Northeastern University
Dukakis Center *for* Urban & Regional Policy

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# SHAPING THE CAPE'S FUTURE

## A Report and Analysis from the Dukakis Center


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## Kitty and Michael Dukakis Center for Urban and Regional Policy

The Kitty and Michael Dukakis Center for Urban and Regional Policy conducts interdisciplinary research, in collaboration with civic leaders and scholars both within and beyond Northeastern University, to identify and implement real solutions to the critical challenges facing urban areas throughout Greater Boston, the Commonwealth of Massachusetts, and the nation. Founded in 1999 as a “think and do” tank, the Dukakis Center’s collaborative research and problem-solving model applies powerful data analysis, a bevy of multidisciplinary research and evaluation techniques, and a policy-driven perspective to address a wide range of issues facing cities and towns. These include affordable housing, local economic development, workforce development, transportation, public finance, and environmental sustainability. The staff of the Dukakis Center works to catalyze broad-based efforts to solve urban problems, acting as both a convener and a trusted and committed partner to local, state, and national agencies and organizations. The Center is housed within Northeastern University’s innovative School of Public Policy and Urban Affairs.

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# EXECUTIVE SUMMARY

## *Shape the Cape* and Study Objectives

Cape Cod, a peninsula off of the southeastern coast of Massachusetts, has a wealth of natural, historic, and cultural resources. These qualities make it a highly desirable place in which to live, work, vacation, and retire. Some consider the islands of Martha's Vineyard and Nantucket to be part of Cape Cod but for the purposes of this study, Cape Cod is defined strictly as Barnstable County (see Figure 2 on page 2). This study is motivated by the recent decline in Cape Cod's population. After seven decades of rapid population growth, why has the Cape begun to lose residents, particularly among young adults, aged 25 to 44?

The centerpiece of this study is a survey carried out by the Dukakis Center for Urban and Regional Policy at Northeastern University on behalf of Cape Cod Young Professionals (CCYP). A member based organization, CCYP's mission is "to connect Cape Cod's emerging workforce and future leaders, to engage them in our community, and to support their efforts to advance their lives, both business and personal, on the Cape" (CCYP, 2012). The survey of young people is part of CCYP's new initiative, *Shape the Cape*.

In addition to the survey, the Dukakis Center conducted four focus groups at various locations on the Cape and conducted telephone interviews with five former Cape Cod residents who have permanently moved off Cape. The focus groups and telephone interviews confirmed and supplemented the findings that emerged from the survey.

More than 3,000 young adults responded to the *Shape the Cape* survey, the results of which tell a fascinating story of what keeps them living on Cape Cod and what may force them to move elsewhere. Findings from this study could help to inform potential solutions for retaining young professionals on Cape Cod and for attracting new young residents to the region, thereby reversing recent trends.

## Cape Cod Demographics

According to the first census of Barnstable County in 1790, Cape Cod was home to just over 17,000 residents (see Figure 1 on page 3). The population would double by the eve of the American Civil War in 1860. For the remainder of the 19th century through 1920, the region's population declined, presumably as better job opportunities could be found elsewhere. It was not until 1940 that the Cape's population returned to its pre-civil war level. However, after World War II, Barnstable's population grew exponentially. With the completion of Route 6, the "Mid-Cape Expressway," the number of Cape residents skyrocketed from approximately 47,000 in 1950 to 148,000 in 1980. Barnstable County's population would continue to expand rapidly until 2000 when it peaked at 222,230, after which it stopped growing. By the 2010 US Census, the population had fallen by nearly three percent to 215,888 and the Census estimate for 2012 reveals a continued decline.

The most telling element of this reversal in population growth is its age profile. As shown in Figure 4 on page 4, the number of residents in the age group of 25 to 44 declined by nearly 27 percent on Cape Cod between 2000 and 2010. During this same period, the population of this age group in Massachusetts (excluding the Cape) fell by just 13 percent, while nationally it declined by only three percent.

The 27 percent decline represents a net loss of nearly 15,000 young adult residents on Cape Cod over a single decade. At the same time, Barnstable County's population of 45 to 64

year olds increased by 20 percent, yet even this growth, fueled by the aging of the Baby Boom generation, was slower than the rest of Massachusetts (28%) and the US (32%), as shown in Figure 5 on page 4. The growth in residents aged 65 or older, as shown in Figure 6 on page 4, reveals that this age group is growing at about the same rate on Cape Cod (5%) as the rest of the Commonwealth (5%), but more slowly than in the US as a whole (15%).

When considering the full population by age group, Figure 8 on page 5 reveals the sharp decline in the population of those 44 and younger, especially within the 24 to 44 age group. Likewise, the number of households (see Figure 9 on page 5) with members in the 25 to 44 age group fell by more than 8,400 between 2000 and 2010, while the number of households in the 45 to 64 age group and the 65 and older age group grew by more than 7,000 and 2,400, respectively. Essentially, Cape Cod is aging faster than nearly anywhere else in the Commonwealth.

Given the marked changes in the demographic patterns on Cape Cod, CCYP and Cape Cod residents have cause to be concerned that if these trends continue, the decline of its young working age population could threaten the vitality of the region's economy and its diverse and dynamic community.

## Survey Methodology

The Dukakis Center, with guidance from CCYP, developed a survey that asked respondents to share their reasons for living and working on Cape Cod, to describe their housing circumstances, and to share their opinions about services and local initiatives on Cape Cod. Through social media, e-mails, announcements at events, and word-of-mouth, CCYP invited members and non-members to complete the survey and to ask their colleagues, friends, and family members to do the same.

Three versions of the survey were fielded via SurveyMonkey™ between October 28, 2013 and December 1, 2013. The first question of the survey asked each respondent to identify where he or she lives and works. Respondents who self-identified as living on Cape Cod and working on Cape Cod and respondents who self-identified as living on Cape Cod but working off Cape Cod were given the On-Cape survey. Respondents who described themselves as living off Cape Cod and working on Cape Cod were given the Live-off/Work-on survey. The fourth group of respondents, self-identified as individuals who live and work off Cape Cod, were given the Off-Cape survey. Table 5 on page 10 summarizes the sample size for each subset of respondents.

Nearly 72 percent of the respondents in the Live-on/Work-on sample were women, while 28 percent were male. There are several explanations for this. The current membership of CCYP is approximately 61 percent female and 39 percent male. Convenience sampling was implemented within CCYP's membership and snow ball sampling was initiated from the membership, thus the larger proportion of females most likely carried over into the survey sample. In addition, research has shown that women tend to respond to surveys more readily than men (Underwood and Matier, 2000).

Statistical tests on the survey results are consistent with *a priori* expectations of any gender bias in the survey. For example women tend to be more family and socially-oriented and female respondents tended to rate reasons related to family, social networks, lifestyle, education, and spouse's jobs higher in importance than men did. Likewise, men tend to be more career and wage oriented and male respondents tended to rate issues around availability of jobs, career advancement, and career development as more important than female respondents did.

While there is a gender difference in how respondents answered certain questions, the differences tend to be small in magnitude and do not significantly change the overall survey results. In any case, the sample sizes for male and female respondents are sufficiently large for statistical validity.

## Key Survey Findings from the Live-on/Work-on Cape Cod Sample

The living on Cape Cod questions asked respondents to describe where they lived, to describe whether they were life-long residents or had moved to Cape Cod from elsewhere, and to rate the importance of the reasons why they had moved to the Cape and reasons why they continued to live on the Cape.

### Moving to Cape Cod

When asked to identify the most important reasons for why current residents moved to Barnstable County, nearly 83 percent responded "to enjoy the natural beauty" of the Cape (see Table 6 on page 11). Nearly 70 percent responded "to enjoy the recreational opportunities." Nearly two-thirds (65%) said that they moved "to be near family members who live here" and 56 percent responded "to raise a family here." Reasons related to job offers only came in fifth place.

**LIVE-ON/WORK-ON SAMPLE CHARACTERISTICS**

| | |
|---|---|
| Sample size | 2,461 respondents |
| Median age | 34.6 years |
| Earned at least a 4-year college degree | 65% |
| Median annual personal income | $45,000 |
| Average annual personal income | $50,630 |
| Single respondents | 26% |
| Respondents who are married or living with a partner | 66% |
| Respondents with no minor dependents | 46% |
| Respondents with at least one minor dependent | 54% |
| Respondents with no adult dependents | 89% |
| Respondents with at least one adult dependent | 11% |

When lifelong residents and residents who moved to Cape Cod were asked why they continue to live on the Cape, the themes that they identified as most important fell into the categories of natural beauty and recreational opportunities, family and social networks, and employment and professional networks. The specific percentages of responses are summarized in Table 3 on page 7.

### Working on Cape Cod

Respondents were asked about their employment status, the town they work in, the industry they work in, whether they need to supplement their income from their primary job, and their overall perception of job availability, salaries, and employee benefits on the Cape.

Nearly 78 percent of the Live-on/Work-on respondents indicated that they were employed during the 12 months prior to the survey. The remaining 22 percent of respondents indicated they had been unemployed at some point during the same 12 months. The top three reasons for being unemployed were not being able to find a job (26%), having had only a seasonal job (25%), or having been a stay-at-home parent (24%). Over 18 percent of respondents chose "Other" as a reason for unemployment. Common explanations given for "Other" were health issues, being laid off, and having recently moved to Cape Cod while having not yet found a job.

Among the respondents who were employed, the largest proportions worked in the towns of Barnstable (39%), Falmouth (11%), and Yarmouth (9%), while the smallest proportions indicated working in Provincetown (2%), Wellfleet (2%), and Truro (0.8%). Just over one percent of respondents worked off Cape Cod and telecommuted two or more days a week.

Nearly 86 percent of respondents worked for an employer versus 14 percent who were self-employed. Just over 80 percent of respondents worked in their desired fields while 20 percent did not. Nearly 85 percent of respondents worked full time and 15 percent worked part time. Men were more likely to work full time when compared to women. Approximately 82 percent of women reported that they worked full time while 95 percent of male respondents reported the same.

The largest proportions of respondents identified the industry in which they work as Educational Services (14%), Professional, Scientific, and Technical Services (11%), and Healthcare (11%). The smallest proportions, those representing less than one percent of respondents, included Agriculture and Forestry, Data Processing and Data Storage, Fishing and Hunting, Manufacturing, Utilities, and Waste Management and Remediation Services.

Despite many positive indications that the vast majority of respondents were in full time positions in their desired fields, the survey respondents were essentially divided regarding whether or not they needed to supplement their

annual income. Slightly more than half of respondents (51%) stated the need to supplement their income while the remaining 49 percent reported that they did not. The most common reason respondents gave for having to supplement their income is not earning enough from their primary jobs to cover basic living expenses followed by wanting to have extra spending money, and to increase savings.

When respondents were asked how strongly they agreed or disagreed with a series of statements about working on Cape Cod, the survey revealed widespread concern about the Cape Cod work environment (see Table 12 on page 14).

- Only a third (34%) responded that they strongly agreed or agreed that the salaries and wages they earned provided a livable wage on the Cape.
- Only a little more than a third (35%) thought there are enough opportunities for promotion and advancement on the Cape in their chosen field.
- Less than 37 percent believed there are enough jobs on the Cape that require their education or experience.
- Less than 39 percent said that there are enough jobs available on the Cape in their chosen career field.
- Less than 36 percent said that there are enough career development resources available.
- Less than a third (32%) said that there are enough mentoring resources available.

Clearly, the work environment on the Cape is a serious impediment to young workers remaining in the region.

### Housing on Cape Cod

The housing questions asked respondents to provide information on whether they owned or rented their homes, the amount of monthly mortgage or rent paid, and whether renters had a year-round lease. From the monthly mortgage and rent data and the income data in the demographics section of the survey, the proportion of gross income dedicated to mortgage or rent was calculated and analyzed to determine the housing cost burden faced by young workers on the Cape.

Among the Live-on/Work-on respondents, the largest group of respondents lived with a spouse/partner and children (43%) followed by respondents who lived solely with a spouse/partner (26%). The third largest proportion represented those respondents who lived alone (10%). Among respondents who indicated other living arrangements the most common response was living with spouse and/or children and another family member or a roommate(s).

Approximately 58 percent of respondents owned their home, 34 percent rented, and eight percent had other arrangements such as living with parents or in-laws, living in a house owned by grandparents or another family member, or living in employer-provided housing. Married respondents were more likely to own their homes while singles and those living with a partner are more likely to rent. Among renters, 93 percent had year-round leases, while the remaining seven percent had seasonal leases.

Over 70 percent of respondents paid monthly mortgages in the range of $1,251 to $2,500. Likewise, over 80 percent of winter and summer rents clustered within the range of $501 to $1,500. As Table 16 on page 15 reveals, the median proportion of gross income spent by survey respondents on their mortgage payments was approximately 35 percent, meaning that half of all the respondents to the survey were paying more than 35 percent of their income in mortgage. Similarly, half of all renters were spending at least 30 percent of their gross income on rent.

According to financial advisors, this means that at least half of all the survey respondents are "housing cost burdened"—forced to spend more on housing than is recommended. As such, housing costs are a second reason that may explain the decline of young households on the Cape.

### Cape Cod Services

The services and community initiatives theme of the survey attempted to gauge respondents' opinions about the availability of transportation alternatives, healthcare services, retail and consumer services, and higher education resources on Cape Cod.

#### Transportation

The survey asked which modes of transportation respondents would use if there were more choices available on Cape Cod. Recreational bike trails were identified as the mode they would use the most. The next most common response was not using any of the options, followed by commuter rail for commuting off Cape and dedicated bike

lanes for commuting on Cape. Commuter bus options garnered the lowest proportion of responses. These transportation preferences are summarized in Table 22 on page 16.

### Services

The vast majority of Live-on/Work-on respondents indicated that they strongly agreed or agreed that medical services (86%), retail services (75%), and consumer services (89%) are available to them on Cape Cod. Men tended to agree more strongly than women that retail services are available.

### Educational Resources

Questions about educational resources on Cape Cod created a range of results. Most respondents strongly agreed or agreed that:

- Cape Cod needs a 4-year college (78%)—to which women tended to agree more strongly.
- Additional education or training would help the respondent advance his or her career (72%).

Only a little more than half of respondents (54%) felt that there are a sufficient number of technical and trade schools on Cape Cod.

### Cape Cod Community Initiatives

When presented with a list of seven current Cape Cod initiatives and issues, the matter respondents were most familiar with was the extension of CapeFLYER service through the summer, where over 70 percent of respondents were very familiar or familiar with the service. Only about half (52%) of all respondents were very familiar or familiar with the regionalization of public school districts.

With respect to the following issues, the majority of respondents were very familiar or familiar:

- Centralized electronic submission of permits and licenses (87%)
- Establishment of a Bridgewater State University satellite campus in South Yarmouth (66%)
- OpenCape project to expand broadband access on Cape Cod (66%)
- Updates to the FEMA flood maps (52%)
- Efforts to improve water quality in coastal estuaries and freshwater ponds (52%).

Men tended to be more familiar with the regionalization of school systems, Bridgewater State University, FEMA flood maps, and efforts to improve water quality.

Given the same list of seven initiatives and issues, the majority of respondents indicated the following to be very important or important to the future of the Cape:

- Improving water quality in coastal estuaries and freshwater ponds (88%)
- Expanding the OpenCape project to include Cape Cod (77%)
- Establishing of a Bridgewater State University satellite campus in South Yarmouth (73%)
- Extending the CapeFLYER service during the summer (66%)
- Updating of FEMA flood maps (61%)
- Centralizing electronic submission of permits and licenses (57%)
- Regionalizing public school districts (56%)

Women tended to rank the improvement of water quality, establishment of a Bridgewater State University satellite campus, updating FEMA flood maps, and regionalization of public schools as more important than the male respondents did.

### Likelihood of Moving Off Cape Cod

When asked if the respondent had seriously considered moving off of Cape Cod in the last 12 months, nearly half (47%) had done so. Men were more likely to indicate wanting to move.

Among those respondents who indicated wanting to move, 71 percent reported that they were very likely or somewhat likely to move.

Combining these statistics suggests that among survey respondents, a full one-third (33%) would be very likely or somewhat likely to move off Cape sometime in the future. Given the responses to the work environment and housing questions, this is a discouraging, but not a totally surprising finding.

## Key Survey Findings from the Off-Cape Cod Sample

A survey was administered to former residents who had permanently moved off Cape Cod in order to collect information on their reasons for doing so. When asked to identify the most important reasons for moving off Cape Cod, not enough job opportunities was clearly the most important reason followed by not enough higher education opportunities, and not enough social activities for people in the respondent's age group.

**LIVE-OFF/WORK-OFF SAMPLE CHARACTERISTICS**

| | |
|---|---|
| Sample size | 308 respondents |
| Median age | 31.9 years |
| Earned at least a 4-year college degree | 88% |
| Median annual personal income | $65,000 |
| Average annual personal income | $62,955 |
| Single respondents | 41% |
| Respondents who are married or living with a partner | 55% |
| Respondents with no minor dependents | 66% |
| Respondents with at least one minor dependent | 34% |
| Respondents with no adult dependents | 93% |
| Respondents with at least one adult dependent | 7% |

The least important reasons for moving were not enough job training opportunities, not feeling a part of a community, and "Other." Many of the off-Cape respondents who chose "Other" reiterated their opinions over the lack of jobs, lack of job advancement opportunities, high cost of housing, high cost of living, a desire to pursue a broader world perspective for themselves or their children, and to find a different social circle, including for the purpose of dating. The summary statistics for these reasons are offered in Table 46 on page 29.

When asked to give the most important reasons that would cause an off-Cape respondent to return to Cape Cod, the most common reason was to be near friends and family, followed by having a job offer, and for raising a family. The least cited reasons for moving back are to be near family or friends who provide care for the respondent's family member, for job training opportunities, and "Other." Respondents also explained that they would move back to the Cape if they had a high paying job to come back to and/or could find an affordable home. Respondents offered retirement as another reason for moving back and several explained that they still enjoy summer vacations on the Cape, but would not want to live on Cape Cod. The responses for these reasons are summarized in Table 47 on page 30.

The themes of the lack of job availability, career advancement, and educational opportunities and low wages were common across the Live-on/Work-on sample and the Live-off/Work-off sample.

## Summary of Focus Groups and Phone Interviews

Four focus groups were conducted in February and March of 2014 with a total of 47 people participating. The median age of the focus group participants was 33 years and 55 percent of the participants were female and 43 percent were male; one person did not answer the gender question. The locations and times of day were varied among the focus groups in order to give a range of opportunities for interested parties to participate. Two focus groups were located in Barnstable, one was in West Barnstable, and one was in Brewster. The West Barnstable and Brewster focus groups

were conducted during the noon lunch hour and the two Barnstable focus groups were held in the early evening. Focus group participants were asked to discuss challenges of living and working on Cape Cod, while focusing on potential solutions. They were asked to brainstorm solutions and these were the recurrent themes:

- Bring more year-round jobs in manufacturing, technology, healthcare, and cloud based businesses to Cape Cod
- Increase the chances of bringing other industry sectors to the Cape beside tourism-based industries
- Provide internship opportunities and more higher education options to retain and attract students
- Provide a centralized web-based source of job listings and career development resources
- Provide a centralized web-based source of community, recreational, and social activities
- Provide housing resources for working age and working class adults
- Increase civic engagement
- Build bridges to the retired segment of the Cape Cod population and town leaders
- Create a Cape Cod identity or brand
- Create a unified sense of a Cape Cod community (as opposed to the current town silos).

Five telephone interviews were held with former Cape Cod residents in order to obtain their perspectives on why they moved off of Cape Cod. Current CCYP members recommended former residents as potential interview candidates. Five candidates were interviewed. Two currently live in the greater Boston area, one lives in the South Shore region, and two live outside of Massachusetts. The five former residents all remembered Cape Cod with great affection and those who live close enough still visit Cape Cod regularly, especially in the summer. The reasons these interviewees identified as their reasons for leaving Cape Cod were similar to those challenges expressed in the surveys and focus groups and include the:

- Lack of year-round jobs that pay living wages
- Reliance on the tourism industry as the Cape's main economic driver
- Lack of affordable housing
- Lack of higher education alternatives
- Lack of resources for families such as daycares and support networks
- Need to give young adults a stronger voice in civic engagement

## Comparison of Cape Cod to Other Coastal Communities

As Cape Cod (Barnstable County) is a unique, tourism-dependent coastal community with few geographic connections to the mainland and a relatively large population, the study revealed only two comparable communities nationwide: New Hanover County, North Carolina and San Luis Obispo County, California. Comparability was determined by the counties being on a coast, being geographically isolated from neighboring regions, and having similar sized populations.

Like Cape Cod, New Hanover County and San Luis Obispo County are coastal communities with relatively high geographic isolation and an abundance of natural beauty. Unlike these two communities, young adults on Cape Cod form a much smaller percentage of the population. Those between the ages of 20 and 44 comprise just 23 percent of Cape Cod's population, but 37 percent in New Hanover County and 34 percent in San Luis Obispo County. Though San Luis Obispo County and Cape Cod are losing population among those ages 5 to 19 and 25 to 44, Cape Cod is experiencing a significant net loss of population among all those under the age of 45 (net loss of 18 percent between 2000 and 2012 versus a mere one percent loss in San Luis Obispo County).

All age groups in New Hanover County are increasing. This could be attributed to the fact that New Hanover County is the only one of the three with a large urban center. The city of Wilmington is home to nearly 110,000 residents, which is more than half of the county's population (American Community Survey, 2012). San Luis Obispo County's largest city, also named San Luis Obispo, is roughly the size of the Town of Barnstable and has many fewer urban amenities than Wilmington. This could be contributing to the eight percent decrease in population among ages 25 to 44 in San Luis Obispo County (US Census Bureau, 2000 and 2010). On Cape Cod, that same age range is declining at a rate of nearly 28 percent. Conversely, that same age group is

increasing at a rate of 14 percent in New Hanover County. Urban amenities like active nightlife and walkable communities in compact city centers attract and retain young adult populations.

Though Barnstable County has many of the natural and cultural amenities of San Luis Obispo County and New Hanover County, Cape Cod falls short in the diversity of industry and the educational opportunities that make the other two coastal resort communities more viable for year-round residents and young adults. There are more than seven institutions of higher learning in each of these two counties along with a much stronger manufacturing base as well as a heavier representation of professional and business services sectors. As a result, San Luis Obispo County and New Hanover County rely much less on leisure, hospitality, education, and health services sectors for economic vitality. These two counties outpace Cape Cod in terms of overall economic performance (US Department of Commerce, Bureau of Economic Analysis, 2014). Both have 2012 GDP's greater than $11 billion, whereas the economic performance of Cape Cod is just over $8.5 billion. However, Barnstable County does feature the highest median family incomes of the three ($77,318 versus $67,853 in New Hanover County and $75,410 in San Luis Obispo County), has the lowest unemployment rate (eight percent versus ten percent in New Hanover County and nine percent in San Luis Obispo County), and has a similar percentage of self-employed workers (12 percent) as San Luis Obispo County and a higher percentage than New Hanover County's seven percent.

Another difference is a focus on regionalism. The two other counties include unincorporated land, which requires stronger county governance and regional coordination. Both San Luis Obispo and New Hanover counties have regional economic development plans with specific industry targets for high-wage job development, though their focuses are very different. For New Hanover County, the plan focuses on regional and national competitiveness—particularly in aerospace and precision manufacturing as well as professional services, life sciences, and marine sciences. San Luis Obispo County features more economic emphasis on construction and building services, precision manufacturing, innovation services, health services, and its "Uniquely SLO" program, which promotes unique products and experiences from the region such as wine and festivals. Local higher educational institutions support the development of these industries.

## Next Steps for *Shape the Cape*

This study confirms a number of suspicions about Cape Cod and its ability to retain and attract young professionals. The first is that the population of Barnstable County is now declining and the decline is being fueled by a loss of those aged 25 to 44.

The second is that two factors seem to be chiefly responsible for the loss of young workers and their households. The lack of job opportunities that pay a living year-round wage and provide a chance for professional advancement is the first.

The lack of affordable housing, making inadequate wages even more important is the second.

Essentially, the natural beauty of the Cape and its abundance of recreational opportunities provide a powerful "pull" to stay on the Cape. However, the lack of good jobs and affordable housing provide a powerful "push" to leave the Cape.

To increase the "pull" of the Cape, *Shape the Cape* should consider becoming a stronger advocate for making the Cape even more attractive. This could be achieved by building support for reduced barriers to new industry development in Barnstable County, helping to create an economic development marketing campaign for the region, urging the creation of additional higher education opportunities, and finding ways to help develop more affordable housing.

In terms of providing more economic opportunity on the Cape, there are some encouraging national trends in terms of where work is actually done.

- Because of the widespread adoption of high speed internet connectivity, more and more workers are able to work either full-time or part-time from their homes or somewhere close to their homes regardless of where their

company's office is located. Living on the Cape becomes less of a barrier over time to working "anywhere".

- Along with the increase in internet connectivity, more and more employers are finding ways to provide flexible working arrangements, especially for young skilled professionals.
- More and more workers are finding ways to become self-employed and therefore can more easily choose where to live.

In terms of attracting business development on the Cape, a new analysis conducted for the Boston Federal Reserve Bank (Bluestone, 2014) provides some guidance as to the factors most important in the firm location decision. The results of this study suggest that four factors are especially important.

