



# MARKET ASSESSMENT FOR CAPE COD, MASSACHUSETTS

PREPARED FOR:

The Cape Cod Commission

PREPARED BY:

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UNDER CONTRACT TO  
TISCHLERBISE**

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## Introduction

The following document is a market assessment defining opportunities for the Cape Cod/Barnstable County area in Massachusetts. It was prepared by The Chesapeake Group, inc. for TischlerBise for the Cape Cod Commission. Its sole purpose or intent is to provide guidance for future area development and related land use planning.

The analysis indicates that there is opportunity to expand economic activity on Cape Cod in the future. However, pursuit of economic activity will likely require a mixing of uses or mixed-use in more than one-story structures and some allowance of increased density of development in a sustainable environment.

The analysis does not address collective or existing zoned acreage for any and all sites. The holding capacity of currently zoned land for any and all uses is not addressed. The report is based on information gathered through a variety of means including those that follow.

- ✓ Face-to-face or one-on-one interviews with select stakeholders.
- ✓ Small group discussion sessions with stakeholders.
- ✓ Surveys of households throughout Cape Cod.
- ✓ A review of secondary available data, such as that from the U.S. Census Bureau, the Cape Cod Commission, the Chamber of Commerce, the Commonwealth of Massachusetts and others.
- ✓ Proprietary computer modeling.
- ✓ Experience of The Chesapeake Group's principals involved with the effort.

All estimates of potential in the analyses are conservative in nature, tending to understate demand, opportunities and activity. The estimates and suggested activity are based on conservative assumptions for the markets potentially served and represent only The Chesapeake Group's opinion based on the analyses and experiences of the organization. Throughout the document, specific names of organizations and businesses are mentioned. This neither reflects an endorsement by The Chesapeake Group, TischlerBise, Barnstable County, and the Cape Cod Commission; nor any expression of interest by the entities.

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## Context

There are demographic and other changes within the United States that impact the opportunities and the future for Cape Cod activity in general. These include but are not limited to those that follow.

- ✓ Birth rates have fallen to the lowest or near lowest level in the history of the country.
- ✓ Fertility rates are at the lowest or near lowest level in history as well.
- ✓ The marriage rates continue to decline and are also at the lowest level in the country's history.
- ✓ The higher the education level, the lower the above rates are.
- ✓ The average age of residents continues to increase both within United States and Cape Cod. Population in the country continues to diversify in terms of origin, ethnicity, race and other related factors.
- ✓ Aging population likely increases the demand for activity often associated with certain services, while diminishing demand in others.
- ✓ Manufacturing changes will impact retail and related space in significant ways in the future.

- ✓ Countering the need for lower inventories for retail on site resulting from increased “on demand” production and the internet is the trend among box stores and others to fulfill online orders from stores versus warehouses.
- ✓ Retailing survival is often a result of combining “entertainment” experiences with purchases of goods and services.

In addition to the noted impacts, there are local issues that impact opportunities as perceived by visitors and full-time and part-time residents. The most notable is the negative perception of “in season” vehicular traffic volume.

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## Gap Analysis/Comparative Assessment (County Level)

Multiple analyses, including both a comparative assessment or gap analysis and demand forecasting were performed to define current and future opportunities for Cape Cod and communities within the Cape. To determine additional potential uses without bias, the property must be placed within (a) the context of the larger geographic area or market, and (b) the local population. The overall purpose is to define opportunities and niches that are un-met and under-served or could potentially be successful at present or in the future on Cape Cod and its communities.

The comparative assessment or gap analysis was performed to identify business “gaps” and opportunities. The U.S. Census Bureau provides annual information on business patterns throughout the country in three different geographic formats. These are at the county, zip code, or Metropolitan Statistical Area level. This analysis includes an assessment of local business patterns at both the county and zip code levels.

The identified business gaps defined in this process may or may not be appropriate for Cape Cod because of the nature of operations, local development regulations, community goals, scale, or other factors.

It is noted that all population and household estimates upon which the comparisons are made were derived from the same source for comparability. That source was the 2010 U.S. Census Bureau data. For consistency purposes, a single source - the U.S. Census Bureau’s “County Business Patterns” - was employed to define the business structure and activity within all areas.

The North American Industry Classification System (NAICS) was introduced in 1997 as a more effective business classification system that identifies and groups establishments according to the activities in which they are primarily engaged. NAICS identifies and groups 1,170 different types of “industries” or establishments into twenty major industry sectors ranging from Agriculture (Sector 11) to Public Administration (Sector 92). This analysis examined and extracted data for all sectors for all geographic areas analyzed. The select sectors follow.

- ✓ Agriculture, Forestry, Fishing and Hunting (Sector 11): Crop and animal production, forestry and logging, fishing, hunting, trapping, support activities for agriculture and forestry.
- ✓ Mining (Sector 21): oil and gas extraction, mining, support activities for mining.

- ✓ Utilities (Sector 22): power generation, transmission, and distribution, water, sewage, and other systems.
- ✓ Construction (Sector 23): building, developing, general contracting, heavy construction, special trade contractors.
- ✓ Manufacturing (Sector 31-33): food, beverage and tobacco product, textile and textile product mills, apparel, leather and allied products, wood product, paper, printing and related support activities, petroleum and coal products, chemicals, plastics and rubber products, nonmetallic mineral products, primary metals, fabricated metal products, machinery, computer and electronic products, electronic equipment, appliances, and components, transportation equipment, furniture and related products.
- ✓ Wholesale Trade (Sector 42): durable and nondurable goods.
- ✓ Retail Trade (Sector 44-45): Motor vehicle and parts, furniture and home furnishings, electronics and appliances, building material and garden equipment and supplies, grocery and beverage, health and personal care, gasoline stations, clothing and accessories, sports, hobby, books and music, general merchandise and miscellaneous store retailers.
- ✓ Transportation and Warehousing (Sector 48-49): air, rail, water, and truck transportation, transit and ground passenger transportation, pipeline transportation, scenic and sightseeing transportation, support activities for transportation, postal service, couriers and messengers, warehousing and storage.
- ✓ Information (Sector 51): Publishing, motion picture and sound recording and exhibition, broadcasting and telecommunications, information services and data processing.
- ✓ Finance and Insurance (Sector 52): Monetary authorities, credit intermediation, securities, commodities, insurance, funds, trusts, and other financial vehicles.
- ✓ Real Estate, Rental and Leasing (Sector 53): Real estate, rental centers and leasing services.
- ✓ Professional, Scientific and Technical Services (Sector 54): Lawyers, accountants, engineers, computer services, veterinary services, etc.
- ✓ Management of Companies and Enterprises (Sector 55): Management, holding companies, corporate and regional offices.
- ✓ Administrative and Support, Waste Management and Remediation Services (Sector 56): Administrative and facilities support services, employment and business support services, travel arrangements, investigative and security systems and other business services.
- ✓ Educational Services (Sector 61): Public sector schools, business, technical, trade schools and instruction.
- ✓ Health Care and Social Assistance (Sector 62): Ambulatory health care services, hospitals, nursing and residential care facilities and social assistance.
- ✓ Arts, Entertainment, and Recreation (Sector 71): Performing arts, spectator sports, museums, historical sites, amusement, gambling and recreation industries.
- ✓ Accommodation and Food Services (Sector 72): Accommodations, food service and drinking places.
- ✓ Other Services (Sector 81): Repair and maintenance, personal and laundry services, and religious, grant making, civic and professional organizations.
- ✓ Public Administration (Sector 92): executive, legislative, and other general government support, justice, public order, and safety activities, administration of human resource programs, administration of environmental quality programs, administration of housing programs, urban planning, and community development, administration of economic programs, space research and technology, national security and international affairs.

The initial gap analysis compared the business structure of Barnstable County to that associated with other counties that are “similar.” In determining communities for which the comparison can be made, the following criteria were used.

- ✓ The population had to be similar to those associated with Barnstable County, since demand for many goods and services are ultimately dependent largely upon the size of the market served.
- ✓ The number of households had to be similar to those associated with Barnstable County, since demand for many goods and services are ultimately dependent largely upon the size of the market served.
- ✓ The selected areas all have median household incomes that are comparable to Barnstable County.
- ✓ The counties had to be located in or in close proximity to larger metropolitan areas.
- ✓ Counties had to be on or have within significant water features that attract non-residents.
- ✓ The selected communities all had to have a significant base of visitor activity and visitations.
- ✓ Transportation and highway access had to be similar.

Based on the criteria, seven counties were identified for which comparisons in economic structures were made. These seven communities follow.

- |                 |                       |
|-----------------|-----------------------|
| Collier Co FL   | Monterey Co CA        |
| Galveston Co TX | San Luis Obispo Co CA |
| Kitsap Co WA    | Santa Cruz Co CA      |
| Marin Co CA     |                       |

Under-represented “industries” were then defined as those where Barnstable County had a lesser number of businesses than at least six of the other seven communities. Thus, the number of businesses in Barnstable County compared to the other communities was below what might be expected. It is further noted that in some cases the under-represented industry differences are great; and in others they are smaller. Once again, under-representation does not mean that the identified categories of businesses are desirable for Cape Cod.

The following are the “industries” or businesses identified as being under-represented in Barnstable County. One hundred forty-nine (149) were identified in total with the majority presented in the table that follows.

*Table 1 - Under-represented Industries in Barnstable County\**

<b>Industry code</b>	<b>Industry code description</b>
115112	Soil preparation, planting, and cultivating
115114	Postharvest crop activities (except cotton ginning)
221122	Electric power distribution
236116	New multifamily housing construction (except operative builders)
236220	Commercial and institutional building construction
237210	Land subdivision
237310	Highway, street, and bridge construction
238110	Poured concrete foundation and structure contractors
238120	Structural steel and precast concrete contractors

*Table 1 - Under-represented Industries in Barnstable County (Continued)\**

Industry code	Industry code description
238150	Glass and glazing contractors
238160	Roofing contractors
238310	Drywall and insulation contractors
238340	Tile and terrazzo contractors
311811	Retail bakeries
321911	Wood window and door manufacturing
323113	Commercial screen printing
325412	Pharmaceutical preparation manufacturing
332212	Hand and edge tool manufacturing
332312	Fabricated structural metal manufacturing
332323	Ornamental and architectural metal work manufacturing
332510	Hardware manufacturing
332710	Machine shops
334418	Printed circuit assembly (electronic assembly) manufacturing
335314	Relay and industrial control manufacturing
337110	Wood kitchen cabinet and countertop manufacturing
337122	Non-upholstered wood household furniture manufacturing
339920	Sporting and athletic goods manufacturing
423120	Motor vehicle supplies and new parts merchant wholesalers
423430	Computer and computer peripheral equipment and software merchant wholesalers
423450	Medical, dental, and hospital equipment and supplies merchant wholesalers
423460	Ophthalmic goods merchant wholesalers
423610	Electrical apparatus & equipment, wiring supplies & equip. merchant wholesalers
423620	Electrical and electronic appliance, television, and radio set merchant wholesalers
423710	Hardware merchant wholesalers
423820	Farm and garden machinery and equipment merchant wholesalers
423830	Industrial machinery and equipment merchant wholesalers
423840	Industrial supplies merchant wholesalers
423910	Sporting and recreational goods and supplies merchant wholesalers
423920	Toy and hobby goods and supplies merchant wholesalers
423930	Recyclable material merchant wholesalers
423940	Jewelry, watch, precious stone, and precious metal merchant wholesalers
424120	Stationery and office supplies merchant wholesalers
424210	Drugs and druggists' sundries merchant wholesalers
424410	General line grocery merchant wholesalers
424420	Packaged frozen food merchant wholesalers
424810	Beer and ale merchant wholesalers
425120	Wholesale trade agents and brokers
441320	Tire dealers

*Table 1 - Under-represented Industries in Barnstable County (Continued)\**

Industry code	Industry code description
443112	Radio, television, and other electronics stores
445210	Meat markets
446120	Cosmetics, beauty supplies, and perfume stores
451140	Musical instrument and supplies stores
451220	Prerecorded tape, compact disc, and record stores
452111	Department stores (except discount department stores)
452112	Discount department stores
453210	Office supplies and stationery stores
453991	Tobacco stores
454111	Electronic shopping
454210	Vending machine operators
454312	Liquefied petroleum gas (bottled gas) dealers
484122	General freight trucking, long-distance, less than truckload
484220	Specialized freight (except used goods) trucking, local
488410	Motor vehicle towing
488510	Freight transportation arrangement
488991	Packing and crating
492210	Local messengers and local delivery
493110	General warehousing and storage
512110	Motion picture and video production
515120	Television broadcasting
518210	Data processing, hosting, and related services
519130	Internet publishing and broadcasting and web search portals
522110	Commercial banking
522130	Credit unions
522310	Mortgage and non-mortgage loan brokers
523110	Investment banking and securities dealing
523930	Investment advice
524114	Direct health and medical insurance carriers
524126	Direct property and casualty insurance carriers
524127	Direct title insurance carriers
524210	Insurance agencies and brokerages
524292	Third party administration of insurance and pension funds
531110	Lessors of residential buildings and dwellings
531120	Lessors of nonresidential buildings (except mini-warehouses)
531130	Lessors of mini-warehouses and self-storage units
531190	Lessors of other real estate property
531312	Nonresidential property managers



*Table 1 - Under-represented Industries in Barnstable County (Continued)\**

Industry code	Industry code description
531320	Offices of real estate appraisers
532120	Truck, utility trailer, and RV (recreational vehicle) rental and leasing
532230	Video tape and disc rental
532411	Commercial air, rail, and water transportation equipment rental and leasing
533110	Lessors of nonfinancial intangible assets (except copyrighted works)
541213	Tax preparation services
541310	Architectural services
541340	Drafting services
541360	Geophysical surveying and mapping services
541420	Industrial design services
541430	Graphic design services
541511	Custom computer programming services
541512	Computer systems design services
541513	Computer facilities management services
541611	Administrative management and general management consulting services
541711	Research and development in biotechnology
541720	Research and development in the social sciences and humanities
541820	Public relations agencies
541830	Media buying agencies
541840	Media representatives
541850	Display advertising
541910	Marketing research and public opinion polling
541921	Photography studios, portrait
541930	Translation and interpretation services
541940	Veterinary services
551114	Corporate, subsidiary, and regional managing offices
561311	Employment placement agencies
561320	Temporary help services
561431	Private mail centers
561612	Security guards and patrol services
561622	Locksmiths
561710	Exterminating and pest control services
562211	Hazardous waste treatment and disposal
562910	Remediation services
611310	Colleges, universities, and professional schools
611420	Computer training
611430	Professional and management development training
611512	Flight training

*Table 1 - Under-represented Industries in Barnstable County (Continued)\**

Industry code	Industry code description
611691	Exam preparation and tutoring
621111	Offices of physicians (except mental health specialists)
621112	Offices of physicians, mental health specialists
621210	Offices of dentists
621310	Offices of chiropractors
621330	Offices of mental health practitioners (except physicians)
621340	Offices of physical, occupational and speech therapists, and audiologists
621492	Kidney dialysis centers
621493	Freestanding ambulatory surgical and emergency centers
621512	Diagnostic imaging centers
622110	General medical and surgical hospitals
623312	Homes for the elderly
624230	Emergency and other relief services
711211	Sports teams and clubs
711510	Independent artists, writers, and performers
721310	Rooming and boarding houses
722212	Cafeterias, grill buffets, and buffets
811112	Automotive exhaust system repair
811113	Automotive transmission repair
811191	Automotive oil change and lubrication shops
811192	Car washes
811310	Commercial machinery repair and maintenance
812220	Cemeteries and crematories
813920	Professional organizations
813930	Labor unions and similar labor organizations

\*Developed by The Chesapeake Group, Inc. 2013.

There are significant clusters of manufacturing and wholesaling among the industries under-represented that may not be appropriate, along with a minimal amount of retail operations including “box” operations. However, one of the significant clusters identified is that may be appropriate for further expansion in the Cape is medical services.

In addition to those under-represented, there are many businesses over-represented. Over-representation is defined when Barnstable County has more of the industry or type of operation than six of the other seven counties. Table 2 contains the 156 over-represented businesses in Barnstable County.

Table 2 - Over-represented Industries in Barnstable County\*

Industry Code	Industry code description
114111	Finfish fishing
114112	Shellfish fishing
114210	Hunting and trapping
115210	Support activities for animal production
221210	Natural gas distribution
236115	New single-family housing construction (except operative builders)
236118	Residential remodelers
237110	Water and sewer line and related structures construction
237130	Power and communication line and related structures construction
238130	Framing contractors
238140	Masonry contractors
238170	Siding contractors
238210	Electrical contractors and other wiring installation contractors
238220	Plumbing, heating, and air-conditioning contractors
238330	Flooring contractors
238350	Finish carpentry contractors
238910	Site preparation contractors
311330	Confectionery manufacturing from purchased chocolate
311340	Non-chocolate confectionery manufacturing
311813	Frozen cakes, pies, and other pastries manufacturing
314912	Canvas and related product mills
323110	Commercial lithographic printing
323115	Digital printing
323122	Prepress services
325510	Paint and coating manufacturing
325612	Polish and other sanitation good manufacturing
332721	Precision turned product manufacturing
333511	Industrial mold manufacturing
334412	Bare printed circuit board manufacturing
334511	Search, detect., nav., guidance, aeronautical & nautical system & instrument. manu.
334513	Instruments & rel. products manu. for measuring, displaying & controlling industries
334516	Analytical laboratory instrument manufacturing
336611	Ship building and repairing
336612	Boat building
337212	Custom architectural woodwork and millwork manufacturing
339113	Surgical appliance and supplies manufacturing
339914	Costume jewelry and novelty manufacturing
423110	Automobile and other motor vehicle merchant wholesalers

*Table 2 - Over-represented Industries in Barnstable County (Continued)\**

Industry Code	Industry code description
423320	Brick, stone, and related construction material merchant wholesalers
423720	Plumbing and heating equipment and supplies (hydronics) merchant wholesalers
424310	Piece goods, notions, and other dry goods merchant wholesalers
424320	Men's and boys' clothing and furnishings merchant wholesalers
424330	Women's, children's, and infants' clothing and accessories merchant wholesalers
424450	Confectionery merchant wholesalers
424460	Fish and seafood merchant wholesalers
424610	Plastics materials and basic forms and shapes merchant wholesalers
424710	Petroleum bulk stations and terminals
424920	Book, periodical, and newspaper merchant wholesalers
441120	Used car dealers
441222	Boat dealers
442110	Furniture stores
442210	Floor covering stores
442291	Window treatment stores
444130	Hardware stores
444210	Outdoor power equipment stores
444220	Nursery, garden center, and farm supply stores
445120	Convenience stores
445220	Fish and seafood markets
445292	Confectionery and nut stores
445310	Beer, wine, and liquor stores
446130	Optical goods stores
446191	Food (health) supplement stores
447190	Other gasoline stations
448110	Men's clothing stores
448120	Women's clothing stores
448130	Children's and infants' clothing stores
448140	Family clothing stores
448310	Jewelry stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
451130	Sewing, needlework, and piece goods stores
451211	Book stores
451212	News dealers and newsstands
453110	Florists
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores

Table 2 - Over-represented Industries in Barnstable County (Continued)\*

Industry Code	Industry code description
453920	Art dealers
454311	Heating oil dealers
481111	Scheduled passenger air transportation
481211	Nonscheduled chartered passenger air transportation
483114	Coastal and great lakes passenger transportation
483212	Inland water passenger transportation
485113	Bus and other motor vehicle transit systems
485310	Taxi service
485320	Limousine service
485410	School and employee bus transportation
487110	Scenic and sightseeing transportation, land
487210	Scenic and sightseeing transportation, water
488111	Air traffic control
488310	Port and harbor operations
511110	Newspaper publishers
511130	Book publishers
511140	Directory and mailing list publishers
512131	Motion picture theaters (except drive-ins)
515112	Radio stations
515210	Cable and other subscription programming
517110	Wired telecommunications carriers
519120	Libraries and archives
522120	Savings institutions
531210	Offices of real estate agents and brokers
532111	Passenger car rental
532220	Formal wear and costume rental
532292	Recreational goods rental
541214	Payroll services
541350	Building inspection services
541370	Surveying and mapping (except geophysical) services
541410	Interior design services
541612	Human resources consulting services
541620	Environmental consulting services
541860	Direct mail advertising
541870	Advertising material distribution services
561440	Collection agencies
561520	Tour operators
561730	Landscaping services
561920	Convention and trade show organizers

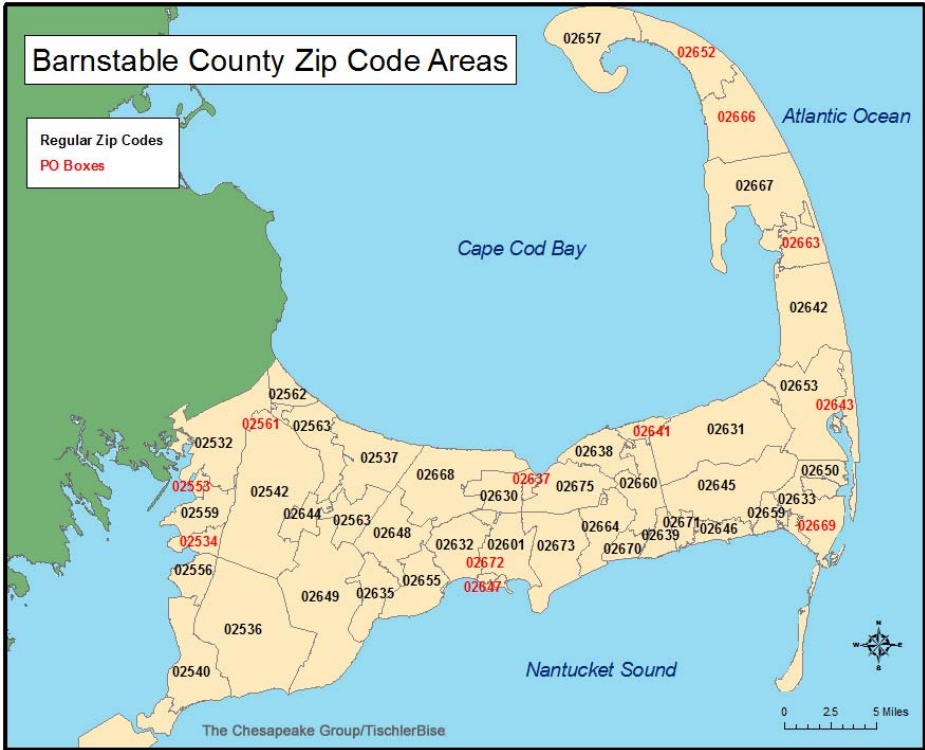
*Table 2 - Over-represented Industries in Barnstable County (Continued)\**

Industry Code	Industry code description
562111	Solid waste collection
562920	Materials recovery facilities
562991	Septic tank and related services
611620	Sports and recreation instruction
611630	Language schools
611692	Automobile driving schools
611710	Educational support services
621420	Outpatient mental health and substance abuse centers
621511	Medical laboratories
623110	Nursing care facilities
623210	Residential mental retardation facilities
624120	Services for the elderly and persons with disabilities
624210	Community food services
624221	Temporary shelters
711310	Promoters of performing arts, sports, and similar events with facilities
712110	Museums
712120	Historical sites
713120	Amusement arcades
713910	Golf courses and country clubs
713930	Marinas
713940	Fitness and recreational sports centers
713950	Bowling centers
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
721211	RV (recreational vehicle) parks and campgrounds
721214	Recreational and vacation camps (except campgrounds)
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
811122	Automotive glass replacement shops
811213	Communication equipment repair and maintenance
811412	Appliance repair and maintenance
811420	Reupholstery and furniture repair
812111	Barber shops
812112	Beauty salons
812210	Funeral homes and funeral services
812921	Photofinishing laboratories (except one-hour)
812930	Parking lots and garages
813312	Environment, conservation and wildlife organizations
813410	Civic and social organizations
813910	Business associations

\*Developed by The Chesapeake Group, Inc. 2013.

