%
Symmetrical High-Speed Ethernet (>10Mbs)	0.5%
Symmetrical High-Speed Ethernet (>50Mbs)	0.2%
Symmetrical High-Speed Ethernet (>1Gbs)	0.0%
Fiber or Microwave Wave Length Service	0.2%
Dark Fiber Lease	0.0%
Don't know	3.4%
None	1.2%

*The figures in this table total more than 100%, because respondents have more than one type of internet connection.

Table 36. Is your internet connection sufficient for your needs?	
Response	N=337
Yes	89.3%
No	10.7%

Table 37. For each of the following broadband services, please indicate whether or not your business currently has the service					
Service		Have, and is sufficient	Have, but needs improvement	Do not have, but need it	Do not have, do not need
Basic Web and Email	N=333	82.3%	14.4%	0.9%	2.4%
Host your own Web and Email Server	N=317	36.9%	7.9%	9.8%	45.4%
Provide Guest or Customer Connectivity to the Internet	N=320	31.9%	8.8%	4.7%	54.7%
Web-based Store with shopping cart that can process credit card transactions and sales; and/or provide on-line availability and reservations	N=321	15.3%	6.5%	12.5%	65.7%
Perform File Transfer Protocol (FTP) Services	N=310	22.3%	6.8%	8.4%	62.6%
Telecommuting	N=319	26.3%	10.3%	7.8%	55.5%
Participate in On-line Meetings	N=320	33.1%	11.9%	10.0%	45.0%
Upload or Publish Content to Customers or Vendors	N=321	34.9%	15.3%	8.4%	41.4%
Perform Interactive Business/Professional Transactions, (e.g. real-time accounting, medical records, equipment control, etc.)	N=319	23.2%	7.8%	7.5%	61.4%

Table 38. What type of waste water disposal system does your business currently have?	
Waste water system	N=333
Standard Title 5	62.2%
Municipal Sewer	13.5%
Innovative Alternative	1.8%
Neighborhood Waste Water Treatment	2.7%
Cesspool/Cesspit	5.1%
Don’t Know	14.7%

Table 39. How interested are you in on-site renewable energy generation?	
Response	N=335
Very Interested	39.4%
Interested	32.8%
Not Very Interested	19.1%
Not at all Interested	8.7%

Table 40. Does your business currently utilize green/sustainability practices?	
Response	N=338
Yes	61.5%
No	28.4%
Don't Know	10.1%

Table 41. Would your business participate in a green business certification program?*	
Response	N=207
Yes	43.5%
No	27.1%
Don't Know	29.5%

*Data in this table represents responses only from those respondents that said they currently utilize green/sustainability practices

Appendix C: Open-Ended Responses

How is your business organized? (Other Responses)
1. Changing to S Corp
2. College
3. Community College
4. DBA
5. Housing Authority
6. Husband Wife Partnership
7. Incorporated
8. It's incorporated; I don't know which schedule
9. Municipal
10. No business
11. Nominee Trust
12. Out of business
13. Partnership
14. PRIVATE :OWNER
15. Professional Corporation
16. Sub S Corp

What is your position in this business? (Other Responses)
1. Board of Directors, member
2. CEO
3. Controller
4. Coordinator
5. Director
6. Director
7. ED
8. Exec. director
9. Executive Director
10. Executive Director
11. Executive Director
12. Executive Director
13. Executive Director
14. Executive director
15. Executive director
16. Financial director
17. Grant writer
18. Independent advisor
19. Local Sales Manager
20. Manager
21. Manager
22. Manager; sole employee
23. Member
24. Member of Advisory Board of Directors
25. N/A
26. No longer operational

27. Office manager
28. Owner/operator
29. President / Director
30. Sales Manager
31. Service provider/outsourced help
32. Single person who does it all
33. Spouse
34. Treasurer
35. Trustee
36. Trustee

In which of the following business sectors would you categorize your business? (Other Responses)
1. Advertising
2. Also wholesale and manufacturing
3. And property management
4. Antique Decorative Arts
5. Architecture & Planning
6. Attorney
7. Automobile collision repair
8. Automotive repair & service/Locksmith service
9. Aviation
10. Beauty Services
11. Business Association
12. Business Consultant
13. Chamber of Commerce
14. Childcare and family support
15. Chiropractic
16. Commercial cleaning
17. Consultant
18. Consulting
19. Consulting
20. Consulting in direct marketing and fundraising
21. Corporations v democracy information & organizing
22. custom showers, mirrors, glass
23. Custom Picture Framing
24. Deli/Bakery
25. Desktop publishing & custom picture framing
26. Design/ Marketing/Web