- Availability of Sites—Communities that make sites readily available for business development are the ones to which firms migrate. For some communities this means redeveloping older mill buildings; for others it means making new undeveloped parcels available with, of course, appropriate regulation.
- Cross Marketing—Towns and cities that bring together municipal leaders, business leaders, and civic leaders to actively encourage firms to settle in their communities do a better job of attracting business investment and jobs.
- Timeliness of Approvals—In an increasing global economy, "time to market" has become the watchword in most industries. To succeed in business, companies need to be able to move quickly from setting up shop to getting products or services out the door. Anything that slows down this process is a "deal-breaker". As such, those communities that have developed timely municipal approval processes in terms of zoning, site approval, building inspections, and so forth are more successful at attracting firms and expanding employment opportunity.
- Local Amenities—Firms locate where there are nearby amenities for their employees and customers. These range from having restaurants and retail to having daycare facilities.

Increased understanding of what firms need to set up a successful business can help Cape Cod communities improve their chances of landing good companies with good jobs.

Finally, in terms of housing especially suited for younger year-round residents, the Cape might consider a variant of a model being developed for the Boston area with its large contingent of graduate students, medical residents and interns, and other young professionals. The "Millennium Village" concept provides a new form of housing including "micro" apartments and small studio and one-bedroom apartments in multi-unit complexes with many shared amenities including common lounges, laundry facilities, exercise rooms, and other places for young people to gather. This is the type of housing that might appeal to young Cape Cod residents both because of the style of life and because of greater affordability.

At the very least, *Shape the Cape* and CCYP should use the results of this study to call greater attention to the "push" factors that could threaten the long-term viability of life on the Cape for its members and other young residents and their families.

# INTRODUCTION

## *Shape the Cape* and the Cape Cod Young Professionals

Cape Cod, a peninsula off the Southeastern Coast of Massachusetts, has a wealth of natural, historic, and cultural resources, making it a highly desirable place in which to live, work, vacation, and retire. While these amenities entice people to spend their time on Cape Cod, other resources need to be present to make living and working on Cape Cod feasible and rewarding for year-round residents. Resources include jobs that pay high enough wages to maintain a desired quality of life, career paths that support professional growth, suitable housing for singles and families, adequate public services and retail services, and a strong local economy that sustains employment and the community over time.

Cape Cod's economy is commonly perceived to be driven by tourism and services for the elderly, thus contributing to the belief that there are few career paths beyond retail, hospitality, and healthcare and no emerging industries. Without clear career paths, young people are tempted to pursue education and employment opportunities off Cape and once off Cape, they tend not to move back. A Boston Federal Reserve Bank report, Labor Market Trends in the Cape & Islands Region, published in December 2012 reveals that the Cape & Islands was one of only two labor markets in the state to lose workers over the past decade. A small and contracting population coupled with the fact that the Cape & Islands has the oldest population in the state is a concern for the economic growth potential of the region. Compared with the population in 2000, the number of residents in the region who are age 44 or younger has declined, while the number of those who are 45 years and older has increased. This suggests that the region's businesses could potentially face an overall shortage of younger workers needed to replace baby boomers as they retire and needed to fill new jobs. Another complication of the Cape Cod labor market is the fact that it is essentially self-contained. Ninety percent of the Cape & Islands' year-round employees come from within the region.

The Cape Cod Young Professionals (CCYP) is engaged in an in-depth examination of this problem of declining working age residents by launching a new initiative called *Shape the Cape*. A member based organization, CCYP's mission is "to connect Cape Cod's emerging workforce and future leaders, to engage them in our community, and to support their efforts to advance their lives, both business and personal, on the Cape" (CCYP, 2012).

## Study Objectives

In 2013, CCYP partnered with the Kitty & Michael Dukakis Center for Urban and Regional Policy at Northeastern University to study why young adults are leaving Cape Cod. There were many anecdotal explanations for this out-migration that CCYP wished to confirm or refute with data so that appropriate action might be considered to reverse this recent trend. The Dukakis Center fielded a survey to residents living and/or working on Cape Cod, conducted focus groups at various locations on Cape Cod, and conducted telephone interviews with a number of former Cape Cod residents who have permanently moved off Cape.

The objective of this research is to collect information on demographic trends on Cape Cod and to collect data and insights on why young adults choose to live on Cape Cod or choose to move away. Findings from this study could help inform potential solutions for retaining young professionals on the Cape and attracting more young professionals to it, thereby enhancing the Cape's economic vitality and the richness of its community.

# CAPE COD DEMOGRAPHICS

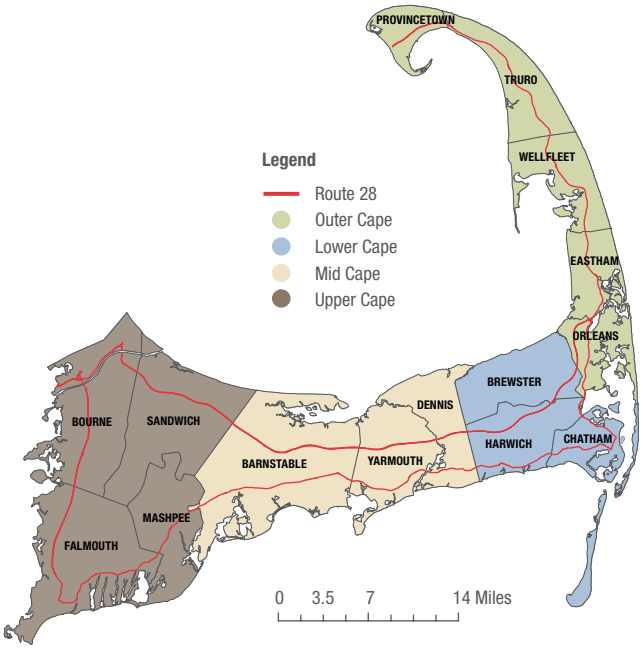
## Population over Time and Geography

According to the first census of Barnstable County in 1790, Cape Cod was home to just over 17,000 residents (see Figure 1). The population would double by the eve of the American Civil War in 1860. For the remainder of the 19th century through 1920, the region's population declined, presumably as better job opportunities could be found elsewhere. It was not until 1940 that the Cape's population returned to its pre-civil war level. However, after World War II, Barnstable's population grew exponentially. With the completion of Route 6, the "Mid-Cape Expressway," the number of Cape residents skyrocketed from approximately 47,000 in 1950 to 148,000 in 1980. Barnstable County's population would continue to expand rapidly until 2000 when it peaked at 222,230, after which it stopped growing. By the 2010 US Census, the population had fallen by nearly three percent to 215,888 and the Census estimate for 2012 reveals a continued decline.

Contemporary Cape Cod includes fifteen towns that comprise Barnstable County. Some consider the islands of Martha's Vineyard and Elizabeth Islands (Dukes County) and Nantucket, Tuckernuck, and Muskeget islands (Nantucket County) to be part of Cape Cod. For the purposes of this study, however, Cape Cod is defined strictly as Barnstable County. Cape Cod is divided into four regions relative to the mainland. Upper Cape is closest to the mainland and includes the towns of Bourne, Falmouth, Mashpee, and Sandwich. The Mid-Cape includes the county seat and the population and economic center of Barnstable, as well as Yarmouth, and Dennis. The remaining eight towns are known collectively as Lower Cape with some residents further grouping these towns into Lower Cape comprised of Brewster, Harwich, and Chatham; and Outer Cape encompassing Orleans, Eastham, Wellfleet, Truro, and Provincetown. See the map of Cape Cod towns and regions in Figure 2.

The population base of Cape Cod is concentrated on the Upper Cape and Mid-Cape and, on average, diminishes as one travels eastward towards the Outer Cape (see Figure 3). More than 56 percent of Cape Cod residents live in the four

**FIGURE 2:** Map of Cape Cod Towns and Regions



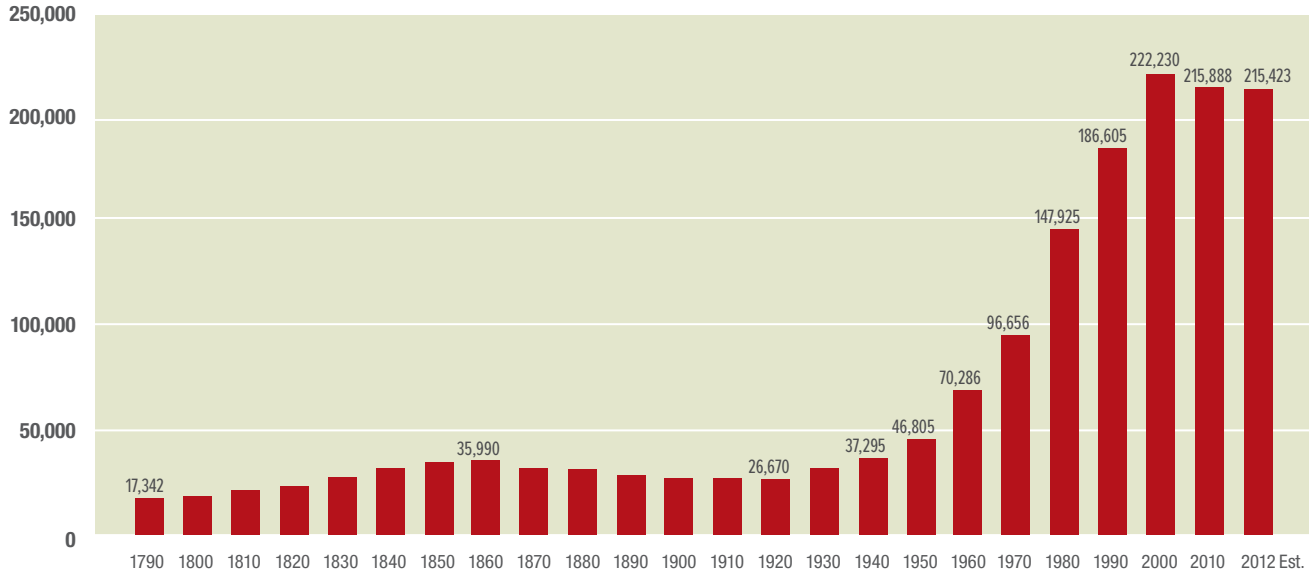

Sources: Mass GIS, Massachusetts Executive Office for Administration and Finance. Community Boundaries (Towns) shapefile. Accessed April 16, 2014 from http://www.mass.gov/anf/research-and-tech/it-serv-and-support/application-serv/office-of-geographic-information-massgis/datalayers/towns.html

towns of Barnstable, Falmouth, Yarmouth, and Sandwich. As one move towards Outer Cape, the year-round population declines and the local economies become more dependent on summer tourism. Most of those who do not live on the Cape know it best as a famous summer vacation destination with world renowned beaches, the Cape Cod National Seashore, and many outdoor and marine based activities including golf, recreational bicycling, sport fishing, and sailing. The summer tourist season traditionally kicks off during Memorial Day weekend and ends over Labor Day weekend, though some residents have noticed that the tourist season has been extending into the spring and the fall.

## Population by Age Groups

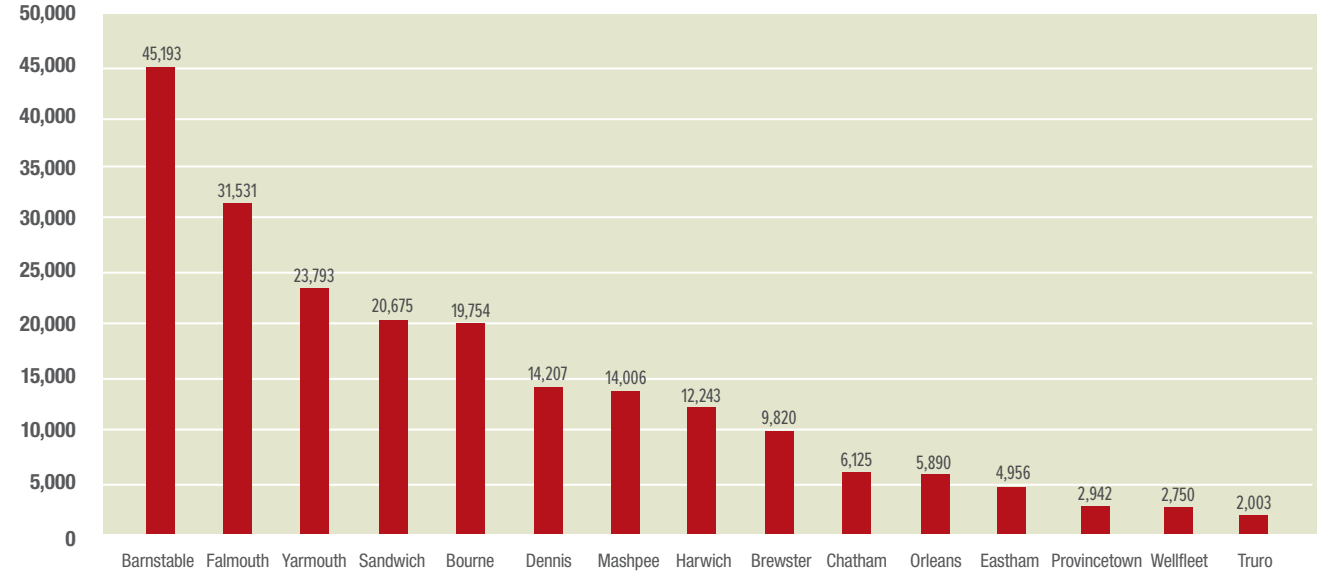
Age is one of the demographic characteristics often at the forefront of people's minds when they think of Cape Cod.

**FIGURE 1:** Population of Barnstable County 1790 to 2012




Source: US Census

**FIGURE 3:** Population of Cape Cod Towns in 2010




Source: Cape Cod Commission, http://www.statscapecod.org/towndata/population.php, accessed on March 25, 2014

The Cape has a reputation as one of the best places in which to retire, evidenced by the growth in the number of older residents. At the opposite end of the age spectrum, young adult residents are leaving Cape Cod. Demographic trends indicate that Cape Cod residents in the 25 to 44 age group are declining in numbers, while those aged 45 and older are increasing in numbers. These trends tend to be consistent with those for Massachusetts and the United States, but the trends are more pronounced for Cape Cod.

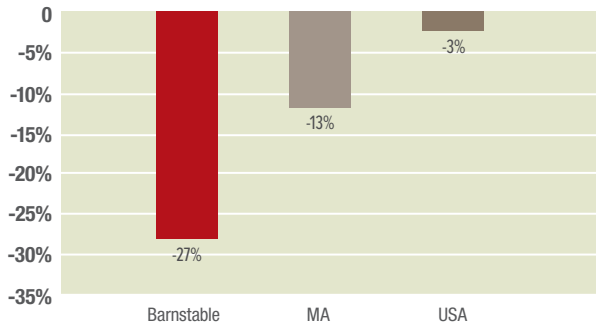
Figure 4 reveals an important element of Cape Cod's population profile. The number of residents in the age group 25 to 44 declined by nearly 27 percent between 2000 and 2010, double the decline Massachusetts-wide and nine times the decline across the country. The 27 percent decline for Cape Cod represents a net loss of 14,919 young adult residents. In contrast, during this latest decade the number of residents aged 45-64 grew by 11,665 or 20 percent. Because the overall population of the Cape has been in decline, the ranks of even this older adult group swelled by less than in the rest of Massachusetts (28%) and the US (32%) as shown in Figure 5. The growth in residents age 65 or older, as shown in Figure 6, reveals that this age group is growing about the same on Cape Cod (5% or 2,614 residents) as in the Commonwealth (5%), but slower than in the US as a whole (15%), again as a result of the overall loss in population on the Cape.

Supporting the trend that younger adults are leaving Cape Cod is the rising median age of Barnstable County residents over time. In 1990, the median age was 39.5 years. By 2000 the median age had risen to 44.6 years and by 2010, the median age had risen another 5.3 years to 49.9. Consistently over these three decades, the median age in Barnstable County has been higher and has been rising faster than Massachusetts as a whole. While the median age in the Commonwealth is also rising, from 33.5 years in 1990 to 36.5 years in 2000, and 39.1 years in 2010, the absolute age is lower and the rate of increase is slower than on Cape Cod (see Figure 7).

While considering the full population by age group, Figure 8 reveals the sharp decline in the population of those aged 44 and younger, especially within the 24 to 44 age group. Likewise, the members in the 25 to 44 age group fell by more than 8,400 between 2000 and 2010, while the number of households in the 45 to 64 age group and the 65 and older age group grew by more than 7,000 and 2,400, respectively. Essentially, Cape Cod is aging faster than nearly anywhere else in the Commonwealth (see Figure 9).

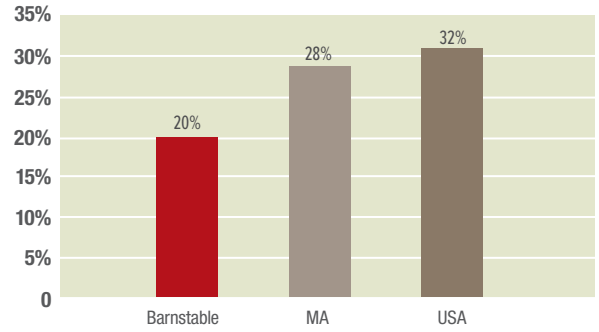
Given the marked changes in the demographic patterns in Cape Cod, CCYP and Cape Cod residents have cause to be concerned that if these trends continue, the decline of its young working age population could threaten the vitality of the region's economy and its diverse and dynamic community.

**FIGURE 4:** Change in Population for 25 to 44 Year Olds on Cape Cod, in Massachusetts, and in the US between 2000 and 2010



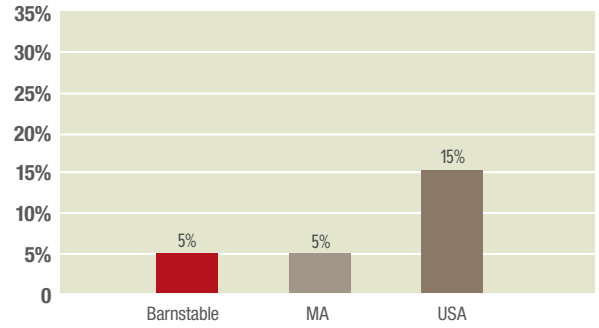

Source: US Census

**FIGURE 5:** Change in Population for 45 to 64 Year Olds on Cape Cod, in Massachusetts, and in the US between 2000 and 2010




Source: US Census

**FIGURE 6:** Change in Population for 65 and Older on Cape Cod, in Massachusetts, and in the US between 2000 and 2010




Source: US Census

**FIGURE 7:** Median Age of Cape Cod Residents and Massachusetts Residents in 1990, 2000, and 2010

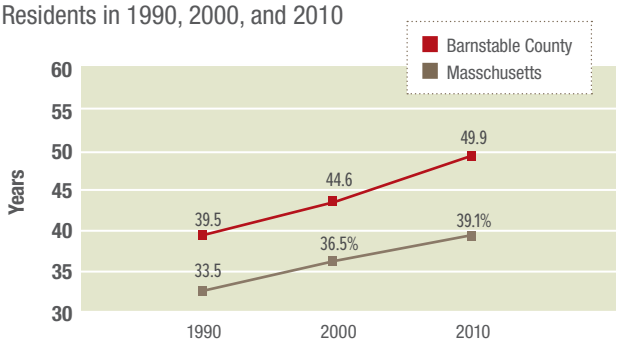
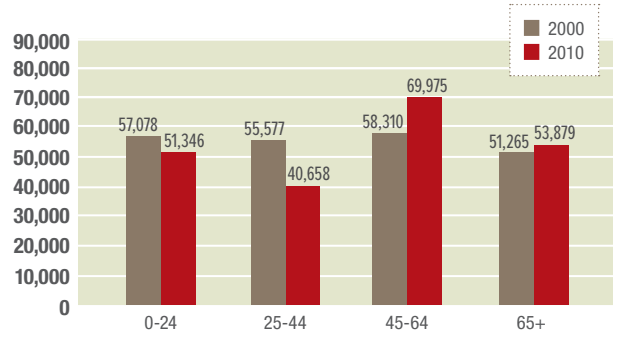
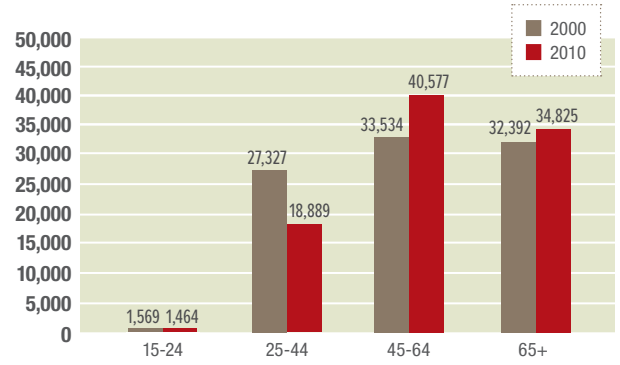



**FIGURE 8:** Barnstable County Population by Age Group in 2000 and 2010




Source: US Census

**FIGURE 9:** Number of Households in Barnstable County by Age Group in 2000 and 2010




Source: US Census

# CAPE COD INDUSTRIES, EMPLOYMENT, AND WAGES

Industries on Cape Cod range from those in leisure and hospitality that primarily serve the summer tourism season to professional and business services that cater to year-round residents. According to the Bureau of Labor Statistics (BLS), 2012 Quarterly Census of Employment and Wages, there were nearly 8,900 establishments on Cape Cod in 2012. The largest percentage of establishments was in professional and business services, followed by leisure and hospitality, construction, and education and health services (see Table 1). Notably, Cape Cod has few manufacturing establishments.

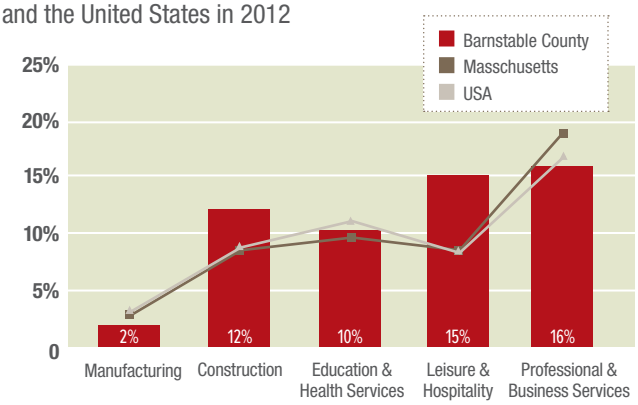
When compared to the rest of Massachusetts and the US, Cape Cod had a lower percentage of establishments in professional and business services and manufacturing. However, Cape Cod had a higher proportion of establishments in leisure and hospitality and construction (see Figure 10). The proportion of education and health services was about the same as the Commonwealth, but was lower than the US as a whole.

Comparing the percent of establishments by industry to other Massachusetts counties, Cape Cod's economy had a higher percentage of establishments in leisure and hospitality than Plymouth, Suffolk, and Berkshire counties. Cape Cod had about the same proportion of education and health services as the other counties; and had a lower proportion of professional and business services than Suffolk County and a lower proportion of manufacturing than Plymouth and Berkshire counties. See Figure 11 for all comparisons.

Turning to employment and wages, education and health services employed 25 percent of the workforce on Cape Cod in 2012, followed by leisure and hospitality (20%). While these two industries combined employed over 41 percent of the workforce, they were the two lowest paying sectors. The average weekly wage for education and health services was $935, while it was $438 for leisure and hospitality. See Table 2 for a summary of employment and average weekly wages. Even if someone found full-year work in these two sectors, total annual wages would be around $47,000 in the former and just $21,900 in the latter

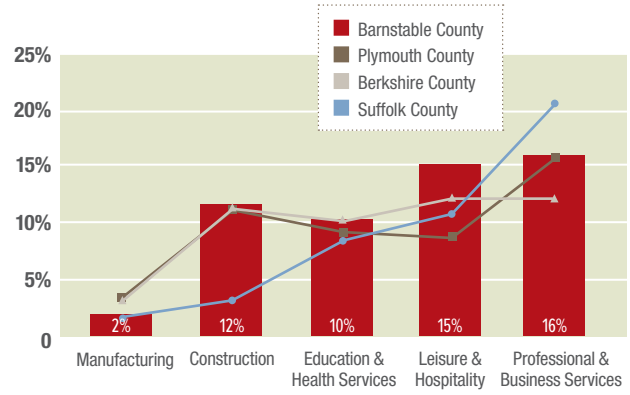
As a percent of the workforce, the number of Cape Cod employees in leisure and hospitality surpassed by nearly twice the proportions in Massachusetts and the US. Meanwhile, the percentages of the Cape Cod workforce in professional and business services and manufacturing were significantly lower. Figure 12 provides the comparisons in detail. The pattern of employment was similar when comparing Cape Cod to Plymouth, Berkshire, and Suffolk counties (see Figure 13).