Included in the over-represented industries are numerous retail goods and related services operations, including the range of food service operations, such as restaurants.

### Gap Analysis/Comparative Assessment (Zip Code Level)



The comparative assessment was also performed at the zip code level as well. There were over thirty zip codes for which this level of analysis was performed. It included all zip codes within the Cape, with the exclusion of those having only post office boxes as addresses.

As was the case for the county level analysis, criteria were utilized to define similar zip codes around the country. Those criteria follow.

- ✓ The population had to be similar to those associated with the respective zip code, since demand for many goods and services are ultimately dependent largely upon the size of the market served.
- ✓ The number of households had to be similar to those associated with the respective zip code, since demand for many goods and services are ultimately dependent largely upon the size of the market served.
- ✓ The selected areas all have median household incomes that are comparable to the respective zip code.
- ✓ The zip codes had to be on or in immediate vicinity of significant water features that attract non-residents.
- ✓ Transportation and highway access had to be similar.
- ✓ Climate had to be reasonably similar.

Each zip code was compared to seven or more zip codes with under and over-representation defined in a similar manner to that defined at the county level. The following is the synopsis of the under-represented and over-represented activity by zip code for all defined Cape Cod zip codes. In and of themselves, the tables define activity for which there are "gaps" in that particular zip code.

## Zip Code - Barnstable

### 02630

#### Under-represented

Industry Code	Industry Code Description
445310	Beer, wine, and liquor stores
722211	Limited-service restaurants

#### Over-represented

Industry Code	Industry Code Description
453920	Art dealers
713930	Marinas
713990	All other amusement and recreation industries

## Zip Code - Brewster

### 02631

#### Under-represented

Industry Code	Industry Code Description
	Supermarkets and other grocery (except convenience) stores
445110	stores
446110	Pharmacies and drug stores
447110	Gasoline stations with convenience stores
447190	Other gasoline stations
453310	Used merchandise stores
454311	Heating oil dealers
454390	Other direct selling establishments
713940	Fitness and recreational sports centers

#### Over-represented

Industry Code	Industry Code Description
442299	All other home furnishings stores
444220	Nursery, garden center, and farm supply stores
445210	Meat markets
445220	Fish and seafood markets
445230	Fruit and vegetable markets
445292	Confectionery and nut stores
445310	Beer, wine, and liquor stores
446191	Food (health) supplement stores
448130	Children's and infants' clothing stores
451120	Hobby, toy, and game stores
451211	Book stores
453220	Gift, novelty, and souvenir stores
453920	Art dealers
454113	Mail-order houses
711120	Dance companies
711510	Independent artists, writers, and performers



712110	Museums
712120	Historical sites
721191	Bed-and-breakfast inns
721211	RV (recreational vehicle) parks and campgrounds
721214	Recreational and vacation camps (except campgrounds)
722310	Food service contractors
722320	Caterers

**Zip Code – Buzzards Bay**

**02542**

**Under-represented**

Industry Code	Industry Code Description
	None

**Over-represented**

Industry Code	Industry Code Description
	None

**Zip Code – Buzzards Bay**

**02532**

**Under-represented**

Industry Code	Industry Code Description
441310	Automotive parts and accessories stores
443112	Radio, television, and other electronics stores
444130	Hardware stores
444190	Other building material dealers
446110	Pharmacies and drug stores
453310	Used merchandise stores
713940	Fitness and recreational sports centers

**Over-represented**

Industry Code	Industry Code Description
441110	New car dealers
441210	Recreational vehicle dealers
441222	Boat dealers
445110	Supermarkets and other grocery (except convenience) stores
445120	Convenience stores
445220	Fish and seafood markets
446130	Optical goods stores
448130	Children's and infants' clothing stores
448310	Jewelry stores
451110	Sporting goods stores
712110	Museums
713930	Marinas
713950	Bowling centers
721110	Hotels (except casino hotels) and motels
722110	Full-service restaurants

722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722310	Food service contractors
722410	Drinking places (alcoholic beverages)

**Zip Code - Centerville**

**02632**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441120	Used car dealers
441310	Automotive parts and accessories stores
445110	Supermarkets and other grocery (except convenience) stores
445310	Beer, wine, and liquor stores
447110	Gasoline stations with convenience stores
452990	All other general merchandise stores
722110	Full-service restaurants
722211	Limited-service restaurants

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442291	Window treatment stores
445120	Convenience stores
453220	Gift, novelty, and souvenir stores
711320	Promoters without facilities
712120	Historical sites
713930	Marinas
713940	Fitness and recreational sports centers
713990	All other amusement and recreation industries
721110	Hotels (except casino hotels) and motels

**Zip Code - Chatham**

**02633**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
447110	Gasoline stations with convenience stores

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441110	New car dealers
442299	All other home furnishings stores
444220	Nursery, garden center, and farm supply stores
445210	Meat markets
445220	Fish and seafood markets
445292	Confectionery and nut stores
445299	All other specialty food stores
445310	Beer, wine, and liquor stores
447190	Other gasoline stations
448110	Men's clothing stores
448120	Women's clothing stores

448130	Children's and infants' clothing stores
448140	Family clothing stores
448150	Clothing accessories stores
448190	Other clothing stores
448310	Jewelry stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
451211	Book stores
452990	All other general merchandise stores
453110	Florists
453210	Office supplies and stationery stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453910	Pet and pet supplies stores
453920	Art dealers
711510	Independent artists, writers, and performers
712110	Museums
713910	Golf courses and country clubs
713930	Marinas
713940	Fitness and recreational sports centers
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
721199	All other traveler accommodation
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722410	Drinking places (alcoholic beverages)

**Zip Code - Cotuit**

**02635**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
447110	Gasoline stations with convenience stores
722211	Limited-service restaurants

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441222	Boat dealers
445120	Convenience stores
445299	All other specialty food stores
447190	Other gasoline stations
453310	Used merchandise stores
711310	Promoters with facilities
712110	Museums
713940	Fitness and recreational sports centers
721110	Hotels (except casino hotels) and motels

**Zip Code - Dennis**

**02638**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
447110	Gasoline stations with convenience stores
713930	Marinas
721191	Bed-and-breakfast inns

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442299	All other home furnishings stores
445292	Confectionery and nut stores
447190	Other gasoline stations
448120	Women's clothing stores
453210	Office supplies and stationery stores
453310	Used merchandise stores
453920	Art dealers
711510	Independent artists, writers, and performers
712110	Museums
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722320	Caterers

**Zip Code – Dennis Port**

**02639**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	None

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442110	Furniture stores
442210	Floor covering stores
444220	Nursery, garden center, and farm supply stores
445220	Fish and seafood markets
445310	Beer, wine, and liquor stores
446110	Pharmacies and drug stores
447190	Other gasoline stations
448120	Women's clothing stores
448190	Other clothing stores
448210	Shoe stores
451120	Hobby, toy, and game stores
452990	All other general merchandise stores
453220	Gift, novelty, and souvenir stores

454113	Mail-order houses
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722410	Drinking places (alcoholic beverages)

**Zip Code**  
**02536**

**Under-represented – East Falmouth**

<b>Industry Code</b>	<b>Industry Code Description</b>
	Supermarkets and other grocery (except convenience) stores
445110	stores
446110	Pharmacies and drug stores
448120	Women's clothing stores
448310	Jewelry stores
452990	All other general merchandise stores
453220	Gift, novelty, and souvenir stores
454111	Electronic shopping
722110	Full-service restaurants
722211	Limited-service restaurants
722310	Food service contractors
722410	Drinking places (alcoholic beverages)

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441222	Boat dealers
443111	Household appliance stores
444130	Hardware stores
444190	Other building material dealers
444220	Nursery, garden center, and farm supply stores
446199	All other health and personal care stores
447110	Gasoline stations with convenience stores
452112	Discount department stores
453991	Tobacco stores
454112	Electronic auctions
454311	Heating oil dealers
713910	Golf courses and country clubs
713990	All other amusement and recreation industries

**Zip Code – East Sandwich**

**02537**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	Supermarkets and other grocery (except convenience) stores
445110	stores
722110	Full-service restaurants

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441110	New car dealers
444210	Outdoor power equipment stores
444220	Nursery, garden center, and farm supply stores
445310	Beer, wine, and liquor stores
447190	Other gasoline stations
451130	Sewing, needlework, and piece goods stores
451211	Book stores
453110	Florists
453220	Gift, novelty, and souvenir stores
453991	Tobacco stores
454111	Electronic shopping
454390	Other direct selling establishments
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
722213	Snack and nonalcoholic beverage bars
722320	Caterers

**Zip Code - Eastham**

**02642**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
452990	All other general merchandise stores
453110	Florists

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
444130	Hardware stores
445299	All other specialty food stores
451110	Sporting goods stores
451211	Book stores
453220	Gift, novelty, and souvenir stores
453998	All other miscellaneous store retailers (except tobacco stores)
713120	Amusement arcades
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
721199	All other traveler accommodation
721211	RV (recreational vehicle) parks and campgrounds

**Zip Code - Falmouth**

**02540**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
444130	Hardware stores
452990	All other general merchandise stores
713910	Golf courses and country clubs

## Over-represented

<b>Industry Code</b>	<b>Industry Code Description</b>
722110	Full-service restaurants
722211	Limited-service restaurants
448120	Women's clothing stores
722213	Snack and nonalcoholic beverage bars
447190	Other gasoline stations
453220	Gift, novelty, and souvenir stores
713930	Marinas
442299	All other home furnishings stores
445310	Beer, wine, and liquor stores
448140	Family clothing stores
451110	Sporting goods stores
442110	Furniture stores
442291	Window treatment stores
444190	Other building material dealers
453910	Pet and pet supplies stores
721191	Bed-and-breakfast inns
444120	Paint and wallpaper stores
446130	Optical goods stores
446199	All other health and personal care stores
448210	Shoe stores
448310	Jewelry stores
453110	Florists
453998	All other miscellaneous store retailers (except tobacco stores)
454390	Other direct selling establishments
711310	Promoters with facilities
713950	Bowling centers
713990	All other amusement and recreation industries
722310	Food service contractors
722410	Drinking places (alcoholic beverages)
441110	New car dealers
442210	Floor covering stores
443112	Radio, television, and other electronics stores
445291	Baked goods stores
446120	Cosmetics, beauty supplies, and perfume stores
448110	Men's clothing stores
448130	Children's and infants' clothing stores
451120	Hobby, toy, and game stores
451130	Sewing, needlework, and piece goods stores
451140	Musical instrument and supplies stores
453210	Office supplies and stationery stores
454113	Mail-order houses
711320	Promoters without facilities
712120	Historical sites

**Zip Code - Forestdale**

**02644**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	none

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
443130	Camera and photographic supplies stores
447110	Gasoline stations with convenience stores
453220	Gift, novelty, and souvenir stores
711219	Other spectator sports
713940	Fitness and recreational sports centers
713990	All other amusement and recreation industries
722110	Full-service restaurants

**Zip Code - Harwich**

**02645**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441310	Automotive parts and accessories stores
443112	Radio, television, and other electronics stores
447110	Gasoline stations with convenience stores
448210	Shoe stores
453220	Gift, novelty, and souvenir stores
454390	Other direct selling establishments
722110	Full-service restaurants
722211	Limited-service restaurants

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441110	New car dealers
441120	Used car dealers
444110	Home centers
444190	Other building material dealers
444210	Outdoor power equipment stores
445310	Beer, wine, and liquor stores
448310	Jewelry stores
712110	Museums
713120	Amusement arcades
713990	All other amusement and recreation industries



Zip Code – Harwich Port

02646

Under-represented

Industry Code	Industry Code Description
445110	Supermarkets and other grocery (except convenience) stores

Over-represented

Industry Code	Industry Code Description
442110	Furniture stores
444130	Hardware stores
444190	Other building material dealers
445120	Convenience stores
445220	Fish and seafood markets
445310	Beer, wine, and liquor stores
446110	Pharmacies and drug stores
446191	Food (health) supplement stores
448310	Jewelry stores
451130	Sewing, needlework, and piece goods stores
453220	Gift, novelty, and souvenir stores
711510	Independent artists, writers, and performers
713120	Amusement arcades
713990	All other amusement and recreation industries
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars

Zip Code - Hyannis

02601

Under-represented

Industry Code	Industry Code Description
722410	Drinking places (alcoholic beverages)

Over-represented

Industry Code	Industry Code Description
441110	New car dealers
441120	Used car dealers
441210	Recreational vehicle dealers
441221	Motorcycle, ATV, and personal watercraft dealers
441222	Boat dealers
441310	Automotive parts and accessories stores
441320	Tire dealers
442110	Furniture stores

442210	Floor covering stores
442299	All other home furnishings stores
443111	Household appliance stores
443112	Radio, television, and other electronics stores
443120	Computer and software stores
444110	Home centers
444120	Paint and wallpaper stores
444130	Hardware stores
444190	Other building material dealers
444210	Outdoor power equipment stores
445110	Supermarkets and other grocery (except convenience) stores
445120	Convenience stores
445220	Fish and seafood markets
445292	Confectionery and nut stores
445299	All other specialty food stores
445310	Beer, wine, and liquor stores
446110	Pharmacies and drug stores
446120	Cosmetics, beauty supplies, and perfume stores
446130	Optical goods stores
446191	Food (health) supplement stores
446199	All other health and personal care stores
447110	Gasoline stations with convenience stores
447190	Other gasoline stations
448110	Men's clothing stores
448120	Women's clothing stores
448130	Children's and infants' clothing stores
448140	Family clothing stores
448150	Clothing accessories stores
448190	Other clothing stores
448210	Shoe stores
448310	Jewelry stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
451130	Sewing, needlework, and piece goods stores
451140	Musical instrument and supplies stores
451211	Book stores
451212	News dealers and newsstands
451220	Prerecorded tape, compact disc, and record stores
452111	Department stores (except discount department stores)
452112	Discount department stores
452910	Warehouse clubs and supercenters
453110	Florists
453210	Office supplies and stationery stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453910	Pet and pet supplies stores
453920	Art dealers
453991	Tobacco stores
453998	All other miscellaneous store retailers (except tobacco

	stores)
454111	Electronic shopping
454311	Heating oil dealers
454312	Liquefied petroleum gas (bottled gas) dealers
454390	Other direct selling establishments
711310	Promoters with facilities
712110	Museums
713120	Amusement arcades
713940	Fitness and recreational sports centers
713990	All other amusement and recreation industries
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722310	Food service contractors
722320	Caterers
722330	Mobile food services

### Zip Code – Marston Mills

## 02648

#### Under-represented

Industry Code	Industry Code Description
447190	Other gasoline stations
722110	Full-service restaurants
722211	Limited-service restaurants
722410	Drinking places (alcoholic beverages)

#### Over-represented

Industry Code	Industry Code Description
442110	Furniture stores
442299	All other home furnishings stores
443130	Camera and photographic supplies stores
445110	Supermarkets and other grocery (except convenience) stores
446110	Pharmacies and drug stores
446191	Food (health) supplement stores
448120	Women's clothing stores
453110	Florists
711510	Independent artists, writers, and performers
713930	Marinas
722213	Snack and nonalcoholic beverage bars

## Zip Code - Mashpee

### 02649

#### Under-represented

Industry Code	Industry Code Description
445110	Supermarkets and other grocery (except convenience) stores
447190	Other gasoline stations
453110	Florists
722310	Food service contractors
722410	Drinking places (alcoholic beverages)

#### Over-represented

Industry Code	Industry Code Description
441222	Boat dealers
442110	Furniture stores
442210	Floor covering stores
442291	Window treatment stores
442299	All other home furnishings stores
443112	Radio, television, and other electronics stores
443120	Computer and software stores
444190	Other building material dealers
444220	Nursery, garden center, and farm supply stores
445120	Convenience stores
445299	All other specialty food stores
445310	Beer, wine, and liquor stores
447110	Gasoline stations with convenience stores
448110	Men's clothing stores
448120	Women's clothing stores
448130	Children's and infants' clothing stores
448140	Family clothing stores
448210	Shoe stores
448310	Jewelry stores
448320	Luggage and leather goods stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
451211	Book stores
453210	Office supplies and stationery stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453910	Pet and pet supplies stores
454390	Other direct selling establishments
711310	Promoters with facilities
712110	Museums
713910	Golf courses and country clubs
713940	Fitness and recreational sports centers
721211	RV (recreational vehicle) parks and campgrounds
721214	Recreational and vacation camps (except campgrounds)
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars

## Zip Code – North Chatham

### 02650

#### Under-represented

Industry Code	Industry Code Description
445110	Supermarkets and other grocery (except convenience) stores
447190	Other gasoline stations
453110	Florists
722310	Food service contractors
722410	Drinking places (alcoholic beverages)

#### Over-represented

Industry Code	Industry Code Description
441222	Boat dealers
442210	Floor covering stores
442291	Window treatment stores
442299	All other home furnishings stores
443112	Radio, television, and other electronics stores
443120	Computer and software stores
444190	Other building material dealers
444220	Nursery, garden center, and farm supply stores
445299	All other specialty food stores
445310	Beer, wine, and liquor stores
447110	Gasoline stations with convenience stores
448110	Men's clothing stores
448120	Women's clothing stores
448130	Children's and infants' clothing stores
448140	Family clothing stores
448210	Shoe stores
448310	Jewelry stores
448320	Luggage and leather goods stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
451211	Book stores
453210	Office supplies and stationery stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453910	Pet and pet supplies stores
453998	All other miscellaneous store retailers (except tobacco stores)
454390	Other direct selling establishments
711310	Promoters with facilities
712110	Museums
713910	Golf courses and country clubs
713940	Fitness and recreational sports centers
721211	RV (recreational vehicle) parks and campgrounds
721214	Recreational and vacation camps (except campgrounds)
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars

**Zip Code – North Falmouth**

**02556**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
444220	Nursery, garden center, and farm supply stores

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
443112	Radio, television, and other electronics stores
445120	Convenience stores
445230	Fruit and vegetable markets
445310	Beer, wine, and liquor stores
446110	Pharmacies and drug stores
451110	Sporting goods stores
453220	Gift, novelty, and souvenir stores
454390	Other direct selling establishments
713930	Marinas

**Zip Code - Orleans**

**02653**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	none

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441110	New car dealers
441222	Boat dealers
442110	Furniture stores
442210	Floor covering stores
442291	Window treatment stores
442299	All other home furnishings stores
443112	Radio, television, and other electronics stores
443120	Computer and software stores
443130	Camera and photographic supplies stores
444110	Home centers
444120	Paint and wallpaper stores
444190	Other building material dealers
444220	Nursery, garden center, and farm supply stores
445110	Supermarkets and other grocery (except convenience) stores
445120	Convenience stores
445220	Fish and seafood markets
445230	Fruit and vegetable markets
445291	Baked goods stores
445310	Beer, wine, and liquor stores

446110	Pharmacies and drug stores
446130	Optical goods stores
446191	Food (health) supplement stores
446199	All other health and personal care stores
447190	Other gasoline stations
448110	Men's clothing stores
448120	Women's clothing stores
448130	Children's and infants' clothing stores
448140	Family clothing stores
448210	Shoe stores
448310	Jewelry stores
448320	Luggage and leather goods stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
452990	All other general merchandise stores
453110	Florists
453210	Office supplies and stationery stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453910	Pet and pet supplies stores
453920	Art dealers
453998	All other miscellaneous store retailers (except tobacco stores)
454111	Electronic shopping
454311	Heating oil dealers
711110	Theater companies and dinner theaters
711510	Independent artists, writers, and performers
713930	Marinas
713940	Fitness and recreational sports centers
713950	Bowling centers
721110	Hotels (except casino hotels) and motels
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722320	Caterers

**Zip Code - Osterville**

**02655**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
447110	Gasoline stations with convenience stores

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442110	Furniture stores
442299	All other home furnishings stores
444130	Hardware stores
444220	Nursery, garden center, and farm supply stores
445120	Convenience stores
445220	Fish and seafood markets
445292	Confectionery and nut stores

445310	Beer, wine, and liquor stores
447190	Other gasoline stations
448120	Women's clothing stores
448130	Children's and infants' clothing stores
448150	Clothing accessories stores
448210	Shoe stores
448310	Jewelry stores
451130	Sewing, needlework, and piece goods stores
453110	Florists
453220	Gift, novelty, and souvenir stores
453998	All other miscellaneous store retailers (except tobacco stores)
454113	Mail-order houses
454390	Other direct selling establishments
712110	Museums
713910	Golf courses and country clubs
713930	Marinas
713940	Fitness and recreational sports centers
713990	All other amusement and recreation industries
722320	Caterers

**Zip Code - Pocasset**

**02559**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
447110	Gasoline stations with convenience stores

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441221	Motorcycle, ATV, and personal watercraft dealers
441310	Automotive parts and accessories stores
442110	Furniture stores
443111	Household appliance stores
444130	Hardware stores
445120	Convenience stores
445310	Beer, wine, and liquor stores
447190	Other gasoline stations
451110	Sporting goods stores
453110	Florists
453930	Manufactured (mobile) home dealers
454390	Other direct selling establishments
722211	Limited-service restaurants
722310	Food service contractors



## Zip Code - Provincetown

### 02657

#### Under-represented

Industry Code	Industry Code Description
441222	Boat dealers
441310	Automotive parts and accessories stores
441320	Tire dealers
444190	Other building material dealers
446110	Pharmacies and drug stores

#### Over-represented

Industry Code	Industry Code Description
442299	All other home furnishings stores
443111	Household appliance stores
444130	Hardware stores
445110	Supermarkets and other grocery (except convenience) stores
445292	Confectionery and nut stores
445299	All other specialty food stores
445310	Beer, wine, and liquor stores
446120	Cosmetics, beauty supplies, and perfume stores
446191	Food (health) supplement stores
448110	Men's clothing stores
448120	Women's clothing stores
448140	Family clothing stores
448150	Clothing accessories stores
448190	Other clothing stores
448310	Jewelry stores
448320	Luggage and leather goods stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
451211	Book stores
451212	News dealers and newsstands
452990	All other general merchandise stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453920	Art dealers
454312	Liquefied petroleum gas (bottled gas) dealers
454390	Other direct selling establishments
711320	Promoters without facilities
711410	Agents and managers for public figures
712110	Museums
712120	Historical sites
713940	Fitness and recreational sports centers
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
721199	All other traveler accommodation
721211	RV (recreational vehicle) parks and campgrounds
721214	Recreational and vacation camps (except campgrounds)
721310	Rooming and boarding houses

722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722320	Caterers
722330	Mobile food services
722410	Drinking places (alcoholic beverages)