27. Digital printing
28. Education & Care
29. Educational, legislative, professional
30. Electronic design consulting
31. Environmental
32. Event Planning/Social Marketing/Public Relations/Fund raising Development
33. Federal sector employment and labor law training
34. Fee-only financial planning and investment management
35. Financial Planning & Investment Advice
36. Gold/Silversmith retail of my work
37. Graphic design, custom illustration, art, retail, wholesale, vintage, gifts
38. Historical research, education and programs
39. Home painting
40. Hotel
41. Hotel/travel and tourism
42. Human Services, Youth Development
43. Interior decorating
44. Interior Design
45. Internet Service Provider
46. Investment management
47. IT Products and Services
48. Landscape
49. Landscaping
50. Landscaping
51. Lawn and garden and pet
52. Management for non-profit entities

53. Marina
54. Marketing & Communications / International staff recruitment
55. Marketing and Advertising
56. Marketing for nonprofits, fundraising
57. Marketing, advertising and business development
58. Massage Therapy
59. Media
60. Media--newspaper-internet
61. Military
62. Multiple
63. Non profit farm
64. Organization and Work Group consulting
65. Pollination and Honey & Candle Sales
66. Primarily Comm. sales and Development
67. Public relations
68. Public Relations, Professional Writing
69. Publishing
70. Recreation - golf course
71. Repair
72. Research, Education, Conservation and Passive Recreation
73. Sales
74. Scholarly publishing
75. Seasonal Resort
76. Service Industry-Consultants to the Retail Food Industry
77. Specialty gifts for fire, police and EMS
78. Storm water Treatment
79. Tanning Salon

80. Telecommunications
81. Tradeshows and conferences
82. Visual Arts, Education, Writing, Historical Information.
83. We own 2 businesses, primary - retail, secondary - lodging
84. Web and Graphic Design Services
85. Web Design / Internet
86. Writing
87. Yoga teacher training and certification

If you would like to own your business' space but do not currently, what is preventing you from doing so?
1. $
2. $
3. 1 - current cash flow insufficient 2 - future prospects uncertain - excessive risk
4. 1.) Some uncertainty about future income 2.) banks are being extremely tight with money
5. Affordable Location
6. Availability of space for sale in a plaza is rare.
7. Bank loans and the right location/deal
8. Cape Cod Commission and the dual regulatory process
9. Cost of affordable and suitable light industrial property in Wellfleet
10. Cost vs. profits
11. Down Payment, Commercial Prices & Good Location
12. Enough business!
13. Finances
14. Finances
15. Funding
16. Funding
17. Have you looked at purchase prices in Provincetown? I am a small business
18. High cost of commercial property.
19. Lack of funds
20. Landlord so far refuses to sell.
21. Landlords are family-owned, no agreement.
22. Location, location, location
23. Looking for the right opportunity
24. Money
25. Need to find an appropriate location, and the current economy

26. New ownership, finance costs vs. lease
27. No affordable kitchen spaces in our area.
28. Not for sale
29. Not sure about business climate. Not sure about space needed to grow the business. Rent currently
30. Owner does not want to sell the property.
31. PRICE TOO HIGH
32. Purchase prices too high, financing hard to get
33. Reluctance of owner to sell
34. Septic issues and not enough parking. Great location, but these other things prevent us from expand
35. Space is owned by Town of Chatham.
36. The building is owned by a family trust that has no interest in selling.
37. The building sits on Lombard Trust land.
38. The Cape Cod Commission making it ridiculously expensive and time consuming to develop
39. The owner does not want to sell at this time.
40. The property is not for sale.
41. The real estate proprietor does not wish to sale
42. We are a very new business and want to see how the first couple of years go