**FIGURE 10:** Comparison of Number of Establishments in Barnstable County, Massachusetts (excluding Barnstable County) and the United States in 2012




Source: BLS, Quarterly Census of Employment and Wages, 2012

**FIGURE 11:** Comparison of Number of Establishments in Barnstable, Plymouth, Berkshire, and Suffolk Counties in 2012




Source: BLS, Quarterly Census of Employment and Wages, 2012

The relative ranking of average weekly wages of select industries on Cape Cod in 2012 varied when compared to wages "just over the bridge" in Plymouth County, Berkshire County, and Suffolk County. Table 3 provides a summary of average weekly wages and Figure 14 provides a graphical comparison. Cape Cod wages were consistently lower than wages in Suffolk County. Wages for leisure and hospitality were slightly higher on Cape Cod than Plymouth and Berkshire counties. Wages for professional and business services were slightly lower. A notable finding is that while Cape Cod had lower percentages of establishments and jobs in manufacturing, the manufacturing jobs paid higher on average than jobs in professional and business services.

The Living Wage Calculator developed by Dr. Amy Glasmeier at the Massachusetts Institute of Technology estimates that a living hourly wage in Barnstable County, assuming one wage earner, ranges from $10.33 per hour for a one adult household to $24.46 per hour for two adults plus three children to $39.99 per hour for one adult plus three children (http://livingwage.mit.edu/counties/25001, accessed on April 14, 2014). The hourly wages take into account cost of living components including food, housing, transportation, child care, medical expenses, and other costs. The childcare expense is driving the single parent plus three children living wage requirement to be nearly three times that of a single adult and 1.6 times that of a two adult plus three children household, assuming the stay-at-home parent household can dispense with the cost of childcare.

In Table 4, the average weekly wage reported in Table 3 above is converted into an hourly wage, assuming a 40 hour work week. The estimated hourly wage is compared to the living wage published by Glasmeier. For manufacturing and professional and business services jobs, the average hourly wage was considered a living wage for all family sizes except those with one adult and two or three children. Construction and education and health services jobs provided a living wage for all but families with onwe adult and two or three children and two adults and three children. Residents with leisure and hospitality jobs fared the worse. The average weekly wage is considered a livable wage only for single adult households. Clearly, low wages relative to costs on the Cape is a formidable problem for many households.

**TABLE 1:** Number of Business Establishments in Barnstable County, 2012.

| Industry | Number of Establishments | Percent of Establishments |
|---|---|---|
| Professional and Business Services | 1,443 | 16% |
| Leisure and Hospitality | 1,354 | 15% |
| Construction | 1,049 | 12% |
| Education and Health Services | 859 | 10% |
| Manufacturing | 182 | 2% |
| All Other Industries | 4,000 | 45% |
| All Industries | 8,887 | 100% |

Source: BLS, Quarterly Census of Employment and Wages, 2012

**TABLE 2:** Average Monthly Employment and Average Weekly Wages in Barnstable County, 2012.

| Industry | Average Monthly Employment | | Average Weekly Wages |
|---|---|---|---|
| | Number of Employees | Percent of Workforce | |
| Education and Health Services | 22,728 | 25% | $935 |
| Leisure and Hospitality | 18,075 | 20% | $438 |
| Professional and Business Services | 8,193 | 9% | $1,014 |
| Construction | 5,140 | 6% | $964 |
| Manufacturing | 1,989 | 2% | $1,058 |
| All Other Industries | 34,416 | 38% | - |
| All Industries | 90,541 | 100% | $785 |

Source: BLS, Quarterly Census of Employment and Wages, 2012

**TABLE 3:** Comparison of Average Weekly Wages in Dollars for Select Industries in Barnstable County, 2012

| Industry | Barnstable County | Plymouth County | Berkshire County | Suffolk County |
|---|---|---|---|---|
| Manufacturing | $1,058 | $1,108 | $1,271 | $1,569 |
| Professional and Business Services | $1,014 | $1,176 | $1,063 | $1,870 |
| Construction | $964 | $1,197 | $922 | $1,785 |
| Education and Health Services | $935 | $894 | $840 | $1,308 |
| Leisure and Hospitality | $438 | $336 | $369 | $638 |
| All Industries | $785 | $872 | $771 | $1,552 |

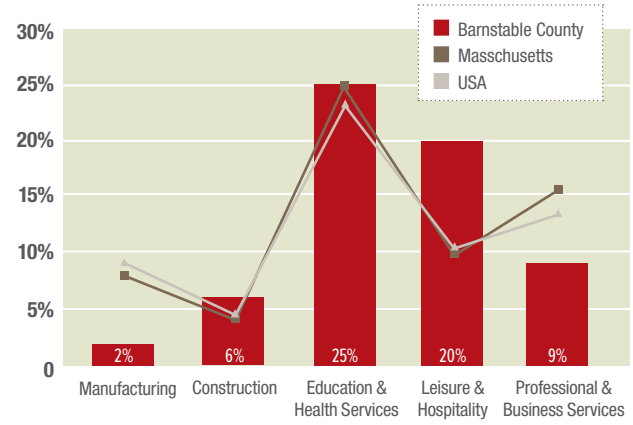
Source: BLS, Quarterly Census of Employment and Wages, 2012

**TABLE 4:** Comparison of Average Weekly Wages in Dollars for Select Industries in Barnstable County, 2012
Do the hourly wages constitute a living wage?

| Industry | Average Hourly Wage[a] | Family Size and Living Hourly Wage[b] | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | 1 adult | 1 adult, 1child | 1 adult, 2 children | 1 adult, 3 children | 2 adults | 2 adults, 1 child | 2 adults, 2 children | 2 adults, 3 children |
| | | $10.33 | $24.78 | $31.67 | $39.99 | $15.52 | $19.82 | $21.23 | $24.46 |
| Manufacturing | $26.45 | Yes | Yes | No | No | Yes | Yes | Yes | Yes |
| Professional and Business Services | $25.35 | Yes | Yes | No | No | Yes | Yes | Yes | Yes |
| Construction | $24.10 | Yes | No | No | No | Yes | Yes | Yes | No |
| Education and Health Services | $23.38 | Yes | No | No | No | Yes | Yes | Yes | No |
| Leisure and Hospitality | $10.95 | Yes | No | No | No | No | No | No | No |

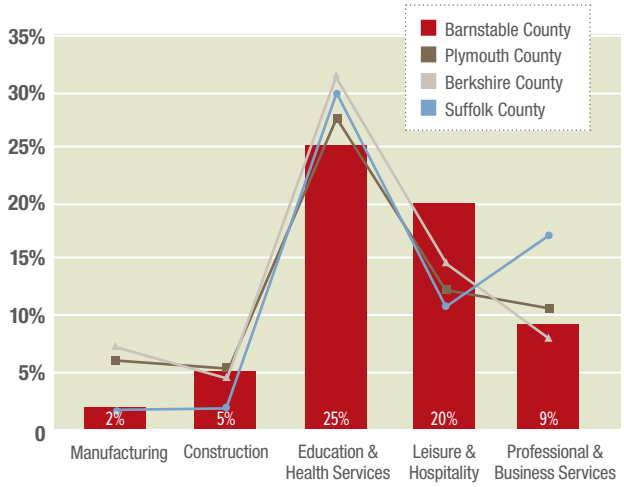
[a] Source: BLS, Quarterly Census of Employment and Wages, 2012
[b] Source: Glasmeier, 2014, http://livingwage.mit.edu/counties/25001, accessed on April 14, 2015

**FIGURE 12:** Comparison of Annual Average Employment in Barnstable County, Massachusetts (excluding Barnstable County) and the US in 2012.



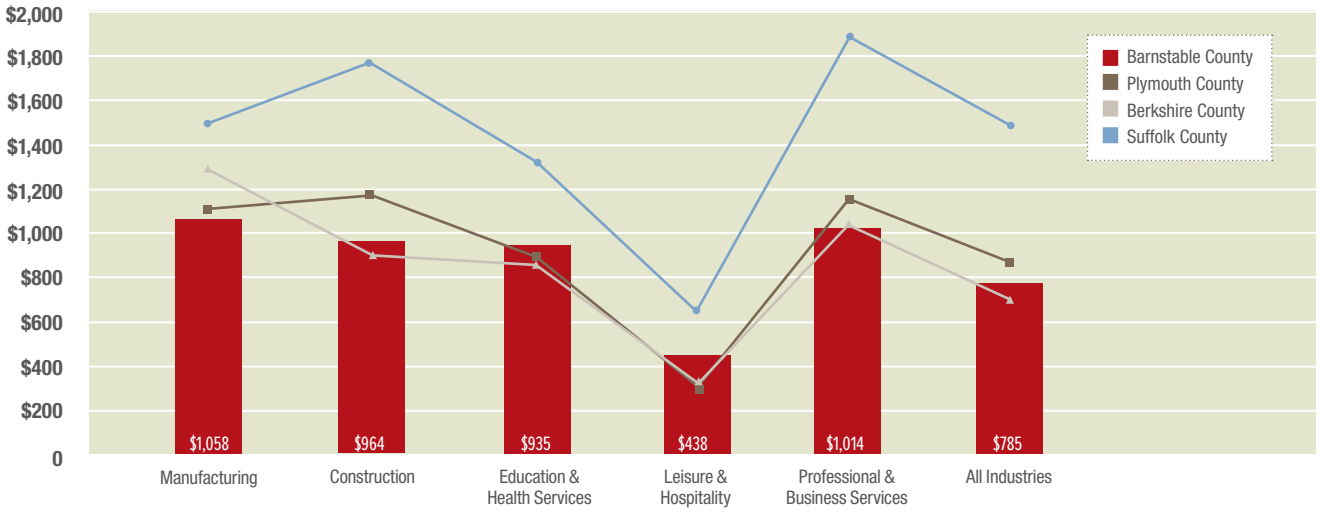

Source: BLS, Quarterly Census of Employment and Wages, 2012

**FIGURE 13:** Comparison of Annual Average Employment in Barnstable, Plymouth, Berkshire, and Suffolk Counties in 2012




Source: BLS, Quarterly Census of Employment and Wages, 2012

**FIGURE 14:** Comparison of Average Weekly Wages in Barnstable, Plymouth, Berkshire, and Suffolk Counties in 2012



# SURVEY METHODOLOGY

With the demographic and economic profile of the Cape in hand, the Dukakis Center, with guidance from CCYP, developed a survey that asked respondents to share their reasons for living on Cape Cod, to describe their occupations, to describe their housing circumstances, and to share their opinions about services and local initiatives on Cape Cod. The survey was targeted to all individuals who live and/or work on Cape Cod and to former Cape Cod residents who currently live and work off Cape. Over 5,200 individuals responded to the survey. Convenience sampling and snow ball sampling were utilized to reach prospective respondents. As such, through social media, e-mails, announcements at events, and word-of-mouth, CCYP invited their members and non-members to complete the survey and to ask their colleagues, friends, and family members to do the same.

CCYP offered a raffle as an incentive for respondents. At the end of the completed survey, respondents had the opportunity to voluntarily enter the raffle for an opportunity to win one month's rent or mortgage payment up to $2,000.

Three versions of a survey were fielded via SurveyMonkey™ during October 28, 2013 and December 1, 2013. The first question of the survey asked the respondent to self-identify where he or she lives and works. Respondents who self-identified as living on Cape Cod and working on Cape Cod and respondents who self-identified as living on Cape Cod but working off Cape Cod were given the On-Cape survey. Respondents who described themselves as living off Cape Cod and working on Cape Cod were given the Live-off/Work-on survey. The fourth group of respondents, self-identified as individuals who live and work off Cape Cod, were given the Off-Cape survey. The three versions of the surveys may be found in Appendices A, B, and C. The summary statistics for questions from all surveys may be found in Appendices D, E, F, and G.

The On-Cape survey covered four themes about life, employment, housing, and service and community initiatives on the Cape. The Live-off/Work-on survey included themes about working on Cape Cod, moving to Cape Cod, and services and community initiatives on Cape Cod. The Off-Cape survey focused on why respondents had moved off Cape Cod and on their working experiences when they were living on Cape Cod. The Live-on/Work-on respondents formed the largest sample (n=2,461), followed by the off-Cape respondents (n=308), the Live-on/Work-off respondents (n=170), and the Live-off/Work-on respondents (n=86). Table 5 summarizes the sample sizes for each of the respondent groups.

The proportion of female and male respondents in the Live-on/Work-on sample is biased towards women. Nearly 72 percent of the respondents are women, while 28 percent are male. There are several explanations for this difference. The current membership of CCYP is approximately 61 percent female and 39 percent male. Because convenience

sampling was implemented within CCYP's membership and snow ball sampling was initiated out of the membership to reach the prospective respondents, the larger proportion of females carried over into the survey sample. In addition, research has shown that women tend to respond to surveys more readily than men do (Underwood and Matier, 2000).

**TABLE 5:** Sample Sizes for Each Survey

| Description of the Respondent Groups | Version of the Survey Received | Sample Size of Respondents Age 25 to 44 |
|---|---|---|
| Live-on/Work-on | On-Cape | 2,461 |
| Live-on/Work-off | On-Cape | 170 |
| Live-off/Work-on | Live-off/Work-on | 86 |
| Live off/Work off | Off-Cape | 308 |

To address the biased sample, statistical tests[1] were performed on key survey questions to determine if men and women tended to answer the questions differently. Statistical tests on the survey results are consistent with *a priori* expectations of any gender bias in the survey. For example, women tend to be more family and socially-oriented and female respondents tended to rate issues related to family, social networks, lifestyle, education, and spouse's jobs higher in importance than men did. Likewise, men tend to be more career- and wage-oriented and male respondents tended to rate issues around availability of jobs, career advancement, and career development as more important than female respondents did.

While there is a gender difference in how respondents answered certain questions, the differences tend to be small in magnitude and do not significantly change the overall survey results. In any case, the sample sizes for male and female respondents are sufficiently large for statistical validity. Among the 2,454 respondents in the Live-on/Work-on sample, 1,757 were women and 695 were men.

[1]The t-test for Equality of Means was performed for questions using a Likert scale and Pearson's Chi-square was used for questions with categorical responses. The significance level used was 0.05 for all tests.

# KEY SURVEY FINDINGS FROM LIVE-ON/ WORK-ON RESPONDENTS

Survey respondents who identified themselves as individuals who live-on and work-on Cape Cod received the On-Cape survey and represent the largest survey sample of 2,461. Discussion of these results will focus on respondents age 25 to 44 because this is the demographic group that experienced the most significant changes in recent population trends and represents the future of Cape Cod's economy and community. This section of the report focuses on the key findings from the Live-on/Work-on respondents. The summary statistics for each of the Live-on/Work-on survey questions may be found in Appendix D.

## Living on Cape Cod

The living on Cape Cod questions asked respondents to describe where they lived, to describe whether they were life-long residents or moved to Cape Cod from elsewhere, and to rate the importance of the reasons why they moved to the Cape and reasons why they continued to live on the Cape.

### Description of the Live-on/Work-on Sample

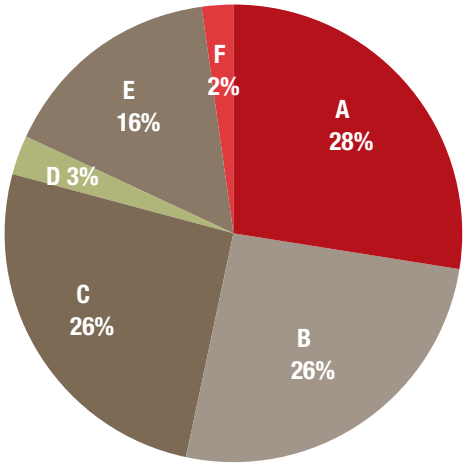
The largest proportions of respondents among the Live-on/Work-on respondents lived in Barnstable (26%), Yarmouth (13%), and Falmouth(10%). The smallest proportions of respondents lived in the Outer Cape towns of Wellfleet (2%), Provincetown (1%), and Truro (1%). This is consistent with each town's population, as shown in Figure 3.

The Live-on/Work-on sample consisted of 28 percent of respondents who identified themselves as having lived on Cape Cod essentially all their lives. The next largest sub-groups were those who grew up on the Cape and moved back as an adult (26%) and those who moved to the Cape as an adult (26%). Almost 16 percent of respondents spent summers on Cape Cod or visited before moving to the Cape as an adult. For those respondents who selected "Other," the predominant explanations were they moved to Cape Cod with their families as a youth and moved to the Cape for military or Coast Guard service. Figure 15 summarizes each of the sub-groups of respondents as they self-identified their tenure as Cape Cod residents.

### Reasons for Moving to Cape Cod and Reasons for Continuing to Live on Cape Cod

The predominant reasons for moving to Cape Cod revolved around the Cape's natural beauty and recreational opportu-

**FIGURE 15:** Description of the Live-on/Work-on Sample as Cape Cod Residents




- Sub-group A: Respondents who have lived on Cape Cod essentially all their lives.
- Sub-group B: Respondents who grew up on Cape Cod, left for two or more years, and have moved back.
- Sub-group C: Respondents who moved to Cape Cod as an adult.
- Sub-group D: Respondents who as an adult, lived for a period on Cape Cod, moved away, and then returned.
- Sub-group E: Respondents who spent summers on Cape Cod or visited Cape Cod before moving here as an adult.
- Sub-group F: Respondents who chose "Other."

**TABLE 6:** Most Important Reasons for Moving to Cape Cod

| Reason for Moving to Cape Cod | Percentage of Respondents Rating Very Important and Important |
|---|---|
| To enjoy the natural beauty[a] | 83% |
| To enjoy the recreational opportunities | 70% |
| To be near family members who live here[a] | 65% |
| To raise a family here | 56% |
| I was offered a job here[b] | 54% |

[a] Women tended to rate this reason higher in importance than men did.
[b] Men tended to rate this reason higher in importance than women did.

**TABLE 7:** Most Important Reasons for Continuing to Live on Cape Cod

| Reason for Moving to Cape Cod | Percentage of Respondents Rating Very Important and Important |
|---|---|
| To enjoy the natural beauty[a] | 88% |
| I have a job here | 87% |
| To enjoy the recreational opportunities | 77% |
| To be near family members who live here[a] | 77% |
| I have a social network here[a] | 74% |
| To raise a family here[a] | 70% |
| My spouse/partner has job here[a] | 65% |
| I have a professional network here | 64% |

[a] Women tended to rate this reason higher in importance than men did

**TABLE 8:** I was unemployed for some point during the last 12 months for the following reasons. (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I could not find a job. | 155 | 26% |
| I had a seasonal job. | 154 | 25% |
| I am a stay-at-home parent. | 144 | 24% |
| Other | 110 | 18% |
| I am a student. | 30 | 5% |
| I am a caregiver to an adult. | 13 | 2% |
| Total | 606 | 100% |

nities, family, and employment. Table 6 summarizes the most important reasons for moving to Cape Cod. Note that women tended to rate natural beauty and being near family as being more important than men rated these reasons. Men rated being offered a job as a more important reason for moving to the Cape than women did.

When life-long residents and residents who moved to Cape Cod were asked why they continued to live on the Cape, the most important reasons once again were natural beauty and recreational opportunities, family and social networks, and employment and professional networks. Table 7 summarizes the percentage of respondents who rated these reason as very important or important for remaining on Cape Cod. Women tended to rate the importance of the following reasons higher than men did: natural beauty, being near family, having a social network, and a spouse's/partner's job.

## Working on Cape Cod

The Working on Cape Cod questions asked respondents about their employment status, where they worked, in what industry they worked, whether they needed to supplement their income, and their overall perception of job availability, salaries, and benefits. Nearly 78 percent of respondents indicated they were employed during the 12 months prior to the survey. The remaining 22 percent of respondents indicated they had been unemployed for some period during the 12 months prior.

Table 8 summarizes the reasons for unemployment. The top three reasons were not being able to find a job, having had a seasonal job, and having been a stay-at-home parent. Common explanations for unemployment given by respondents who chose "Other" were health issues, being laid off, and having recently moved to Cape Cod and having not yet found a job.

Among the Live-on/Work-on respondents, who were employed during the 12 months prior to the survey, the largest proportions worked in Barnstable (39%), Falmouth (11%), and Yarmouth (9%), while the smallest proportions indicated working in Provincetown (2%), Wellfleet (2%), and Truro (1%). Just over one percent of respondents worked off Cape Cod and telecommuted two or more days a week.

**TABLE 9:** What industry do you work in for your primary job? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Educational Services | 270 | 14% |
| Professional, Scientific, and Technical Services | 217 | 11% |
| Health Care | 212 | 11% |
| Other | 184 | 10% |
| Finance and Insurance | 182 | 9% |
| Non-profits | 170 | 9% |
| Retail Trade | 116 | 6% |
| Hotel and Food Services | 107 | 6% |
| Construction | 81 | 4% |
| Public Administration | 75 | 4% |
| Arts, Entertainment, and Recreation | 55 | 3% |
| Office Administration and Support | 53 | 3% |
| Publishing, Broadcasting, and Telecommunications | 42 | 2% |
| Real Estate; Rental and Leasing | 42 | 2% |
| Social Assistance | 31 | 2% |
| Wholesale Trade | 22 | 1% |
| Transportation and Warehousing | 20 | 1% |
| Agriculture and Forestry | 17 | 0.9% |
| Manufacturing | 16 | 0.8% |
| Waste Management and Remediation Services | 12 | 0.6% |
| Data Processing and Data Storage | 9 | 0.5% |
| Fishing and Hunting | 8 | 0.4% |
| Utilities | 3 | 0.2% |
| Total | 1,944 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

The largest proportions of respondents identified the industry in which they work as Educational Services (14%), Professional, Scientific, and Technical Services (11%), and Health care (11%). The smallest proportions, those that represented less than one percent of respondents, included Agriculture and Forestry, Data Processing and Data Storage, Fishing and Hunting, Manufacturing, Utilities, and Waste Management and Remediation Services (see Table 9). Among the respondents who chose "Other" as the industry in which they worked, common responses were hair and nail salons, day spas, marine and yachting, military, and clergy.

The large majority of the respondents (86%) worked for an employer as their primary job, while the remaining were self-employed (14%). Most respondents (86%) worked full time at their primary job and most respondents indicated they work in their desired fields (80%). Men were more likely to work full time than women. Just over 95 percent of male respondents indicated they worked full time while 82 percent of female respondents did.

For the 19 percent of respondents who identified that they are not working in their desired fields, the most common responses for what is the desired field include:

- Professional, Scientific, and Technical Services
- Heath care
- Other (includes fitness, event planning/management, and animal care)
- Arts, Entertainment, and Recreation
- Educational Services
- Owning one's own business
- Social Assistance
- Unsure

Despite many positive indications that the vast majority of respondents held full time positions in their desired fields, the survey respondents were essentially divided regarding whether or not they needed to supplement their annual income. A slightly larger proportion (51%) reported the need to supplement their income and the remaining 49 percent reported that they did not. The most common reason respondents cited for having to supplement their income was not earning enough from their primary jobs to cover basic living expenses, followed by wanting to have extra spending money, and to increase savings (see Table 10). For respondents who answered "Other" the most common reasons were to pay for student loan and other debt, to enhance household income including paying for children's activities, to support a small business, and to enhance summer income.

**TABLE 10:** Why do you supplement your income? (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I do not earn enough from my primary job to cover my basic living expenses. | 654 | 44% |
| I want to have extra spending money (disposable income). | 415 | 28% |
| I want to increase my savings. | 345 | 23% |
| Other | 65 | 4% |
| Total | 1,479 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 11:** How do you supplement your annual income? (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I have a second or third job. | 457 | 27% |
| I work at odd jobs. | 279 | 17% |
| I use credit, such as credit cards or personal loans. | 233 | 14% |
| I have support from my family members. | 210 | 13% |
| I am self-employed part-time. | 186 | 11% |
| I sell products from artistic or creative pursuits. | 114 | 7% |
| Other | 104 | 6% |
| I receive public assistance such as WIC, SNAP, fuel assistance, etc. | 73 | 4% |
| I rent out my house in the summer. | 24 | 1% |
| I receive unemployment benefits from a seasonal job. | 4 | 0% |
| Total | 1,684 | 100% |

**TABLE 12:** Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)

| Statement | Percent of Respondents who Strongly Agree or Agree |
|---|---|
| Salaries and wages I earn are livable wages for the Cape.[a] | 34% |
| There are enough opportunities for promotion or advancement in my chosen career field.[a] | 35% |
| There are enough jobs that require my education or experience. | 37% |
| There are enough jobs available in my chosen career field. | 39% |
| There are enough career development resources for me. | 35% |
| There are enough mentoring resources for me. | 32% |

[a] Men tended to disagree more strongly than women did.

**TABLE 13:** Which of the following statements best describes your current living arrangement? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| I live with a spouse/partner and children. | 1,067 | 43% |
| I live with a spouse/partner. | 639 | 26% |
| I live alone. | 241 | 10% |
| I live with my parents (or another family member). | 189 | 8% |
| I live with a roommate(s). | 133 | 5% |
| I live with my children. | 131 | 5% |
| Other | 57 | 2% |
| Total | 2,457 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 14:** Likelihood of Home Ownership and Marital Status

| | Do you own or rent your primary residence on Cape Cod? | | | | |
|---|---|---|---|---|---|
| Marital Status | Own | Rent | Other Arrangement | Skipped Question | Total |
| Single, never married | 170 | 351 | 121 | 1 | 643 |
| Married | 1,052 | 249 | 54 | 1 | 1,356 |
| Living with partner | 114 | 131 | 18 | 0 | 263 |
| Widowed | 4 | 2 | 1 | 0 | 7 |
| Divorced | 71 | 74 | 8 | 2 | 155 |
| Separated | 14 | 13 | 3 | 0 | 30 |
| Skipped Question | 3 | 4 | 0 | 0 | 7 |
| Total | 1,428 | 824 | 205 | 4 | 2,461 |

The most commonly reported method by which to supplement income was to have an additional job(s) (27%), followed by working at odd jobs (17%), using credit (14%), and relying on support from family (13%). These account for 71 percent of the ways in which respondents supplement their income (see Table 11). The most common responses for "Other" were relying on a spouse's income, working overtime or additional shifts at a current job, looking for additional jobs, renting a room in one's house, working a second job seasonally, and relying on child support.