### Zip Code – Sagamore Beach

## 02562

#### Under-represented

Industry Code	Industry Code Description
722110	Full-service restaurants
722211	Limited-service restaurants

#### Over-represented

Industry Code	Industry Code Description
444190	Other building material dealers
445120	Convenience stores
447190	Other gasoline stations
454390	Other direct selling establishments

### Zip Code - Sandwich

## 02563

#### Under-represented

Industry Code	Industry Code Description
447110	Gasoline stations with convenience stores
448210	Shoe stores
453998	All other miscellaneous store retailers (except tobacco stores)
713940	Fitness and recreational sports centers
722211	Limited-service restaurants
722410	Drinking places (alcoholic beverages)

#### Over-represented

Industry Code	Industry Code Description
444130	Hardware stores
444190	Other building material dealers
445220	Fish and seafood markets
445230	Fruit and vegetable markets
445292	Confectionery and nut stores
445299	All other specialty food stores
448130	Children's and infants' clothing stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
454111	Electronic shopping
454210	Vending machine operators
454390	Other direct selling establishments
711510	Independent artists, writers, and performers
712110	Museums
721191	Bed-and-breakfast inns
721211	RV (recreational vehicle) parks and campgrounds
722213	Snack and nonalcoholic beverage bars
722310	Food service contractors

## Zip Code – South Chatham

### 02659

#### Under-represented

Industry Code	Industry Code Description
447110	Gasoline stations with convenience stores

#### Over-represented

Industry Code	Industry Code Description
444110	Home centers
444190	Other building material dealers
444220	Nursery, garden center, and farm supply stores
453220	Gift, novelty, and souvenir stores
721110	Hotels (except casino hotels) and motels
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars

## Zip Code – South Dennis

### 02660

#### Under-represented

Industry Code	Industry Code Description
447110	Gasoline stations with convenience stores
722110	Full-service restaurants

#### Over-represented

Industry Code	Industry Code Description
441310	Automotive parts and accessories stores
441320	Tire dealers
443120	Computer and software stores
444120	Paint and wallpaper stores
444190	Other building material dealers
444220	Nursery, garden center, and farm supply stores
445110	Supermarkets and other grocery (except convenience) stores
445120	Convenience stores
445210	Meat markets
445220	Fish and seafood markets
445230	Fruit and vegetable markets
445310	Beer, wine, and liquor stores
446130	Optical goods stores
446199	All other health and personal care stores
448140	Family clothing stores
451110	Sporting goods stores
453220	Gift, novelty, and souvenir stores
713930	Marinas
722211	Limited-service restaurants

## Zip Code – South Yarmouth

### 02664

#### Under-represented

Industry Code	Industry Code Description
447110	Gasoline stations with convenience stores

#### Over-represented

Industry Code	Industry Code Description
441120	Used car dealers
442299	All other home furnishings stores
443111	Household appliance stores
443112	Radio, television, and other electronics stores
444130	Hardware stores
444190	Other building material dealers
444220	Nursery, garden center, and farm supply stores
445292	Confectionery and nut stores
445310	Beer, wine, and liquor stores
446130	Optical goods stores
447190	Other gasoline stations
448130	Children's and infants' clothing stores
448310	Jewelry stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
452990	All other general merchandise stores
453110	Florists
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453910	Pet and pet supplies stores
711219	Other spectator sports
711310	Promoters with facilities
711320	Promoters without facilities
711510	Independent artists, writers, and performers
712190	Nature parks and other similar institutions
713120	Amusement arcades
713930	Marinas
713940	Fitness and recreational sports centers
713950	Bowling centers
713990	All other amusement and recreation industries
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars

Zip Code - Wellfleet

02667

Under-represented

Industry Code

Industry Code Description

None

Over-represented

Industry Code

Industry Code Description

441222	Boat dealers
442299	All other home furnishings stores
444110	Home centers
445120	Convenience stores
445220	Fish and seafood markets
445230	Fruit and vegetable markets
445292	Confectionery and nut stores
445310	Beer, wine, and liquor stores
448120	Women's clothing stores
448150	Clothing accessories stores
451110	Sporting goods stores
451120	Hobby, toy, and game stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453920	Art dealers
453998	All other miscellaneous store retailers (except tobacco stores)
454390	Other direct selling establishments
711320	Promoters without facilities
711510	Independent artists, writers, and performers
712120	Historical sites
713910	Golf courses and country clubs
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
721211	RV (recreational vehicle) parks and campgrounds
722110	Full-service restaurants
722211	Limited-service restaurants

**Zip Code – West Barnstable**

**02668**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	None

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442110	Furniture stores
447190	Other gasoline stations
448190	Other clothing stores
451130	Sewing, needlework, and piece goods stores
451211	Book stores
452990	All other general merchandise stores
453220	Gift, novelty, and souvenir stores
453310	Used merchandise stores
453998	All other miscellaneous store retailers (except tobacco stores)

**Zip Code – West Dennis**

**02670**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	None

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442291	Window treatment stores
445310	Beer, wine, and liquor stores
446199	All other health and personal care stores
448310	Jewelry stores
451110	Sporting goods stores
453220	Gift, novelty, and souvenir stores
711510	Independent artists, writers, and performers
713990	All other amusement and recreation industries
721110	Hotels (except casino hotels) and motels
722110	Full-service restaurants
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars
722410	Drinking places (alcoholic beverages)

**Zip Code – West Harwich**

**02671**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	None

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442299	All other home furnishings stores
444130	Hardware stores
445120	Convenience stores
453220	Gift, novelty, and souvenir stores
454111	Electronic shopping
711110	Theater companies and dinner theaters
713940	Fitness and recreational sports centers
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
722110	Full-service restaurants
722211	Limited-service restaurants
722410	Drinking places (alcoholic beverages)

**Zip Code – West Yarmouth**

**02673**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441120	Used car dealers
441310	Automotive parts and accessories stores
444130	Hardware stores
445110	Supermarkets and other grocery (except convenience) stores
447110	Gasoline stations with convenience stores
452990	All other general merchandise stores
721211	RV (recreational vehicle) parks and campgrounds

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441222	Boat dealers
442291	Window treatment stores
444190	Other building material dealers
445299	All other specialty food stores
445310	Beer, wine, and liquor stores
446110	Pharmacies and drug stores
447190	Other gasoline stations
448190	Other clothing stores
448210	Shoe stores

448310	Jewelry stores
451110	Sporting goods stores
454390	Other direct selling establishments
712130	Zoos and botanical gardens
713120	Amusement arcades
713990	All other amusement and recreation industries
721110	Hotels (except casino hotels) and motels
722110	Full-service restaurants
722212	Cafeterias, grill buffets, and buffets

**Zip Code – Woods Hole**

**02543**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
	None

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
445110	Supermarkets and other grocery (except convenience) stores
445310	Beer, wine, and liquor stores
448120	Women's clothing stores
448190	Other clothing stores
453220	Gift, novelty, and souvenir stores
713910	Golf courses and country clubs
713930	Marinas
721110	Hotels (except casino hotels) and motels
721191	Bed-and-breakfast inns
722110	Full-service restaurants
722213	Snack and nonalcoholic beverage bars
722310	Food service contractors

**Zip Code – Yarmouth Port**

**02675**

**Under-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
441120	Used car dealers
441310	Automotive parts and accessories stores
444130	Hardware stores
445120	Convenience stores
447110	Gasoline stations with convenience stores
451110	Sporting goods stores
713940	Fitness and recreational sports centers
722211	Limited-service restaurants
722213	Snack and nonalcoholic beverage bars

**Over-represented**

<b>Industry Code</b>	<b>Industry Code Description</b>
442291	Window treatment stores
445110	Supermarkets and other grocery (except convenience) stores



447190	Other gasoline stations
448310	Jewelry stores
453310	Used merchandise stores
711130	Musical groups and artists
712110	Museums
712120	Historical sites
721191	Bed-and-breakfast inns
722110	Full-service restaurants

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## Demand Forecasts

### Resident Sample

As noted, the potential for all goods and services is based on the ability of the market to purchase those goods and services. To facilitate data that can be used to project demand for goods and services in computer modeling, existing demographic information and trends were reviewed; and a survey of residents was conducted. The focus of the survey was on attitudes and opinions or issues related to economic development and current spending and activity patterns otherwise not available from other sources. The current spending is used to forecast future spending, with growth in revenues or sales and related supportable space derived from growth in the market. Theoretically, none of the growth in revenues or sales indicated is extracted from any existing operation. The following is also noted.

- ✓ All survey methodologies, including those employed by the U. S. Census Bureau, have inherent biases. Online surveys have a tendency to be biased toward higher income households and those without young children.
- ✓ Grocery shopping is used as a surrogate for convenience shopping in general; while apparel shopping is used for non-convenience shopping.
- ✓ Food for home consumption is generally purchased from supermarkets or box operations containing food space.
- ✓ People also purchase food from food service establishments. There is a relationship between the type of food service establishment and the typical price of the meal.
- ✓ There are certain forms of entertainment and recreation which are often associated with food consumption.
- ✓ Regardless of the level of income, most households spend the majority of the income on three basic commodities. These are food, housing and transportation.

More than 200 residents contributed to the survey, representing all areas of Cape Cod.

### Demographics

- ✓ The average (mean) household contains roughly 2.4 people. However, about seven out of ten households have one or two members. Only about 7% of the households have children under the age of 6.

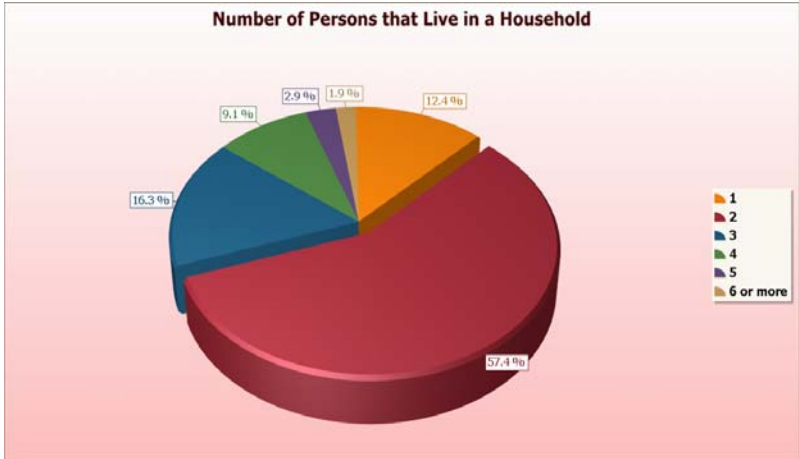


Table 3 - Number of Members in Households\*

Household Members	Percent
1	12.4%
2	57.4%
3	16.3%
4	9.1%
5	2.9%
6 or more	1.9%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ About four in ten households have two or more members employed full-time. On the other hand, about one-fourth of all households have no one employed full-time.

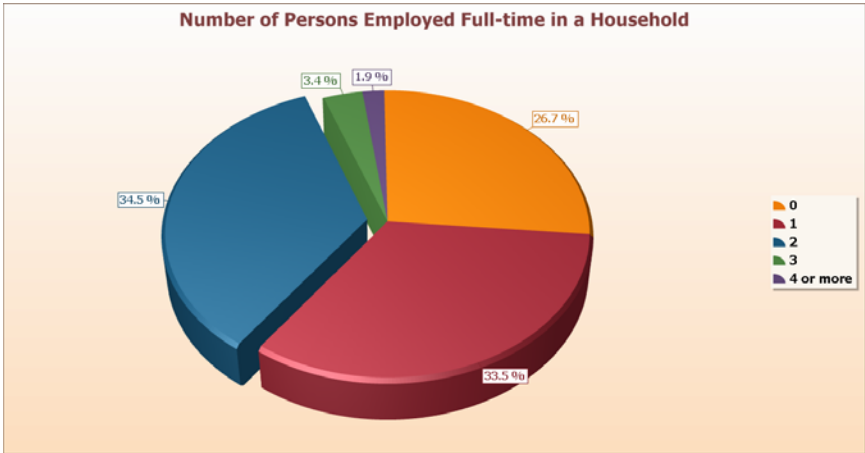


Table 4 - Number of Household Members Employed Full-time\*

Number Employed	Percent
0	26.7%
1	33.5%
2	34.5%
3	3.4%
4 or more	1.9%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ About four out of every ten households have one or more members employed part-time.

Table 5 - Number of Household Members Employed Part-time

Number Part-time	Percent
0	58.1%
1	31.8%
2	8.1%
3	1.5%
4 or more	0.5%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ 32% of the households have someone with two jobs.
- ✓ Only about 20% of the households have one or more members that would like to work full-time but for any and all reasons are not employed full-time at present.

Table 6 - Number in Household Having Someone Not Employed Full-time But Would Like Full-time Employment

Number	Percent
No/none	79.6%
Yes, 1 person	16.9%
Yes 2 or more people	3.5%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ The minority that is not working full-time that wish to do so are generally highly educated. Roughly 44% have advanced degrees; and an additional four in ten have a Bachelor’s Degree.

Table 7 - Education Level of Household Member/Members\*

Education	Percent
Less than high school	1.1%
High school	7.5%
Technical	3.2%
Some college or Associate's Degree	23.7%
Bachelor's Degree	38.7%
Advanced degree	43.5%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ A variety of reasons are identified for not having full-time work. Most have to do with the current labor market conditions either locally or nationally. However, age is also a factor.

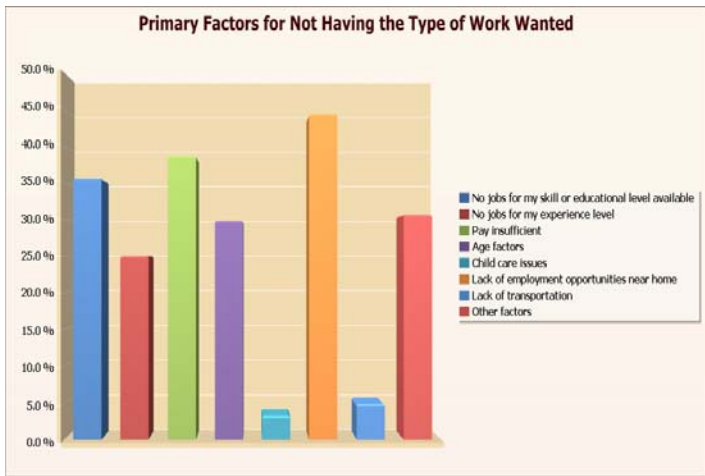


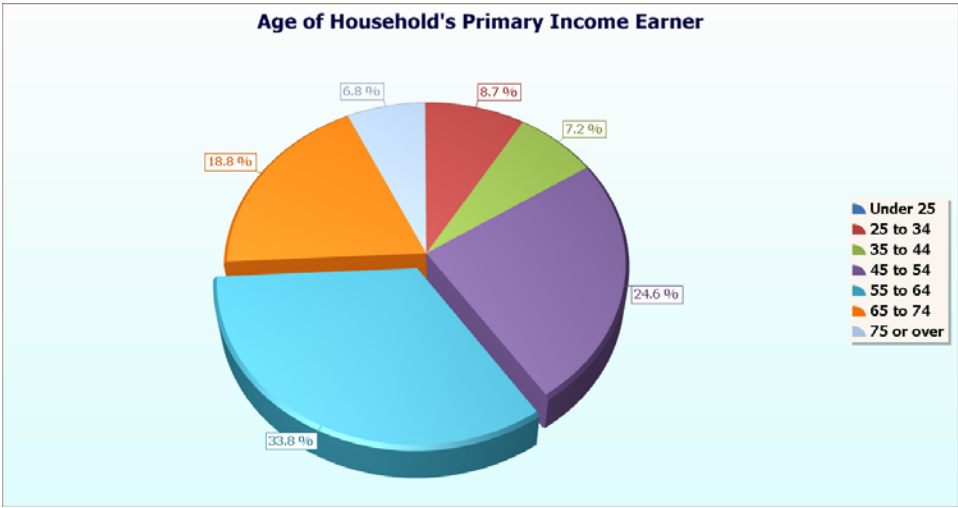
Table 8 - Primary Factors in Not Having the Type of Employment Desired\*

Primary Factors	Percent
No jobs for my skill or educational level available	35.5%
No jobs for my experience level	25.0%
Pay insufficient	38.7%
Age factors	29.8%
Child care issues	3.2%
Lack of employment opportunities near home	44.4%
Lack of transportation	4.8%
Other factors	30.6%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ In fact, about one-quarter of the households have a primary income earner at least 65 years of age. There is a high correlation between these households and the households with someone wanting full-time employment but not employed full-time.

**Age of Household's Primary Income Earner**



*Table 9 - Age of Household's Primary Income Earner\**

Age Category	Percent
Under 25	0.0%
25 to 34	8.7%
35 to 44	7.2%
45 to 54	24.6%
55 to 64	33.8%
65 to 74	18.8%
75 or over	6.8%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Income and assets are the two primary factors in the ability of households to spend on any type of goods and services. The average (mean) household income is about \$123,000. However, about four of every ten households have total annual incomes between \$50,000 and \$100,000.

*Table 10 - Average Household Income\**

Annual Household Income	Percent
Less than \$15,000	1.1%
\$15,000 to \$24,999	2.1%
\$25,000 to \$49,999	8.0%
\$50,000 to \$74,999	16.5%
\$75,000 to \$99,999	22.9%
\$100,000 to \$124,999	13.8%
\$125,000 to \$149,999	9.6%
\$150,000 to \$199,999	12.8%
\$200,000 to \$249,000	6.4%
\$250,000 to \$299,999	3.2%
\$300,000 to \$399,999	2.7%
\$400,000 or more	1.1%

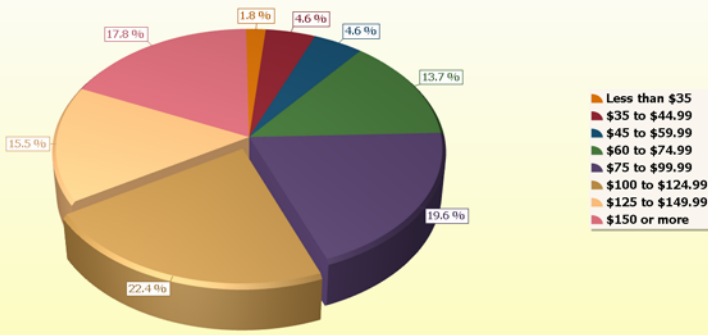
\*Developed by The Chesapeake Group, Inc., 2013.

**Spending - Food**

As noted, majority of households spend their resources on three basic commodities. Once again, these are food, transportation and housing. The type of food items purchased; the type of transportation and range of options; and the size, style and other housing characteristics typically change with household income and resources.

- ✓ Food is generally purchased for consumption off-site at home or by a food preparation establishment for consumption on premise or "carried out." The average household spends \$104 per week on groceries and related merchandise.

**Usual Amount of Money Spent on Groceries Each Week**



*Table 11 - Average Weekly Grocery Spending\**

Average Grocery Spending	Percent
Less than \$35	1.8%
\$35 to \$44.99	4.6%
\$45 to \$59.99	4.6%
\$60 to \$74.99	13.7%
\$75 to \$99.99	19.6%
\$100 to \$124.99	22.4%
\$125 to \$149.99	15.5%
\$150 or more	17.8%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Stop and Shop and Shaw’s are the two entities at which most grocery purchases are made, with Stop and Shop clearly in a dominant market position.

*Table 12 - Operations Most Often Frequented for Grocery Shopping\**

Operation	Percent
Stop and Shop	64.02%
Shaw's	10.75%
Market Basket	8.41%
Trader Joe's	7.94%
Others	6.07%
BJ's	1.87%
Barnstable Market	0.93%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Table 13 contains the general location of the establishments at which grocery and related merchandise are purchased.

*Table 13 - General Location of the Store\**

Location	Percent
Hyannis	20.28%
Orleans	10.60%
Sandwich	7.83%
Mashpee	7.83%
Harwich	7.83%
Marstons Mills	6.45%
Bourne	5.99%
Falmouth	5.53%
Yarmouth	5.07%
South Dennis	4.15%
East Harwich	4.15%
Dennis	4.15%
Provincetown	2.30%
South Yarmouth	1.84%
Barnstable	1.84%
Sagamore	1.38%
Cotuit	1.38%
Others	1.38%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ In addition to purchases made for food at traditional operations, purchases are made frequently at fresh markets, bakeries, butcher shops, dairy stores and others. About four in ten households have one or more members purchasing fresh items at non-box or supermarket operations at least once per week. More than one-half of the residents make such purchases at least twice per month.

*Table 14 - Frequency Purchase Fresh Products from Non-traditional Supermarkets, Box Stores, Etc.\**

Frequency	Percent
A few times/week	11.0%
About once/week	27.6%
About twice/month	14.3%
Once/ month	10.5%
4 to 9 times/year	14.3%
Once or twice/year	12.4%
Less often than once/year	10.0%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ The primary products purchased from the alternative operations include fresh fruit and produce in season, fresh or smoked fish, and breads and other baked goods.

*Table 15 - Type of Fresh Product Purchased from Non-traditional Operations\**

Product	Percent
Fresh produce in season	81.3%
Fresh fruit in season	60.6%
Fresh or smoked fish	50.2%
Breads	42.4%
Other baked goods	33.0%
Meats	24.6%
Others	14.3%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ More than one-half of the households have one or more members that eat lunch and dinner outside of the home at least once per week. In addition, roughly two of ten households have one or more members eating lunch or dinner out about twice each month.

*Table 16 - Frequency Eat Lunch and Dinner Outside the Home\**

Answer Options	Percent Lunch	Percent Dinner
A few times/week	29.4%	22.2%
About once/week	25.8%	34.4%
About twice/month	17.2%	20.3%
Once/ month	9.5%	8.5%
4 to 9 times/year	13.6%	7.1%
Once or twice/year	2.3%	5.2%
Less often than once/year	2.3%	2.4%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ There is a correlation between the typical per person sale and the type of establishment. Full-service establishments are overwhelmingly frequented for dinner; and more than four in ten households have one or members that generally make lunch trips to full-service operations.

*Table 17 - Type of Food Service Frequented for Lunch and Dinner\**

Type of Establishment	Percent Lunch	Percent Dinner
Full-service restaurant	44.1%	89.6%
Fast food operation	11.4%	0.9%
All you can eat buffet	0.0%	0.5%
Sub shop	20.0%	2.4%
Other	24.5%	6.6%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Table 18 includes the establishments most often frequented for lunch.

*Table 18 - Name of Lunch Establishment Most Often Frequented\**

Lunch Establishment	Percent
Others	41.51%
Subway	7.55%
Barnstable Market	4.40%
Wendy's	4.40%
Daily Paper	3.14%
Panera Bread	3.14%
Sam's Deli	3.14%
Cafe Chew	2.52%
Green Lotus Cafe	2.52%
Brewster Village Marketplace	1.89%
Colombo's Cafe & Pastries	1.89%
Hyannis Common Ground Cafe	1.89%
Hearth 'n Kettle	1.89%
JoMama's	1.89%
Lamberts	1.89%
B2 Burrito Bistro	1.26%
Bangkok Kitchen	1.26%
Bobby Byrne's	1.26%
Corner Store	1.26%
Kream n Kone	1.26%
Local Flavor	1.26%
Pie in the Sky	1.26%
Stop n Shop	1.26%
The Beacon Room	1.26%
The Little Sandwich Shop	1.26%
Wimpy's Seafood Cafe	1.26%
Zia Pizzeria	1.26%
McDonald's	1.26%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Table 19 identifies the general location for lunch trips.