Which of the following best describes your business' ***primary*** customer bases? (Other responses)
1. 2nd home owners
2. A mix of locals & seasonal
3. All of the above
4. All of the above
5. All of the above
6. All of the above
7. Also visitors
8. And local residents
9. And out of Cape residents
10. Both B-B and B-C
11. Both local and seasonal
12. Both local and seasonal residents/visitors 50/50
13. Both seasonal and local residents
14. Builders- contractors- etc
15. Buyers from US and International
16. Colleges and other non-profit human service programs
17. Combination of the above
18. Disabled
19. Equal local, seasonal residence, businesses
20. Families & children
21. Government and private
22. Government Consulting
23. Home owners, both seasonal and year round, developers, municipalities
24. Homeowners
25. International book trade
26. Local and 2nd-homeowners

27. Local & 2nd Homeowners
28. local & seasonal
29. Local and Visitors (Retail)
30. Local, regional and national residents
31. Military- US Navy
32. Mix of local and seasonal
33. Mix of resident and visitors
34. Mix permanent and seasonal
35. Mixed between locals and visitors according to season
36. Municipalities, other general contractors
37. Nantucket and Martha's Vineyard Residents
38. National
39. National nonprofit charities
40. Nonprofits
41. Not for profit
42. Not for Profit/ Organizations
43. Off cape
44. Out of state
45. Own and operate a commercial Truck
46. plus summer people, and vacationers
47. Schools and parents
48. Seasonal & internet
49. Second home owners and local residents
50. Social change activists/advocates
51. Sub-contracting
52. The federal government
53. Tourism

54. We have clients in 22 states and 4 foreign countries
55. Work group consultants
56. Writer - whoever needs writing services
57. Year round Visitors - not just summer

Which of the following were sources of any capital used by your business over the last 5 years? (Other responses)
1. All generated by the business.
2. Assets of the organization
3. Bank line of credit for winter months
4. Bank loans
5. Bequests and donations
6. Business Line of Credit
7. Capital projects funded by profits from operations
8. Childcare tuition revenues
9. Commercial Lender
10. Community capital loan
11. Contributions from our national data base members
12. Donations
13. Donations
14. Donations
15. Donations
16. Donations
17. Donations by individuals & businesses
18. Donations from members and other people
19. Donations, Volunteers
20. Equity....stock investment
21. Fundraising events and activities
22. Line of credit
23. Membership fees and income from festivals
24. Monies earned
25. Not really any of your business
26. Prior year's savings

27. Private Philanthropy
28. Profits
29. Savings held in business

Are there any other barriers or impediments to your business' success?
1. Affordable Housing
2. Affordable seasonal housing for the workforce is a serious problem.
3. Affordable rental housing for employees
4. Although my internet service is adequate, upgrades will be needed for future
5. Amount of paperwork both state and federal. 3/4% meals tax in Chatham
6. As a small business owner I cannot afford to invest in an IRA or health insurance. That is a barrier
7. As a sole proprietor who needs health insurance, I cannot grow my business further
8. Availability of peak time seasonal and year-round part-time workers not needing health benefits
9. Barack Obama, Deval Patrick, the State Legislature and rampant corruption therein
10. Being an island, Cape Cod (as well as Martha's Vineyard and Nantucket) is subject to flooding
11. Cape Cod and its various planning groups do not seem to make it possible for the right kind of job creation
12. Cape Cod Commission
13. Cape Cod Commission Historic Groups gone wild
14. Cape Cod Commission and its restrictions on development.
15. Cape Cod Commission!
16. Cape Cod Commission. It has exceeded its original mandate in scope.
17. Capital and the ability to find proper distribution channels.
18. Climate for renovation, additions and new residential projects is low.
19. Comment on the above: we don't need NEW businesses; rather, we need to make the most of what we already have
20. Companies from off-Cape who advertise here and take business away from local businesses.
21. Current economic climate and complete lack of confidence in government and current executive branch
22. Currently, federal political bickering has a serious effect on the economy
23. Decline in housing sales
24. Difficult regulatory agencies
25. Economy