When respondents were asked how strongly they agreed to a series of statements about working on Cape Cod, only half of respondents strongly agreed or agreed that employers provided adequate paid time off benefits while 62 percent strongly agreed or agreed that they had flexibility in the work place such as the ability to set one's hours and telecommuting.

On the opposite end of the agreement spectrum, only about one-third of respondents strongly agreed or agreed that salaries and wages were livable wages for the Cape, that there were enough opportunities for promotion, and that there were enough mentoring resources. Just a little over one-third of respondents felt that there were enough career development resources, that there were enough jobs that required his or her educational experience, and that there were enough jobs in his or her chosen field.

Table 12 summarizes these results. Note that men tended to disagree more strongly than women regarding the statement that there were enough opportunities for promotion and advancement and that wages on earned were livable wages for Cape Cod.

Clearly, the employment situation on the Cape poses a problem for the majority of young adults on the Cape and one important reason for the decline in Cape residency.

## Housing on Cape Cod

The housing questions asked respondents to provide information on whether they owned or rented, the amount of monthly mortgage or rent paid, whether renters had a year-round lease, and on what types of housing they would want to rent if additional rental housing were to be available and affordable. From the monthly mortgage and rent data and the income data in the demographics section of the survey, the percent of gross income dedicated to mortgage or rent was calculated and analyzed to determine the cost of housing burden.

Table 13 reveals that 69 percent of the Live-on/Work-on respondents reported that they lived with a spouse/partner or with a spouse/partner and children. The largest group of respondents lived with a spouse/partner and children (43%) followed by respondents who lived with a spouse/partner only (26%). The third largest proportion represents those respondents who lived alone (10%). Among respondents who indicated other living arrangements, the most common responses were:

- Living with spouse and/or children and a grandparent(s)
- Living with spouse and/or children with another family member such as a sibling
- Living with spouse and/or children and a roommate(s).

Just over 58 percent of respondents indicated that they own their home, while 34 percent indicated that they rent. The remaining eight percent had other living arrangements. Among the other arrangements, the most commonly provided explanations were:

- Living with parents or in-laws
- Living in a house owned by a family member such as parents or grandparents
- Living in employer provided housing.

Among the survey respondents who lived and worked on Cape Cod, married couples had the highest rate of home-ownership, where 78 percent owned their homes, 18 percent rented, and four percent had other arrangements. Only about 27 percent of respondents who were single and never-married owned their homes, 55 percent rented, and 19 percent had other arrangements. Like single respondents,

**TABLE 15:** Approximately how much do you pay each month for your mortgage, including principle, interest, and taxes? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 25 | 2% |
| $501 to $750 | 31 | 2% |
| $751 to $1,000 | 78 | 6% |
| $1,001 to $1,250 | 137 | 10% |
| $1,251 to $1,500 | 278 | 20% |
| $1,501 to $1,750 | 271 | 19% |
| $1,751 to $2,000 | 264 | 19% |
| $2,001 to $2,500 | 206 | 14% |
| $2,501 to $3,000 | 93 | 7% |
| $3,001 to $3,500 | 19 | 1% |
| $3,501 to $4,000 | 13 | 0.9% |
| $4,001 or more | 11 | 0.8% |
| Total | 1,426 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 16:** Percent of Income[1] Spent on Mortgage and Rent

| Measure | Median |
|---|---|
| Percent of Gross Income Spent on Mortgage | 35% |
| Percent of Gross Income Spent on Summer Rent | 30% |
| Percent of Gross Income Spent on Winter Rent | 30% |

[1] The percent of mortgage to gross income was calculated by finding midpoint of the reported ranges for mortgage and income for each respondent.

**TABLE 17:** Approximately how much do you pay in rent each month during the summer (June to August)? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 58 | 7% |
| $501 to $750 | 155 | 19% |
| $751 to $1,000 | 200 | 24% |
| $1,001 to $1,250 | 172 | 21% |
| $1,251 to $1,500 | 142 | 17% |
| $1,501 to $1,750 | 41 | 5% |
| $1,751 to $2,000 | 33 | 4% |
| $2,001 to $2,500 | 10 | 1% |
| $2,501 to $3,000 | 7 | 0.9% |
| $3,001 to $3,500 | 1 | 0.1% |
| $3,501 to $4,000 | 3 | 0.4% |
| $4,001 or more | 0 | 0% |
| Total | 822 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 18:** Approximately how much do you pay in rent each month during the winter (September to May)? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 57 | 7% |
| $501 to $750 | 168 | 20% |
| $751 to $1,000 | 206 | 25% |
| $1,001 to $1,250 | 177 | 22% |
| $1,251 to $1,500 | 134 | 16% |
| $1,501 to $1,750 | 37 | 5% |
| $1,751 to $2,000 | 28 | 3% |
| $2,001 to $2,500 | 4 | 0.5% |
| $2,501 to $3,000 | 3 | 0.4% |
| $3,001 to $3,500 | 0 | 0% |
| $3,501 to $4,000 | 2 | 0.2% |
| $4,001 or more | 8 | 1% |
| Total | 824 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 19:** What type of lease do you have? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Year-round lease | 762 | 93% |
| Winter rental (September to May or similar) | 58 | 7% |
| Total | 820 | 100% |

**TABLE 20:** If there were more rental housing on Cape Cod that was within your budget, what type of unit would you want for year-round living? (Check all that apply.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 1-2 bedroom house | 382 | 34% |
| 3+ bedroom house | 264 | 24% |
| 2-3 bedroom apartment | 243 | 22% |
| 1 bedroom apartment | 164 | 15% |
| Studio apartment | 42 | 4% |
| Other | 21 | 2% |
| Total | 1,116 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 21:** What is your desired location to rent? (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Rural neighborhoods | 384 | 29% |
| Within walking distance of beaches | 382 | 28% |
| Within walking distance of village centers | 373 | 28% |
| Willing walking distance of commercial zones with employment opportunities | 137 | 10% |
| Other | 68 | 5% |
| Total | 1,344 | 100% |

**TABLE 22:** If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Trails for recreational biking | 926 | 25% |
| None | 800 | 21% |
| Commuter rail to work off Cape | 778 | 21% |
| Dedicated bicycle lanes to bike to work on Cape | 686 | 18% |
| Commuter bus to work on Cape | 383 | 10% |
| Commuter bus to work off Cape | 213 | 6% |
| Total | 3,786 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 23:** Tell us how much you agree or disagree that the following services are available to you on Cape Cod. (Check one for each service.)

| Services | Percent of Respondents Who Strongly Agree or Agree |
|---|---|
| Consumer Services (for example, dry cleaners, salons) | 89% |
| Medical Services (for example, hospitals, emergency rooms, clinics, doctors) | 86% |
| Retail Stores (for example, clothing stores, grocery stores, pharmacies)[a] | 75% |

[a] Men tended to agree more strongly than women did.

those who were living with a partner were more likely to rent than own their homes, where 43 percent owned, 50 percent rented, and seven percent had other arrangements. The summaries are in Table 14. These differences are probably due to married couples and partners having dual incomes or a parent staying home with children and thus saving on child care costs.

Over 71 percent of respondents pay a monthly mortgage in the range of $1,251 to $2,500 (see Table 15). A conventional indicator of whether the cost of housing is overly burdensome is the percent of gross income that is spent on housing, which for a homeowner includes mortgage principal, interest, taxes, and mortgage insurance. FreddieMac (2014) recommends keeping the ratio under 28 percent. For the survey respondents who own their homes, the median percent of income dedicated to mortgage was 35 percent (see Table 16). At 35 percent of gross income, mortgage payments were higher than recommended for more than half of the Live-on/Work-on respondents.

The rent that survey respondents paid in summer and winter showed little variation (see Table 17 and Table 18), which was consistent with nearly 93 percent of respondents having indicated they had year-round leases (see Table 19). Rent payments clustered within the range of $501 and $1500 per month. The median rent to gross income ratio was 30 percent for both the summer and winter. The cost of housing burden for renters was less than it was for homeowners on Cape Cod, however, it was still higher than the recommended ratio of 28 percent.

If additional affordable rental housing were available, the most popular choice for rental would be a 1-2 bedroom house, followed by a 3+ bedroom house and by a 2-3 bedroom apartment (see Table 20). Among respondents who checked "Other," there was no definitive pattern of additional types of desired rental housing, however, pet friendly rentals were mentioned.

The most popular location for rentals was in rural neighborhoods, and within walking distance of beaches and village centers. Each was around 28 percent of the responses (see Table 21), which is not surprising as the beaches and town centers are among the most beautiful and charming places on Cape Cod. Feedback for other desired locations included:

- Deemphasizing location for emphasis on affordable housing
- Being within a 10 minute drive to jobs, village centers, and public schools
- Being near recreation and commercial areas

In sum, affordable housing is a common problem in many parts of the Commonwealth and it continues to be one on the Cape, especially for young adults and their families.

## Services and Community Initiatives on Cape Cod

The services and community initiatives theme of the survey attempted to gauge respondents' opinions about the availability of transportation alternatives, healthcare services, retail and consumer services, and higher education resources on Cape Cod. The questions around community initiatives asked about respondents' awareness of seven different issues ranging from the Cape Flyer to the regionalization of school districts to improving water quality. The section ended with questions asking about the likelihood of respondents moving off of Cape Cod and for what reasons.

Asked if there were more transportation choices on Cape Cod, which would they use, respondents identified recreational bike trails as the mode they would use the most (25%), followed by commuter rail for commuting off Cape (21%), and dedicated bike lanes for commuting on Cape (18%). Commuter bus options had the lowest proportion of responses (see Table 22). However, 21 percent of responses indicated that they would not use any of the modes, suggesting Cape Codders continue to be reliant on their cars.

Most survey respondents agreed that medical services, retail stores, and consumer services were available to them on Cape Cod (see Table 23). Nearly 90 percent of respondents either strongly agreed or agreed that consumer services were readily available on the Cape. Similarly, 86 percent of respondents either strongly agreed or agreed that medical services were available to them. The availability of retail services revealed somewhat less agreement that they were sufficiently available on the Cape. Nearly 20 percent of respondents indicated they disagreed that retail services were available to them on the Cape. Note that men tended to agree more strongly than women that retail services were available.

The responses summarized in Table 24 revealed that 78 percent of respondents strongly agreed or agreed that Cape Cod needs a four year college, which is consistent with only 25 percent of respondents who strongly agreed or agreed that there are sufficient higher education institutions on Cape Cod. Almost 41 percent of respondents strongly agreed or agreed that they would attend a four year college located on the Cape, however, only 37% strongly agreed or agreed that they would be financially able to attend. Almost 72 percent of respondents strongly agreed or agreed that additional education or training would help advance their careers.

**TABLE 24:** Tell us how much you agree or disagree with the following statements about higher education opportunities and the cost of education on Cape Cod. (Chose one for each statement.)

| Statement | Percent of Respondents Who Strongly Agree or Agree |
|---|---|
| Cape Cod needs a four year college.[a] | 78% |
| Additional education or training would help me advance my career. | 72% |
| There are sufficient technical schools or trade schools on Cape Cod. | 54% |
| If a four year college were located on Cape Cod, I would attend.[a] | 41% |
| I am financially able to pursue additional education opportunities. | 37% |
| There are sufficient higher education institutions on Cape Cod. | 25% |

[a] Women tended to agree more strongly than men did.

**TABLE 25:** Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)

| Initiative | Percent of Respondents Very Familiar or Familiar | Percent of Respondents Not Very Familiar or Not at All Familiar |
|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER[a] | 70% | 30% |
| Regionalization of public school districts | 52% | 48% |
| Update of flood maps by the Federal Emergency Management Agency (FEMA)[a] | 50% | 50% |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems[a] | 48% | 53% |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands[a] | 34% | 66% |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 34% | 66% |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns[a] | 13% | 87% |

[a] Men tended to be more familiar with the initiative than women were.

**TABLE 26:** Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)

| Reason for Moving to Cape Cod | Percent of Respondents Indicating Very Important or Important | Percent of Respondents Indicating Not Very Important or Not at All Important | Percent of Respondents Indicating N/A or Don't Know |
|---|---|---|---|
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems[a] | 88% | 9% | 3% |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 77% | 19% | 3% |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth[a] | 73% | 22% | 5% |
| Extending train service to the Cape during the summer through the CapeFLYER | 66% | 31% | 3% |
| Regionalization of public school districts[a] | 56% | 31% | 13% |
| Update of flood maps by the Federal Emergency Management Agency (FEMA)[a] | 61% | 32% | 8% |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 57% | 34% | 8% |

[a] Women tended to respond that these initiatives are higher in importance than men did.

Most respondents strongly agreed or agreed (54%) there were sufficient technical schools and trade schools on Cape Cod. Note that women were more likely to agree that the Cape needs a four year college and that they would attend.

Presented with a list of seven current Cape Cod initiatives and issues as shown in Table 25, the issue respondents were most familiar with was the extension of CapeFLYER service through the summer, where 70 percent of respondents were very familiar or familiar with the issue. Respondents were mostly familiar with the regionalization of public school districts (60% were very familiar or familiar).

The issue respondents were least familiar with was the centralized electronic submission of permits and licenses where just 13 percent of respondents were very familiar or familiar with it. About a third of respondents were very familiar or familiar with the establishment of a Bridgewater State University satellite campus in South Yarmouth (34%) and the OpenCape project (34%). On balance, just under half of the respondents were very familiar or familiar with updates to the FEMA flood maps (50%) and efforts to improve water quality in coastal estuaries and freshwater ponds (48%).

Male respondents tended to be more familiar with all the issues than female respondents. The exceptions were the regionalization of public schools and the establishment of a Bridgewater State University campus where there was no difference in how males and females responded.

The questions summarized in Table 26 asked respondents to indicate how important each of the current Cape Cod initiatives or issues was to them. The order of importance as rated by respondents is as follows with the percentage of respondents indicating very important or important in parenthesis:

1. Improving water quality in coastal estuaries and freshwater ponds (88%)
2. Expanding the OpenCape project to include Cape Cod and the Islands (77%)
3. Establishing of a Bridgewater State University satellite campus in South Yarmouth (73%)
4. Extending the CapeFLYER service during the summer (66%)
5. Updating of FEMA flood maps (61%)
6. Centralizing electronic submission of permits and licenses (57%)
7. Regionalizing public school districts (56%)

When the responses were compared, women tended to respond that regionalizing public school districts, updating the flood maps, establishing a Bridgewater State University campus, and improving water quality was higher in importance.

The opinion portion of the survey closed with a series of questions asking respondents if they had seriously considered moving off Cape Cod during the past year. Nearly half (47%) of all respondents answered in the affirmative (see Table 27). Men were more likely to report they had seriously considered moving off Cape Cod. Approximately 51 percent of male respondents indicated as such versus about 45 percent of female respondents.

About one quarter (24%) of those who indicated that they have considered moving off Cape indicated that it was very

likely they would do so. Nearly another half of these potential movers suggested they were somewhat likely to carry out their plans to leave the Cape (see Table 28). Combining all these statistics suggests that among survey respondents, a full one-third (33%) would be very likely or somewhat likely to move off Cape sometime in the future.

**TABLE 27:** In the past 12 months, have you seriously considered moving off Cape Cod? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes[a] | 1,144 | 47% |
| No | 1,314 | 54% |
| Total | 2,458 | 100%[1] |

[a] Men were more likely to indicate they have seriously considered moving off Cape Cod than women did.
[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 28:** How likely is it that you would move off Cape Cod? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Very likely | 279 | 24% |
| Somewhat likely | 537 | 47% |
| Not very likely | 310 | 27% |
| Not at all likely | 20 | 2% |
| Total | 1,146 | 100% |

**TABLE 29:** Choose the most important reasons that would make it "very likely" or "somewhat likely" that you would move off of Cape Cod. (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Housing costs are too high on Cape Cod. | 561 | 20% |
| Available jobs on Cape Cod do not pay a living wage. | 498 | 18% |
| There are not enough job opportunities on Cape Cod in my field. | 496 | 18% |
| There are not enough social activates for people my age group. | 358 | 13% |
| There are not enough higher education opportunities on Cape Cod. | 220 | 8% |
| I do not feel I am part of a community on Cape Cod. | 219 | 8% |
| I want to be near family or friends who live off Cape Cod. | 200 | 7% |
| There are not enough job training opportunities on Cape Cod. | 157 | 6% |
| Other | 85 | 3% |
| Total | 2,794 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

Given the responses to the work environment and housing questions, this is a discouraging, but not a totally surprising finding.

The main reasons survey respondents cited that would cause them to very likely or somewhat likely move off of Cape Cod revolved around high housing costs (20%), jobs that did not pay a living wage (18%), the lack of job opportunities in their fields (18%), and the lack of social activities for people of their age (13%), as shown in Table 29. Among the reasons cited by respondents who chose "Other" were:

- Lack of economic and social activity during the winter months
- Incompatibility with retired residents, e.g., they do not respect younger residents; they do not support longer business hours; it is difficult for bicyclists, joggers, and walkers to share the road with older drivers
- Challenges in meeting people, including for the purpose of dating
- Concerns over personal safety or safety of children due to residents having drug and alcohol problems
- Lack of affordable activities for children, especially during the winter months
- Lack of job opportunities for spouses.

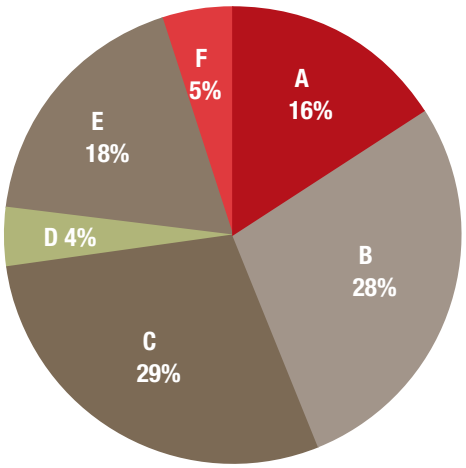
# KEY SURVEY FINDINGS FROM LIVE-ON/ WORK-OFF RESPONDENTS

Survey respondents who identified themselves as living on Cape Cod and working off Cape Cod received the same On-Cape survey as the respondents who live and work on Cape Cod. The Live-on/Work-off response group had a sample size of 170. This section of the report focuses on the key findings from the Live-on/Work-off respondents and focuses on respondents age 25 to 44. The summary statistics for each of the Live-on/Work-off survey questions may be found in Appendix E.

## Living on Cape Cod

The living on Cape Cod questions asked respondents to share the name of the town they live in, to describe whether they were life-long Cape Cod residents or moved to the Cape, and to rate the importance of the reasons why they had moved to the Cape and why they continued to live on the Cape.

**FIGURE 16:** Description of the Live-on/Work-off Sample as Cape Cod Residents




- Sub-group A: Respondents who have lived on Cape Cod essentially all their lives.
- Sub-group B: Respondents who grew up on Cape Cod, left for two or more years, and have moved back.
- Sub-group C: Respondents who moved to Cape Cod as an adult.
- Sub-group D: Respondents who as an adult, lived on for a period on Cape Cod, moved away, and then returned.
- Sub-group E: Respondents who spent summers on Cape Cod or visited Cape Cod before moving here as an adult.
- Sub-group F: Respondents who chose "Other."

### Description of the Live-on/Work-off Sample

Among survey respondents who lived on but worked off Cape Cod, it was not surprising to see the highest proportions living in the upper Cape towns of Bourne (10%), Falmouth (12%), and Sandwich (19%), with shorter commutes off Cape. Just over 20 percent of these respondents lived in the county seat of Barnstable. The proportions of residents from these four towns represented nearly 61 percent of the Live-on/Work-off Cape Cod sample.

The largest two sub-groups among the Live-on/Work-off sample were those who identified themselves as having moved to Cape Cod as an adult (29%) and those who grew up on Cape Cod, moved off Cape, and moved back to the Cape (28%). For those respondents who selected "Other," there were no dominant themes outside of the reasons surveyed for moving to Cape Cod, though a couple of respondents mentioned military service. Figure 16 shows the proportions for each sub-group of respondents and their tenure as Cape Cod residents.

### Reasons for Moving to Cape Cod and Reasons for Continuing to Live on Cape Cod

The predominant themes for moving to Cape Cod revolved around the Cape's natural beauty and recreational opportunities, family, the array of community events, and culture and the arts. Table 30 summarizes the most important reasons for moving to Cape Cod.

**TABLE 30:** Most Important Reasons for Moving to Cape Cod

| Reason for Moving to Cape Cod | Percentage of Respondents Rating Very Important and Important |
|---|---|
| To enjoy the natural beauty | 80% |
| To enjoy the recreational opportunities | 70% |
| To raise my family here | 64% |
| To be near family members who live here | 60% |
| To participate in community events (e.g., festivals, fundraisers, sports events) | 49% |
| To enjoy the cultural and artistic opportunities | 43% |
| My spouse/partner was offered a job here. | 35% |

When life-long residents and residents who moved to Cape Cod were asked why they continued to live on the Cape, the themes that were most important were natural beauty and recreational opportunities followed by family and social networks, participation in community events, and cultural/artistic opportunities. Table 31 summarizes the percentage of respondents who rated these reasons as very important or important for remaining on Cape Cod.

## Working off Cape Cod

The Working on Cape Cod questions asked respondents about their employment status, where they worked and in what industry, whether they needed to supplement their primary job income, and their overall perception of job availability, salaries, and benefits. More than 82 percent of respondents indicated they were employed during the 12 months prior to the survey. The remaining 18 percent of respondents indicated they had been unemployed for some period during the 12 months. The proportion of off-Cape workers that were unemployed was lower than the Live-on/Work-on sample, potentially due to the greater off-Cape availability of year-round jobs. The top two reasons for not working year-round were not being able to find a job or having been a stay-at-home parent. Unlike those who work on the Cape, less than nine percent cited having a seasonal job as a reason for unemployment (compared to more than 25 percent among the Live-on/Work-on sample) as shown in Table 32.

Among the Live-on/Work-off respondents who were employed during the 12 months prior to the survey, more than one in four (26%) percent telecommuted two or more days per week, allowing them to remain on the Cape while working. This percentage was significantly higher than the percent of telecommuters who worked on the Cape.

The mix of primary jobs for those who worked off-Cape differed from those who worked on Cape. The largest proportions of Live-on/Work-off respondents identified the industries in which they work as Professional, Scientific, and Technical Services (16%), Educational Services (11%), and Finance and Insurance (9%). The smallest proportions, those representing less than one percent of respondents included Hotel and Food Services, Office Administration and Support, Real Estate Rental and Leasing, Social Assistance, and Waste Management and Remediation Services. Among the respondents who chose "Other" as the industry in which they worked, no common themes emerged, though boating and marine-related jobs were mentioned several times.

The vast majority of respondents were in full time positions in their desired fields—unlike those who worked on-Cape—

**TABLE 31:** Most Important Reasons for Continuing to Live on Cape Cod

| Reason for Living On Cape Cod | Percentage of Respondents Rating Very Important and Important |
|---|---|
| To enjoy the natural beauty | 85% |
| To enjoy the recreational opportunities | 77% |
| I have a social network here. | 69% |
| To raise my family here | 65% |
| To be near family members who live here | 63% |
| To participate in community events (e.g., festivals, fundraisers, sports events) | 55% |
| My spouse/partner has a job here. | 50% |
| To enjoy the cultural and artistic opportunities | 45% |

**TABLE 32:** I was unemployed for some point during the last 12 months for the following reasons. (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I could not find a job. | 14 | 40% |
| I am a stay-at-home parent. | 7 | 20% |
| Other | 7 | 20% |
| I am a student | 4 | 11% |
| I had a seasonal job. | 3 | 9% |
| I am a caregiver to an adult. | 0 | 0% |
| Total | 35 | 100% |

**TABLE 33:** Why do you supplement your income? (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I want to have extra spending money (disposable income). | 31 | 38% |
| I do not earn enough from my primary job to cover my basic living expenses. | 26 | 32% |
| I want to increase my savings. | 23 | 28% |
| Other | 2 | 2% |
| Total | 82 | 100% |

**TABLE 34:** What type of lease do you have? (Check one.)

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Year-round lease | 31 | 91% |
| Winter rental (September to May or similar) | 3 | 9% |
| Total | 34 | 100% |

**TABLE 35:** Percent of Income[1] Spent on Mortgage and Rent

| Measure | Median |
|---|---|
| Percent of Gross Income Spent on Mortgage | 26% |
| Percent of Gross Income Spent on Summer Rent | 23% |
| Percent of Gross Income Spent on Winter Rent | 23% |

[1]The percent of mortgage to gross income was calculated by finding midpoint of the reported ranges for mortgage and income for each respondent.