*Table 19 - Location of the Food Service Establishment for Lunch\**

Location	Percent
Hyannis	28.65%
Barnstable	8.33%
Orleans	7.29%
Mashpee	6.77%
Others	6.25%
Brewster	5.73%
Sandwich	5.73%
Dennis	4.69%
Harwich	4.17%
Yarmouth	4.17%
Falmouth	3.65%
Eastham	2.60%
Provincetown	2.08%
Chatham	1.56%
Osterville	1.56%
Woods Hole	1.56%
Centerville	1.04%
South Dennis	1.04%
South Yarmouth	1.04%
Wellfleet	1.04%
West Falmouth	1.04%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Table 20 includes the establishments most often frequented for dinner.

*Table 20 - Name of Dinner Establishment Most Often Frequented\**

Dinner Establishment	Percent
Others	17.42%
Peppino's	17.42%
Main St. Pub	11.36%
Logan's Roadhouse	8.33%
Grand Coney	6.82%
McDonald's	6.82%
Applebee's	5.30%
Texas Roadhouse	4.55%
Jet's Pizza	3.79%
Taco Bell	3.03%
Ucello's	3.03%
Carrabbas	2.27%
La Pita	2.27%
Arby's	1.52%
Bangkok Taste	1.52%
Coney Island	1.52%
Culvers	1.52%
Subway	1.52%

\*Developed by The Chesapeake Group, Inc., 2013.



- ✓ Table 21 identifies the general location for lunch trips.

*Table 21 - Location of the Food Service Establishment for Dinner\**

Location	Percent
Hyannis	18.18%
Dennis	8.56%
Falmouth	8.56%
Yarmouth	8.02%
Mashpee	7.49%
Others	7.49%
Orleans	5.88%
Sandwich	5.88%
Harwich	4.81%
Barnstable	3.74%
Osterville	3.21%
Varies	3.21%
Provincetown	2.67%
Wellfleet	2.67%
Brewster	2.67%
Chatham	2.67%
Centerville	2.14%
Buzzards Bay	1.07%
Eastham	1.07%

\*Developed by The Chesapeake Group, Inc., 2013.

## Spending - Transportation

- ✓ The number of personal vehicles owned or leased and their age impact household spending. It is noted that less than 1% of the households do not own or lease a personal vehicle. Some may have access to a business vehicle. The majority of households have two vehicles.

*Table 22 - Number of Personal Vehicles Owned or Leased in Households\**

Number of Vehicles	Percent
0	0.5%
1	17.2%
2	54.5%
3	21.5%
4 or more	6.2%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Vehicles older than five years generally have less or no monthly loan payments, but often have higher maintenance costs. Only 18% of the households have no vehicles less than five years old. Seven out of ten households have one or two vehicles at least five years old.

Table 23 - Number Five Years of Age or Older\*

Number	Percent
0	17.9%
1	39.1%
2	31.4%
3	10.1%
4 or more	1.4%

\*Developed by The Chesapeake Group, Inc., 2013.

**Spending - Housing**

- ✓ About nine out of ten responding households spend most of the year in Cap Code. Others spend less than one month to three-fourths of the year in the Cape.

Table 24 - Time Spent on Cape Cod Each Year

Time Spent	Percent
Less than 3 months	1.0%
About 3 to 4 months	1.0%
5 to 6 months	1.9%
7 to 9 months	3.4%
Most or all of the year	92.8%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ About one-third of the respondents have lived on Cape Cod for twenty or more years with an additional one-third for ten or more years.

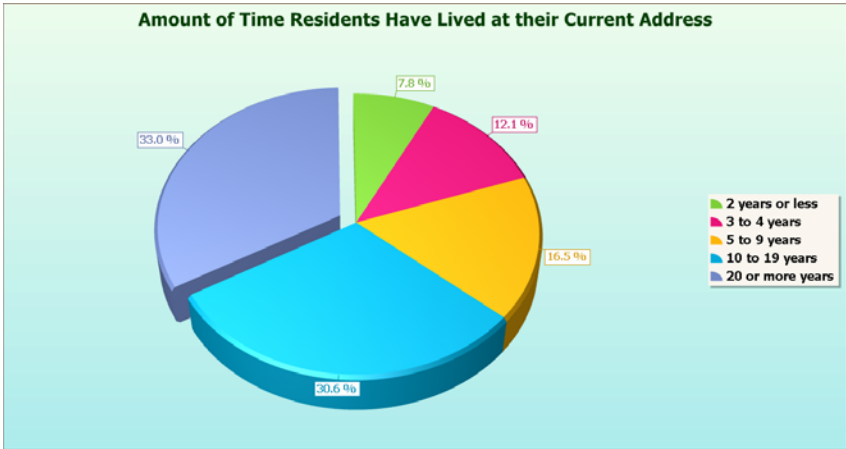


Table 25 - Tenure at the Current Address on Cape Cod\*

Tenure	Percent
2 years or less	7.8%
3 to 4 years	12.1%
5 to 9 years	16.5%
10 to 19 years	30.6%
20 or more years	33.0%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Reflecting the long-term tenure of many residents, about one-fourth of the households have no monthly rent or mortgage payments, providing for lesser proportions of their income being spent on housing than those that have such payments. The average (mean) monthly rent or mortgage payment, including those without any such payment, is \$1,187. The average (mean) monthly rent or mortgage payment, excluding those without payments, is \$1,559.

Table 26 - Monthly Rent or Mortgage Payment\*

Payment	Percent
None	23.6%
Less than \$500/month	2.5%
\$500 to \$699/month	3.5%
\$700 to \$999/month	11.6%
\$1,000 to \$1,249/month	13.1%
\$1,250 to \$1,499/month	12.6%
\$1,500 to \$1,749/month	6.5%
\$1,750 to \$1,999/month	8.5%
\$2,000 to \$2,499/month	6.0%
\$2,500 to \$2,999/month	4.0%
\$3,000 or more/month	7.0%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ About one-fourth of the households anticipate a possible move from their current unit in the next five years. An additional quarter is uncertain as to whether or not a move will occur in the next five years.

Table 27 - Anticipated Change in Unit in the Next Five Years\*

Possible Change in Housing Units	Percent
Yes	22.2%
No	53.6%
Maybe	24.2%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ For those that anticipate a change and those that are not certain of a change, about four in ten are likely to want a smaller unit than that in which they reside on the Cape. This potentially presents both issues and opportunities for new housing on Cape Cod. Creating the appropriate housing stock as the population ages could expand both housing and commercial markets.

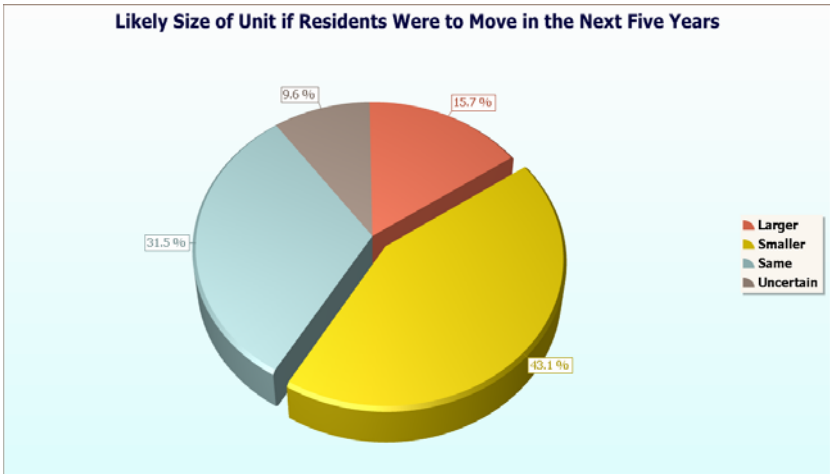
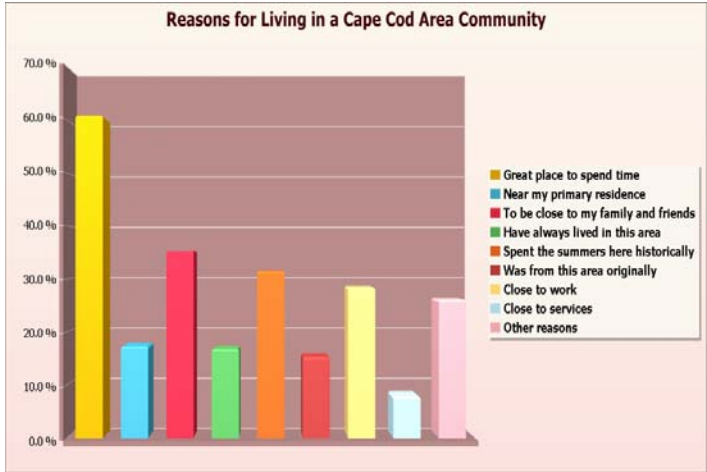


Table 28 - Potential New Scale of Unit\*

New Unit Size	Percent
Larger	15.7%
Smaller	43.1%
Same	31.5%
Uncertain	9.6%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ The quality of Cape Cod, the proximity to family and friends and multi-generational familial patterns are the primary reasons people live in the Cape. The past may or may not be as critical to the future generations. If it is not as strong a factor in the future, the Cape’s housing market could be adversely impacted. If it is a strong a factor in the future, the Cape’s housing market would not likely be negatively impacted.



*Table 29 - Primary Reasons for Living on Cape Cod\**

Primary Reasons	Percent
Great place to spend time	60.8%
Near my primary residence	17.2%
To be close to family and friends	35.3%
Have always lived in this area	16.7%
Spent the summers here historically	31.4%
Was from this area originally	15.2%
Close to work	28.4%
Close to services	7.8%
Other reasons	26.0%

\*Developed by The Chesapeake Group, Inc., 2013.

**Spending - Entertainment**

In addition to the major commodities, households spend money on other activity that results in or supports commercial space. Entertainment is one of the additional commodities.

- ✓ About 17% of the households have one or more members that generally go to see movies at theaters at least once per month.

*Table 30 - Frequency Go to Theaters to View Movies\**

Frequency	Percent
A few times/week	0.0%
About once/week	1.0%
About twice/month	5.3%
Once/ month	10.5%
4 to 9 times/year	26.3%
Once or twice/year	34.0%
Less often than once/year	23.0%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ About one in ten households have one or more members that attend crafts, art, antiques or other collectibles shows or events at least once per month on average.

Table 31 - Frequency of Attendance at Crafts, Collectibles, Antiques, Art, Guns and Other Shows\*

Frequency	Percent
A few times/week	0.0%
About once/week	0.5%
About twice/month	1.4%
Once/ month	7.1%
4 to 9 times/year	21.8%
Once or twice/year	32.2%
Less often than once/year	37.0%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Table 32 provides information on the type of entertainment and related recreation in which one or more household members participate. It is noted that live concerts, theater, beach activity and sporting events have the greatest “market penetration.”

Table 32 - Type of Entertainment to Enjoy or Partake of Outside of the Home\*

Entertainment	Percent
Live Music Concerts	20.38%
Theater	14.97%
Beach	13.38%
Sporting Events	9.55%
Walking	7.01%
Dining out	6.69%
Golf	6.37%
Art Shows	5.10%
Museums	4.46%
Shopping	3.18%
Park	2.23%
Kayaking	1.91%
Fishing	1.59%
Biking	1.59%
Swimming	1.59%

\*Developed by The Chesapeake Group, Inc., 2013.

## Spending - Other

- ✓ Spending on apparel is a surrogate for “shopper goods” commodity spending in general. The largest proportions of households have one or more members that shop at Macy’s, Marshalls and T.J Maxx for apparel.

*Table 33 - Name of Store Often Frequented for Clothes Shopping\**

Operation	Percent
Others	21.35%
Macy's	12.36%
Marshalls	10.67%
TJ MAXX	10.11%
LL Bean	6.18%
on line	3.37%
Talbots	3.37%
Thrift Shops	3.37%
Gap	2.81%
Land's End	2.81%
Puritan	2.81%
Kohl's	2.25%
Old Navy	2.25%
Banana Republic	1.69%
Chico's	1.69%
Sears	1.69%
Shift	1.69%
Wal*Mart	1.69%
Cape cod mall	1.12%
Cold water Creek	1.12%
Consignment shops	1.12%
Dress Barn	1.12%
Eddie Bauer	1.12%
J Jill	1.12%
Nordstrom	1.12%

\*Developed by The Chesapeake Group, Inc., 2013.

- ✓ Table 34 contains the general location for apparel shopping. It is noted that “online” has significant market penetration for apparel purchases.

*Table 34 - Location of the Clothing Establishment\**

Location	Percent
Hyannis	39.16%
Others	10.84%
Online	9.04%
Mashpee	8.43%
Orleans	7.83%
Dennis	4.22%
Falmouth	4.22%
Barnstable	2.41%
Plymouth	2.41%
South Dennis	2.41%
Wareham	2.41%
Provincetown	1.81%
Boston	1.20%
Maine	1.20%
Sandwich	1.20%
Wrentham	1.20%

\*Developed by The Chesapeake Group, Inc., 2013.

Online Exportation

- ✓ Not only is apparel shopping impacted, online purchases are increasing in share of purchases and sales compared to “local” “bricks and mortar” operations in most communities today. About 20% of all households in the Cape have one or more members that shops online and makes purchases at least once each week. Slightly less than one-half of the households make purchases online at least twice each month.

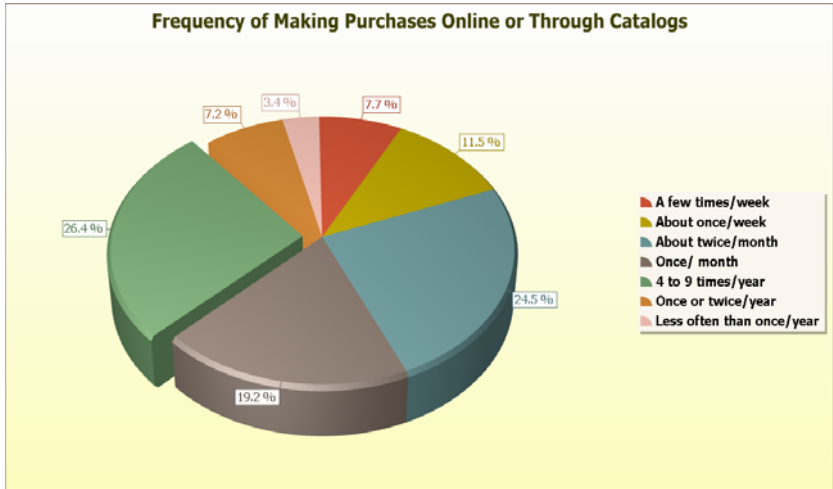
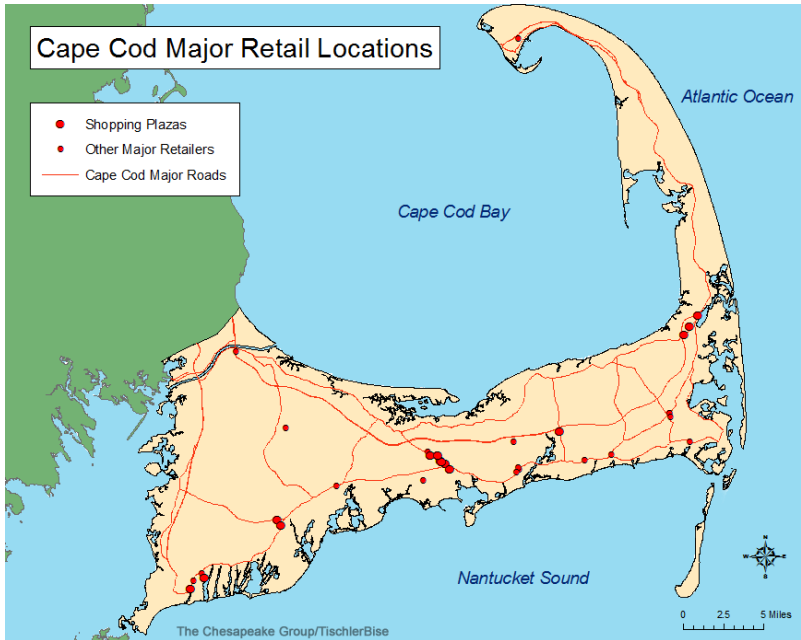


Table 35 - Frequency of Online Purchases\*

Frequency	Percent
A few times/week	7.7%
About once/week	11.5%
About twice/month	24.5%
Once/month	19.2%
4 to 9 times/year	26.4%
Once or twice/year	7.2%
Less often than once/year	3.4%

\*Developed by The Chesapeake Group, Inc., 2013.

Total Demand for Retail Goods and Services Generated by Residents of Cape Cod



The following are the estimates of current and future demand for retail goods and services for Cape Cod. No consideration is given to the existing zoning or holding capacity of the land as with all other estimates in this analysis. While it is assumed that there will be some marginal growth in housing units and related households that will result in increased demand for retail goods and related services; it is also assumed that some part-time residents will become full-time residents. Countering the increased demand for goods and services generated from the two changes will be increased growth of online sales at least in the foreseeable future and technological change that will result in changes in required inventories within “bricks and mortar” operations. It is also noted that:

- ✓ All sales estimates are in 2013 dollars.
- ✓ Focusing on opportunities associated with growth is important from a public sector perspective since the opportunities are not derived from any existing operations or activities.

- ✓ There have been some substantial changes nationally in consumer spending in the past five years that are anticipated to remain relatively constant over the next few years. Additional significant changes are anticipated in the future. They include a significant shift away from discretionary spending that impacts what is often termed “shopper goods” categories of retail associated with general merchandise, furniture, apparel and many miscellaneous operations and “on demand” production of many “shopper goods.”

Aggregate retail sales figures represent a compilation of sales associated with ten major categories and the types of operations within those categories. The ten major categories of retail goods and related services follow.

- ✓ Food, such as groceries and related merchandise generally purchased for home preparation or consumption.
- ✓ Eating and drinking, consisting of prepared food and beverages generally consumed on the premises or carried to another location.
- ✓ General merchandise, including variety stores, department stores, and large value oriented retail operators.
- ✓ Furniture and accessories, including appliances and home furnishings.
- ✓ Transportation and utilities, including the sale of new and used automotive and other personal vehicles and parts and basic utilities for the home.
- ✓ Drugstores, including those specializing in health and beauty aids or pharmaceuticals.
- ✓ Apparel and accessories.
- ✓ Hardware & building materials, including traditional hardware stores & garden & home improvement centers.
- ✓ Auto services, including gasoline and vehicle repair.
- ✓ Miscellaneous, including a plethora of retail goods and services ranging from florists to paper goods.

Many of today’s better known operations fall into more than one category. For example, many of the “big box” merchandisers, such as Target and Walmart, often have traditional supermarket components within their operations.

A productivity level is the sales per square foot figure essential to pay all costs of operation and provide a reasonable return on investment. Sales productivity levels vary for each sub-category, type of business operation, or store-type. The productivity levels vary from low figures for bowling centers to thousands of dollars for others such as jewelry stores. Supportable space is derived by dividing the amount of sales by the appropriate productivity level. Both the spending patterns and productivity levels are likely to change over time.

Table 36 contains the retail sales and supportable square footage of space generated by residents of Cape Cod at any and all locations for 2013, 2023 and the change from 2013 to 2033. The ability to capture any or all of the sales in one or more areas of Cape Cod is relatively high for a variety of reasons including but not limited to those that follow.

- ✓ Distance from other areas beyond the Cape by vehicles.
- ✓ Traffic conditions during peak season.

As presented in the table, sales and supportable square footage of space generated by the residents of Cape Cod is expected to grow by \$566 million and 1.6 million square feet of space respectively between 2013 and 2033. It is noted that should policies be pursued which results in substantial growth and density in housing units, the estimate would be substantially greater.



*Table 36 - Aggregate Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and the Change from 2013 to 2023 by Category\**

Category	2013 Sales	2023 Sales	2013-33 Sales	2013 Space	2023 Space	2013-33 Space
Food	523,330,000	523,586,000	55,343,000	977,348	977,825	103,355
Eat/Drink	755,266,000	755,636,000	79,871,000	1,888,165	1,889,090	199,678
General Merchandise	471,372,000	471,603,000	49,848,000	1,537,571	1,538,325	162,599
Furniture	239,971,000	240,089,000	25,377,000	739,157	739,520	78,166
Transportation	1,128,614,000	1,129,167,000	119,353,000	3,284,114	3,285,723	347,302
Drugstore	394,774,000	394,967,000	41,748,000	789,548	789,934	83,496
Apparel	272,646,000	272,779,000	28,833,000	848,398	848,812	89,720
Hardware	467,622,000	467,851,000	49,452,000	1,987,849	1,988,823	210,219
Vehicle Service	590,822,000	591,111,000	62,480,000	1,438,346	1,439,049	152,106
Miscellaneous	512,081,000	512,332,000	54,153,000	1,977,817	1,978,786	209,155
<b>TOTAL</b>	<b>5,356,498,000</b>	<b>5,359,121,000</b>	<b>566,458,000</b>	<b>15,468,313</b>	<b>15,475,887</b>	<b>1,635,796</b>

\*Developed by The Chesapeake Group, Inc., 2013.

The following is also noted.

- ✓ The largest category is transportation. This likely has the lowest capturable sales and space of any category at present.
- ✓ The second largest category in terms of sales is also related to household transportation. Vehicle service is the second largest in terms of sales but not in terms of supportable space.
- ✓ In terms of supportable space, food service (eating and drinking) is the second largest category.
- ✓ The greatest increases in space are associated with transportation, hardware, miscellaneous and food services. The latter two are of particular importance to traditional area downtowns and also serve visitor markets.
- ✓ The increase in supportable space is sufficient to expand existing space or add operations in all categories. However, the potential for the number of additional operations in hardware and general merchandise is the smallest based on growth as the typical stores that dominate those industries are the largest in the overall retail industry in most cases.

The aggregate figures found in Table 36 are actually composites of types of operations or sub-categories associated with each category. Essentially, the sales and supportable space associated with each sub-category of space is added together to form the category sales. Table 37 contains the retail goods and related services space for 2013, 2023 and the change from 2013 to 2023 generated by residents of Cape Cod.