26. Economy has been tough
27. Employee work ethic is an issue.
28. Falmouth seems very opposed to development and business.
29. Financing seasonal nature/tourism
30. Finding any winter/off season employees who will be paid on the books. Huge culture of working off
31. Finding dependable workers with a good work ethic and affordable housing
32. Finding people with excellent computer skills
33. Foreigners who are running businesses without carrying liability or worker's comp. insurance
34. Getting capital from banks/lenders
35. Government regulations are oppressive, and the enforcement is officious.
36. Greatest barrier to growth in the Commonwealth remains predictability of tax code, regulations
37. Health Insurance is the number one issue.
38. Health insurance, taxes and electricity costs
39. Hostile town and regulatory climate opposed to anything & discussion is dominated by NIMBY's
40. I am a photographer. Technology has made it easy for non-professionals to enter the field.
41. I have a specialty and there are not a lot of trained employees out there with the skills I need.
42. Illegal foreign labor
43. In addition to the low pay on Cape Cod is the mistreatment of employees esp. local people.
44. Increasing number of taxes, including town occupancy taxes.
45. Insurance costs (Liability, Workman's Comp, & Health) have had such huge increases over the past
46. Jobs that pay well enough for young families to afford nursery school/child care.
47. Just not enough work as building has slowed to stop for new housing
48. Lack of a year round economy. There is nothing done to promote Cape Cod as a year round destination
49. Lack of access to capital for early-stage non-profitable and/or non-revenue ventures.
50. Lack of centralized economic development coordination.
51. Lack of economic growth and lack of job opportunities to attract and retain good new talent.
52. Lack of National Employment & Confidence.

53. Lack of reliable public transportation for visitors and staff
54. Lack of skilled licensed labor affects my business significantly.
55. Local and State Government needs to reduce Taxes and offer more incentives to small business
56. Local town govt and state govt raising fees, increasing regulations and paperwork
57. Local towns lack of organization, departments do not work together. Board of health in particular
58. Local zoning as it applies to non profits eats into for profit business owners' revenue.
59. Location of our business vis-a-vis our markets.
60. Many of my customers make very low wages on the Cape and it is very expensive to live here
61. More stringent building code requirements based on energy conservation and assumptions about 110 mph
62. Most are already captured above.
63. My impediment is my own learning curve for running the business
64. N/A
65. N/A
66. Need better public transportation throughout Cape Cod...not JUST for visitors - for everyone!!
67. No
68. No
69. No
70. No but I think there should be more mixed use zoning of business and residential
71. Only the economy. Currently, nonprofit entities are suffering from the loss of government support
72. Other Barriers
73. Our competition has recently engaged in heavily discounted offers such as Groupon, Living Social, et
74. Our economy. the success of my business relies heavily on the architectural and construction industry
75. Our state tourist dollars go to the Chamber and then they do NOTHING for small business...NOTHING
76. Overly stringent federal regulation.
77. Rental of private homes to vacationers. People are packed in.
78. Scale! There are very few sources of the capital funding and support that would allow us to ramp up

79. Separate application and approval requirements by town, county and state regulators are barriers
80. Services to support families with young children on Cape Cod
81. Spot zoning is always a barrier. Zoning without consideration of the overall community is mishandled
82. State and Federal Regulations - Anti Business Litigation Climate in MA
83. State and Federal regulatory agencies.
84. State level taxes, fees, regulations
85. State rules and regulations and compliance issues, health insurance is huge
86. Taxation, stagnation, apathy of elected officials. Too many ""commissions"" with no value-added
87. The above are not relevant to our work, which is spread across the country.
88. The Cape Cod Commission
89. The Cape Cod Commission is a barrier.
90. The Cape Cod Commission is FAR too anti-growth generally.
91. The cost of advertising is an issue.
92. The cost of doing business has been rising exponentially, non-stop
93. The cost of employee health insurance is the number one issue - far and away.
94. The economy has made fundraising difficult.
95. The fact that the Cape is closed to any business that is not green in nature. No jobs is the worst
96. The lack of small business support, buy local....and the lack of vision for the future growth of cape
97. The length of time for nearly all government decision making at all levels in Massachusetts
98. The mindset against wind development that is being exploited by an off-Cape anti-wind faction
99. The only other main barrier is self-imposed, as I am the primary caregiver of our school-aged children
100. The particular skill and experience I need in an employee is currently very hard to find
101. The potential loss or elimination of the H2B guest worker program.
102. The Seasonality of the Cape Area
103. The year round population is not diverse enough- mainly retirees and blue- collar workers.
104. Too many contractors operate without paying payroll taxes and pay employees as subcontractors.