**TABLE 36:** If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Commuter rail to work off Cape | 107 | 37% |
| Trails for recreational biking | 60 | 21% |
| Commuter bus to work off Cape | 44 | 15% |
| None | 39 | 13% |
| Dedicated bicycle lanes to bike to work on Cape | 28 | 10% |
| Commuter bus to work on Cape | 13 | 5% |
| Total | 3,786 | 100%1 |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 37:** Tell us how much you agree or disagree with the following statements about higher education opportunities and the cost of education on Cape Cod. (Choose one for each statement.)

| Statement | Percent of Respondents Who Strongly Agree or Agree |
|---|---|
| Cape Cod needs a four year college. | 74% |
| Additional education or training would help me advance my career. | 66% |
| I am financially able to pursue additional education opportunities. | 57% |
| There are sufficient technical schools or trade schools on Cape Cod. | 51% |
| If a four year college were located on Cape Cod, I would attend. | 40% |
| There are sufficient higher education institutions on Cape Cod. | 21% |

and had less of a need to supplement their incomes (35% compared to 51%). The most common reason Live-on/Work-off respondents cited for having to supplement their income included wanting to have extra spending money (38%) followed by not earning enough from their primary jobs to cover basic living expenses (32%) and to increase savings (28%). On-Cape workers cited a higher need to cover basic living expenses (44%), indicating that off-Cape workers earned more (see Table 33).

## Housing on Cape Cod

The housing questions asked respondents to provide information on whether they owned or rented, the amount of monthly mortgage or rent paid, whether renters had a year-round lease, and on what types of housing they would want to rent if additional rental housing were to be available and affordable. From the monthly mortgage and the rent and income data in the demographics section of the survey, the share of gross income dedicated to mortgage or rent was calculated and analyzed to determine the level of housing cost burden.

When asked about current living arrangements, more respondents that lived on, but worked off the Cape reported living with a spouse or partner and children (53%) when compared to those who live and work on the Cape (43%). A higher proportion (69%) reported owning their homes when compared to those who worked on Cape (just over 58%). Nearly 74 percent of Live-on/Work-off Cape respondents paid a monthly mortgage in the range of $1,251 to $2,500.

Among the 20 percent of respondents (34 individuals) that rented, the proportion that paid monthly rent in the range of $501 to $1,500 jumped from 74 percent in the summer to 82 percent in the winter. More than 91 percent had year-round leases, which was similar to respondents from the on-Cape survey (see Table 34).

Those who worked off Cape also reported spending less of their gross income on rent and mortgage (see Table 35). Those who worked off Cape spent 26 percent of gross income on a mortgage or 23 percent on rent. Those who worked on the Cape spent 35 percent of gross income on a mortgage or 30 percent on rent, both of which exceeded the Freddie Mac-recommended 28 percent maximum. A smaller proportion of those who worked off-Cape are "housing cost burdened."

As such, the greater job opportunities off-Cape provided incomes that allowed a larger number of Live-on/Work-off residents to afford housing on the Cape.

The reported data about living arrangements and payments indicate that those who worked off Cape earn more to support families and are more able to afford the cost of living on the Cape.

If additional affordable rental housing were available, the most popular choice for rental reported by the Live-on/Work-off sample would be a 3+ bedroom house, followed by 1-2 bedroom house, and then a 2-3 bedroom apartment. The most popular location for rentals was within walking distance of beaches and village centers (36%) followed by being within walking distance of village centers (27%) and in rural neighborhoods (24%).

## Services and Community Initiatives on Cape Cod

The services and community initiatives section of the survey attempted to gauge respondents' opinions about the availability of transportation alternatives, healthcare services, retail and consumer services, and higher education resources on Cape Cod. The questions around community initiatives asked about respondents' awareness of seven different issues ranging from the Cape Flyer to the regionalization of school districts to improving water quality. The section ended with questions asking about the likelihood of respondents moving off of Cape Cod and for what reasons.

When asked if there were more transportation choices on Cape Cod, which would they use, respondents who worked off Cape named the commuter rail as the mode they would use the most (37%), followed by trails for recreational biking (21%) and commuter bus for commuting off Cape (15%). The differences from those who work on the Cape indicate a desire for more commuter-related transportation options, as well as placing a high priority on enjoying the region's recreational opportunities while at home (see Table 36).

Most survey respondents agreed that medical services, retail stores, and consumer services were available to them on Cape Cod (see Table 36). Nearly 90 percent of respondents were satisfied with the array of consumer services available to them. Similarly, 89 percent of respondents either strongly

**TABLE 38:** Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)

| Initiative | Percent of Respondents Very Familiar or Familiar | Percent of Respondents Not Very Familiar or Not at All Familiar |
|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | 78% | 22% |
| Update of flood maps by the Federal Emergency Management Agency (FEMA)[a] | 52% | 48% |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 51% | 49% |
| Regionalization of public school districts | 40% | 60% |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 39% | 61% |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 30% | 70% |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 13% | 87% |

**TABLE 39:** Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)

| Reason for Moving to Cape Cod | Percent of Respondents Indicating Very Important or Important | Percent of Respondents Indicating Not Very Important or Not at All Important | Percent of Respondents Indicating N/A or Don't Know |
|---|---|---|---|
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 86% | 11% | 3% |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 82% | 13% | 5% |
| Extending train service to the Cape during the summer through the CapeFLYER | 72% | 26% | 2% |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 70% | 21% | 9% |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | 60% | 33% | 7% |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 55% | 37% | 8% |
| Regionalization of public school districts | 53% | 30% | 17% |

agreed or agreed that medical services were available to them. More than three-quarters of respondents (77%) indicated they either strongly agreed or agreed that retail services were available to them.

The responses summarized in Table 37 reveal that nearly three out of four respondents strongly agreed or agreed that Cape Cod needs a four year college. Just over 40 percent of respondents strongly agreed or agreed that they would attend a four year college located on the Cape. In sharp contrast to those who work on the Cape, 57 percent of Live-on/Work-off respondents strongly agreed or agreed that they would be financially able to attend (compared to 37%). More than 65 percent of respondents strongly agreed or agreed that additional education or training would help advance their careers, fewer than those who work on Cape (72%). Slightly more than half of respondents (51%) strongly agreed or agreed that there were sufficient technical schools and trade schools on Cape Cod.

Presented with a list of seven current Cape Cod initiatives and issues as shown in Table 38, the respondents were most familiar with the extension of CapeFLYER service through the summer, with more than three out of four (78%) respondents very familiar or familiar with the issue. This proportion was higher than those who worked on Cape, most likely due to the Live-on/Work-off sample being more aware of off Cape commuter options. Similar to those who worked on the Cape, roughly half of respondents were familiar with the update of FEMA flood maps (52%) and efforts to improve water quality (51%).

The issues respondents were less familiar with included the regionalization of public school districts (40%), the OpenCape Project (39%), and the establishment of a Bridgewater State University satellite campus in South Yarmouth (30%). The issue with which respondents were least familiar was the proposed centralized application and permit system for all Cape towns (13.%).

The question summarized in Table 39 asked respondents to indicate how important each of the current Cape Cod initiatives or issues was to them. The order of importance was as follows:

1. Improving water quality in coastal estuaries and freshwater ponds (86%)
2. Expanding the OpenCape project to include Cape Cod and the Islands (82%)
3. Extending the CapeFLYER service during the summer (72%)
4. Establishing of a Bridgewater State University satellite campus in South Yarmouth (70%)
5. Updating of FEMA flood maps (60%)
6. Centralizing electronic submission of permits and licenses (55%)
7. Regionalizing public school districts (53%)

Though off-Cape workers prioritized extending the CapeFLYER service higher than establishing a satellite of Bridgewater State University, other responses were similar to responses from those who worked on the Cape.

The opinion portion of the survey closed with a series of questions asking respondents if they had seriously considered moving off of Cape Cod during the past year. Similar to those who work on the Cape, just over half of respondents (52%) have seriously considered moving off of Cape Cod in the last 12 months.

Among the respondents who indicated that they have considered moving off of Cape Cod, more than three out of four respondents (79%) suggested that they are very likely or somewhat likely to do so. This percentage was much higher than for those who work on the Cape, no doubt due to their off-Cape employment and other factors like off-Cape professional networks.

Common themes among "Other" reasons for seriously considering moving off Cape Cod included the possibility that the respondent's job would move further off Cape, the desire for better public schools and more activities for children, and to avoid a perceived drug abuse problem on the Cape.

The final open ended question on the survey asks respondents to discuss any other factors that have affected their experience or opinion about living and working on Cape Cod that were not covered in the survey. Many of these responses reiterated concerns over the need for:

- More job opportunities on Cape Cod
- More better paying job opportunities on Cape Cod

Additional themes found in the responses address topics that were lightly covered in the survey or not at all. These themes include:

- Need for additional commuter train service
- Drug and crime problem on Cape Cod
- Enduring long commutes to enjoy the Cape Cod lifestyle and scenic beauty

# KEY SURVEY FINDINGS FROM LIVE-OFF/ WORK-ON RESPONDENTS

Survey respondents who identified themselves as living off of Cape Cod and working on Cape Cod received the Live-on/Work-off survey. This response group had the smallest sample size of 86 individuals. This section of the report focuses on the key findings from the Live-off/ Work-on respondents focusing on respondents age 25 to 44. The summary statistics for each of the Live-off/Work-on survey questions may be found in Appendix F.

## Working on Cape Cod

The Working on Cape Cod questions asked respondents about their employment status, where they worked, in what industry they worked, whether they needed to supplement their income, and their overall perception of job availability, salaries, and benefits. A majority of respondents (76%) worked primarily in the towns of Barnstable (45%), Bourne (13%), Falmouth (11%) or Sandwich (7%). Thirteen of the respondents (15%) were self-employed; the remaining 85 percent worked for an employer.

The largest proportions of respondents identified the industry in which they work as Nonprofits (13%), Professional, Scientific, and Technical Services (13%), Hotel and Food Services (11%), Finance and Insurance (9%), and Construction (7%).

Most respondents (89%) worked full time at their primary job, and most respondents indicated they work in their desired fields (87%). Nearly 98 percent reported that their primary job was year-round.

A much higher proportion of Live-off/Work-on respondents agreed or strongly agreed with a series of statements about working on Cape Cod than those among the Live-on/ Work-on sample (see Table 40). More than 80 percent (compared to 61%) of respondents strongly agreed or agreed that Cape Cod employers provided adequate paid time off benefits, and 75 percent (compared to 62%) strongly agreed or agreed that they had flexibility in the work place such as the ability to set one's own working hours and telecommuting. Nearly 61 percent (compared to 50%) agreed that their employers provided affordable health insurance.

In areas where there was less agreement, only 42 percent agreed that there were enough jobs in their chosen career fields and that these jobs required their education and experience. Less than 41 percent strongly agreed or agreed that salaries and wages were livable wages for the Cape and fewer than 39 percent said that there were enough mentoring resources. Among those in the Live-off/Work-on sample, only about 38 percent felt that there were enough career development resources. Moreover, only 35 percent agreed that there are enough opportunities for advancement on the Cape and only 29 percent reported that there were enough employment opportunities for their spouse/partner.

**TABLE 40:** Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)

| Statement | Percent of Respondents who Strongly Agree or Agree |
|---|---|
| My employer provides adequate paid time off benefits (e.g., vacation, sick time, etc.) | 80% |
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | 76% |
| My employer provides affordable health insurance. | 61% |
| There are enough jobs available in my chosen career field. | 50% |
| There are enough jobs that require my education or experience. | 42% |
| Salaries and wages I earn are livable wages for the Cape. | 41% |
| There are enough mentoring resources for me. | 39% |
| There are enough career development resources for me. | 38% |
| There are enough opportunities for promotion or advancement in my chosen career field. | 35% |
| There are enough employment opportunities for my spouse/partner. | 29% |
| Other | 14% |

**TABLE 41:** Choose the most important reasons that would make you decide to move to Cape Cod. (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| To raise my family on Cape Cod | 10 | 29% |
| Housing options within your budget | 7 | 20% |
| A job offer for you | 6 | 17% |
| Other | 3 | 7% |
| To be near a family member or friend who provides care for a member of my family | 2 | 6% |
| A job offer for your spouse/partner | 2 | 6% |
| Social activities for people in my age group | 2 | 6% |
| Community events (e.g., festivals, fundraisers, sporting events, etc.) | 2 | 6% |
| To be a care giver for a family member or friend on Cape Cod | 1 | 3% |
| To be near family and friends who live on Cape Cod | 0 | 0% |
| Higher education opportunities | 0 | 0% |
| Job Training opportunities | 0 | 0% |

## Moving to Cape Cod

When it comes to living on Cape Cod, fewer than 40 percent of respondents had seriously considered moving to the Cape in the past year. Respondents were split exactly 50/50 on their likelihood to move to the Cape: 50 percent responded that they were very likely or somewhat likely to move to the Cape, which mirrored an equal percentage who indicated they were not very or not at all likely to move to the Cape. For those who were very likely or somewhat likely to move to the Cape, the top reasons that would make them decide to move included to raise their families on the Cape (29%), housing options within their budget (20%), or a job offer (17%). See Table 41 for the complete list of responses.

## Services and Community Initiatives on Cape Cod

The services and community initiatives theme of the survey attempted to gauge respondents' opinions about the availability of transportation alternatives, healthcare services,

**TABLE 42:** Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)

| Initiative | Percent of Respondents Very Familiar or Familiar | Percent of Respondents Not Very Familiar or Not at All Familiar |
|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | 76% | 24% |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | 55% | 45% |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 45% | 55% |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 42% | 58% |
| Regionalization of public school districts | 27% | 73% |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 23% | 77% |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 16% | 84% |

**TABLE 43:** Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)

| Reason for Moving to Cape Cod | Percent of Respondents Indicating Very Important or Important | Percent of Respondents Indicating Not Very Important or Not at All Important | Percent of Respondents Indicating N/A or Don't Know |
|---|---|---|---|
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 91% | 9% | 0% |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 82% | 18% | 0% |
| Extending train service to the Cape during the summer through the CapeFLYER | 74% | 26% | 0% |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 73% | 27% | 0% |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 72% | 28% | 0% |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | 63% | 37% | 0% |
| Regionalization of public school districts | 54% | 46% | 0% |

retail and consumer services, and higher education resources on Cape Cod. The questions around community initiatives asked about respondents' awareness of seven different issues ranging from the Cape Flyer to the regionalization of school districts to improving water quality.

When asked if there were more transportation choices on Cape Cod, which would they use, Live-off/Work-on respondents identified the commuter rail as the mode they would use the most (37%), followed by recreational biking trails (18%) and commuter bus service (17%). Commuter bus options had the lowest proportion of responses. However, 22 percent of responses indicated that they would not use any of the modes.

Most survey respondents agreed that medical services, retail stores, and consumer services were available to them on Cape Cod.

Responses to statements about higher education opportunities and the cost of education on Cape Cod confirmed that those who live outside the community felt that though the Cape needs a four-year college (72% agree or strongly agreed) only 18% agreed or strongly agreed that additional education would help their careers (60%). A larger proportion of respondents indicated that technical and trade groups were sufficient (45%). Though 42 percent reported that they were financially able to pursue additional education opportunities, only 30 percent would choose to attend a four-year college on Cape Cod. These results indicate that, compared to those who lived in the community, the availability of educational opportunities on the Cape was less important. However, those who lived off Cape were able to afford it more than others who lived and worked on Cape.

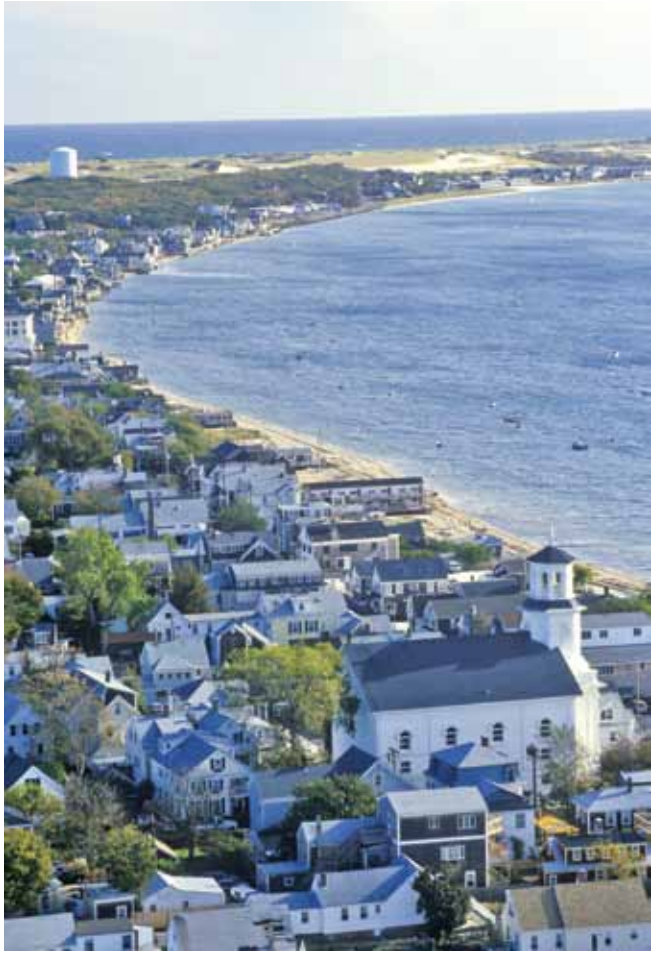
As Table 42 reveals, the issue respondents were most familiar with is the extension of CapeFLYER service through the summer (76%). A slight majority of respondents was familiar with the update of FEMA flood maps (55%). A little less than half of respondents were familiar with efforts to improve water quality (45%)

The OpenCape high speed internet project (42%) was less familiar to respondents. The issues among which respondents had the least awareness included the regionalization of public schools (27%), the establishment of the Bridgewater State University campus (23%), and the proposed centralized permitting and licensing system (16%).

While awareness of issues for those in the Live-off/Work-on sample was lower, a majority indicated that all the issues were either very important or important to the future of Cape Cod. Table 43 summarizes how important each of the current Cape Cod initiatives or issues was to them. The respondents indicated the order of importance as follows with the sum of percent indicating very important or important in parenthesis:

1. Improving water quality in coastal estuaries and freshwater ponds (91%)
2. Expanding the OpenCape project to include Cape Cod and the Islands (83%)
3. Extending the CapeFLYER service during the summer (74%)
4. Establishing of a Bridgewater State University satellite campus in South Yarmouth (73%)
5. Centralizing electronic submission of permits and licenses (72%)
6. Updating of FEMA flood maps (63%)
7. Regionalizing public school districts (54%)

# KEY SURVEY FINDINGS FROM LIVE-OFF/ WORK-OFF RESPONDENTS



Survey respondents who received the Off-Cape survey were individuals who were once Cape Cod residents who now live and work off of Cape Cod. This sample includes 308 respondents. This section of the report focuses on the key findings from the off-Cape respondents in the age 25-44 demographic. The summary statistics for each of the Off-Cape survey questions may be found in Appendix G.

## Living on Cape Cod

The off-Cape respondents were asked in what town they had primarily resided during the last year they lived on Cape Cod. The largest proportion of respondents lived in Barnstable (27%), followed by Falmouth (14%) and Yarmouth (11%). Three percent or fewer of the respondents indicated that they lived in Bourne, Mashpee, Provincetown, Truro, and Wellfleet.

Over 45 percent of the respondents moved away within the last five years. Just over 35 percent of respondents moved away from Cape Cod between six and ten years ago. Two residents moved away as long ago as 22 years. The median number of years that respondents had been living off Cape Cod was six.

When asked to rate how important each of the reasons shown in Table 44 was to the respondents when they decided to move, the most important was being offered a job off Cape. That reason was followed by not being able to

**TABLE 44:** For the following, rate how important each reason was for you when you decided to move off Cape Cod. (Check one for each reason.)

| Reason for Moving From Cape Cod | Percentage of Respondents Rating Very Important and Important |
|---|---|
| I was offered a job off Cape. | 66% |
| I could not develop a professional network on the Cape. | 62% |
| I moved for educational opportunities not available on the Cape. | 56% |
| There were too few entertainment or social opportunities for my age group. | 54% |
| I worked off Cape and moved to be closer to my job. | 50% |
| Other (please explain) | 49% |
| I could not develop a social network on the Cape. | 32% |
| My spouse/partner was offered a job off Cape . | 27% |
| I moved to be near family or friends who live off Cape. | 25% |
| I felt I was not part of a community on the Cape. | 25% |
| I was no longer needed to be a care giver for a family member or friend on the Cape. | 3% |
| I moved to be near a family member or friend who provides care for a member of my family. | 1% |

develop a professional network on the Cape, moving for educational opportunities, and having too few entertainment and social opportunities. The reason with the lowest percentage of respondents answering very important or important was moving for a spouse's or partner's job.

Additional themes among these explanations include moving off Cape Cod to:

- Pursue higher education
- Avoid increasing drug and crime problems
- Pursue a broader world perspective for the respondents or their children
- Pursue a different social circle, including for dating purposes

## Working on Cape Cod

When asked where they worked when they lived on Cape Cod, the largest proportion of the Live-off/Work-off sample indicated that they worked in Barnstable (27%), Falmouth (11%), and off Cape (15%). Fewer than three percent of respondents worked in Bourne, Eastham, Harwich, Provincetown, Truro, and Wellfleet. Only two percent of respondents telecommuted while they lived on the Cape. Over 92 percent of respondents worked for an employer, versus being self-employed. The most common industry in which the respondents worked were hotel and food services (28%), retail trade (11%), and professional, scientific, and technical services (11%).

The majority of respondents had full time jobs (74%) and had jobs there were year-round (63%). However, 54 percent of respondents indicated they were not working in their desired fields. When asked how much they agreed with the statements in Table 45 regarding working on Cape Cod, very low percentages of respondents indicated positive opinions about the experiences they had had. Less than 20 percent of respondents strongly agreed or agreed that:

- There were enough jobs that require my education or experience
- There were enough mentoring resources for me
- There were enough opportunities for promotion or advancement in my chosen career field
- There were enough career development resources for me
- There were enough employment opportunities for my spouse/partner

The off-Cape survey concluded by asking two questions to gauge the most important reasons for why respondents moved off Cape Cod and what would be the most important reasons to cause them to move back. When asked to identify

**TABLE 45:** Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)

| Statement | Percentage of Respondents Who Strongly Agree or Agree |
|---|---|
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | 43% |
| My employer provided adequate paid time off benefits (e.g., vacation, sick time, etc.) | 40% |
| My employer provided affordable health insurance. | 33% |
| Salaries and wages I earned were livable wages for the Cape. | 25% |
| There were enough jobs available in my chosen career field. | 22% |
| There were enough jobs that require my education or experience. | 18% |
| There were enough mentoring resources for me. | 17% |
| There were enough opportunities for promotion or advancement in my chosen career field. | 15% |
| There were enough career development resources for me. | 12% |
| Other | 11% |
| There were enough employment opportunities for my spouse/partner. | 11% |

**TABLE 46:** Choose the most important reasons that made you decide to move off Cape Cod? (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| There were not enough job opportunities on Cape Cod in my field. | 215 | 26% |
| There were not enough higher education opportunities on Cape Cod. | 116 | 14% |
| There were not enough social activities for people in my age group. | 115 | 14% |
| Available jobs on Cape Cod did not pay a living wage. | 114 | 14% |
| Housing costs were too high on Cape Cod. | 108 | 13% |
| I wanted to be near family or friends who live off Cape Cod. | 53 | 7% |
| There were not enough job training opportunities on Cape Cod. | 36 | 4% |
| I did not feel I was part of a community. | 32 | 4% |
| Other | 29 | 4% |
| Total | 818 | 100% |

the most important reasons for moving off Cape, not enough job opportunities was clearly the most important reason followed by not enough higher education opportunities, and not enough social activities for people in the respondent's age group. The least important reasons for moving were not enough job training opportunities and not feeling a part of a community. A small number of respondents answered "Other", adding that they moved off Cape to broaden their social circle, to gain more access to cultural and social activities, and for educational purposes. The summary statistics for these reasons are offered in Table 46.

When asked to give the most important reasons that would cause an off-Cape respondent to return to Cape Cod, the most common reason was to be near friends and family, followed by having a job offer, and for raising a family. The least cited reasons for moving back are to be near family or friends who provide care for the respondent's family member, for job training opportunities, and "Other." Respondents also explained that they would move back to the Cape if they had a high paying job to come back to and/or could find an affordable home. Respondents offered retirement as another reason for moving back and several explained that they still enjoy summer vacations on the Cape, but would not want to live on Cape Cod. The responses for these reasons are summarized in Table 47.