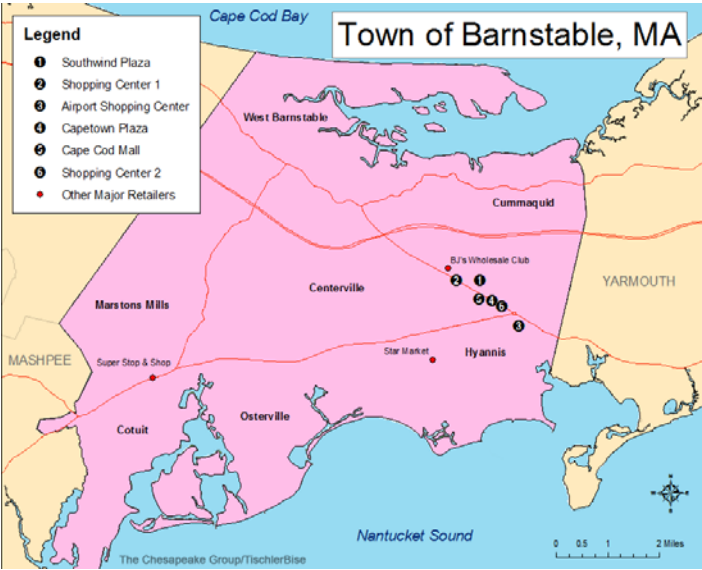
*Table 37 - Aggregate Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and the Change from 2013 to 2023 by Sub-category\**

Sub-category	2013 Sales	2023 Sales	2013-33 Sales	2013 Space	2023 Space	2013-33 Space
Food	523,330,000	523,586,000	55,343,000	977,348	977,825	103,355
Supermarkets	436,980,550	437,194,310	46,211,405	740,645	741,007	78,324
Independents	41,866,400	41,886,880	4,427,440	104,666	104,717	11,069
Bakeries	11,513,260	11,518,892	1,217,546	38,378	38,396	4,058
Dairies	6,803,290	6,806,618	719,459	18,898	18,907	1,998
Others	26,166,500	26,179,300	2,767,150	74,761	74,798	7,906
Eat/Drink	755,266,000	755,636,000	79,871,000	1,888,165	1,889,090	199,678
General Merchandise	471,372,000	471,603,000	49,848,000	1,537,571	1,538,325	162,599
Dept. Stores	166,865,688	166,947,462	17,646,192	556,219	556,492	58,821
Variety Stores	33,938,784	33,955,416	3,589,056	130,534	130,598	13,804
Jewelry	32,524,668	32,540,607	3,439,512	45,809	45,832	4,844
Sporting Goods/Toys	51,379,548	51,404,727	5,433,432	171,265	171,349	18,111
Discount Dept.	176,764,500	176,851,125	18,693,000	589,215	589,504	62,310
Antiques, etc.	2,356,860	2,358,015	249,240	10,247	10,252	1,084
Others	7,541,952	7,545,648	797,568	34,282	34,298	3,625
Furniture	239,971,000	240,089,000	25,377,000	739,157	739,520	78,166
Furniture	36,235,621	36,253,439	3,831,927	116,889	116,947	12,361
Home Furnishings	49,913,968	49,938,512	5,278,416	142,611	142,681	15,081
Store/Office Equip.	37,915,418	37,934,062	4,009,566	126,385	126,447	13,365
Music Instr./Suppl.	10,318,753	10,323,827	1,091,211	51,594	51,619	5,456
Radios,TV, etc.	105,587,240	105,639,160	11,165,880	301,678	301,826	31,903
Transportation	1,128,614,000	1,129,167,000	119,353,000	3,284,114	3,285,723	347,302
New/Used Vehicles	395,014,900	395,208,450	41,773,550	987,537	988,021	104,434
Tires, Batt., Prts.	497,718,774	497,962,647	52,634,673	1,659,063	1,659,875	175,449
Marine Sales/Rentals	59,816,542	59,845,851	6,325,709	161,666	161,746	17,097
Auto/Truck Rentals	176,063,784	176,150,052	18,619,068	475,848	476,081	50,322
Drugstore	394,774,000	394,967,000	41,748,000	789,548	789,934	83,496
Apparel	272,646,000	272,779,000	28,833,000	848,398	848,812	89,720
Men's and Boy's	35,716,626	35,734,049	3,777,123	89,292	89,335	9,443
Women's and Girl's	90,518,472	90,562,628	9,572,556	244,645	244,764	25,872
Infants	5,725,566	5,728,359	605,493	19,085	19,095	2,018
Family	75,795,588	75,832,562	8,015,574	252,652	252,775	26,719
Shoes	56,983,014	57,010,811	6,026,097	207,211	207,312	21,913
Jeans/Leather	1,090,584	1,091,116	115,332	3,635	3,637	384
Tailors/Uniforms	4,907,628	4,910,022	518,994	24,538	24,550	2,595
Others	1,908,522	1,909,453	201,831	7,340	7,344	776
Hardware	467,622,000	467,851,000	49,452,000	1,987,849	1,988,823	210,219
Hardware	226,329,048	226,439,884	23,934,768	905,316	905,760	95,739
Lawn/Seed/Fertil.	8,884,818	8,889,169	939,588	26,132	26,145	2,763
Others	232,408,134	232,521,947	24,577,644	1,056,401	1,056,918	111,717
Vehicle Service	590,822,000	591,111,000	62,480,000	1,438,346	1,439,049	152,106
Gasoline	200,879,480	200,977,740	21,243,200	138,538	138,605	14,650
Garage, Repairs	389,942,520	390,133,260	41,236,800	1,299,808	1,300,444	137,456
Miscellaneous	512,081,000	512,332,000	54,153,000	1,977,817	1,978,786	209,155
Advert. Signs, etc.	8,193,296	8,197,312	866,448	29,794	29,808	3,151
Barber/Beauty shop	31,236,941	31,252,252	3,303,333	156,185	156,261	16,517
Book Stores	23,555,726	23,567,272	2,491,038	63,664	63,695	6,733
Bowling	11,777,863	11,783,636	1,245,519	117,779	117,836	12,455
Cig./Tobacco Dealer	3,584,567	3,586,324	379,071	7,169	7,173	758
Dent./Physician Lab	20,483,240	20,493,280	2,166,120	63,025	63,056	6,665
Florist/Nurseries	38,406,075	38,424,900	4,061,475	90,367	90,412	9,556
Laundry, Dry Clean	17,410,754	17,419,288	1,841,202	58,036	58,064	6,137
Optical Goods/Opt.	12,289,944	12,295,968	1,299,672	35,114	35,131	3,713
Photo Sup./Photog.	35,333,589	35,350,908	3,736,557	100,953	101,003	10,676
Printing	41,478,561	41,498,892	4,386,393	150,831	150,905	15,951
Paper/Paper Prod.	22,019,483	22,030,276	2,328,579	110,097	110,151	11,643
Gifts/Cards/Novel.	73,227,583	73,263,476	7,743,879	244,092	244,212	25,813
Newsstands	4,096,648	4,098,656	433,224	8,193	8,197	866
Others	102,416,200	102,466,400	10,830,600	409,665	409,866	43,322
TOTAL	5,356,498,000	5,359,121,000	566,458,000	15,468,313	15,475,887	1,635,796

\*Developed by The Chesapeake Group, Inc., 2013.

The following tables provide a breakdown of the retail goods and related services supportable square footage of space for each of the fifteen jurisdictional subareas of the Cape. Each is based on the population, households and incomes that reside in the subarea. The subarea information is in alphabetical order.

**Barnstable**



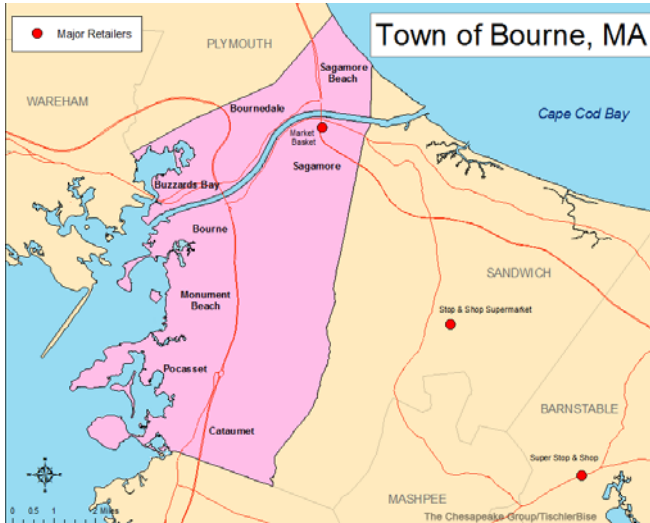
The residents of the Town of Barnstable generate \$1.17 billion in sales which supports 3.3 million square feet of space in 2013. The sales and space will increase respectively to \$1.24 billion and 3.6 million square feet of space by 2033.

*Table 38 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for the Town of Barnstable\**

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	114,407,000	114,629,000	120,987,000	213,661	214,076	225,949
Eat/Drink	165,111,000	165,431,000	174,608,000	412,778	413,578	436,520
General Merchandise	103,048,000	103,248,000	108,975,000	336,133	336,786	355,467
Furniture	52,461,000	52,563,000	55,478,000	161,590	161,903	170,883
Transportation	246,730,000	247,208,000	260,921,000	717,951	719,342	759,245
Drugstore	86,303,000	86,470,000	91,267,000	172,606	172,940	182,534
Apparel	59,604,000	59,720,000	63,032,000	185,471	185,832	196,137
Hardware	102,228,000	102,427,000	108,108,000	434,568	435,415	459,564
Vehicle Service	129,161,000	129,412,000	136,590,000	314,440	315,051	332,526
Miscellaneous	111,948,000	112,165,000	118,387,000	432,377	433,216	457,247
<b>TOTAL</b>	<b>1,171,001,000</b>	<b>1,173,273,000</b>	<b>1,238,353,000</b>	<b>3,381,575</b>	<b>3,388,139</b>	<b>3,576,072</b>

\*Developed by The Chesapeake Group, Inc., 2013.

Bourne



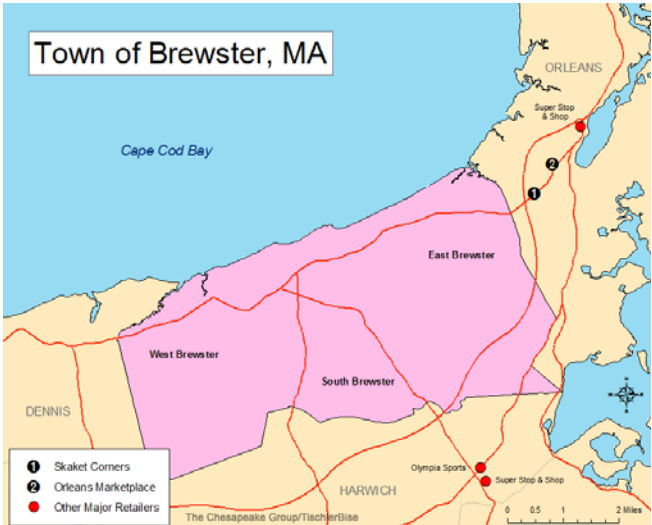
The residents of Bourne generate \$451 million in sales which supports 1.3 million square feet of space in 2013. The sales and space will increase respectively to \$1.24 billion and 3.6 million square feet of space by 2033.

Table 39 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Bourne\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	44,067,000	44,060,000	46,602,000	82,297	82,284	87,031
Eat/Drink	63,598,000	63,587,000	67,256,000	158,995	158,968	168,140
General Merchandise	39,692,000	39,686,000	41,975,000	129,472	129,452	136,920
Furniture	20,207,000	20,204,000	21,369,000	62,242	62,232	65,820
Transportation	95,036,000	95,020,000	100,502,000	276,542	276,495	292,447
Drugstore	33,242,000	33,237,000	35,154,000	66,484	66,474	70,308
Apparel	22,958,000	22,954,000	24,279,000	71,438	71,427	75,550
Hardware	39,377,000	39,370,000	41,641,000	167,390	167,360	177,015
Vehicle Service	49,751,000	49,742,000	52,612,000	121,118	121,096	128,083
Miscellaneous	43,120,000	43,113,000	45,601,000	166,545	166,514	176,124
<b>TOTAL</b>	<b>451,048,000</b>	<b>450,973,000</b>	<b>476,991,000</b>	<b>1,302,523</b>	<b>1,302,302</b>	<b>1,377,438</b>

\*Developed by The Chesapeake Group, Inc., 2013.

Brewster



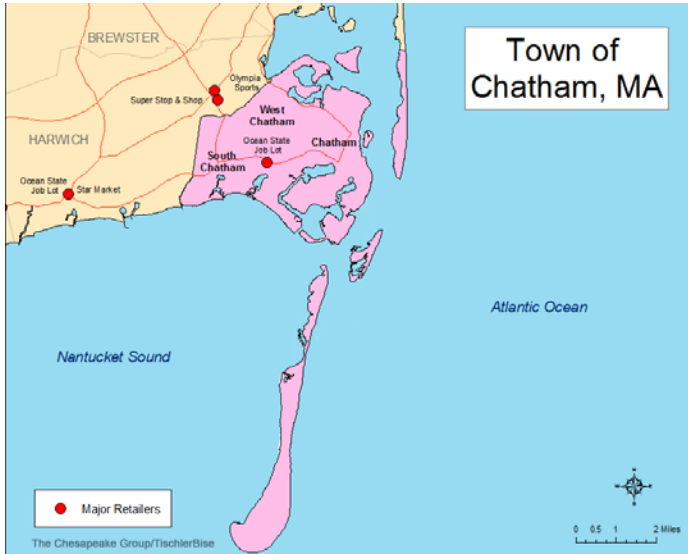
The residents of Brewster generate \$252 million in sales which supports 728 thousand square feet of space in 2013. The sales and space will increase respectively to \$266 million and 770 thousand square feet of space by 2033.

Table 40 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Brewster\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	24,620,000	24,654,000	26,036,000	45,979	46,043	48,623
Eat/Drink	35,531,000	35,580,000	37,574,000	88,828	88,950	93,935
General Merchandise	22,175,000	22,206,000	23,451,000	72,334	72,434	76,496
Furniture	11,289,000	11,305,000	11,939,000	34,773	34,822	36,774
Transportation	53,095,000	53,168,000	56,148,000	154,500	154,712	163,384
Drugstore	18,572,000	18,598,000	19,640,000	37,144	37,196	39,280
Apparel	12,826,000	12,844,000	13,564,000	39,911	39,966	42,207
Hardware	21,999,000	22,029,000	23,264,000	93,517	93,645	98,894
Vehicle Service	27,795,000	27,833,000	29,393,000	67,666	67,759	71,557
Miscellaneous	24,090,000	24,124,000	25,476,000	93,043	93,176	98,396
TOTAL	251,992,000	252,341,000	266,485,000	727,695	728,703	769,546

\*Developed by The Chesapeake Group, Inc., 2013.

Chatham



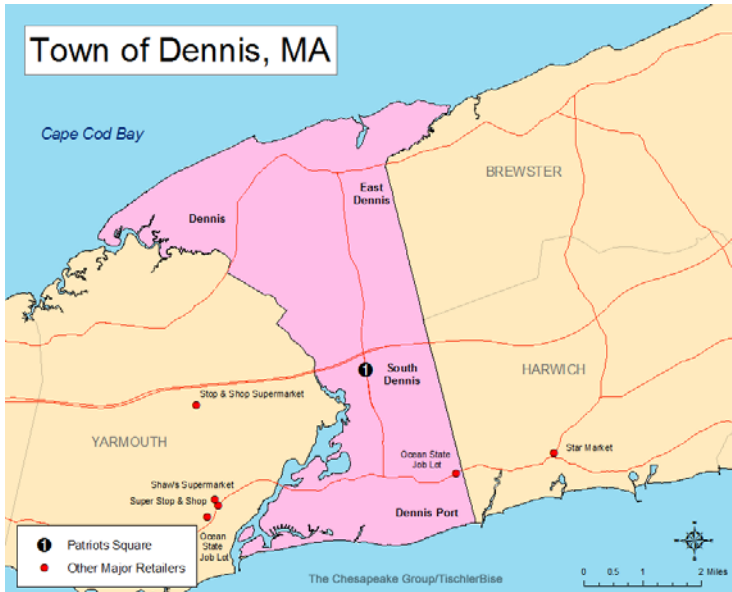
The residents of Chatham generate \$140 million in sales which supports 403 thousand square feet of space in 2013. The sales and space will increase respectively to \$148 million and 427 thousand square feet of space by 2033.

Table 41 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Chatham\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	13,664,000	13,621,000	14,450,000	25,518	25,438	26,986
Eat/Drink	19,719,000	19,658,000	20,853,000	49,298	49,145	52,133
General Merchandise	12,307,000	12,269,000	13,015,000	40,145	40,020	42,455
Furniture	6,265,000	6,246,000	6,626,000	19,298	19,239	20,411
Transportation	29,467,000	29,375,000	31,162,000	85,745	85,477	90,678
Drugstore	10,307,000	10,275,000	10,900,000	20,614	20,550	21,800
Apparel	7,119,000	7,096,000	7,528,000	22,152	22,082	23,425
Hardware	12,209,000	12,171,000	12,911,000	51,900	51,738	54,884
Vehicle Service	15,426,000	15,378,000	16,313,000	37,554	37,438	39,714
Miscellaneous	13,370,000	13,328,000	14,139,000	51,640	51,477	54,609
TOTAL	139,853,000	139,417,000	147,897,000	403,864	402,604	427,095

\*Developed by The Chesapeake Group, Inc., 2013.

Dennis



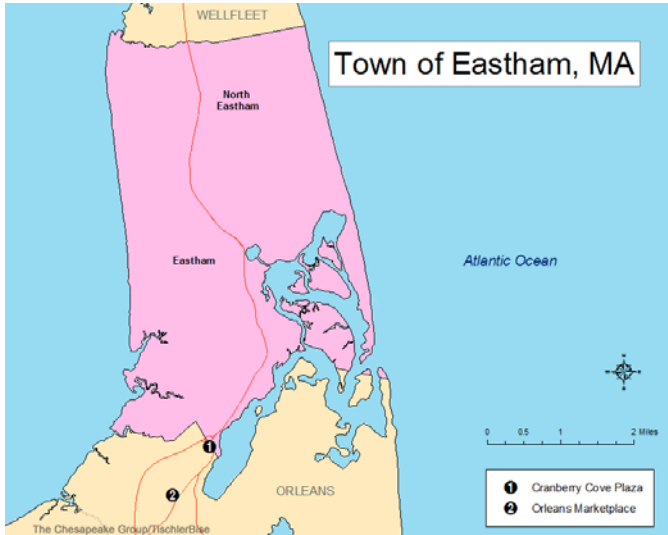
The residents of Dennis generate \$368 million in sales which supports 1.06 million square feet of space in 2013. The sales and space will increase respectively to \$389 million and 1.12 million square feet of space by 2033.

Table 42 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Dennis\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	35,915,000	35,829,000	37,980,000	67,074	66,912	70,930
Eat/Drink	51,832,000	51,708,000	54,813,000	129,580	129,270	137,033
General Merchandise	32,349,000	32,272,000	34,209,000	105,519	105,268	111,587
Furniture	16,468,000	16,429,000	17,416,000	50,726	50,606	53,643
Transportation	77,453,000	77,269,000	81,908,000	225,378	224,841	238,342
Drugstore	27,092,000	27,028,000	28,650,000	54,184	54,056	57,300
Apparel	18,711,000	18,666,000	19,787,000	58,223	58,084	61,572
Hardware	32,091,000	32,015,000	33,937,000	136,417	136,095	144,265
Vehicle Service	40,546,000	40,450,000	42,878,000	98,708	98,475	104,386
Miscellaneous	35,143,000	35,059,000	37,164,000	135,733	135,409	143,538
TOTAL	367,600,000	366,725,000	388,742,000	1,061,542	1,059,016	1,122,596

\*Developed by The Chesapeake Group, Inc., 2013.

Eastham



The residents of Eastham generate \$128 million in sales which supports 372 thousand square feet of space in 2013. The sales and space will increase respectively to \$136 million and 393 thousand square feet of space by 2033.

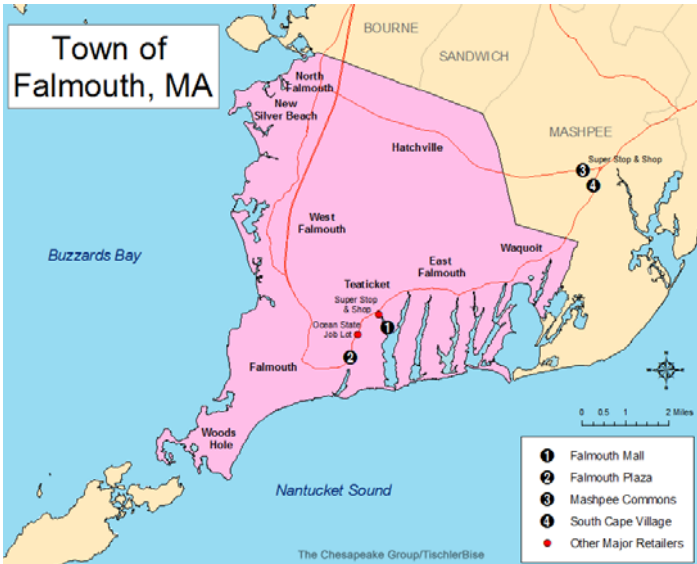
Table 43 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Eastham\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	12,588,000	12,581,000	13,312,000	23,509	23,495	24,861
Eat/Drink	18,166,000	18,156,000	19,211,000	45,415	45,390	48,028
General Merchandise	11,338,000	11,332,000	11,990,000	36,984	36,963	39,110
Furniture	5,772,000	5,769,000	6,104,000	17,779	17,768	18,802
Transportation	27,147,000	27,132,000	28,708,000	78,995	78,950	83,537
Drugstore	9,496,000	9,490,000	10,042,000	18,992	18,980	20,084
Apparel	6,558,000	6,554,000	6,935,000	20,406	20,393	21,579
Hardware	11,248,000	11,242,000	11,895,000	47,815	47,790	50,566
Vehicle Service	14,211,000	14,203,000	15,028,000	34,596	34,577	36,586
Miscellaneous	12,317,000	12,310,000	13,026,000	47,573	47,545	50,310
<b>TOTAL</b>	<b>128,841,000</b>	<b>128,769,000</b>	<b>136,251,000</b>	<b>372,064</b>	<b>371,851</b>	<b>393,463</b>

\*Developed by The Chesapeake Group, Inc., 2013.



Falmouth



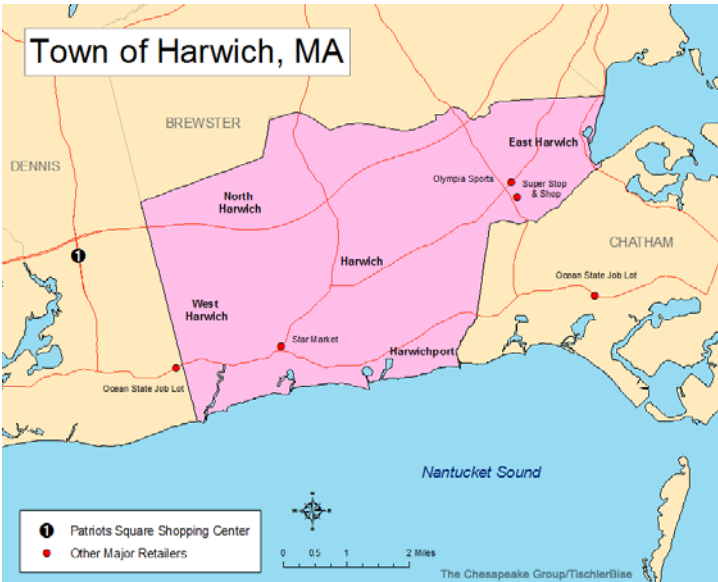
The residents of Falmouth generate \$756 million in sales which supports 2.18 million square feet of space in 2013. The sales and space will increase respectively to \$799 million and 2.3 million square feet of space by 2033.