105.	Too many regulations.
106.	Too many seasonals taking business away from year-rounders
107.	Unrealistic expectations of the cost of Internet Service.
108.	We are dependent on grants and donations to stay in business
109.	Without question....government intrusion and control at all levels.....local, state and federal.
110.	Would love to rent a space and set up shop but rents on Main Street are TOO HIGH and the landlords d
111.	YES the school schedules are ruining us. The colleges let the kids out in May when it is too early
112.	Yes, the promoting of 50% or go to another business by the media can cause our business to fold.
113.	Your web page does not allow me to answer the questions above, kind of what I would expect from a UM
114.	Zoning, permitting, licensing

What, if anything, could local/county government do to support your business' growth?
1. Cause the regulatory agencies to become more consumer friendly.
2. Chamber of Commerce visitor information should be supporting the outer cape businesses
3. Change the way Cape Cod Commission operates
4. Change the zoning laws and allow businesses to build and grow in Sandwich.
5. Charge lodging tax on all lodging rentals, not just hotels.
6. Charge us all less money for unwanted and redundant services
7. County services handling building departments.
8. Crack down on pervasive unemployment insurance fraud which would increase supply of workers
9. Create a viable plan for public sewer systems to replace private septic and protect land and water
10. Cut back on local taxes and permitting fees. I don't see that happening, but it would be nice.
11. Cut itself in half. cut fees, cut regulations, hire ""pro-business"" officials to key posts
12. Designated preapproved growth centers with low entry costs.
13. Do not bring in any other ""big box"" stores. Cape is known for its charm.
14. Ease zoning requirements - more affordable housing
15. Eliminate multiple levels of review and multiple department review for development projects.
16. Encourage and hire local businesses instead of using large companies from other areas
17. Encourage funding for the arts
18. Encourage home-based businesses and back off on enforcement of zoning and use restrictions.
19. Enforce labor and permitting/ licensing laws
20. Enforce the laws and regulations they already have. Go after the rule breakers
21. First and foremost, limit the regulations and bureaucracy.
22. For Storm-Treat, we would be helped by stricter storm water runoff laws, and enforcement.
23. Get out of my way.
24. Get out of our way! It's good that they try to protect water and open space, but they are clueless
25. Get out of the way.
26. Get some real facts out there to counteract the line of fear-mongering nonsense being fed to the Cape

27. Get the state and pressure the universities to start school in September
28. Government needs to stay out of business and let capitalism and free enterprise run their course
29. Greater support in the way of grants for early education.
30. Haven't a clue
31. Health insurance is very costly for small employers. Although I participate through my local chamber
32. Help with promotion of our business to off-Cape markets.
33. Hold a conference regarding the role of large corporations, based off-Cape, in determining values
34. I am very worried about the quality of drinking water on Cape Cod.
35. I approached my town manager Sharon Lynn.... she ""feels bad"" She said that the town cannot help
36. I don't need government to help me, I should help them understand the need for expense control
37. I don't think anything.....
38. I really could not think of anything.
39. I think local government should be required to purchased goods and services from the local community
40. Increased ability for our children to get to our establishment on regional public transportation.
41. It's the economy not governmental regulation that is the problem for my business.
42. Just try to assist the business and not act like they are doing them a favor by speaking to them
43. Keep out of the way. Stop regulating everything. Stop trying to make it impossible to afford housing
44. Lead by example and spend local. Advertise...spend local. Make it a mantra...spend local.
45. Lend us money at a low interest rate.
46. Less government...KEEP TAXES LOW. do something meaningful to lower insurance costs
47. less taxes
48. Let us take more for insurance on year taxes... more to off taxes in any other way possible
49. Licensing and certification of landscape contractors, improved auditing of 1099 subcontractors.
50. Loan, Capital , Grants
51. Local and County government must stop creating more studies
52. Local government is pretty good. It would be nice if Barnstable looked at their signage by-laws
53. Local taxes options on meals and rooms are unfair to the hospitality industry.

54. Local town could provide new terminal building to support airport.
55. Lower the cost of health insurance
56. Make more capital available to hard working locals
57. Make private home rentals meet the same regulations and inspections that ""legal"" accommodation face
58. More bike paths, so that one could safely explore all of CC on a bike would be great for my business
59. Most of our work is in Europe. It would be nice to get some work on the Cape.
60. Much more help with the sewer construction project. Town Government has not done enough planning
61. My business is very small (I paint occasionally for clients)
62. N/A
63. N/A
64. Not at this time.
65. Not implement a tax on vacation rentals, as the town is trying to do.
66. Not sure, exactly. My business is unique. I work at home; can't use public signs for my business
67. Offer incentives for legitimate business owners who abide by the laws; Penalize those who are breaking the law
68. Nothing; just don't increase services and don't introduce more regulations & fees.
69. Nothing
70. Offer single payer health care
71. Zone for light industrial uses
72. Promote more business
73. Promote regional public transit and renewable energy initiatives.
74. Promote small businesses
75. Protect the environment and control inappropriate development.
76. Provide a written guideline of steps necessary to open a new business.
77. Provide financial support for working families with housing costs, childcare
78. Provide grants to eligible non-profit human service agencies.
79. Reach out, get to know us, and let's figure it out together...