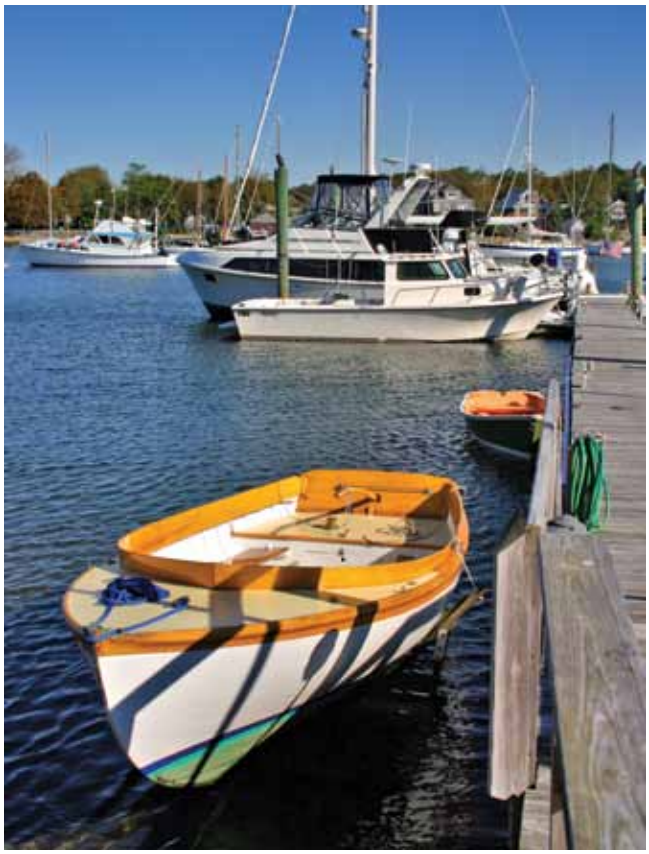


**TABLE 47:** Choose the most important reasons that would cause you to move back to Cape Cod. (Check all that apply.)

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| To be near family and friends who live on Cape Cod | 208 | 18% |
| A job offer for you | 187 | 16% |
| To raise my family on Cape Cod | 152 | 13% |
| Housing options within your budget | 126 | 11% |
| A job offer for your spouse/partner | 121 | 11% |
| To be a care giver for a family member or friend on Cape Cod | 90 | 8% |
| Social activities for people in my age group | 82 | 7% |
| Community events (e.g. festivals, fundraisers, sporting events, etc.) | 73 | 6% |
| Higher education opportunities | 38 | 3% |
| To be near a family member or friend who provides care for a member of my family | 26 | 2% |
| Job training opportunities | 26 | 2% |
| Other | 22 | 2% |
| Total | 1,151 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

# FOCUS GROUP SUMMARIES

In February and March of 2014, four focus groups were conducted. In total, 47 people participated. The locations and time of day were varied among the focus groups to give a range of opportunities for interested parties to participate. Two focus group sessions took place in Barnstable, and one each in West Barnstable and Brewster. The West Barnstable and Brewster focus groups were conducted during the noon lunch hour and the two Barnstable focus groups were held in the early evening from 5:30 PM to 7:00 PM. Focus group participants were asked to discuss the challenges of living and working on Cape Cod, while still focusing on the discussion of potential solutions.

Tables 48 through Table 50 summarize some demographic characteristics of the focus group participants. Table 48 reveals that the largest groups of participants lived in Barnstable (19%) and Yarmouth (19%), followed by Dennis (11%) and Harwich (11%). The towns in which most of the participants worked were more varied, as shown in Table 49. The largest group of participants worked in Barnstable (36%). The second largest group (11%) reported that they worked in multiple towns, as did many construction workers and independent consultants and contractors. The next largest groups worked in Chatham, Dennis, and Harwich with each town representing about nine percent of the participants.

The median age among the participants was 33 years. Just over 55 percent of the participants were female and nearly 43 percent were male. Table 50 summarizes the highest levels of education attained by the focus group participants. Approximately 85 percent of the respondents have either a 4-year college degree or a graduate degree.

## Summary of the February 4th Focus Group in West Barnstable

The first focus group was held at the YMCA in West Barnstable. There were twelve participants of whom nine were CCYP members and three were non-members. The opening question of the focus group asked participants to share the challenges they face working and living on Cape Cod and asked them to brainstorm solutions to these challenges. The first comments concentrated on the relatively lower wages paid for jobs on Cape Cod, the relatively higher housing costs and higher overall cost of living, and the challenges of finding year-round jobs.

### Bring Jobs and People to Cape Cod

When prompted to brainstorm ideas for solutions, the participants coalesced around the following ideas for bringing jobs to Cape Cod.

- Bring in different industries of varying sizes to the Cape. The Cape has many small businesses, but it needs more mid-size businesses that can create jobs and boost pay.
- A participant suggested building a technology base around Woods Hole Oceanographic Institute.
- A participant cautioned against diminishing the character of Cape Cod by turning it into a "495" technology park (alluding to the Route 495 technology corridor). Other participants agreed and said that job development can be done within the "framework of the Cape and the character of the Cape while also attracting those jobs that are the reason why we go off Cape to get them."
- A participant suggested including manufacturing jobs to retain the Cape's skilled workers.
- Attract corporate headquarters that could renovate an old building and provide higher paying jobs.
- Attract cloud based companies and technology entrepreneurs who can work remotely, while enjoying the beauty of Cape Cod.
- Establish internship programs that would also provide housing to bring college students to the Cape. This introduces them to Cape Cod's beauty and lifestyle and perhaps would entice some to stay. Internship programs can also help to expand smaller companies by providing them with a low cost staffing option.

### Resources for Residents and Families

The conversation about internships drifted towards resources to help residents find social activities and establish social networks.

- Participants agreed that it can be hard for a "wash ashore" to integrate into Cape Cod social networks. Many of these networks are tight knit groups made up of lifelong friends and family. Several Cape Cod natives acknowledged that is the case.
- Participant shared his/her experience living on Martha's Vineyard, which has an almost exclusively tourism-based seasonal economy. During the off-season on Martha's Vineyard, there are a variety of activities, hobby groups, and social groups. We should model the Vineyard experience on Cape Cod. Along those lines, ideas were contributed, suggesting CCYP organize trivia teams and sports teams to meet at establishments across the Cape on different nights of the week.
- Several participants suggested the Cape needs a centralized community calendar. There are many events happening on the Cape, however, it is difficult to find out about the events if one is not directly involved. These include community and social activities, lecture series at Woods Hole, and conferences and job fairs at Cape Cod Community College.
- Several participants also said that a centralized job listing site and list of companies on Cape Cod would help job seekers who are looking to move to the Cape and those who are already living on the Cape.

### Civic Engagement on Cape Cod

The lack of communication making it difficult to find out about events and activities extends to civic engagement. Many participants felt they did not hear about town or committee meetings and did not know where to find that information. A couple of participants pointed out that for the age 25 to 44 demographic, those on the younger end are not as interested in civic engagement, but as one gets older or has a family, interests change and one becomes more interested. Another participant explained that as a renter s/he felt less engaged with civic matters, especially if renters frequently moved between towns to find affordable housing.

### Cape Cod is Town-centric

The conversation returned to Martha's Vineyard and their identity as one island. Cape Cod has town identities, but lacks a Cape identity, which contributes to the dearth of communication and civic engagement. Ideas for breaking that barrier include the following.

- The lack of transportation options is a challenge and contributes to the separation of the towns. Unless an event is extraordinary, residents do not want to drive on two lane roads to get to another part of the Cape. There is no reliable taxi service, especially late at night.

**TABLE 48:** Summary of the Towns in which Focus Group Participants Live

| Town | Number of Participants | Percent of Participants |
|---|---|---|
| Barnstable | 9 | 19% |
| Yarmouth | 9 | 19% |
| Dennis | 5 | 11% |
| Harwich | 5 | 11% |
| Brewster | 3 | 6% |
| Falmouth | 3 | 6% |
| Orleans | 3 | 6% |
| Sandwich | 3 | 6% |
| Mashpee | 2 | 4% |
| Bourne | 1 | 2% |
| Wellfleet | 1 | 2% |
| Off Cape | 2 | 4% |
| Skipped Question | 1 | 2% |
| Total | 47 | 100%[1] |

[1] Total percentage in tables may not sum to 100% due to rounding.

**TABLE 49:** Summary of the Towns in which Focus Group Participants Work

| Town | Number of Participants | Percent of Participants |
|---|---|---|
| Barnstable | 17 | 36% |
| Chatham | 4 | 9% |
| Dennis | 4 | 9% |
| Harwich | 4 | 9% |
| Orleans | 3 | 6% |
| Falmouth | 2 | 4% |
| Bourne | 1 | 2% |
| Brewster | 1 | 2% |
| Mashpee | 1 | 2% |
| Yarmouth | 1 | 2% |
| Off Cape Cod | 2 | 4% |
| Multiple Towns | 5 | 11% |
| Skipped Question | 2 | 4% |
| Total | 47 | 100% |

**TABLE 50:** Summary of the Highest Level of Education Completed by Focus Group Participants

| Highest Level of Education Completed | Number of Participants | Percent of Participants |
|---|---|---|
| 4-year college degree (BA, BS) | 22 | 47% |
| Graduate degree (MS/MA, PhD) | 18 | 38% |
| 2-year college degree (Associates) | 4 | 9% |
| Some college | 1 | 2% |
| Professional degree (MD, JD) | 1 | 2% |
| Skipped question | 1 | 2% |
| Total | 47 | 100% |

- A participant mentioned the bus that runs between Provincetown and Brewster during the summer. Extending that service from seasonal to year-round would be helpful.
- A participant suggested spreading landmarks and events throughout the Cape that would draw people from off Cape and would encourage residents to travel around the Cape. Examples of such landmarks and events would be the Beachcomber and the Falmouth Road Race. Another participant noted that these are summer events and that one would need similar events during the winter. A participant suggested more destinations like Mashpee Commons.

### Reasons to Stay on Cape Cod and Reasons to Leave

The final question posed to the focus group was for each participant to share the most important reason they live on Cape Cod and the most important reason that would cause them to leave Cape Cod. Most participants cited their jobs, a family business, and their social network of family and friends as reasons to stay on the Cape. Most participants in this group said they would not leave the Cape. If their job situation changed, they would find a way to stay on Cape. One participant mentioned that losing his/her job would be reason to move off Cape. Another participant said that if the crime and drug situations worsened, he/she would move.

## Summary of the February 13th Focus Group in Barnstable

The second focus group met at the Cape Cod Commission offices in the Barnstable County complex in Barnstable. The group was comprised of thirteen participants of whom approximately one-third were CCYP members and two-thirds were non-members. The initial question of identifying challenges and solutions to working on Cape Cod led to the following comments.

### Challenges to Working on Cape Cod

Many responses echoed the common themes of too few job opportunities, too few growth opportunities, and low wages. A few unique stories were:

- A participant who moved to the Cape with his/her spouse had to take a huge pay cut and was struggling to find a full time job. A career center in mid-Cape advised him/her not to negotiate a salary offer because Cape employers could always find someone to fill jobs at the salaries they are offering.
- Moving up one's career ladder is very slow, especially at the small businesses on the Cape where there is no room for promotion. It is normal for Cape residents to work multiple jobs to make ends meet.
- Within the non-profit industry, many retired residents take part-time jobs for very low wages and non-profits have come to rely on this type of employee and hire fewer full time employees at a living wage.
- Employers on Cape Cod want to hire experienced employees making it hard for new college graduates to find work. Creating internships could help to provide students with experience during their education.

### Industries to Diversify Cape Cod's Economy

When prompted to think about ways to diversify Cape Cod's economy with industries that would do well on the Cape, participants offered the following ideas.

- A participant described Cape Cod's economy as heavily reliant on tourism and services, but not on products. Cape Cod needs to break out of the tourism mold, but there is a lack of marketing strategies.
- Focus on core industries such as those that support Otis Air Force base, health care, marine biology and technology, and alternative energy.
- The Chamber of Commerce sponsored an event called Start-up Weekend where entrepreneurs could meet with a variety of advisors and professionals such as lawyers, artists, and technology specialists to develop a business idea. The Chamber also has an Entrepreneurial Center in Hyannis which provides workspace and a staff that can help people with business ideas and which also has resources where one can access professional services such as an attorney or accountant.
- Establish a program to get entrepreneurs or artists into empty store fronts that they can share and rent more affordably. Existing examples of this are commercial kitchens and Maker's Space. It also allows opportunity for start-ups to be with like-minded people as opposed to being isolated in a home office.

### Getting Information about Events and Professional Development Resources

When asked how the participants prefer to receive information about events and resources, many agreed that social media is the best method. A participant mentioned the Cape Cod Wave as an online newspaper that has good information. Another participant suggested using a balanced set of news sources, including social media, newspapers, and radio. The group agreed that Cape Cod needs one source that consolidates all the sources.

A participant self-identified as being an immigrant and wanted to know where to find resources to help immigrants integrate in the community. There are many who are business owners and want to stay on Cape Cod, but are in need of support and guidance. S/he suggested that there could be a CCYP event for the immigrant community and that eventually there could possibly be a sub-group of CCYP for immigrants.

### Civic Engagement

When prompted about civic engagement, one participant felt that young people are not taught to participate. A participant said that every town has committee openings that are listed in newspapers and newsletters such as the Town of Barnstable newsletter.

### Reasons for Leaving Cape Cod

This focus group was only asked to provide reasons that would force them to leave Cape Cod. The responses include leaving to expand one's social circle, including for dating. Another reason is for work, specifically if one's current job was lost. A participant explained that one can only look for work for so long before hitting a breaking point. Another participant said seasonality swings keeps one's life unbalanced by working so hard in the summer that there is no time to enjoy the Cape and then in winter there is nothing to do.

A participant, who wanted to end on a positive note, said that because Cape Cod is a small community, it is easy to make something happen once you learn how to get something done.

## Summary of the March 12th Focus Group in Brewster

The third focus group was held on the Lower Cape at the Cape Cod Natural History Museum in Brewster. There were eleven participants of which eight were CCYP members and three were non-members. The opening question of sharing challenges and solutions for working and living on Cape Cod immediately created agreement among the participants that the biggest challenges are high property values and high cost of living versus wages. One participant noted that vacation homes inflate house prices on the Cape. The ensuing discussion highlighted some challenges that are specific to the Lower Cape.

### Challenges of the Lower Cape

Participants pointed out that as one moves further east from Dennis and Harwich towards the Outer Cape, the challenges of working and living on the Cape become more pronounced. There are fewer transportation options, more intense seasonal effects, fewer year-round, sustainable job opportunities, higher housing costs, higher costs of living, and fewer young people. The nearest year-round jobs are in health care in Hyannis and Falmouth. The types of jobs that exist on Lower Cape are in hospitality, restaurant, and lodging and are seasonal by nature.

- A Wellfleet resident said that it is impossible to find affordable year-round housing and suggested that we look into ways to get homeowners on the side of young renters who are Cape Cod residents. Another participant said many homeowners rent only in the summer and that they make essentially the same rental income as if they rented year-round. Homeowners need incentives to rent year-round.
- The housing market caters to retired residents because there are more of them than young residents and they have money.
- Existing housing programs have thresholds that are too low for the average Cape professional, but wages are not high enough to own a house, especially if one has student loans and other debt.
- Sometimes it is second homeowners who say "not in my backyard" and the "old salts" who understand they need young people to keep the towns going.

### Attracting Businesses to Cape Cod

The focus groups identified biotechnology, health care, and military research and development or technology centers at the Otis Air National Guard Base as industries that make sense for Cape Cod. Non-profits are plentiful on Cape Cod because there is a large donor pool, but non-profits do not pay employees well, which causes employee turnover and restricts job growth opportunities. In terms of attracting businesses, the participants identified challenges related to infrastructure and town regulations.

- A participant pointed out that it is expensive for businesses to tie into infrastructure services such as OpenCape and natural gas. Small business cannot afford to connect to OpenCape and natural gas lines and new businesses are responsible for the costs to tie in.
- A participant said that processing centers make sense for Cape Cod, but once they grow to a certain size, they move off Cape because of infrastructure constraints. Back Office Associates is a rare success story because they are committed to staying on Cape because they started on the Cape. It is a different story to convince a company to come to Cape Cod.
- A web designer said it can take up to an afternoon to upload files that would take minutes in a place with better connectivity.
- A participant talked about strict regulations around starting a business on Cape Cod such as getting approvals for licenses and permits. Existing businesses have difficulties too and one participant shared a story about a company's permit application for a new sign being rejected by the town because the sign was six inches taller than the old one.
- Historic and conservation regulations can be restrictive for businesses and homeowners. One participant feels that some homes are not kept up because the renovation plan approval process is too complex and restrictive.

### Cape Cod is a Divided Community

Participants discussed how Cape Cod does not have a shared identity, sense of community, or sense of unity; and "even the beaches are divided." When asked what is behind this division, participants responded with several ideas.

- The lack of transportation options is one reason. There are no other transportation alternatives such as public transit or reliable taxis. If one does not have a car, it is too difficult to work in another town or to go to another town to socialize.
- A participant suggested a beach sticker that allows year-round residents to use any beach during the off season. As a Cape Cod resident, this participant feels any Cape Cod beach is his/her beach. However, there is no incentive for beaches to cooperate or to share revenues.
- A participant named successful school districts that have merged, such as Dennis-Yarmouth and Nauset. Other participants pointed out that disposal services and wastewater treatment might benefit from regionalization because towns struggle with solving similar problems.
- Several participants offered explanations for the divided communities. Towns on the Cape are old and want to maintain their autonomy and identity. Town governments are afraid that their traditions will be dismantled if they work with other towns. Because of the influx of tourists in the summer, year-round residents know and look out for each other during the winter.
- County government might be able to do more things on a regional level.

### Focus on the Success Stories

Participants named several success stories on Cape Cod and suggest finding ways to duplicate them.

- Leverage Woods Hole and Massachusetts Maritime Academy for the Outer Cape, which has unique marine environments.
- Having a four year college on Cape Cod with housing would introduce college students to the Cape. Internship programs would also bring students to the Cape, some of whom might stay.
- Cultural events like CCYP's Back to Business Bash, OysterFest, BeerFest, and the St. Patrick's Day parade all bring tens of thousands of people to the Cape.

- One participant suggested studying Gloucester, Massachusetts, which is similar to Cape Cod in many ways, but has more commerce and is a year-round town.
- A participant suggested that we look into developing more businesses like Back Office Associates.

### Reasons to Stay on Cape Cod and Reasons to Leave

When asked to share the most important reason for staying on the Cape and the most important reason for leaving the Cape, respondents cited job, family, and Cape Cod's natural beauty and quality of life as reasons to stay. Taking too long to find a job or to find a job growth opportunity and having to accept lower salaries were the most commonly cited reasons forcing people to leave Cape Cod. Several people said that they have invested in the Cape by buying a house or by living the Cape Cod lifestyle and because of the investment, they are not planning on leaving. Individuals cited difficulty in finding a social network and having to leave for a spouse's or partner's higher education as reasons.

## Summary of the March 12th Focus Group in Barnstable

The last of the four focus groups was held at the Cape Cod Commission in the Barnstable County complex. Eleven people participated of whom four were CCYP members and seven were non-members. The focus group was kicked off with the facilitator asking the group to share some challenges associated with working and living on Cape Cod and to brainstorm ideas for solutions to those challenges.

### Challenges and Solutions to Working on Cape Cod

When asked to name some challenges to working on Cape Cod, participants quickly said that they need more year-round jobs and that seasonality makes staying employed on Cape Cod difficult. Several participants agreed that there are no centralized resources such as job boards or lists of companies on Cape Cod. A job seeker has "to dig" to find what is available.

- Seasonality is a big challenge for Cape Cod businesses. A participant was laid off at a beach resort because there were not enough large events or conferences during the past winter. Another participant added that seasonal layoffs make it difficult to retain good employees.
- Several participants in differing professions identified the level of experience expected by Cape Cod employers to be a challenge. Due to the fact that Cape Cod businesses tend to be smaller, employers are looking for expertise and there is no room for entry level professionals. A participant in the nursing field explained that Cape Cod hospitals hire nurses with experience, so one has to work off Cape to build one's resume before attempting to apply for jobs at Cape hospitals.
- One participant said that the Cape needs more staffing agencies with staff that are trained to assess skills and to help build bridges with employers.
- A participant noted that many Cape Cod Community College students come from off Cape because it is the closest community college. However, these students do not stay on Cape after they graduate.
- A participant suggested collaboration with Barnstable County or with agencies at the state level to incentivize businesses to come to Cape Cod. Start with one industry such as healthcare, train Cape Cod residents in this field, and then build off that success to attract other companies.

When asked which industries it would make sense to bring to Cape Cod, the participants offered technology, finance, and healthcare as responses.

### The Cape Cod Brand

While discussing the types of industries that are appropriate for Cape Cod, a participant raised the issue of Cape Cod's brand or what Cape Cod is known for. Participants described Cape Cod as "a place for retired people," as a place where "marine science is big," and as a place with the competitive advantage of "natural beauty."

- One brand image described by a participant is that of "a family and summer destination." The participant elaborated that if a resident does not have a family on Cape or if a person is not a summer resident or vacationer, then, "Cape Cod is not for you." The participant suggested rebranding Cape Cod as a place for foodies, art lovers, and culture. These amenities exist on the Cape, but they are not well advertised.
- Another participant described Cape Cod's brand as having minimal culture and diversity. The participant said that companies want to see diversity in skills, age, and race in a community but that this is not apparent on Cape Cod. Without diversity, there is no incentive for companies, such as technology companies, to relocate to the Cape. It is very apparent, especially in the winter months, that Cape Cod has many retired and older residents.
- Two Latino participants expressed a strong desire to become involved and to organize their peers to participate in the Cape Cod community. The names and contact information of these participants were forwarded to CCYP.
- A participant suggested promoting Cape Cod as a great place to live and to raise children, and as being close to Boston, New York and Providence.
- A participant agreed that these are all good ideas but that the challenge goes back to the town residents who do not want things to change. We need to get young adults involved.
- When asked if any of the participants were involved in town committees or in town meeting, the general consensus was that they are not.
- A participant said that the community expressed no desire to involve young people in civic activities or in civic engagement. When the participant was living in Boston, there were invitations to get involved, but s/he has not heard of any opportunities on the Cape and does not feel anyone is reaching out to young adults.
- A participant recounted an attempt to get involved with planning a Bike Summit but felt disconnected from the organizers who were older and retired. They did not use email and wanted to meet during business hours when the focus group participant needed to be at work. The participant suggested that we find ways to bridge the communication gap between working and retired residents on Cape Cod.

### Building Bridges with Retired Residents, Homeowners, and Town Leaders

Expanding on the idea of building communication bridges, several challenges and solutions were brought forth by the focus group. Several participants pointed out the "cliquey" nature of groups on Cape Cod, such as those among retired residents, town government, and homeowners. There was general consensus that both the younger generations and the older generations can live without interfering with each other and can even find ways to benefit each other. Ideas for building bridges with the retired residents include the following.

- Find ways for the young adults and retired residents to get to know each other, through committee work, town meeting, or town event planning. If these two generations can connect on a personal level, then when ideas are brought up at town meeting, the older generation may be more open to them.
- One participant suggested that CCYP organize groups of young adults to attend town meetings. CCYP could assist in formulating a common message for young adults to communicate at town meetings.
- Another participant suggested that the CCYP approach older residents and ask them to assist younger residents. Given that everyone likes to share, there could be professional mentoring opportunities.
- Along the lines of making connections with retired residents, one participant suggested doing the same with homeowners in terms of making more year-round rentals available.

### Reasons to Stay on Cape Cod and Reasons to Leave

The final question to the focus group was for each participant to share the most important reason they live on Cape Cod and the most important reason that would cause them to move off Cape Cod. Most participants cited the quality of life and scenic beauty as reasons to stay followed by their current jobs and family. The most common reason to move off Cape Cod is to find a better job or to find another job if the current one had been lost. Other reasons for leaving included the lack of social activities and the possibility of continued education off Cape. One participant said s/he would never leave.

# INTERVIEWS WITH FORMER CAPE COD RESIDENTS

Five telephone interviews were held with former Cape Cod residents in order to obtain their perspectives on why they moved off of Cape Cod. Current CCYP members recommended former residents as potential interview candidates. Five candidates were interviewed. Two currently live in the greater Boston area, one lives in the South Shore region, and two live outside of Massachusetts.

## Interviewee #1

Interviewee #1 was a native Cape Cod resident who had been in her late 20's when she moved off Cape. She currently lives on the South Shore. The primary reasons she cited for moving away from Cape Cod centered on the inability to find well-paying jobs, the high cost of housing, and the high overall cost of living. Interviewee #1 and her spouse both had difficulty finding well-paying jobs when they lived on Cape Cod. Her spouse currently works in Boston and the move to the South Shore was a compromise that shortened his commute, while at the same time allowed them to be close enough to visit friends and family who were on Cape Cod.

While living on Cape Cod, they rented but could not afford to purchase a house. Moving to the South Shore allowed the interviewee and her husband to purchase a house for their growing family. Interviewee #1 and her spouse have family and friends living on Cape Cod and would consider moving back if they could find jobs that paid better and they would even settle for wages that allowed them to break even relative to their cost of living.

When asked about solutions to the challenges she faced as a Cape Cod resident, Interviewee #1 suggested:

- Providing more affordable housing
- Providing more jobs with livable wages
- Adding more age diversity to town committees to help give younger residents a voice
- Getting young people involved with non-profit organizations as a means to building their network
- Providing more family-oriented services, especially affordable day care.

When asked what would keep young people on Cape Cod or attract young people to Cape Cod, the interviewee suggested:

- Bringing more year-round businesses
- Helping establish a larger online presence for businesses as many young people get their information or shop online
- Allowing businesses to stay open later
- Establishing more networks for families and children, such as family networking events, support groups for families with special needs, or for single parents. Cape Cod Children's Place in North Eastham is an example of such a network, but these types of resources are too few and far between.