Table 44 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Falmouth\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	73,857,000	73,447,000	78,105,000	137,931	137,165	145,865
Eat/Drink	106,589,000	105,998,000	112,720,000	266,473	264,995	281,800
General Merchandise	66,524,000	66,155,000	70,350,000	216,994	215,791	229,476
Furniture	33,867,000	33,679,000	35,815,000	104,318	103,738	110,317
Transportation	159,279,000	158,395,000	168,440,000	463,480	460,909	490,138
Drugstore	55,714,000	55,404,000	58,918,000	111,428	110,808	117,836
Apparel	38,478,000	38,264,000	40,691,000	119,732	119,066	126,619
Hardware	65,995,000	65,628,000	69,790,000	280,543	278,983	296,675
Vehicle Service	83,382,000	82,919,000	88,177,000	202,992	201,865	214,665
Miscellaneous	72,269,000	71,868,000	76,426,000	279,126	277,576	295,184
TOTAL	755,954,000	751,757,000	799,432,000	2,183,017	2,170,896	2,308,575

\*Developed by The Chesapeake Group, Inc., 2013.

Harwich



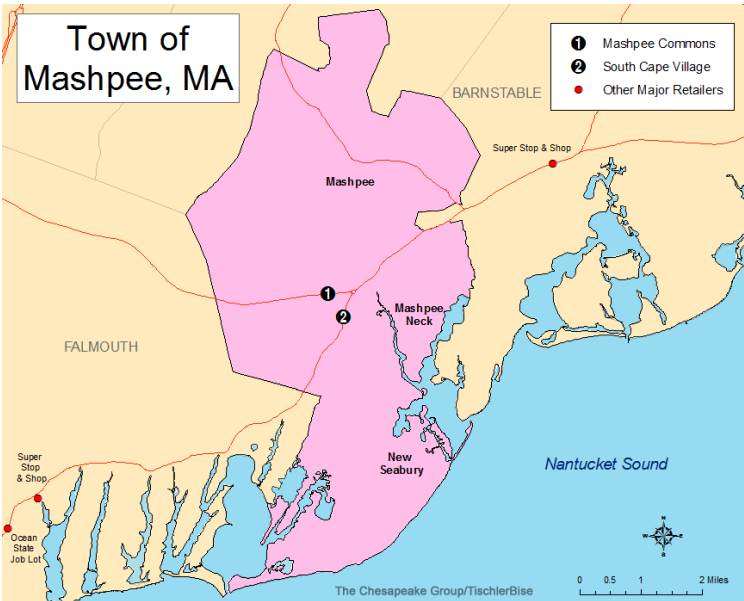
The residents of the Town of Harwich generate \$288 million in sales which supports 831 thousand square feet of space in 2013. The sales and space will increase respectively to \$304 million and 879 thousand square feet of space by 2033.

Table 45 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Harwich\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	28,125,000	28,097,000	29,742,000	52,526	52,472	55,544
Eat/Drink	40,590,000	40,549,000	42,924,000	101,475	101,373	107,310
General Merchandise	25,332,000	25,307,000	26,789,000	82,631	82,549	87,381
Furniture	12,897,000	12,884,000	13,638,000	39,725	39,686	42,008
Transportation	60,654,000	60,593,000	64,143,000	176,494	176,318	186,647
Drugstore	21,216,000	21,195,000	22,436,000	42,432	42,390	44,872
Apparel	14,653,000	14,638,000	15,495,000	45,596	45,550	48,218
Hardware	25,131,000	25,106,000	26,576,000	106,831	106,725	112,974
Vehicle Service	31,752,000	31,720,000	33,578,000	77,299	77,222	81,745
Miscellaneous	27,520,000	27,493,000	29,103,000	106,290	106,186	112,403
<b>TOTAL</b>	<b>287,870,000</b>	<b>287,582,000</b>	<b>304,424,000</b>	<b>831,299</b>	<b>830,471</b>	<b>879,102</b>

\*Developed by The Chesapeake Group, Inc., 2013.

Mashpee



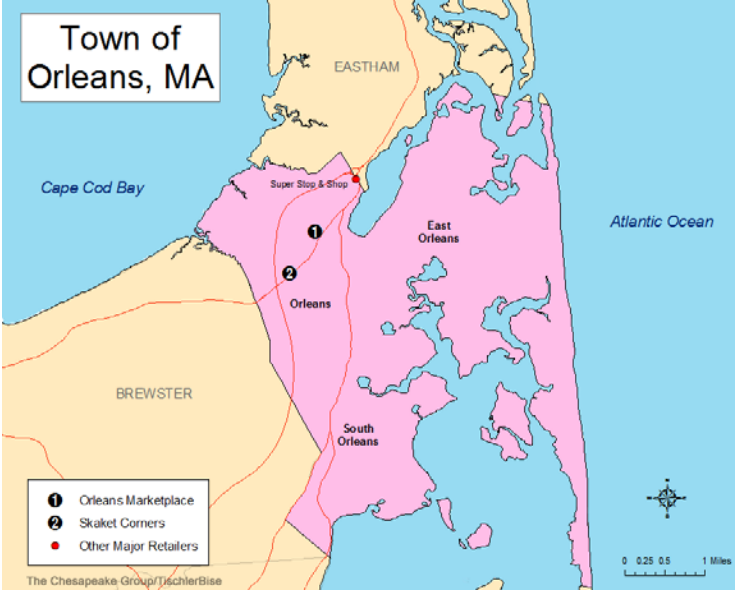
The residents of Mashpee generate \$371 million in sales which supports 1.07 million square feet of space in 2013. The sales and space will increase respectively to \$393 million and 1.13 million square feet of space by 2033.

Table 46 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Mashpee\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	36,284,000	36,612,000	38,371,000	67,762	68,374	71,661
Eat/Drink	52,365,000	52,839,000	55,377,000	130,913	132,098	138,443
General Merchandise	32,682,000	32,977,000	34,561,000	106,605	107,568	112,735
Furniture	16,638,000	16,789,000	17,595,000	51,248	51,713	54,195
Transportation	78,250,000	78,959,000	82,751,000	227,698	229,760	240,795
Drugstore	27,371,000	27,619,000	28,945,000	54,742	55,238	57,890
Apparel	18,903,000	19,074,000	19,991,000	58,821	59,353	62,206
Hardware	32,422,000	32,715,000	34,286,000	137,825	139,070	145,749
Vehicle Service	40,963,000	41,334,000	43,320,000	99,724	100,627	105,462
Miscellaneous	35,504,000	35,826,000	37,546,000	137,129	138,371	145,016
TOTAL	371,382,000	374,744,000	392,743,000	1,072,467	1,082,172	1,134,152

\*Developed by The Chesapeake Group, Inc., 2013.

Orleans



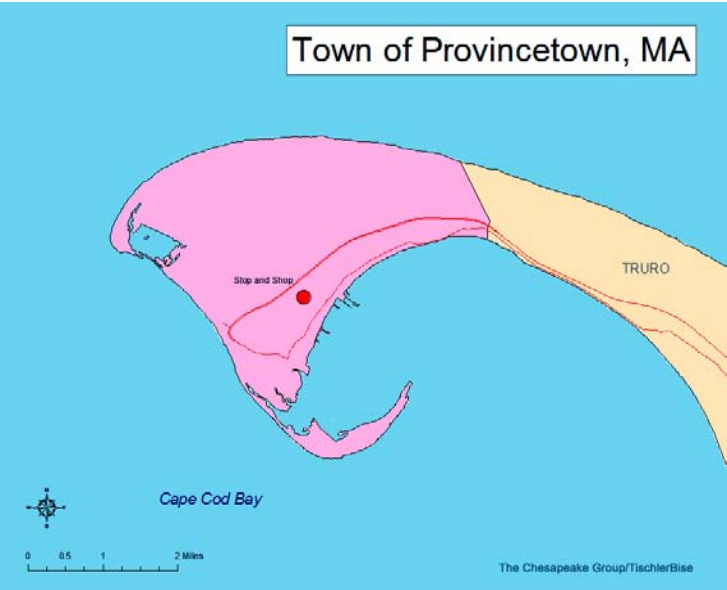
The residents of Orleans generate \$137 million in sales which supports 395 thousand square feet of space in 2013. The sales and space will increase respectively to \$145 million and 417 thousand square feet of space by 2033.

Table 47 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Orleans\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	13,365,000	13,338,000	14,134,000	24,960	24,910	26,395
Eat/Drink	19,289,000	19,249,000	20,398,000	48,223	48,123	50,995
General Merchandise	12,038,000	12,013,000	12,731,000	39,268	39,185	41,529
Furniture	6,129,000	6,116,000	6,481,000	18,878	18,839	19,963
Transportation	28,824,000	28,764,000	30,482,000	83,874	83,700	88,699
Drugstore	10,082,000	10,061,000	10,662,000	20,164	20,122	21,324
Apparel	6,963,000	6,949,000	7,364,000	21,666	21,622	22,915
Hardware	11,943,000	11,918,000	12,630,000	50,769	50,663	53,690
Vehicle Service	15,089,000	15,058,000	15,957,000	36,734	36,659	38,847
Miscellaneous	13,078,000	13,051,000	13,830,000	50,512	50,408	53,415
<b>TOTAL</b>	<b>136,800,000</b>	<b>136,517,000</b>	<b>144,669,000</b>	<b>395,048</b>	<b>394,231</b>	<b>417,772</b>

\*Developed by The Chesapeake Group, Inc., 2013.

Provincetown



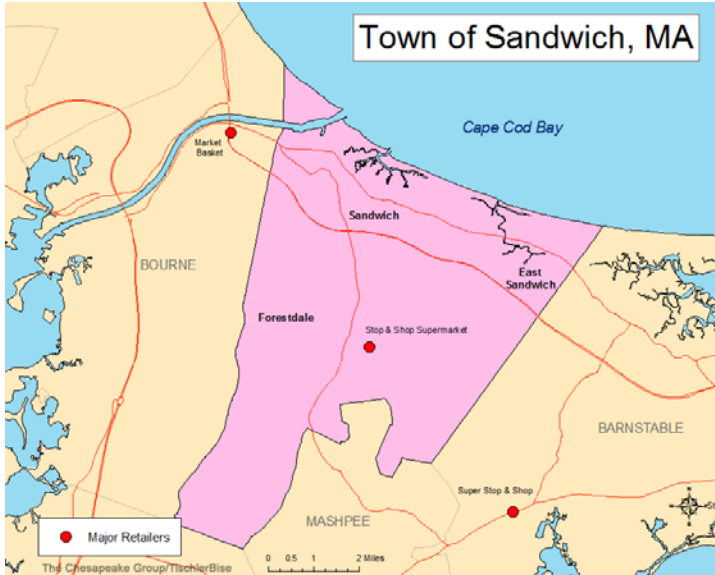
The residents of Provincetown generate \$68 million in sales which supports 195 thousand square feet of space in 2013. The sales and space will increase respectively to \$71 million and 266 thousand square feet of space by 2033.

Table 48 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Provincetown\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	6,604,000	6,588,000	6,984,000	12,332	12,304	13,043
Eat/Drink	9,531,000	9,508,000	10,080,000	23,828	23,770	25,200
General Merchandise	5,949,000	5,934,000	6,291,000	19,404	19,357	20,521
Furniture	3,028,000	3,021,000	3,203,000	9,327	9,306	9,866
Transportation	14,243,000	14,208,000	15,062,000	41,445	41,343	43,828
Drugstore	4,982,000	4,970,000	5,269,000	9,964	9,940	10,538
Apparel	3,441,000	3,432,000	3,639,000	10,709	10,679	11,325
Hardware	5,901,000	5,887,000	6,241,000	25,085	25,025	26,531
Vehicle Service	7,456,000	7,438,000	7,885,000	18,151	18,108	19,196
Miscellaneous	6,462,000	6,446,000	6,834,000	24,955	24,898	26,396
TOTAL	67,597,000	67,432,000	71,488,000	195,200	194,730	206,444

\*Developed by The Chesapeake Group, Inc., 2013.

Sandwich



The residents of the Town of Sandwich generate \$540 million in sales which supports 1.56 million square feet of space in 2013. The sales and space will increase respectively to \$571 million and 1.65 million square feet of space by 2033.

Table 49 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Sandwich\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	52,744,000	53,187,000	55,778,000	98,503	99,329	104,168
Eat/Drink	76,120,000	76,759,000	80,498,000	190,300	191,898	201,245
General Merchandise	47,508,000	47,906,000	50,240,000	154,966	156,265	163,878
Furniture	24,186,000	24,389,000	25,577,000	74,497	75,123	78,782
Transportation	113,749,000	114,702,000	120,291,000	330,994	333,767	350,031
Drugstore	39,788,000	40,121,000	42,076,000	79,576	80,242	84,152
Apparel	27,479,000	27,709,000	29,059,000	85,507	86,223	90,423
Hardware	47,130,000	47,525,000	49,841,000	200,349	202,027	211,872
Vehicle Service	59,547,000	60,046,000	62,971,000	144,966	146,181	153,302
Miscellaneous	51,611,000	52,043,000	54,579,000	199,339	201,006	210,801
TOTAL	539,862,000	544,387,000	570,910,000	1,558,997	1,572,061	1,648,654

\*Developed by The Chesapeake Group, Inc., 2013.

Truro



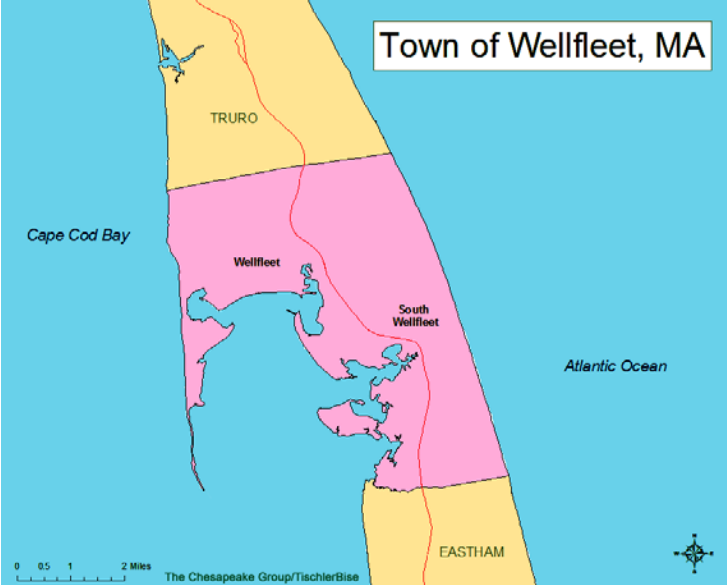
The residents of Truro generate \$49 million in sales which supports 141 thousand square feet of space in 2013. The sales and space will increase respectively to \$52 million and 149 thousand square feet of space by 2033.

Table 50 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Truro\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	4,768,000	4,766,000	5,042,000	8,905	8,901	9,416
Eat/Drink	6,881,000	6,878,000	7,276,000	17,203	17,195	18,190
General Merchandise	4,294,000	4,292,000	4,541,000	14,006	14,000	14,812
Furniture	2,186,000	2,185,000	2,312,000	6,733	6,731	7,122
Transportation	10,282,000	10,278,000	10,873,000	29,920	29,907	31,638
Drugstore	3,596,000	3,595,000	3,803,000	7,192	7,190	7,606
Apparel	2,484,000	2,483,000	2,627,000	7,731	7,726	8,174
Hardware	4,260,000	4,258,000	4,505,000	18,109	18,100	19,151
Vehicle Service	5,382,000	5,380,000	5,692,000	13,102	13,098	13,857
Miscellaneous	4,665,000	4,663,000	4,933,000	18,018	18,009	19,053
<b>TOTAL</b>	<b>48,798,000</b>	<b>48,778,000</b>	<b>51,604,000</b>	<b>140,919</b>	<b>140,857</b>	<b>149,019</b>

\*Developed by The Chesapeake Group, Inc., 2013.

Wellfleet



The residents of Wellfleet generate \$63 million in sales which supports 183 thousand square feet of space in 2013. The sales and space will increase respectively to \$67 million and 194 thousand square feet of space by 2033.

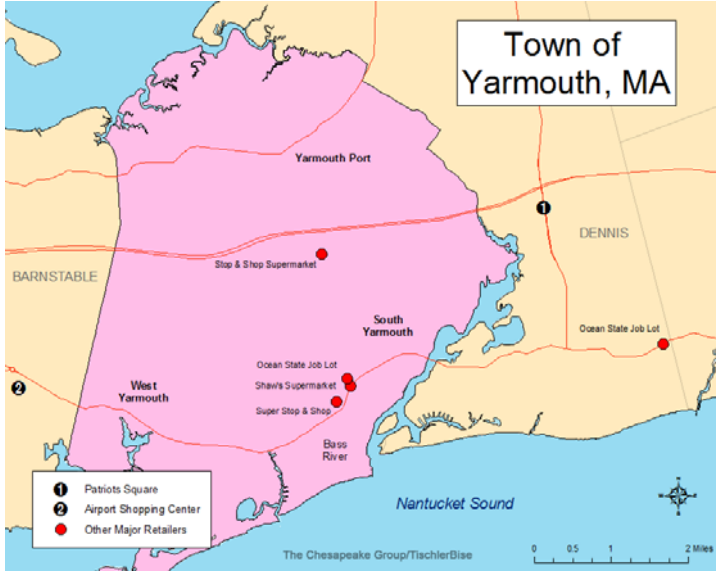
Table 51 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Wellfleet\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	6,202,000	6,199,000	6,559,000	11,582	11,578	12,250
Eat/Drink	8,951,000	8,947,000	9,466,000	22,378	22,368	23,665
General Merchandise	5,587,000	5,584,000	5,908,000	18,224	18,214	19,271
Furniture	2,844,000	2,843,000	3,008,000	8,759	8,757	9,265
Transportation	13,376,000	13,369,000	14,146,000	38,923	38,902	41,163
Drugstore	4,679,000	4,676,000	4,948,000	9,358	9,352	9,896
Apparel	3,231,000	3,230,000	3,417,000	10,054	10,051	10,633
Hardware	5,542,000	5,539,000	5,861,000	23,559	23,547	24,916
Vehicle Service	7,002,000	6,999,000	7,405,000	17,046	17,039	18,027
Miscellaneous	6,069,000	6,066,000	6,418,000	23,441	23,428	24,787
TOTAL	63,483,000	63,452,000	67,136,000	183,324	183,236	193,873

\*Developed by The Chesapeake Group, Inc., 2013.



Yarmouth



The residents of the Town of Yarmouth generate \$574 million in sales which supports 1.66 million square feet of space in 2013. The sales and space will increase respectively to \$607 million and 1.75 million square feet of space by 2033.

Table 52 - Residentially Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category for Yarmouth\*

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	56,121,000	55,980,000	59,349,000	104,809	104,546	110,837
Eat/Drink	80,994,000	80,790,000	85,653,000	202,485	201,975	214,133
General Merchandise	50,549,000	50,422,000	53,457,000	164,886	164,472	174,371
Furniture	25,734,000	25,669,000	27,214,000	79,265	79,066	83,825
Drugstore	42,335,000	42,228,000	44,770,000	84,670	84,456	89,540
Apparel	29,238,000	29,165,000	30,920,000	90,980	90,754	96,213
Hardware	50,147,000	50,021,000	53,032,000	213,174	212,638	225,438
Vehicle Service	63,359,000	63,199,000	67,003,000	154,247	153,857	163,118
Miscellaneous	54,915,000	54,777,000	58,074,000	212,100	211,566	224,300
TOTAL	574,423,000	572,977,000	607,465,000	1,658,800	1,654,626	1,754,218

\*Developed by The Chesapeake Group, Inc., 2013.

It is noted that all of the estimates include both full and part-time resident spending. According to the assessment office records, there are more than 49,000 second homes in the Cape. Some are used a few weeks of the year and some longer. The table that follows contains the location of the second homes.

It is also noted, that second homes are often rented out during the year. Sales and supportable space generated by the renters is excluded from the above estimates.

Table 53 – Second Home Units by Jurisdiction in Cape\*

TOWN	Total second home units
BARNSTABLE	4702
BOURNE	1729
BREWSTER	3081
CHATHAM	3,366
DENNIS	8128
EASTHAM	3185
FALMOUTH	2799
HARWICH	4286
MASHPEE	3435
ORLEANS	2121
PROVINCETOWN	1818
SANDWICH	1255
TRURO	1834
WELLFLEET	2369
YARMOUTH	5273
Total	49381

\*Based on assessor’s data.

The full-time residential population has not grown in the recent past. However, the population is likely to expand in the future as some part-time residents become full-time.

**TABLE 9: BARNSTABLE COUNTY POPULATION ESTIMATE**

	1990	2000	2010	% Change 2000-2010
<b>Population</b>	186,605	222,230	215,888	-2.85%

Source: U.S. Census Bureau, Census 2010, Census 2000, Census 1990

**Total Demand for Retail Goods and Services Generated by Seasonal Rented Residential Units of Cape Cod**

Currently, many of the second homes and units associated with investment properties are rented during the year. The bulk of the rentals based on demand are in the summer season. These visitors have a significant impact on retail goods and services sales and supportable space on the area. Furthermore, such sales and supportable generated space will continue to grow annually in the foreseeable future.

It is estimated that the sales from this non-resident market segment will grow from about \$236 million in 2013 to about \$246 million in 2033. It is noted that impacted are seven of the ten categories of retail goods and services, with sales in other three categories being insignificant.

The amount of supportable space is estimated at 648,000 square feet in 2013; and supportable space is expected to rise to 674,000 square feet by 2033. The supported space will grow by about 27,000. The sales and space from this market will change as the number of units available could diminish as part-time residents retire and relocate to the Cape on a full-time basis. By definition, all space generated from the sales are captured or go to establishments on Cape Cod. Table 54 contains the category and total sales and space generated by rented residential units for 2013, 2023 and 2033.

*Table 54 – Rented Residential Units Generated Demand (Retail Goods and Related Services Supportable Square Footage of Space) for 2013, 2023 and 2033 by Category\**

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	47,260,000	48,206,000	49,170,000	88,261	90,028	91,828
Eat/Drink	70,891,000	72,308,000	73,755,000	177,228	180,770	184,388
General Merchandise	23,630,000	24,103,000	24,585,000	77,080	78,622	80,193
Drugstore	7,089,000	7,231,000	7,375,000	14,178	14,462	14,750
Apparel	16,541,000	16,872,000	17,209,000	51,471	52,501	53,550
Vehicle Service	23,630,000	24,103,000	24,585,000	57,527	58,679	59,852
Miscellaneous	47,260,000	48,206,000	49,170,000	182,534	186,186	189,913
<b>TOTAL</b>	<b>236,301,000</b>	<b>241,029,000</b>	<b>245,849,000</b>	<b>648,279</b>	<b>661,248</b>	<b>674,474</b>

\*Developed by The Chesapeake Group, Inc., 2013.

## Demand for Retail Goods and Services Generated by Other Visitors to Cape Cod

According to the Cape Cod Chamber of Commerce, the following indicators suggest that the number of visitors to Cape Cod in total has recovered from the peak of the Great Recession; but that overall growth or increases in visitation is marginal or small.

- ✓ The number of visitors to the Route 6 visitor center in 2012 was below the number in 2007 but above 2010 and 2011.