80. Recognize the importance of affordable childcare and family support services
81. Recognize the importance of non-profit organizations in the region's economy and offer more grants
82. Reduce regulation--especially town boards of health and conservation commissions- which look to have leverage
83. Reduce regulations.
84. Reduce regulatory oversight of every aspect of my business
85. Reduce Taxes
86. Reduce their employees, budget, and regulations by 20%.
87. See above but also take steps to encourage businesses to come here.
88. Smart business growth in each town, encourage businesses in lacking categories
89. Smarter, better zoning bylaws, both residential and commercial. Allow for pockets of higher density
90. Start investment fund that targets new early-stage non-tourism opportunities on Cape with growth potential
91. Stay out of my business
92. Stay out of the way. Why would the government need to be involved with private business?
93. STOP promoting International Tourism. They never buy any retail items
94. Stop with the endless fees and permits. A tax is a tax no matter what you call it.
95. Streamline permitting.
96. Supply technical support in the area of energy conservation consulting and funding for alternative energy
97. Support and Protect Businesses the same way they protect individuals. Not more just equally.
98. Support Culture, Tech, and Conference businesses that are compatible with the Cape's environment
99. Support taxation of internet sales on the state and national levels. Consider bids from local businesses
100. Support increased tourism marketing for the region.
101. Support taxation of internet sales on the state and national levels. Consider bids from local businesses
102. Support temporary housing for seasonal workers
103. Support various other business so that we have growth in that sector; business can/will sell to each other

104.	Take away Cape Cod Commission's regulatory function and give it back to the Towns
105.	Take away some of the regulations, taxes, and fees.
106.	Talk to small businesses to find out there needs...set up a forum for businesses up to five employees
107.	Tax breaks. Where major corporations are given huge tax breaks and incentives
108.	Tax incentives, removing occupancy taxes; personal excise taxes are a personal affront.
109.	Tax rates which reflect true business property value.
110.	The county could stop paying its administrator, assistant administrator and County Commissioners
111.	The government needs to stop the media from promoting discounts, etc
112.	Understand the Cape needs good strong business to support all communities on Cape Cod.
113.	Uniform regulations across town, county and state.
114.	Use some common sense for new development plans and for reuse of existing spaces.
115.	Using more common sense on licensing, zoning & permitting, hours of operation, spending,
116.	Work to lower health insurance costs.
117.	Cape wide, there are mostly ineffective Economic Development organizations.
118.	Bring highly skilled, highly-paid professional jobs to the Cape.
119.	Better transportation. Lower state and local meals tax. Incentivize ""worker housing"" options.
120.	Better public transportation to and from the Cape. New Train system!!!
121.	Better internet access. We have to use satellite internet which limits our ability to download info
122.	Be realistic! When one department has NO CLUE about what another department requires
123.	Be more tax friendly to tourism economy. They are taxing Occupancy and meals at a higher rate
124.	Be aware that a community is either growing and developing or declining.
125.	Apply zoning and planning laws evenly. Not issue special permits unless it benefits the community
126.	Although, not particular to my business, local towns are parochial in their thinking. More openness
127.	Actively support and implement renewable energy use.

128.	Abolish the Cape Cod Commission. There is enough regulation in place
129.	Abolish Cape Cod Commission
130.	A lot of people have incurred credit issues over the last few years due to the economy.
131.	a local university would help affordable accessible training and conference space
132.	1) The local, county and state governments need to reconsider the tax laws

What type of waste water disposal system does your business currently use? (Other responses)
1. Also Title 5
2. Composting Toilet
3. I think
4. No need
5. Our own de-nitrifying plant
6. These questions certainly tell where you are coming from.
7. Will be getting Title 5 soon