## Interviewee #2

The second Interviewee was a Cape Cod native who moved off Cape to attend college. She currently lives in the Greater Boston area with her spouse and children. They wanted to be within 30 minutes of Boston for her husband's commute and close enough to Cape Cod to spend summer vacations there. Interviewee #2 said that the main reason she moved off Cape Cod was to attend college. Once off Cape, she

decided she wanted to remain off Cape, preferring to live in more urban areas. She and her husband looked into moving to Cape Cod, but there were no career opportunities for either of them.

While Interviewee #2 would not move back to Cape Cod, she visits often because she has family there and feels that there are plenty of cultural resources, activities, and events for children. Among her family's favorite activities are attending story hour at the West Falmouth library, going to the Cape Cod Children's Museum in Mashpee, and visiting the Heritage Museums and Gardens in Sandwich, which she remembers visiting as a child. Interviewee #2 agrees that while there are cultural and family resources on the Cape, one may need to seek them out because they are not as visible as, for example, the Boston Symphony Orchestra. However, once one knows about Cape resources, she suggests that they are more accessible because the Cape is made up of small towns. While it is easy to find events and activities in an urban place like Boston, it takes more effort to attend.

Suggestions Interviewee #2 had for retaining and attracting young people to Cape Cod were:

- Highlighting the family advantages of Cape Cod
  - The beach replaces the need for summer camp
  - The "bridges" keep the crime rate low by creating barriers for criminal elements
- Reaching into the community to find resources to supplement what the small towns on the Cape might not be able to provide
  - There are many fascinating people who can help organize cultural events
  - The Woods Hole science community has many people working on interesting projects.

## Interviewee #3

The third Interviewee returned to Cape Cod after finishing graduate school in Southeast Massachusetts. She could not find a job on or off Cape Cod that had an acceptable commute. Subsequently, she tried to start a shellfish business but experienced many barriers to entry due to state and local regulations. Other reasons she cited for moving were as follows: her spouse did not see a path for advancement at his job, the cost of living was high, and they felt claustrophobic on Cape Cod. Many businesses were closed in the winter and the heavy traffic during the tourist season created a disincentive to participating in summer activities. About five years after returning to the Cape, she and her

spouse moved to a community in the Midwest that they describe as a business friendly, university town.

Interviewee #3 offered these solutions to the challenges that she experienced on Cape Cod:

- Attract mid-size to large companies that offer year-round professional opportunities
- Change the culture of resistance against new businesses or franchises that want to locate on Cape Cod
- Relax or reduce the number of regulations issued by towns and commissions
- Take action on ideas such as building a third bridge or finishing the Rail Trail bike path
- Increase the number of opportunities for higher education on Cape Cod.

Interviewee #3 and her husband would consider moving back to Cape Cod if one or both of them could find jobs with good salaries, benefits, and a clear path for advancement. They see a lot of focus on the tourism economy and services for retired residents, but they think that the Cape needs to develop an economy for the year-round, working community. They both love the natural environment of Cape Cod, but need to be financially secure and need to be able to build a nest egg for the future.

## Interviewee #4

Interviewee #4 initially left Cape Cod for college and lived and worked in Boston for several years afterwards. He returned to graduate school and, after graduation, he tried to move back to Cape Cod. He stayed for two years and

decided to move off Cape again. He wanted more career growth opportunities and he explained that he liked the company that he worked for while on the Cape. However, he noted that there were several employees that were over 65 years of age working at their "retirement jobs." Because of their extensive work experience, they prevented Interviewee #4 from developing leadership and responsibility. In moving, Interviewing #4 also wanted to expand his opportunities for socializing, for joining recreation groups (e.g., running), and for reducing his dependence on a car. He currently lives in the Boston area.

When prompted for ideas on solutions to the challenges that he faced on Cape Cod, Interviewee #4 wanted to see more effort focused on developing sustained, year-round social groups around sports leagues, running clubs, and other social activities. He also wanted to see efforts to raise the profile of underutilized artistic resources such as the art shanties.

Interviewee #4 suggested that professional leadership development organizations like CCYP should focus on reaching out to groups that may feel excluded because they perceive such organizations to be for white collar professionals only and/or because there are fees associated with membership and events. He suggested finding meaningful ways to include and to cater to the needs of those who work in retail and service industries and to those who are in the trades.

Interviewee #4 also advised that Cape Cod needs to address the growing drug problem and drug related crimes that appear to be concentrated in Hyannis and Centerville. While the situation remains isolated, he is concerned that outsiders will perceive the problems to be widespread across Cape Cod.

While he still loves Cape Cod and has family and friends there, Interviewee #4 does not see himself moving back to the Cape in the next ten years. He may consider it once he and his wife have children, but the limited year-round activities do not suit their current lifestyle and the business climate is too restrictive for his career development.

## Interviewee #5

The fifth interviewee was born and raised on Cape Cod and initially moved away for college. She remained off Cape for almost a decade before moving back in 2010. She explained that she was socially fulfilled on Cape Cod, but not financially fulfilled. She worked in the non-profit sector and pursued a career in the arts. After almost two years, she decided to pursue a specialized career in the arts off of Cape Cod.

When prompted for solutions, Interviewee #5 explained that the Cape Cod economy needs to move some of its focus away from the vacation and resort sectors and needs to catch up on creating jobs for a year-round economy. When asked to think about what would pull her back to Cape Cod, she acknowledged that her situation is unique because she is tied to her current location because of her career. However, if her career were established and if she could work remotely, and if she had a family that would want to live on Cape Cod, then she would consider moving back.

Regarding the Cape Cod arts community, she felt that there was an overwhelming amount of resources and opportunities, but that one does have to do some digging to find them. Her experience was that upon finding one resource, she was quickly led to many more. She did not feel as if the opportunities were limited in the winter and, in fact, she felt that there were more promotional events and fund raisers in the winter than in the summer. When asked if there are guides to artistic resources and events, she said that there are many, but that there is not one that consolidates all of the information. She felt that a consolidated online resource would do more than just spread information; it may also help to break down the town based silos on Cape Cod. Each town has its own set of artistic resources and events, but a centralized guide could help to create a stronger Cape Cod community.

# COMPARISON OF CAPE COD TO OTHER COASTAL COMMUNITIES

Barnstable County possesses unique features for a coastal community. The Cape boasts one of the largest populations among remote coastal regions, particularly among those in northern climates. The geographic features make it singular in its form and accessibility, allowing for it to boast nearly 560 miles of coastline. Barnstable County is separated from mainland Massachusetts by the Cape Cod Canal. Bridges on Highway 6 and State Route 28, along with ferry service, connect the Cape with the mainland. Cape Cod is bordered by Cape Cod Bay to the north, Nantucket Sound to the south, Buzzards Bay to the west, and the Atlantic Ocean to the east. The unique shape of the peninsula provides each town with a variety of beach and interior island communities. The largest Cape Cod town is the Town of Barnstable, which has an estimated 2012 population of 44,824.

Cape Cod residents and visitors get around primarily by a series of state highways. The community is also served by Cape Cod Regional Transit Authority's bus service. The Cape features multiple on and off-road bike paths, including the Claire Saltonstall Bikeway, which runs from Cape Cod to Boston. The Cape also features eight ferry and cruise options that offer seasonal transportation to and from different towns throughout the county. The Cape supports two municipal airports in Provincetown and Barnstable.

Two institutions of higher education call Cape Cod home, including Cape Cod Community College in West Barnstable and Bridgewater State University, which is on-schedule to open a satellite campus in January 2015 in Yarmouth. Cape Cod Community College and Bridgewater State University are currently collaborating on the development of majors that would be appropriate for Cape Cod students. The two schools are also working on credit transfer processes that will give students the ability to apply community college credits towards their Bachelor's degrees (Fuller, 2014).

Communities on the Cape operate independently of one another. Like the rest of Massachusetts, Barnstable County is 100 percent incorporated and can be characterized by strong municipal government. These municipalities coordinate on some efforts, including regional planning through the Cape Cod Commission and the Cape Cod Economic Development Council. These two bodies work together through their RESET initiative, which uses a project-based approach to provide economic development technical assistance to municipalities across the Cape. As a result, the strategy focuses on creating a balanced economy and meeting the county's priorities. The revised 2014 plan identifies regional clusters that include marine research and technology, arts/culture, information and related technology, and education/knowledge creation. Cape Cod is primarily service oriented, with 11 percent of its 2012 GDP (BEA, 2013) and 25 percent of its jobs from the leisure and hospitality sector (US Census Bureau ACS 2012).

As a tourism-dependent coastal community with few geographic connections to the mainland and a large population, there are two comparable communities in the United States: New Hanover County, North Carolina and San Luis Obispo County, California.

## New Hanover County, North Carolina

New Hanover County is located 131 miles south of Raleigh, North Carolina. The county is bordered in the west by the Cape Fear River and on the east by barrier islands along the Atlantic Ocean. Just across the Cape Fear River to the north is Pender County and across the river to the west is Brunswick County. Interstate 40 connects New Hanover County to North Carolina's capital, Raleigh. The interstate ends in downtown Wilmington, which is home to nearly 110,000 of the county's 203,000 residents. As of 2012, 27 percent of the county-wide population was between the ages of 25 and 44.

Unlike neighboring South Carolina, North Carolina's coastal regions provide escape and privacy due to a lower level of accessibility. The relatively removed coastal area is partially a peninsula though the northern part of the county includes more geographic connections to the mainland and less

separation by water features than Cape Cod. Several roads connect to the area's many barrier islands and reserves, but the 8.4 mile long Masonboro Island, which is an undeveloped national estuarine research reserve, is only accessible by ferry.

New Hanover County residents have the option to get around using the Cape Fear Public Transit Authority's Wave Transit, which features fixed bus routes, shuttles, and a free downtown trolley in Wilmington (www.wavetransit.com). The bus routes run from 6am to 9pm five to seven days a week. The county features public trails and other amenities, but no passenger rail service.

New Hanover County has seven institutions of higher education, including the University of North Carolina - Wilmington and Cape Fear Community College. Local industry and a large urban center support Wilmington International Airport, a seaport, freight rail service, and one major highway. Unlike Barnstable County, New Hanover County features a manufacturing base (15 percent of GDP) that also drives a strong wholesale trade sector to support the airport and other infrastructure. New Hanover County's economy derives only 5 percent of its 2012 GDP and 26 percent of its jobs from the leisure and hospitality sector (BEA, 2013; US Census Bureau ACS 2012).

Unlike Cape Cod, New Hanover County includes unincorporated land. This means that local communities in unincorporated towns rely on strong leadership from county government and regional collaboration. These unincorporated communities require coordination between the county and municipal entities to provide affordable housing, education, economic development, and public safety services. As a result, New Hanover County has an aggressive regional economic development strategy targeting three existing market clusters (life/marine sciences, high value office operations, and precision manufacturing) and one aspirational target (aircraft assembly and maintenance) (Garner Economics, 2014). This economic development strategy deliberately avoids the hospitality sector and is driven by economic competitiveness.

## San Luis Obispo County, California

Researcher and author Dan Buettner named San Luis Obispo County as the “happiest place in North America” (Buettner, 2010). Located 95 miles northwest of Santa Barbara, CA, 171 miles south of Santa Cruz, and 189 miles northwest of Los Angeles, the coastal county is bordered on the west by the Pacific Ocean. Rough terrain, due to mountain peaks and deep valleys, forms a physical barrier from neighboring regions. This drives the county’s remote character and has kept the development of the region's only major interstate, I-5, out of the county. Its largest city, San Luis Obispo, is home to almost 46,000 of the county's 270,000 residents. Just over 22 percent of the county's residents were between the ages of 25 and 44 in 2012 (US Census Bureau ACS, 2012). San Luis Obispo County features the mountainous Los Padres National Forest as well as oceanfront conservation lands.

San Luis Obispo County residents get around using the Regional Transit Authority and/or one of five local transit authorities. All six transit authorities coordinate and interconnect using town nodes and park and ride lots for integrated county-wide service. Other ways to get around include Amtrak passenger rail, charter bus, and taxi services. The county also features hiking and bike trails to connect jurisdictions and encourages biking on state and arterial roadways like the Pacific Coast Highway, which runs from San Diego to Seattle. Though the area features moderate weather year-round, the mountainous terrain makes every day biking inaccessible for some.

Seven institutions of higher education, including California Polytechnic State University and Cuesta College, are sited near the central city of San Luis Obispo. Local industry supports the San Luis Obispo County Regional Airport and a fishing port. Similar to New Hanover County, San Luis Obispo County features a strong manufacturing base (7 percent of GDP) that also drives a wholesale trade sector which in turn supports the airport and other infrastructure (BEA, 2013).

Much like New Hanover County in North Carolina, San Luis Obispo County includes large tracts of unincorporated land, in which a majority of the county’s residents live due to high home prices in town centers. San Luis Obispo’s strong county government drives a comprehensive regional economic development strategy. Its 2012 economic development strategy focuses on "head of household job creation" that includes building career ladders, improving education, and helping families meet the area's livable wage ($77,000 for a family of four with two children according to the plan (Lisa Wise Consulting, 2012)). The strategy focuses on building regional partnerships and enhancing five high-potential clusters, including building design and construction, health services, specialized manufacturing, knowledge/innovation services, and "Uniquely SLO"—which promotes unique products and experiences from the county.

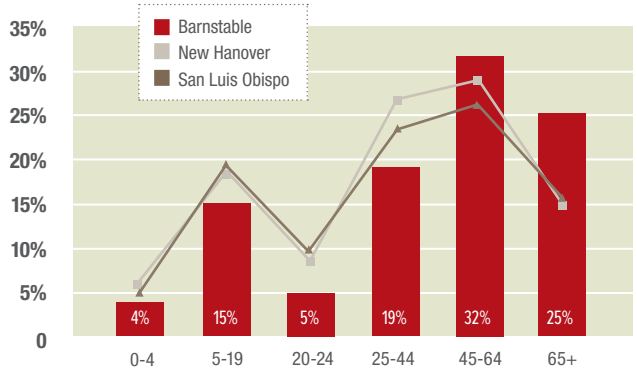
The economy of San Luis Obispo County is primarily service oriented, with five percent of its 2012 GDP and 24 percent of its jobs reliant on the leisure and hospitality sector (BEA, 2013; US Census Bureau ACS 2012). The county features the Nine Sisters mountains, highland and coastal lakes, bays, Pacific Ocean beaches, sea caves, museums, performing arts centers, an international film festival, Mediterranean gardens, Spanish missions, spas, and Hearst Castle for a variety of outdoor and historical tourist activities. The region also features a strong agricultural sector that includes wineries and vineyards, which it celebrates along with its culture of a relaxed lifestyle and eclectic history through events and festivals.

## How They Compare

Like Cape Cod, New Hanover County and San Luis Obispo County are coastal communities with relatively high geographic isolation and an abundance of natural beauty. Unlike these two communities, young adults on Cape Cod form a much smaller percentage of the population, see Figure 17. Those between the ages of 25 and 44 comprise just 19 percent of Cape Cod's population, but 27 percent in New Hanover County and 23 percent in San Luis Obispo County. The median age on Cape Cod (49.9 years) is more than 10 years older than San Luis Obispo County (39.3 years) and New Hanover County (37.4 years) (US Census Bureau ACS, 2012). Though San Luis Obispo County and Cape Cod are losing population among the age groups of 15 to 19 and 25 to 44, Cape Cod is experiencing a significant net loss of population among all those under age 45.

All age groups in New Hanover County are increasing. This could be attributed to the fact that New Hanover County is the only one of the three with a large urban center. The lack of a large urban center could also explain the eight percent decrease in population among ages 25-44 in San Luis Obispo County. On Cape Cod, that same age range is declining at a rate of nearly 28 percent. Conversely, that same age group is increasing at a rate of 14 percent in New Hanover County as shown in Figure 18. Urban amenities like active nightlife and walkable communities in compact city centers attract and retain young adult populations.

**FIGURE 17:** Age Distribution Comparison for Barnstable, New Hanover, and San Luis Obispo Counties (2012)




Source: US Census Bureau 2010 Census and American Community Survey Table DP05, 5-Year Estimates 2008-2012.

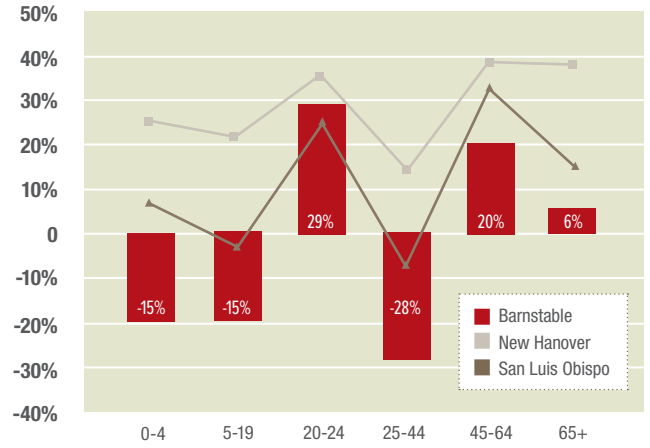
Though Barnstable County has many of the natural and cultural amenities of San Luis Obispo County and New Hanover County, Cape Cod falls short in its diversity of industry and educational opportunities that make the other two coastal resort communities more viable for year-round residents and young adults. There are more than seven institutions of higher learning in each of these two counties along with a much stronger manufacturing base as well as a heavier representation of professional and business services sectors. As a result, San Luis Obispo and New Hanover counties rely much less on leisure, hospitality, education, and health services sectors for economic vitality (see Figure 19) and jobs (see Figure 21). These two counties outperform Cape Cod in terms of overall economic performance. Both have 2012 GDPs greater than $11 billion, whereas the economic performance of Cape Cod is just over $8.5 billion; see Figure 20. (BEA, 2013).

However, Barnstable County features the highest median family incomes among the three counties ($77,318 versus $67,853 in New Hanover County and $75,410 in San Luis Obispo County) as shown in

Figure 22. Barnstable County also has the lowest unemployment rate (eight percent versus ten percent in New Hanover County and nine percent in San Luis Obispo County) as shown in Figure 23.

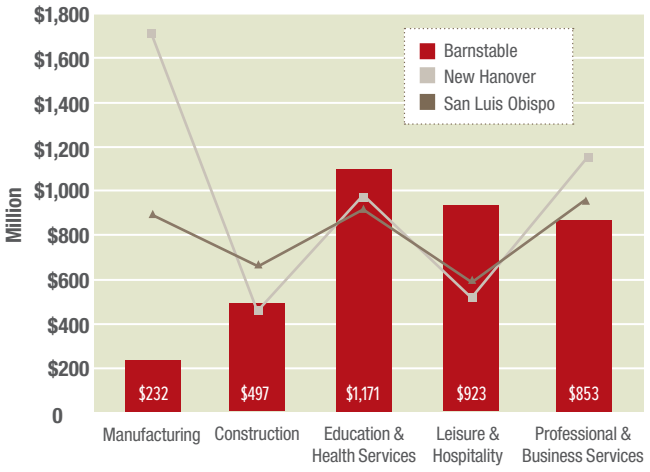
Another difference is a focus on regionalism. The other two counties include unincorporated land, which requires stronger county governance and regional coordination. Both San Luis Obispo and New Hanover counties have regional economic development plans with specific industry targets and plans for implementing high-wage job development, though their focuses are very different. For New Hanover County, the plan focuses on regional and national competitiveness -- particularly in aerospace and precision manufacturing as well as professional services, life sciences, and marine sciences. San Luis Obispo County features more economic emphasis on construction and building services, precision manufacturing, innovation services, health services, and the "Uniquely SLO" marketing campaign. Local higher educational institutions support the development of these industries.

**FIGURE 18:** Change in Age Cohort Comparison of Barnstable, New Hanover, and San Luis Obispo Counties (2000-2012)



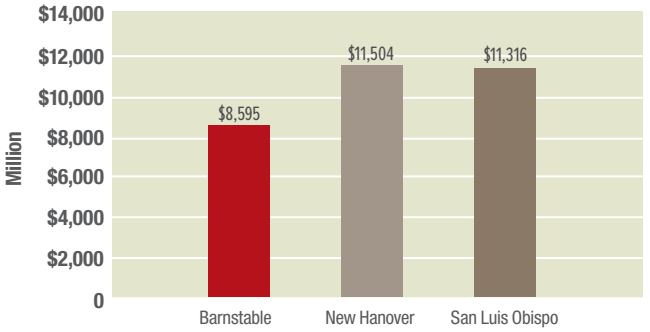

Source: US Census Bureau 2010 Census and American Community Survey Table DP05, 5-Year Estimates 2008-2012.

**FIGURE 19:** Key Industry Comparison of GDP for Barnstable, New Hanover, and San Luis Obispo Counties in 2012 (in millions of dollars)



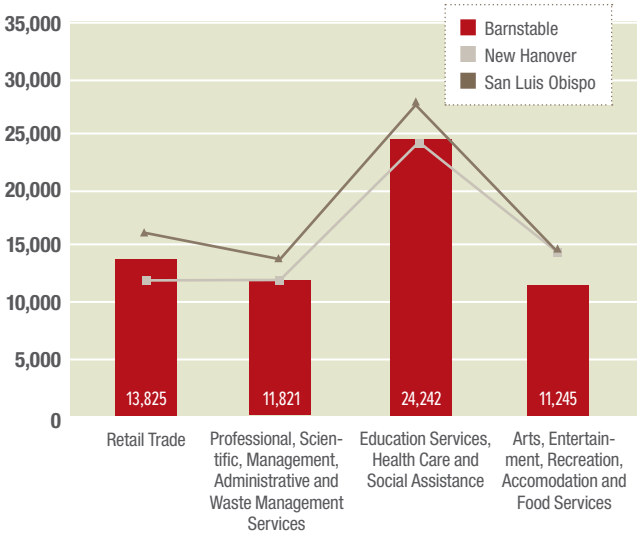

Source: BLS, Quarterly Census of Employment and Wages, 2012

**FIGURE 20:** Comparison of GDP for Barnstable, New Hanover, and San Luis Obispo Counties in 2012: All Industries (in millions of dollars)



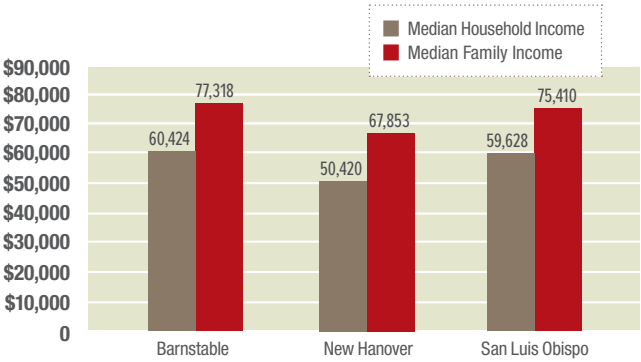

Source: Bureau of Economic Analysis GDP by Metropolitan Area, Updated Sept. 17, 2013

**FIGURE 21:** Employees per Industry Cluster Comparison for Barnstable, New Hanover, and San Luis Obispo Counties (2012)



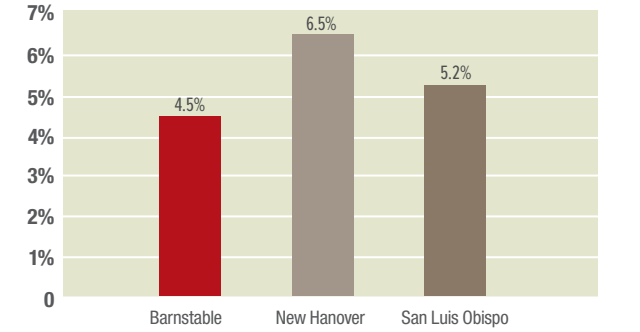

Source: US Census Bureau American Community Survey Table DP03, 5-Year Estimates 2008-2012.

**FIGURE 22:** Income Comparison of Barnstable, New Hanover, and San Luis Obispo Counties (2012 Dollars)




Source: US Census Bureau American Community Survey Table DP03, 5-Year Estimates 2008-2012.

**FIGURE 23:** Comparison of Annual Average Employment in Barnstable County, Massachusetts (excluding Barnstable County) and the US in 2012.




Source: US Census Bureau American Community Survey Table DP03, 5-Year Estimates 2008-2012.

# NEXT STEPS FOR *SHAPE THE CAPE*

This study confirms a number of suspicions about Cape Cod and its ability to retain and attract young professionals. The first is that the population of Barnstable County is now declining and the decline is being fueled by a loss of residents aged 25 to 44.

The second is that two factors seem to be chiefly responsible for the loss of young workers and their households. The lack of job opportunities that pay a living year-round wage and provide a chance for professional advancement is the first. A lack of affordable housing, making inadequate wages even more important, is the second.

Essentially, the natural beauty of the Cape and its abundance of recreational opportunities provide a powerful "pull" to stay on the Cape. However, the lack of good jobs and affordable housing provide a powerful "push" to leave the Cape.

To increase the "pull" of the Cape, *Shape the Cape* should consider becoming a stronger advocate for making the Cape even more attractive. This could be achieved by building support for reduced barriers to new industry development in Barnstable County, helping to create an economic development marketing campaign for the region, urging the creation of additional higher education opportunities, and finding ways to help develop more affordable housing.

In terms of providing more economic opportunity on the Cape, there are some encouraging national trends in terms of where work is actually done.