*Table 55 - Route 6 Visitor Center Counts\**

Month	2013	2012	2011	2010	2009	2008	2007
January	222	96	76	108	175	358	469
February	215	249	135	308	391	406	562
March	430	453	305	303	645	509	759
April	1,095	1,262	1,126	1,284	1,546	1,377	1,660
May	1,659	1,892	2,119	2,230	2,556	2,168	3,180
June		2,876	3,077	3,408	3,410	3,769	4,500
July		5,504	5,627	5,484	6,195	7,179	6,857
August		6,198	6,581	6,613	6,800	7,136	7,927
September		4,180	3,606	3,522	4,250	3,454	4,561
October		2,717	1,837	2,209	2,669	2,729	2,202
November		510	327	350	305	721	838
December		151	137	100	154	226	339
<b>TOTAL:</b>		<b>26,088</b>	<b>24,953</b>	<b>25,919</b>	<b>28,637</b>	<b>30,032</b>	<b>33,854</b>

\*Provided by the Cape Cod Chamber of Commerce.

- ✓ East and westbound bridge counts have not increased substantially since 2007.

Table 56 – Bridge Crossing Counts from 2007 to 2013\*

Quarter	2013	2012	2011	2010	2009	2008	2007
<b>Quarter 1</b>							
Eastbound	37,363	38,243	30,410*	37,371	37,136	37,824	38,409
Westbound	38,263	37,828	29,128*	37,135	36,789	37,544	38,138
<b>Quarter 2</b>							
Eastbound		50,591	50,010	50,468	50,662	49,701	51,275
Westbound		48,368	48,496	49,448	49,272	48,268	49,587
<b>Quarter 3</b>							
Eastbound		59,557	59,062	60,070	59,577	58,003	60,222
Westbound		60,359	59,026	60,032	59,721	58,033	60,677
<b>Quarter 4</b>							
Eastbound		42,872	43,205	42,363	42,285	42,349	43,065
Westbound		42,706	43,064	42,189	Station down	41,926	42,714

\*Source: Mass. Highway Department Average Daily Traffic count.

- ✓ According to the Chamber of Commerce’s “Accommodation Survey,” average daily occupancy has remained relatively constant or fluctuated for hotel rooms. Daily room rates and associated revenue have increased in general in the past two years.

Table 57 – Cape Code Chamber Accommodations Survey Occupancy and Room Rates\*

Month	2013	2012	2011	2010	2009	2008
January: Occupancy	24.2%	26.57%	22.76%	33.86%	26.41%	22.91%
ADR	\$80.49	\$84.89	\$109.60	\$60.50	\$115.60	\$72.47
RevPAR	\$19.50	\$22.56	\$24.94	\$20.49	\$30.53	\$25.33
February: Occupancy	50.7%	43.7%	46.4%	38.52%	46%	45.88%
ADR	\$119.14	\$129.69	\$127.11	\$102.43	\$141.94	\$77.02
RevPAR	\$60.42	\$56.65	\$59.24	\$39.46	\$65.33	\$50.27
March: Occupancy	40.66%	38.94%	32.7%	28.47%	34.15%	35.17%
ADR	\$98.34	\$100.21	\$90.66	\$93.76	\$88.20	\$88.08
RevPAR	\$39.99	\$39.02	\$29.64	\$26.69	\$30.12	\$26.49
April: Occupancy	39.1%	37.6%	44.5%	40.78%	37.24%	44.73%
ADR	\$151.52	\$150.43	\$121.36	\$63.82	\$95.92	\$98.29
RevPAR	\$59.18	\$56.60	\$54.10	\$26.02	\$35.72	\$62.68
May: Occupancy	46.9%	46.2%	47.6%	45.60%	45.70%	42.16%
ADR	\$134.11	\$124.04	\$105.61	\$103.87	\$102.84	\$96.66
RevPAR	\$62.90	\$57.34	\$50.27	\$46.63	\$46.99	\$46.20
June: Occupancy		62.11%	56.86%	59.1%	51%	59.70%
ADR		\$144.08	\$134.59	\$115.41	\$131.19	\$91.19
RevPAR		\$89.49	\$76.53	\$68.91	\$66.71	\$80.19
July: Occupancy		84.83%	83.9%	75.90%	65.08%	83.10%
ADR		\$228.70	\$220.75	\$169.39	\$162.48	\$145.37
RevPAR		\$194.01	\$185.42	\$128.68	\$105.75	\$130.79
August: Occupancy		92.08%	84.04%	80.01%	81.35%	87.3%
ADR		\$230.19	\$197.31	\$167.27	\$193.12	\$173.31
RevPAR		\$211.96	\$166.99	\$134.01	\$157.10	\$167.97
September: Occupancy		67.05%	68.04%	66.2%	61.60%	74.3%
ADR		\$135.86	\$133.74	\$109.99	\$115.29	\$150.39
RevPAR		\$91.04	\$91	\$72.81	\$71.12	\$86.04
October: Occupancy		40.6%	50.9%	51.63%	51.50%	54.81%
ADR		\$139.73	\$129.70	\$103.68	\$103.21	\$107.98
RevPAR		\$56.67	\$65.74	\$53.53	\$53.18	\$55.07
November: Occupancy		31.4%	30%	29.2%	27.92%	30.3%
ADR		\$125.04	\$118.85	\$112.61	\$76.44	\$113.68
RevPAR		\$39.24	\$35.67	\$32.94	\$21.34	\$23.34
December: Occupancy		26.73%	29.47%	19%	21.97%	34.60%
ADR		\$116.25	\$121.47	\$101.72	\$90.86	\$164.89
RevPAR		\$31.07	\$35.80	\$19.02	\$19.96	\$18.60

\*Based on survey responses from survey to Cape Cod Chamber Accommodations Surveys.

- ✓ According to the U.S. Parks Service, visitations to the Cape Cod National Seashore are slightly down since 2008.

*Table 58 – Cape Cod National Seashore Visitation Estimates\**

Month	2013	2012	2011	2010	2009	2008
January	122,736	124,095	104,608	108,585	95,271	160,536
February	135,646	131,024	100,218	115,351	142,650	123,480
March	184,199	230,858	168,271	172,554	176,443	154,176
April	238,561	262,831	257,933	273,613	282,861	303,361
May		329,107	323,490	319,446	347,258	359,078
June		499,236	484,766	541,268	444,506	432,796
July		881,328	865,639	873,731	810,164	872,651
August		852,951	1,029,194	1,029,421	868,289	946,625
September		493,044	453,354	567,099	540,604	530,581
October		365,664	394,611	347,087	332,008	399,733
November		166,124	171,559	205,181	182,395	190,245
December		135,026	130,496	129,918	118,785	125,121
<b>TOTAL:</b>		<b>4,470,838</b>	<b>4,484,319</b>	<b>4,683,254</b>	<b>4,341,234</b>	<b>4,673,783</b>

\*Provided by the Cape Cod National Seashore.

- ✓ The Barnstable Municipal Airport shows a decline in use since 2007.

*Table 59 – Barnstable Municipal Airport Traffic\**

Month	2013	2012	2011	2010	2009	2008	2007
January	7,269	7,067	6,304	6,850	7,653	8,576	9,293
February	5,872	7,177	6,226	7,073	7,257	8,205	8,057
March	8,483	7,866	7,455	6,851	9,265	9,048	10,030
April	8,396	8,196	6,635	8,430	10,041	9,755	9,629
May		8,357	8,046	9,040	10,468	11,062	11,828
June		9,338	8,383	9,367	10,359	11,312	11,537
July		10,944	9,747	11,392	10,640	12,287	12,447
August		11,263	9,299	11,011	10,267	13,013	14,146
September		9,425	8,979	9,548	9,632	10,181	11,002
October		8,355	9,007	8,825	8,766	10,546	9,711
November		8,382	8,651	7,934	7,350	8,519	8,920
December		7,779	8,131	7,400	6,883	8,401	7,781
<b>TOTAL:</b>		<b>104,149</b>	<b>96,863</b>	<b>103,721</b>	<b>108,581</b>	<b>120,904</b>	<b>124,381</b>

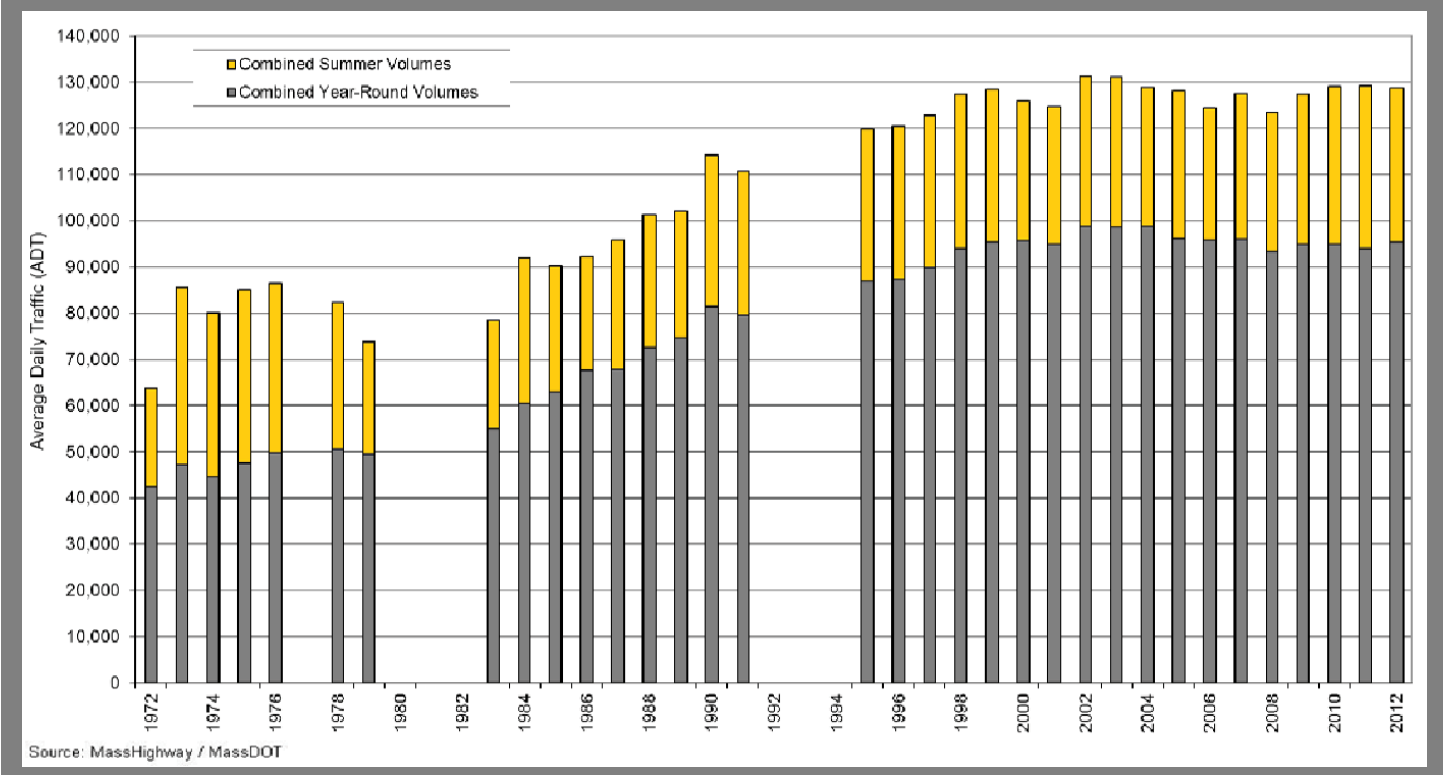
\*Provided by Barnstable Municipal Airport

- ✓ Room sales tax receipts have increased as a result of the noted rise in room rates.

<b>ROOMS TAX RECEIPTS - BARNSTABLE COUNTY</b>						
	2013	2012	2011	2010	2009	2008
<b>Quarter 1</b>	\$1,420,136.37	\$1,378,790.80	\$1,202,847	\$1,116,930	\$1,063,839	\$1,164,617
<b>Quarter 2</b>		\$5,811,287.63	\$5,121,522	\$4,499,857	\$4,222,095	\$4,659,069
<b>Quarter 3</b>		\$15,659,104.80	\$15,130,334	\$14,126,895	\$12,380,625	\$13,393,521
<b>Quarter 4</b>		\$2,879,962	\$2,863,721	\$2,749,921	\$2,146,738	\$2,499,206
<b>TOTAL:</b>		<b>\$25,729,145</b>	<b>\$24,318,424</b>	<b>\$22,493,603</b>	<b>\$19,813,297</b>	<b>\$21,716,413</b>

*Source: Department of Revenue*

✓ Measurements of Average Daily Traffic in summer months do not show a definitive uptick.



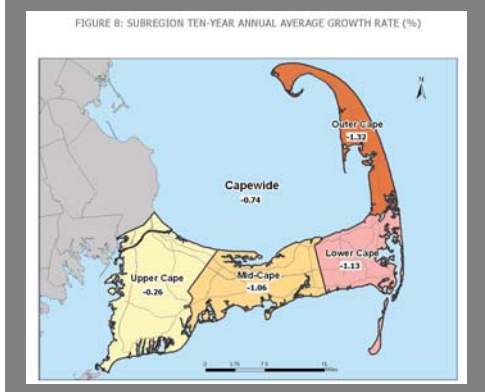
✓ In fact, the ten year pattern obtained from all Massachusetts Department of Transportation’s checkpoints shows a declining pattern in traffic.

TABLE 8: CAPE COD SUMMER TRAFFIC GROWTH BY SUBREGION

Region*	Number of Comparisons**	10-Year Total Growth	10-Year Annual Average Growth Rate	One-Year Growth Rate 2011-2012
Upper Cape	110	-2.48%	-0.26%	0.50%
Mid-Cape	108	-10.07%	-1.06%	-0.55%
Lower Cape	70	-10.71%	-1.13%	-4.52%
Outer Cape	63	-12.44%	-1.32%	0.37%
<b>All Roads</b>	<b>351</b>	<b>-7.09%</b>	<b>-0.74%</b>	<b>-0.59%</b>

\*Upper = Bourne, Sandwich, Falmouth, Mashpee | Mid = Barnstable, Yarmouth, Dennis  
 Lower = Harwich, Chatham, Brewster, Orleans | Outer = Eastham, Wellfleet, Truro, Provincetown  
 \*\* Corresponds to ten-year analysis only

FIGURE 8: SUBREGION TEN-YEAR ANNUAL AVERAGE GROWTH RATE (%)



As would be anticipated, average occupancy rates in traditional transient accommodations, such as hotels and motels and Beds and breakfasts, vary from season to season. For 2012, the occupancy fluctuated from a high of 83.7% in August to a low of 28.2% in January. Average occupancy rate was above 70% only in July and August. However, it did approach the 70% level both in June and September.

*Table 60 – Occupancy Rates by Month for 2012 and Utilized Room Night Estimates for 2012\**

Month	2012 Occupancy Rate	Room Nights
January	28.2%	5358
February	35.2%	6688
March	37.6%	7144
April	42.4%	8056
May	51.2%	9728
June	69.1%	13129
July	77.1%	14649
August	83.7%	15903
September	68.8%	13072
October	57.8%	10982
November	38.8%	7372
December	31.1%	5909
Total	51.0%	3,539,700

\*Developed by the Chesapeake Group, Inc., 2013.

In total, 3.54 million room nights were utilized in 2012. Of these room nights, 2.03 million or 57.4% of the occupancy occurred between June and October.

The visitors staying in traditional transient accommodations spent about \$519 million on Cape Cod on their visits. The number is expected to grow by a relatively small percentage each year, reaching \$586 million and \$639 million in 2023 and 2033, respectively. The associated supportable square footage of space on Cape Cod will grow from roughly 1.53 million to 1.88 million between 2013 and 2033.

*Table 61 – Transient Accommodation Visitor Generated Demand for retail Goods and Related Services\**

Category	2013 Sales	2023 Sales	2033 Sales	2013 Space	2023 Space	2033 Space
Food	25,966,000	29,341,000	31,982,000	48,492	54,797	59,728
Eat/Drink	181,761,000	205,390,000	223,875,000	454,403	513,475	559,688
General Merchandise	51,932,000	58,683,000	63,964,000	169,398	191,419	208,645
Drugstore	15,580,000	17,605,000	19,189,000	31,160	35,210	38,378
Apparel	88,284,000	99,761,000	108,739,000	274,716	310,427	338,367
Vehicle Service	36,352,000	41,078,000	44,775,000	88,498	100,004	109,004
Miscellaneous	119,443,000	134,971,000	147,118,000	461,324	521,301	568,215
TOTAL	519,318,000	586,829,000	639,644,000	1,528,000	1,727,000	1,882,000

\*Developed by the Chesapeake Group, Inc., 2013.

## Total of All Markets Demand for Retail Goods and Services

In total, the markets for commercial activity on Cape Cod support roughly 17.64 million square feet of space in 2013. This is expected to grow by about 2 million square feet in the next 20 years, representing a growth of about 11%.

*Table 62- Total Market Generated Demand for Retail Goods and Related Services for 2013 and 2023 and the Change in Goods and Services Sales and Supportable Square Footage of Space between 2013 and 2033\**

Category	2013 Sales	2023 Sales	2013-33 Sales	2013 Space	2023 Space	2013-33 Space
Resident Generated	5,356,498,000	5,359,121,000	566,458,000	15,468,000	15,476,000	1,636,000
Rented Resident Generated	236,301,000	241,029,000	9,548,000	648,000	661,000	26,000
Transient Acc. User Gen.	519,318,000	586,829,000	120,326,000	1,528,000	1,727,000	354,000
<b>Total</b>	<b>6,112,117,000</b>	<b>6,186,979,000</b>	<b>696,332,000</b>	<b>17,644,000</b>	<b>17,864,000</b>	<b>2,016,000</b>

\*Developed by the Chesapeake Group, Inc., 2013.

## Traditional Office Space Opportunities

The residents of Cape Cod believe that there are changes that they would like to see that would enhance quality of life within the community, making it a better place in which to reside. Table 63 contains elements that residents would like to see changed. Among the top two changes is “better employment and housing opportunities for younger families.” Among the top five is “better year-round employment;” and among the top ten is a “diversified economy.” Among the desires, no other cluster is more dominant than the noted changes in the economy as well as the housing structure.

*Table 63 - Factors or Elements for Change on Cape Cod\**

Factor Making Cap Code a Better Place	Percent
Affordable Year-round Housing	12.16%
<b>Better employment and housing opportunities for younger families.</b>	<b>11.76%</b>
Others	10.98%
Improve local transportation services	9.41%
<b>Better Year-round Employment</b>	<b>6.67%</b>
An affordable waste water solution	6.27%
Better Road Conditions	3.92%
Modernize/Younger Community	3.92%
<b>Diversified economy</b>	<b>3.14%</b>
Better Quality Grocery stores	2.75%
Lower Cost of Living	2.75%
Address Drug/Crime Problems	2.35%
Keep it special - no more chain stores	2.35%
Lower Tax and Regulations	2.35%
Better beach access	1.96%
Improve public school system	1.96%
More Shopping options	1.96%

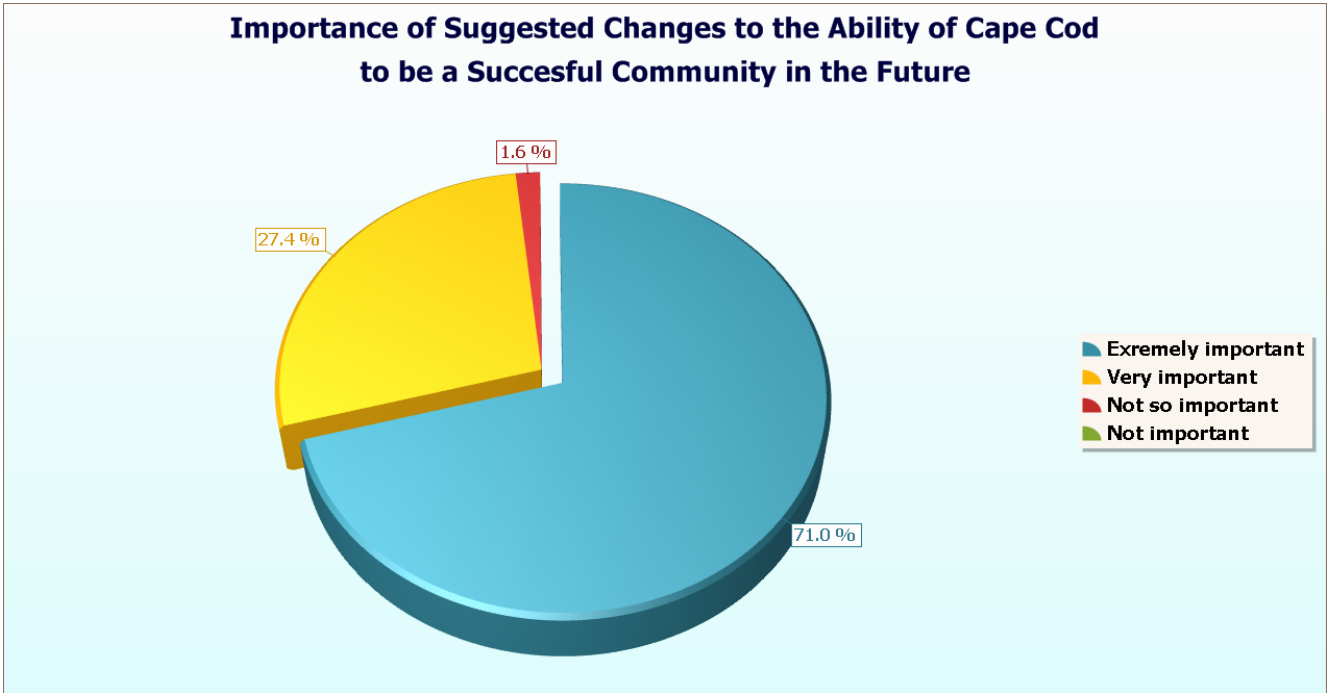


Table 63 - Factors or Elements for Change on Cape Cod (Continued)\*

Factor Making Cap Code a Better Place	Percent
More Tech jobs	1.96%
Support Local Business	1.96%
Better Bike Lanes	1.57%
Less Retirees	1.57%
Lower congestion	1.57%
A 3rd Bridge	1.18%
Adjust Zoning	1.18%
Improve Healthcare	1.18%
More Year-round Businesses	1.18%

\*Developed by the Chesapeake Group, Inc., 2013.

Furthermore, a significant majority of residents feel that the indicated changes are important to the success of the community in the future.



Estimates of office space are premised upon that which follows

- ✓ Opportunities to provide employment within the Cape for current and future residents.
- ✓ Changing demographics which will create growing demand for medical and other select services.
- ✓ The potential to diminish commuting to and from the Cape because of the provision of space for economic activity within the Cape.
- ✓ Mitigation of some stress on the transportation system.
- ✓ Declining average per gross square footage per employee.
- ✓ Continued growth in home studios and other work-office activity.

It is estimated that on Cape Cod roughly 900,000 square feet of office space could be absorbed in the next ten years with: (a) a shift in some of the current employment activity of part-time residents to the area, (b) a shift in commuting by some part-time residents, (c) the conversion of some current visitors to the Cape to residents, and (d) the dispersal and expansion of medical services essential as the population continues to age.

Some of the types of operations that could be associated with such space include those that follow that were defined as being under-represented in Barnstable County.

- Mortgage and non-mortgage loan brokers
- Investment banking and securities dealing
- Direct health and medical insurance carriers
- Direct property and casualty insurance carriers
- Direct title insurance carriers
- Insurance agencies and brokerages
- Architectural services
- Graphic design services
- Custom computer programming services
- Computer systems design services
- Computer facilities management services
- Research and development in biotechnology
- Research and development in the social sciences and humanities
- Public relations agencies
- Marketing research and public opinion polling
- Photography studios, portrait
- Offices of physicians (except mental health specialists)
- Offices of physicians, mental health specialists
- Offices of dentists
- Offices of chiropractors
- Offices of mental health practitioners (except physicians)
- Offices of physical, occupational and speech therapists, and audiologists
- Kidney dialysis centers
- Freestanding ambulatory surgical and emergency centers
- Diagnostic imaging centers

## **Non-traditional Office Space Opportunities**

Cape Cod is the home of one a world renowned research institute. Woods Hole Oceanographic Institution is the world's largest private, non-profit oceanographic research institution and a global leader in the study and exploration of the ocean. The institution is dedicated to research and education to advance understanding of the ocean and its interaction with the Earth system, and to communicating this understanding for the benefit of society.

Woods Hole has numerous partners. Partners are attracted to the entity because of its “can-do” environment maintained in the lab and at sea. This fosters breakthrough discovery and supports further innovation and entrepreneurship well beyond the Institution. WHOI also provides its partners with connections in the worlds of research, engineering, and education that only a global leader in scientific research and ocean exploration can provide.

WHOI’s partners include but are not limited to those that follow.

**U. S. Government:** NSF, National Science Foundation; DOD, Department of Defense; NOAA, National Oceanic and Atmospheric Administration; NASA, National aeronautics and Space Administration; USGS, U.S. Geological Survey; DOE, Department of Energy; NIH, National Institutes of Health; and EPA, Environmental Protection Agency.

**International Governments:** Chinese Academy of Sciences; Ecuador’s Naval Oceanographic Institute; French Research institute of Exploration of the Sea; India’s Council of Scientific and Industrial Research; Pakistan’s national Institute of Oceanography; Vietnam Academy of Science and Technology.

**Academic:** Alexandria University; Cape Breton University; Cornell University; Dalhousie University; Korea Maritime University; Marine Biological Laboratory; Massachusetts Institute of Technology; National Oceanography Centre, Southampton; Naval Post Graduate School; Oregon State University; Rensselaer Polytechnic Institute; Scripps Institution of Oceanography; Shanghai Ocean University; Universidad de Concepcion; University of Tokyo.

**Industry:** Chevron; Flatley Discovery Lab; James Fisher Defense; Kongsberg Hydroid; Raytheon; Schlumberger Doll Research; Sonardyne; Teledyne Technologies.

**Non-government Organizations:** Conservation International and the Smithsonian Institution.

Opportunities to attract branches of those entities to Cape Cod most likely exist as some have locations near other partners in other locations. In addition, the opportunity for entrepreneurial research laboratories would also be a niche that Cape Cod could pursue.

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## Policy Conclusions

There are some very significant policy issues raised by the analysis and the findings of opportunities that suggest that future economic viability and sustainability for Cape Cod is in question without a “correction in course.”

Cape Cod’s economy has been driven by its appeal to non-residents, providing employment opportunities for full-time residents. Unlike tourist driven vacation destinations crammed with traditional hotel and motel operations, the driving force has been the second home market. Many of the units have been passed down from one generation to another in the past; many are rented during the “season;” and others have been sold to like minded “baby boomer” households often residing within driving distance of the area and seeking water related activity. The latter group’s impact on the market for single-family housing, the bulk of the supply in the Cape, will diminish to become minuscule after the next few years.

Clearly, the emerging generation that would be the “next owners” of the second homes differs significantly from previous generations and the “baby boomers.” In general, it has greater mobility; is more likely to move to locations further from the Cape and move with greater frequency, making second homes used for extended time frames and quick getaways in one location less important; has a diversity that is dissimilar to the previous and current populations associated with the Cape’s second home market; seeks a more dynamic mixture of activity on a regular basis in larger numbers, etc.

Other factors also suggesting economic sustainability requires change are also apparent. Visitor attractions, such as the national seashore, visitations have peaked and are no longer growing. The number of trips to the Cape, whether by road, air, or other means, is not growing. Certain infrastructure, such as the internal road system, is taxed or failing at present, with expansion difficult if not impossible in most locations without damaging the character of the Cape’s communities. Limited “virgin” developable parcels exist to support a continuation of past development patterns of largely single-family detached homes and strip commercial development and shopping facilities.

Most importantly, the previously defined opportunities to expand economic activity and related economic viability abound with the potential positive return to the current residents and property owners, current and future business operators, local jurisdiction tax revenues, expanded full-year employment opportunities, broadened entrepreneurial and employment opportunities for full-year current and future residents, and others. The range in opportunities includes those that followed as previously documented.

- ✓ Accommodating existing residents that will seek alternative housing styles in the next few years for a variety of reasons including, but not limited to aging factors.
- ✓ Accommodating other potential part-time residents that wish to utilize housing less frequently than they typical part-time user at present, or are concerned with maintenance factors as absentees or non-regular users.
- ✓ Expansion of some convenience and other retail located in communities or neighborhoods versus concentrated in one or a handful of communities in the Cape.
- ✓ Roughly 900,000 square feet of additional office space, including but not limited to the dispersal and expansion of medical services essential as the population continues to age.
- ✓ Substantial reasons and opportunities for R & D activity independent of or in partnership with Woods Hole. Such activity could more than double the potential for new office space.

The above activity, if developed, will result in greater future economic sustainability to the benefit of all.

However, it cannot be accomplished without modifications to the traditional land use and development patterns and increased inter-jurisdictional cooperation. It is not possible to develop the type and density of housing for a changing market; locate commercial to areas appropriate to residents, resulting in less traffic congestion and improved quality of life particularly in-season; expand employment options, resulting in increased year-around activity, broader range of jobs, expanded local tax revenues and other impacts; generally provide greater economic opportunity and expanded professional services; and maintain or enhance property values for all ends of the spectrum because of growth in demand.

Appropriate redevelopment of built sites and structures, compatible and complementary to the existing community, is the only option that will: preserve and enhance the economic viability, current and future residential and non-residential property values; take advantage of opportunities; and preserve and enhance quality of life for this and future generations in a “land-locked” peninsula area.

Other jurisdictions faced or are facing such conditions and have collectively worked together to seize opportunities. Some such areas include the “Pottstown Region” in Chester and Montgomery County Pennsylvania, the Florida Keys, and Carteret County jurisdictions in North Carolina. Many others have addressed fiscal and infrastructure issues in a multi-jurisdiction manner. Others, like the Triangle Area in North Carolina, have addressed opportunities through multi-jurisdictional economic development and land use policies and programs.

Many started with simply making land use consistent and understandable no matter which jurisdiction was involved. This means diminishing risk for the potential resident and investor. There are many ways of doing such. One simple way is to have jurisdictions comprehensive or land use plans “match” each other so that there are common threads; common zoning classifications; and existing or proposed land use compatibility on borders.

From a policy perspective, individual community identities and competition should and must continue. Yet, success will also be achieved by cooperation on land use and infrastructure issues to seize the opportunities for additional housing, retail closer to the residents or in their own communities, R & D and other significant employment opportunities.

Development scale associated with sites must change to preserve economic viability. Both mixing of uses and mixed-use should be considered at densities beyond the norm in the area at this time on sites and parcels. This is the only practical way to achieve growth.

Typically local jurisdictions make little or no attempt to attract the “right” developers for projects, but respond to development proposals. A proactive role in the development process, seeking “qualified” national and international development interests, could be significant in the Cape in creating future accommodating, compatible development. “Qualified” development interests are those that have a proven track record or portfolio with similar projects and have the financial capacity to “pull off” new efforts at this time. This proactive role is most likely cost effective at a multi-jurisdictional level and not by my most individual jurisdictions.

A similar type of effort is essential to expand the institutional and corporate research base of activity in the Cape. In this case a “blue ribbon” committee could be established under the County or the Cape Cod Commission to facilitate the recruitment process. Woods Hole and others could play a significant role on such a committee.

Finally, the Cape has vast private sector fiscal resource interests whose local investment through such activity as directed “crowd-funding” or the establishment of a specific economic development investment fund could grow the economy in a sustainable manner. These resources will not likely be tapped in an efficient and effective manner without a multi-jurisdictional cooperative effort. The potential for such resource development on the Cape far exceeds the public sector funding capacity.



**MARKET  
ASSESSMENT FOR  
CAPE COD,  
MASSACHUSETTS**

**APPENDIX**

PREPARED FOR:

The Cape Cod Commission

PREPARED BY:

**THE CHESAPEAKE GROUP, INC.  
UNDER CONTRACT TO  
TISCHLERBISE**

# Resident Survey Form

## Cape Cod and Surrounding Areas Survey of Residents

1. of 5

The following survey is being conducted in cooperation with Barnstable County and the Cape Cod Commission. The survey provides valuable input for the Cape Cod Commission; its planning process; and its efforts to enhance, preserve or expand economic activity and opportunity in the region. Your input is extremely valuable to us.

The survey is strictly confidential. You are not asked to provide nor do we have any way of identifying your name, address, email or other specific information for the person or residence responding to the questionnaire. Please take a few minutes to fill out the questionnaire as completely as you can. Should there be any question that you are uncomfortable answering, do not answer it; but go to the next one. Thank you in advance for helping in this effort.

### 1. What is the name of the store at which you most often shop for groceries?

### 2. In which community is that store located?

### 3. Which of the following best describes the usual amount spent on groceries each week?

- |                                       |   |   |
|---------------------------------------|---|---|
| <input type="radio"/> Less than \$35  | <input type="radio"/> \$60 to \$74.99   | <input type="radio"/> \$125 to \$149.99 |
| <input type="radio"/> \$35 to \$44.99 | <input type="radio"/> \$75 to \$99.99   | <input type="radio"/> \$150 or more     |
| <input type="radio"/> \$45 to \$59.99 | <input type="radio"/> \$100 to \$124.99 |   |

### 4. Which of the following best describes the frequency that you eat lunch outside the home or place of employment at any type of food service establishment?

- |   |  |   |
|---|--|---|
| <input type="radio"/> A few times/week  | <input type="radio"/> Once/ month        | <input type="radio"/> Less often than once/year |
| <input type="radio"/> About once/week   | <input type="radio"/> 4 to 9 times/year  |   |
| <input type="radio"/> About twice/month | <input type="radio"/> Once or twice/year |   |

### 5. When eating lunch out, which of the following best describes the type of establishment most often frequented?

- |   |  |                             |
|---|--|-----------------------------|
| <input type="radio"/> Full-service restaurant | <input type="radio"/> All you can eat buffet | <input type="radio"/> Other |
| <input type="radio"/> Fast food operation     | <input type="radio"/> Sub shop               |                             |

### 6. What is the name of the establishment most often frequented for lunch?

### 7. In which community is that food service establishment located?

**8. Which of the following best describes the frequency that you eat dinner outside the home at any type of food service establishment?**

- A few times/week
- About once/week
- About twice/month
- Once/ month
- 4 to 9 times/year
- A few times/year
- Less often than a few times/year

**9. When eating dinner out, which of the following best describes the food establishment most often frequented?**

- Full-service restaurant
- Fast food operation
- All you can eat buffet
- Sub shop
- Other

**10. What is the name of the establishment most often frequented for dinner?**

**11. In which community is that food service establishment located?**

**12. Which of the following best describes the frequency that you make purchases on-line or through catalogs?**

- A few times/week
- About once/week
- About twice/month
- Once/ month
- 4 to 9 times/year
- Once or twice/year
- Less often than once/year

**13. Which of the following best describes the frequency that you go to see movies at a theater?**

- A few times/week
- About once/week
- About twice/month
- Once/ month
- 4 to 9 times/year
- Once or twice/year
- Less often than once/year

**14. Please identify the types of entertainment of which you enjoy or partake outside of the home.**



## Cape Cod and Surrounding Areas Survey of Residents

**15. Which of the following best describes the frequency that you purchase fresh vegetables, breads, baked items, fresh fish or other fresh items from a farmers' market, roadside stand, a butcher or a bakery?**

- A few times/week       Once/ month       Less often than once/year
- About once/week       4 to 9 times/year
- About twice/month       Once or twice/year

**16. Which of the following do you buy at such non-supermarket or non-box store operations? (check all that apply)**

- Fresh produce in season       other baked goods
- Fresh fruit in season       meats
- Fresh or smoked fish       other
- breads

**17. What is the name of the operation from which you make most clothes purchases?**

**18. In which community is that clothing establishment located?**

**19. Which of the following best describes the frequency that you attend crafts, art, guns, antiques or other collectible shows?**

- A few times/week       About once/week       About twice/month       Once/ month       4 to 9 times/year       Once or twice/year       Less often than once/year

**20. Please identify the types of collectables in which you have an interest when attending shows?**

# Cape Cod and Surrounding Areas Survey of Residents

3. of 5

## 21. Which of the following sports do you enjoy as a PARTICIPANT; and how often do you participate?

	A few times/month	About once/month	6 to 9 times/year	Once or twice/year	Less often than once/year	Never
Baseball	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Basketball	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bowling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boxing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bicycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Canoe/Kayaking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cross country skiing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diving or swimming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downhill skiing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equestrian and rodeos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Football	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Golf	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hockey/ice hockey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hunting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ice skating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Indoor fitness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lacrosse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Martial Art	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Motor cycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Motor sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other winter sports than skiing or hockey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Roller skating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rowing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Running	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sailing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soccer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Softball	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tennis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weightlifting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wrestling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Cape Cod and Surrounding Areas Survey of Residents

4.

**22. Which of the following recreational activities do you enjoy as a PARTICIPANT and how often do you participate?**

	No Interest/never	A few times/month	About once/month	6 to 9 times/year	Once or twice/year	Less often than once/year
Walking or running	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hiking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bird watching	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**23. How many people live in your household?**

- 1     
  2     
  3     
  4     
  5     
  6 or more

**24. How many people in your household are YOUNGER than six years of age?**

- 0     
  1     
  2     
  3     
  4 or more

**25. How many people in your household are employed full-time?**

- 0     
  1     
  2     
  3     
  4 or more

**26. How many people in your household are employed part-time?**

- 0     
  1     
  2     
  3     
  4 or more

**27. Is there anyone in your household that is employed at two different jobs?**

- Yes     
  No

**28. Is there anyone in your household that is not employed or employed part-time that would like to be employed full-time?**

- No     
  Yes, 1 person     
  Yes 2 or more people

**29. Which of the following best describes the person's or people's education levels?**

- Less than high school     
  High school     
  Technical     
  Some college or Associate's Degree     
  Bachelor's Degree     
  Advanced degree

**30. Which of the following would you say are the primary factors for not having the type of work wanted? (Check all that apply.)**

- |  |   |
|--|---|
| <input type="checkbox"/> No jobs for my skill or education level available | <input type="checkbox"/> Child care issues                          |
| <input type="checkbox"/> No jobs for my experience level                   | <input type="checkbox"/> Lack of employment opportunities near home |
| <input type="checkbox"/> Pay insufficient                                  | <input type="checkbox"/> Lack of transportation                     |
| <input type="checkbox"/> Age factors                                       | <input type="checkbox"/> Other factors                              |

## Cape Cod and Surrounding Areas Survey of Residents

**31. In which of the following age category does your household's primary income earner fall?**

- Under 25     25 to 34     35 to 44     45 to 54     55 to 64     65 to 74     75 or over

5. of 5

**32. How many vehicles does your household own or lease?**

- 0     1     2     3     4 or more

**33. How many vehicles are more than 5 years old that your household owns or leases?**

- 0     1     2     3     4 or more

**34. Which of the following best describes the amount of time in general you spend at your residence in Cape Cod or the surrounding communities in a year?**

- Less than 3 months     About 3 to 4 months     5 to 6 months     7 to 9 months     Most or all of the year

**35. Do you own or rent the home in which you live in either Cape Cod or one of the surrounding communities?**

- Own/Buying     Rent     Neither

**36. Which of the following best describes the amount of time you have lived at your current address in the Cape Cod area?**

- 2 years or less     3 to 4 years     5 to 9 years     10 to 19 years     20 or more years

**37. Which of the following best describes the amount of your monthly rent or mortgage payment?**

- |  |  |  |
|--|--|--|
| <input type="radio"/> None                     | <input type="radio"/> \$1,250 to \$1,499/month | <input type="radio"/> \$2,000 to \$2,499/month |
| <input type="radio"/> Less than \$500/month    | <input type="radio"/> \$1,500 to \$1,749/month | <input type="radio"/> \$2,500 to \$2,999/month |
| <input type="radio"/> \$500 to \$699/month     | <input type="radio"/> \$1,750 to \$1,999/month | <input type="radio"/> \$3,000 or more/month    |
| <input type="radio"/> \$700 to \$999/month     | <input type="radio"/> \$2,000 to \$1,499/month |  |
| <input type="radio"/> \$1,000 to \$1,249/month | <input type="radio"/> \$1,500 to \$1,999/month |  |

**38. Because of life-style changes, rental conditions, housing market conditions, employment changes, increase or decrease in family size, changes in physical or fiscal conditions, or for medical or other reasons; do you see yourself potentially moving from your current residence in this area in the next 5 years?**

- Yes     No     Maybe

**39. Hypothetically, if such a move occurred, is there a reason to believe that the move would likely be to an area outside of the general Cape Cod area?**

- Yes     No     Uncertain

## Cape Cod and Surrounding Areas Survey of Residents

**40. If you were to move in the next 5 years, would you be likely to move to a unit that was larger, smaller, or about the same size as your current unit?**

- Larger       Smaller       Same       Uncertain

6. of 5

**41. On a scale of 1 to 5, with 5 being Excellent and 1 being Poor, please rank each of the following in the Cape Cod area?**

	1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent
Housing Options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local employment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range of food service operations like restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of food service operations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**42. Which of the following answers describe your reasons for living in a Cape Cod area community? (select all appropriate)**

- Great place to spend time       Have always lived in this area       Close to work  
 Near my primary residence       Spent the summers here historically       Close to services  
 To be close to family and friends       Was from this area originally       Other reasons

**43. Please tell us what you believe would make Cape Cod a better place to live.**

**44. How important do you feel those changes are to the ability of Cape Cod to be a successful community in the future?**

- Extremely important  
 Very important  
 Not so important  
 Not important

**45. What reasons do you believe Cape Cod is good place to open and operate a business?**

**46. Please provide the name of the town or community in which you live.**

## Cape Cod and Surrounding Areas Survey of Residents

**47. In which of the following categories does YOUR TOTAL annual household income fall? (Include pensions or Social Security if applicable)**

- |  |  |
|--|--|
| <input type="radio"/> Less than \$15,000     | <input type="radio"/> \$150,000 to \$199,999 |
| <input type="radio"/> \$15,000 to \$24,999   | <input type="radio"/> \$200,000 to \$249,000 |
| <input type="radio"/> \$25,000 to \$49,999   | <input type="radio"/> \$250,000 to \$299,999 |
| <input type="radio"/> \$50,000 to \$74,999   | <input type="radio"/> \$300,000 to \$399,999 |
| <input type="radio"/> \$75,000 to \$99,999   | <input type="radio"/> \$400,000 to \$499,999 |
| <input type="radio"/> \$100,000 to \$124,999 | <input type="radio"/> \$500,000 or more      |
| <input type="radio"/> \$125,000 to \$149,999 |  |

WASTEWATER QUESTIONS TO BE ANSWERED ONLY BY PART AND FULL-TIME RESIDENTS OF THE CAPE COMMUNITIES

**48. How frequently do you pump your on-site septic system?**

- |  |   |                                      |
|--|---|--------------------------------------|
| <input type="radio"/> Once a year          | <input type="radio"/> Every 3 to 4.9 years  | <input type="radio"/> Never have yet |
| <input type="radio"/> Every 1 to 2.9 years | <input type="radio"/> Every 5 or more years | <input type="radio"/> Not applicable |

**49. How old is your on-site septic system?**

**50. At what age do you expect your existing system will need to be replaced?**

**51. How much do you think it will cost to replace your existing system?**

**52. Assume a wastewater management plan has been developed that will adequately maintain and improve the quality of our drinking water, freshwater ponds, and coastal water resources on Cape Cod; if you, along with everyone else, had to pay \$25 more per month to implement this plan would that be acceptable or unacceptable given your current budget?**

- Acceptable
- Unacceptable

## Cape Cod and Surrounding Areas Survey of Residents

7.

**53. If you, along with everyone else, had to pay \$50 more per month to implement this plan would that be acceptable or unacceptable given your current budget?**

- Acceptable  
 Unacceptable

**54. If you, along with everyone else, had to pay \$75 more per month to implement this plan would that be acceptable or unacceptable given your current budget?**

- Acceptable  
 Unacceptable

## Cape Cod and Surrounding Areas Survey of Residents

9.

**55. If you, along with everyone else, had to pay \$15 more per month to implement this plan would that be acceptable or unacceptable given your current budget?**

- Acceptable  
 Unacceptable

## Cape Cod and Surrounding Areas Survey of Residents

10.

**56. If you, along with everyone else, had to pay \$10 more per month to implement this plan would that be acceptable or unacceptable given your current budget?**

- Acceptable  
 Unacceptable

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## Demand Forecasting Modeling Processes and Inputs

The demand forecast models utilized in the analysis were developed by the Chesapeake Group, Inc. for use by The Chesapeake Group, Inc. They are proprietary in nature.

The model employs and combines a variety of analytical techniques and numerous inputs.

The model employs and combines regression, shift-share, input-output, concentric zone, and statistical trends analyses. Each has a distinct role in developing the spending information, essential sales for operations, cost of operation for each type of business, productivity levels, and future projections.

The inputs utilized in the process are numerous and include those that follow.

- ✓ Numerous federal publications available from the Census Bureau and other federal agencies. Some of the statistical data is defined for regions, counties, cities, zip codes and by census blocks and groups.
- ✓ State data if and when available on any and all facets of resident demographics, employment, unemployment, permits issued for new construction of residential units.
- ✓ Regional planning organizations' data on employment, unemployment, permits issued for new construction of residential units, etc.
- ✓ Appropriate Urban Land Institute publications.
- ✓ The online subscriber-based Retail Tenant Directory.
- ✓ Development publications associated with real estate industry interests on leasing, leasing trends, new commercial and residential construction, sale of property, etc.
- ✓ Web-based United States Postal Service data bases.
- ✓ Zillow.com and other on line entities that track housing values, sales and costs by micro-geographic area.
- ✓ Trade journals and data for each retail sector and, wherever possible, types of operations.
- ✓ Trade organization newsletters on various components of the retail and office sector.
- ✓ Various online sources that track specific retail industry business announcements with respect to changes in the numbers of operations for national and regional chains, or new models developed or pursued for such operations.
- ✓ Interviews with real estate interests and developers in the area under review.
- ✓ Surveys of resident spending patterns and commercial utilization patterns in the geographic area under review.

Information and data bases are updated quarterly at a minimum. Some of the paid subscription services provide new information as often as weekly and others monthly, resulting in updates at some junctures with greater frequency than quarterly.