- Because of the widespread adoption of high speed internet connectivity, more and more workers are able to work either full-time or part-time from their homes or somewhere close to their homes regardless of where their company's office is located. Living on the Cape becomes less of a barrier over time to working "anywhere" and gives residents the opportunity to take advantage of the Cape life style.
- Along with the increase in internet connectivity, more and more employers are finding ways to provide flexible working arrangements, especially for young skilled professionals.
- More and more workers are finding ways to become self-employed and therefore can more easily choose where to live.

In terms of attracting business development on the Cape, a new analysis conducted for the Boston Federal Reserve Bank (Bluestone, 2014) provides some guidance as to the factors most important in the firm location decision. The results of this study suggest that four factors are especially important.

- Availability of Sites – Communities that make sites readily available for business development are the ones to which

firms migrate. For some communities this means redeveloping older mill buildings; for others it means making new undeveloped parcels available with, of course, appropriate regulation.

- Cross Marketing – Towns and cities that bring together municipal leaders, business leaders, and civic leaders to actively encourage firms to settle in their communities do a better job of attracting business investment and jobs.
- Timeliness of Approvals – In an increasing global economy, "time to market" has become the watchword in most industries. To succeed in business, companies need to be able to move quickly from setting up shop to getting products or services out the door. Anything that slows down this process is a "deal-breaker". As such, those communities that have developed timely municipal approval processes in terms of zoning, site approval, building inspections, and so forth are more successful at attracting firms and expanding employment opportunity.
- Local Amenities – Firms locate where there are nearby amenities for their employees and customers. These range from having restaurants and retail to having daycare facilities.

Increased understanding, at the local and regional levels, of what firms need to set up a successful business can help Cape Cod communities improve their chances of landing good companies with good jobs. It can also help nurture and grow existing businesses who have already invested in the Cape Cod community.

Finally, in terms of housing especially suited for younger year-round residents, the Cape might consider a variant of a model being developed for the Boston area with its large contingent of graduate students, medical residents and interns, and other young professionals. The "Millennium Village" concept provides a new form of housing including "micro" apartments and small studio and one-bedroom apartments in multi-unit complexes with many shared amenities including common lounges, laundry facilities, exercise rooms, and other places for young people to gather. This is the type of housing that might appeal to young Cape Cod residents and young families. The housing would offer greater affordability and a style of living that fosters community and networks.

At the very least, *Shape the Cape* and CCYP should use the results of this study to call greater attention to the "push" factors that could threaten the long-term viability of life on the Cape for its members and other young residents and their families.

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# Cape Cod Young Professionals
# Shape the Cape Survey (On-Cape)

According to the 2010 US Census, there are 26 percent fewer Cape Cod residents between the ages of 25 and 44 living on the Cape than in the year 2000. If this trend continues, it can create potential imbalances in the local workforce and in the fabric of the community.

Your participation in this survey will help Cape Cod Young Professionals (CCYP) identify factors that influence residents in this age group to live on Cape Cod or to move away. Your input will provide information that CCYP can use to formulate and implement solutions to slow and perhaps reverse this trend over time.

CCYP is sponsoring a raffle for people who complete this survey. CCYP will award a single winner with one monthly payment of their rent or mortgage up to $2,000. The raffle prize is a generous token of their appreciation of you for taking the time to complete this survey. At the end of the survey, you will have the opportunity to enter the raffle.

Please respond to the survey questions candidly based on your own experiences and knowledge. Be assured that all your responses will be kept confidential. You should take this survey only once and it should take about 20 minutes to complete.

## Where do you live and work?

1. In order to direct you to the appropriate set of survey questions, please tell us where you live and work. (Check one.)
   - ◯ I live and work on Cape Cod. (Proceed to question #2.)
   - ◯ I live on Cape Cod and work off Cape Cod. (Proceed to question #2.)
   - ◯ I live off Cape Cod and work on Cape Cod. (Please ask for the Live off-Work on survey)
   - ◯ I live and work off Cape Cod. (Please ask for the Off-Cape survey.)

## Living on Cape Cod

We'd like to start the survey by asking you a few questions about where and why you live on Cape Cod.

2. What town do you live in? (Check one.)

| | | | | |
|---|---|---|---|---|
| ◯ Barnstable | ◯ Bourne | ◯ Brewster | ◯ Chatham | ◯ Dennis |
| ◯ Eastham | ◯ Falmouth | ◯ Harwich | ◯ Mashpee | ◯ Orleans |
| ◯ Provincetown | ◯ Sandwich | ◯ Truro | ◯ Wellfleet | ◯ Yarmouth |

3. Choose the statement that best describes you as a Cape Cod resident. (Check one.)
   - ( ) I have lived on Cape Cod essentially all my life. (Skip to question #5)
   - ( ) I grew up on Cape Cod, left for two or more years, and have moved back.
   - ( ) As an adult, I moved to Cape Cod.
   - ( ) As an adult, I lived for a period on Cape Cod, moved away, and then returned.
   - ( ) I spent summers on Cape Cod or visited Cape Cod before moving here as an adult.
   - ( ) Other (please explain):

   _____

   _____

4. For the following, rate how important each reason was to you for moving to (or moving back to) Cape Cod. (Check one for each reason.)

| Reason for Moving to Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| To be near family members who live here | ( ) | ( ) | ( ) | ( ) | ( ) |
| To be a care giver for a family member or friend | ( ) | ( ) | ( ) | ( ) | ( ) |
| To be near a family member or friend who provides care for a member of my family | ( ) | ( ) | ( ) | ( ) | ( ) |
| To raise my family here | ( ) | ( ) | ( ) | ( ) | ( ) |
| I was offered a job here. | ( ) | ( ) | ( ) | ( ) | ( ) |
| My spouse/partner was offered a job here. | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the recreational opportunities | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the natural beauty | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the cultural and artistic opportunities | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the entertainment and nightlife opportunities | ( ) | ( ) | ( ) | ( ) | ( ) |
| To participate in community events (e.g., festivals, fundraisers, sports events) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Other (please explain): | ( ) | ( ) | ( ) | ( ) | ( ) |

5. For the following, rate how important each reason is for you to continue living on Cape Cod. (Check one for each reason.)

| Reason for Continuing to Live on Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| To be near family members who live here | ( ) | ( ) | ( ) | ( ) | ( ) |
| To be a care giver for a family member or friend | ( ) | ( ) | ( ) | ( ) | ( ) |
| To be near a family member or friend who provides care for a member of my family | ( ) | ( ) | ( ) | ( ) | ( ) |
| To raise my family here | ( ) | ( ) | ( ) | ( ) | ( ) |
| I have a job here. | ( ) | ( ) | ( ) | ( ) | ( ) |
| My spouse/partner has a job here. | ( ) | ( ) | ( ) | ( ) | ( ) |
| I have a professional network. | ( ) | ( ) | ( ) | ( ) | ( ) |
| I have a social network. | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the recreational opportunities | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the natural beauty | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the cultural and artistic opportunities | ( ) | ( ) | ( ) | ( ) | ( ) |
| To enjoy the entertainment and nightlife opportunities | ( ) | ( ) | ( ) | ( ) | ( ) |
| To participate in community events (e.g., festivals, fundraisers, sports events) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Other (please explain): | ( ) | ( ) | ( ) | ( ) | ( ) |

## Working on Cape Cod

We would like to ask you some questions about your job and work experience on Cape Cod. Because some people work more than one job, please answer Questions 8-17 for the job you consider to be your primary job.

6. Were you unemployed anytime during the last 12 months? (Check one.)
   - ( ) Yes
   - ( ) No (Skip to question #8.)

7. I was unemployed at some point during the last 12 months for the following reasons. (Check all that apply and skip to question #16.)
   - ( ) I could not find a job.
   - ( ) I had a seasonal job.
   - ( ) I am a stay-at-home parent.
   - ( ) I am a caregiver to an adult.
   - ( ) I am a student.
   - ( ) Other (please explain):

   _____

8. What is the location of your primary job? (Check one.)
   - ( ) Off Cape Cod
   - ( ) Off Cape Cod, but I telecommute 2 or more days per week

| | | | | |
|---|---|---|---|---|
| ( ) Barnstable | ( ) Bourne | ( ) Brewster | ( ) Chatham | ( ) Dennis |
| ( ) Eastham | ( ) Falmouth | ( ) Harwich | ( ) Mashpee | ( ) Orleans |
| ( ) Provincetown | ( ) Sandwich | ( ) Truro | ( ) Wellfleet | ( ) Yarmouth |

9. For your primary job, do you work for an employer or are you self-employed? (Check one.)
   - ( ) Work for an employer
   - ( ) Self-employed

10. What industry do you work in for your primary job? (Check one.)
    - ( ) Agriculture and Forestry
    - ( ) Arts, Entertainment, and Recreation
    - ( ) Construction
    - ( ) Data Processing and Data Storage
    - ( ) Educational Services
    - ( ) Finance and Insurance
    - ( ) Fishing and Hunting
    - ( ) Health Care
    - ( ) Hotel and Food Services
    - ( ) Manufacturing
    - ( ) Non-profits
    - ( ) Office Administration and Support
    - ( ) Professional, Scientific, and Technical Services
    - ( ) Public Administration
    - ( ) Publishing, Broadcasting, and Telecommunications
    - ( ) Real Estate; Rental and Leasing
    - ( ) Retail Trade
    - ( ) Social Assistance
    - ( ) Transportation and Warehousing
    - ( ) Utilities
    - ( ) Waste Management and Remediation Services
    - ( ) Wholesale Trade
    - ( ) Other (please explain):

    _____

11. Is your primary job in your desired field of employment? (Check one.)
    - ❍ Yes (Skip to question #13)
    - ❍ No

12. What is the desired field that you want to work in? (Please explain.)

    _____

13. Is your primary job full-time or part-time? (Check one.)
    - ❍ Full-Time
    - ❍ Part-Time

14. How are you paid at your primary job? (Check all that apply.)
    - ❍ Salary
    - ❍ Hourly
    - ❍ Hourly plus tips
    - ❍ Commission
    - ❍ Cash

15. Do you need to supplement your annual income from your primary job in any way? (Check one.)
    - ❍ Yes
    - ❍ No (Skip to question #18)

16. Why do you supplement your income? (Check all that apply.)
    - ❍ I do not earn enough from my primary job to cover my basic living expenses.
    - ❍ I want to have extra spending money (disposable income).
    - ❍ I want to increase my savings.
    - ❍ Other (please explain):

      _____

17. How do you supplement your annual income? (Check all that apply.)
    - ❍ I have a second or third job.
    - ❍ I am self-employed part-time.
    - ❍ I work at odd jobs.
    - ❍ I sell products from artistic or creative pursuits.
    - ❍ I rent out my house in the summer.
    - ❍ I have support from family members.
    - ❍ I use credit, such as credit cards or personal loans.
    - ❍ I receive unemployment benefits from a seasonal job.
    - ❍ I receive public assistance such as WIC, SNAP, fuel assistance, etc.
    - ❍ Other (please explain):

      _____

18. Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are enough jobs available in my chosen career field. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There are enough opportunities for promotion or advancement in my chosen career field. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There are enough jobs that require my education or experience. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There are enough employment opportunities for my spouse/partner. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There are enough career development resources for me. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There are enough mentoring resources for me. | ( ) | ( ) | ( ) | ( ) | ( ) |
| Salaries and wages I earn are livable wages for the Cape. | ( ) | ( ) | ( ) | ( ) | ( ) |
| My employer provides affordable health insurance. | ( ) | ( ) | ( ) | ( ) | ( ) |
| My employer provides adequate paid time off benefits (e.g., vacation, sick time, etc.) | ( ) | ( ) | ( ) | ( ) | ( ) |
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Other (please explain): | ( ) | ( ) | ( ) | ( ) | ( ) |

19. Are you interested in starting your own business on Cape Cod?

( ) Yes

( ) No

## Housing on Cape Cod

In this section, we would like to ask about your experiences with housing on Cape Cod.

20. Which of the following statements best describes your current living arrangements? (Check one.)
    - ( ) I live alone.
    - ( ) I live with a spouse/partner.
    - ( ) I live with a spouse/partner and children.
    - ( ) I live with my children.
    - ( ) I live with a roommate(s).
    - ( ) I live with my parents (or another family member).
    - ( ) Other (please explain): _____

21. Do you own or rent your primary residence on Cape Cod? (Check one.)
    - ( ) Own
    - ( ) Rent (Skip to question #23.)
    - ( ) Other arrangement (Please explain and skip to question #29.):

    _____

22. Approximately how much do you pay each month for your mortgage, including principle, interest, and taxes? (Check one and skip to question #29.)
    - ( ) Less than $500
    - ( ) $501 to $750
    - ( ) $751 to $1,000
    - ( ) $1,001 to $1,250
    - ( ) $1,251 to $1,500
    - ( ) $1,501 to $1,750
    - ( ) $1,751 to $2,000
    - ( ) $2,001 to $2,500
    - ( ) $2,501 to $3,000
    - ( ) $3,001 to $3,500
    - ( ) $3,501 to $4,000
    - ( ) $4,001 or more

23. Approximately how much do you pay in rent each month during the summer (June to August)? (Check one.)
    - ( ) Less than $500
    - ( ) $501 to $750
    - ( ) $751 to $1,000
    - ( ) $1,001 to $1,250
    - ( ) $1,251 to $1,500
    - ( ) $1,501 to $1,750
    - ( ) $1,751 to $2,000
    - ( ) $2,001 to $2,500
    - ( ) $2,501 to $3,000
    - ( ) $3,001 to $3,500
    - ( ) $3,501 to $4,000
    - ( ) $4,001 or more

24. Approximately how much do you pay for rent each month during the winter (September to May)? (Check one.)

- ○ Less than $500
- ○ $501 to $750
- ○ $751 to $1,000
- ○ $1,001 to $1,250
- ○ $1,251 to $1,500
- ○ $1,501 to $1,750
- ○ $1,751 to $2,000
- ○ $2,001 to $2,500
- ○ $2,501 to $3,000
- ○ $3,001 to $3,500
- ○ $3,501 to $4,000
- ○ $4,001 or more

25. What type of lease do you have? (Check one.)

- ○ Year-round lease
- ○ Winter rental (September to May or similar)

26. If there were more rental housing on Cape Cod that is within your budget, what type of unit would you want for year-round living? (Check all that apply.)

- ○ Studio apartment
- ○ 1 bedroom apartment
- ○ 2-3 bedroom apartment
- ○ 1-2 bedroom house
- ○ 3+ bedroom house
- ○ Other (please explain) _____

27. What is your desired location to rent? (Check all that apply.)

- ○ Within walking distance of village centers
- ○ Within walking distance of commercial zones with employment opportunities
- ○ Within walking distance of beaches
- ○ Rural neighborhoods
- ○ Other (please explain): _____

28. Are you considering buying a single-family house or condominium over the next 12 months? (Check one.)

- ○ Yes, a single-family house
- ○ Yes, a condominium
- ○ No

## Services and Community Initiatives on Cape Cod

In the following section, we'd like to ask you some questions about services on Cape Cod and your awareness of initiatives in the community.

29. If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)
    - ( ) Commuter rail to work off Cape
    - ( ) Commuter bus to work off Cape
    - ( ) Commuter bus to work on Cape
    - ( ) Dedicated bicycle lanes to bike to work on Cape
    - ( ) Trails for recreational biking
    - ( ) None

30. Tell us how much you agree or disagree that the following services are available to you on Cape Cod. (Check one for each service.)

| Services | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| Medical services (for example, hospitals, emergency rooms, clinics, doctors) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Retail stores (for example, clothing stores, grocery stores, pharmacies) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Consumer services (for example, dry cleaners, salons) | ( ) | ( ) | ( ) | ( ) | ( ) |

31. Tell us how much you agree or disagree with the following statements about higher education opportunities and the cost of education on Cape Cod. (Choose one for each statement.)

| Higher Education | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are sufficient higher education institutions on Cape Cod. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There are sufficient technical schools or trade schools on Cape Cod. | ( ) | ( ) | ( ) | ( ) | ( ) |
| Cape Cod needs a four year college. | ( ) | ( ) | ( ) | ( ) | ( ) |
| If a four year college were located on Cape Cod, I would attend. | ( ) | ( ) | ( ) | ( ) | ( ) |
| Additional education or training would help me advance my career. | ( ) | ( ) | ( ) | ( ) | ( ) |
| I am financially able to pursue additional education opportunities. | ( ) | ( ) | ( ) | ( ) | ( ) |

32. Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)

| Initiative | Very Familiar | Familiar | Not Very Familiar | Not at all Familiar |
|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | ○ | ○ | ○ | ○ |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | ○ | ○ | ○ | ○ |
| Regionalization of public school districts | ○ | ○ | ○ | ○ |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | ○ | ○ | ○ | ○ |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | ○ | ○ | ○ | ○ |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | ○ | ○ | ○ | ○ |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems. | ○ | ○ | ○ | ○ |

33. Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)

| Initiative | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | ○ | ○ | ○ | ○ | ○ |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | ○ | ○ | ○ | ○ | ○ |
| Regionalization of public school districts | ○ | ○ | ○ | ○ | ○ |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | ○ | ○ | ○ | ○ | ○ |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | ○ | ○ | ○ | ○ | ○ |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | ○ | ○ | ○ | ○ | ○ |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems. | ○ | ○ | ○ | ○ | ○ |

## Just a few more questions…

34. In the past 12 months, have you seriously considered moving off Cape Cod? (Check one.)
    - ( ) Yes
    - ( ) No (Skip to question #37.)

35. How likely is it that you would move off Cape Cod? (Check one.)
    - ( ) Very likely
    - ( ) Somewhat likely
    - ( ) Not very likely (Skip to question #37.)
    - ( ) Not at all likely (Skip to question #37.)

36. Choose the most important reasons that would make it "very likely" or "somewhat likely" that you would move off of Cape Cod. (Check all that apply.)
    - ( ) I want to be near family or friends who live off Cape Cod.
    - ( ) There are not enough job opportunities on Cape Cod in my field.
    - ( ) Available jobs on Cape Cod do not pay a living wage.
    - ( ) Housing costs are too high on Cape Cod.
    - ( ) There are not enough higher education opportunities on Cape Cod.
    - ( ) There are not enough job training opportunities on Cape Cod.
    - ( ) There are not enough social activities for people my age group.
    - ( ) I do not feel I am part of a community on Cape Cod.
    - ( ) Other (please explain) _____

37. If there are other factors that have affected your experience or opinion about working and living on Cape Cod that were not covered in this survey, please tell us about them.

_____

_____

_____

_____

_____

_____

_____

_____

_____

## Demographic Information

We would like to end this survey by asking you some demographic questions. Please remember that any information you provide on this survey will be kept confidential.

38. What is your sex? (Check one.)
    - ◯ Female
    - ◯ Male

39. In what year where you born? _____

40. Are you of Hispanic origin? (Check one.)
    - ◯ Yes
    - ◯ No

41. What is your race? (Check one.)
    - ◯ White
    - ◯ Black or African American
    - ◯ American Indian or Alaskan Native
    - ◯ Asian
    - ◯ Native Hawaiian or Other Pacific Islander
    - ◯ Two or more races
    - ◯ Other: (Please specify.)

    _____

42. What is the highest level of education you have completed? (Check one.)
    - ◯ Some high school
    - ◯ High school/GED
    - ◯ Some college
    - ◯ 2-year college degree (Associates)
    - ◯ 4-year college degree (BA, BS)
    - ◯ Graduate degree (MS/MA, PhD)
    - ◯ Professional degree (MD, JD)

43. What is your marital status? (Check one.)

- ○ Single, never married
- ○ Married
- ○ Living with partner
- ○ Widowed
- ○ Divorced
- ○ Separated

44. How many dependent children under age 18 live with you? (Check one.)

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5
- ○ 6
- ○ 7
- ○ 8
- ○ More than 8

45. How many adult dependents, such as elderly parents, do you have? (Check one.)

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ More than 4

46. Which range best represents your total personal income before taxes over the last 12 months? (Check one.)

- ○ Less than $10,000
- ○ $10,000 to $19,999
- ○ $20,000 to $29,999
- ○ $30,000 to $39,999
- ○ $40,000 to $49,999
- ○ $50,000 to $59,999
- ○ $60,000 to $69,999
- ○ $70,000 to $79,999
- ○ $80,000 to $89,999
- ○ $90,000 to $99,999
- ○ $100,000 or greater

## Thank you for completing the Shape the Cape survey!
## CCYP deeply appreciates your time and input.

Help CCYP spread the word about the importance of this survey and encourage your friends, family, and colleagues to participate. This survey is available at www.shapethecape.org.

You may also contact Anne Van Vleck, Executive Director, at anne@capecodyoungprofessionals.org or call 508-714-2201 for the survey or to share additional thoughts about Shape the Cape.

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## Raffle for One Month's Rent or Mortgage Payment up to $2,000

If you would like to enter the raffle, please provide your name and contact information so that CCYP can contact you if you are the lucky winner. Your information **will not** be associated with your survey responses. **Your responses will remain anonymous**.

First and Last Name: _____

Phone number: _____

Email Address: _____

Birth Date (mm/dd/yyyy): _____

# Cape Cod Young Professionals Shape the Cape Survey (Live Off-Cape and Work On-Cape)

According to the 2010 US Census, there are 26 percent fewer Cape Cod residents between the ages of 25 and 44 living on the Cape than in the year 2000. If this trend continues, it can create potential imbalances in the local workforce and in the fabric of the community.

Your participation in this survey will help Cape Cod Young Professionals (CCYP) identify factors that influence residents in this age group to live on Cape Cod or to move away. Your input will provide information that CCYP can use to formulate and implement solutions to slow and perhaps reverse this trend over time.

CCYP is sponsoring a raffle for people who complete this survey. CCYP will award a single winner with one monthly payment of their rent or mortgage up to $2,000. The raffle prize is a generous token of their appreciation of you for taking the time to complete this survey. At the end of the survey, you will have the opportunity to enter the raffle.

Please respond to the survey questions candidly based on your own experiences and knowledge. Be assured that all your responses will be kept confidential. You should take this survey only once and it should take about 20 minutes to complete.

## Where do you live and work?

1. In order to direct you to the appropriate set of questions, please tell us where you live and work. (Choose one.)
   - ( ) I live off Cape Cod and work on Cape Cod. (Proceed to question #2.)
   - ( ) I live and work on Cape Cod. (Please ask for the On-Cape survey.)
   - ( ) I live on Cape Cod and work off Cape Cod. (Please ask for the On-Cape survey.)
   - ( ) I live and work off Cape Cod. (Please ask for the Off-Cape survey.)

## Working on Cape Cod

We would like to ask you some questions about your job and work experience on Cape Cod. Because some people work more than one job, please answer Questions 2-9 for the job you consider to be your primary job.

2. What is the location of your primary job? (Check one.)

| | | | | |
|---|---|---|---|---|
| ( ) Barnstable | ( ) Bourne | ( ) Brewster | ( ) Chatham | ( ) Dennis |
| ( ) Eastham | ( ) Falmouth | ( ) Harwich | ( ) Mashpee | ( ) Orleans |
| ( ) Provincetown | ( ) Sandwich | ( ) Truro | ( ) Wellfleet | ( ) Yarmouth |

3. For your primary job, do you work for an employer or are you self-employed? (Check one.)
   - ( ) Work for an employer
   - ( ) Self-employed

4. What industry do you work in for your primary job? (Check one.)

- ( ) Agriculture and Forestry
- ( ) Arts, Entertainment, and Recreation
- ( ) Construction
- ( ) Data Processing and Data Storage
- ( ) Educational Services
- ( ) Finance and Insurance
- ( ) Fishing and Hunting
- ( ) Health Care
- ( ) Hotel and Food Services
- ( ) Manufacturing
- ( ) Non-profits
- ( ) Office Administration and Support
- ( ) Professional, Scientific, and Technical Services
- ( ) Public Administration
- ( ) Publishing, Broadcasting, and Telecommunications
- ( ) Real Estate; Rental and Leasing
- ( ) Retail Trade
- ( ) Social Assistance
- ( ) Transportation and Warehousing
- ( ) Utilities
- ( ) Waste Management and Remediation Services
- ( ) Wholesale Trade
- ( ) Other (please explain):

_____

5. Is your primary job in your desired field of employment? (Check one.)

- ( ) Yes (Skip to question #7)
- ( ) No

6. What is the desired field that you want to work in? (Please explain.)

_____

7. Is your primary job seasonal or year-round? (Check one.)

- ( ) Seasonal
- ( ) Year-round

8. Is your primary job full-time or part-time? (Check one.)

- ( ) Full-Time
- ( ) Part-Time

9. How are you paid at your primary job? (Check all that apply.)

- ( ) Salary
- ( ) Hourly
- ( ) Hourly plus tips
- ( ) Commission
- ( ) Cash

10. Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are enough jobs available in my chosen career field. | ○ | ○ | ○ | ○ | ○ |
| There are enough opportunities for promotion or advancement in my chosen career field. | ○ | ○ | ○ | ○ | ○ |
| There are enough jobs that require my education or experience. | ○ | ○ | ○ | ○ | ○ |
| There are enough employment opportunities for my spouse/partner. | ○ | ○ | ○ | ○ | ○ |
| There are enough career development resources for me. | ○ | ○ | ○ | ○ | ○ |
| There are enough mentoring resources for me. | ○ | ○ | ○ | ○ | ○ |
| Salaries and wages I earn are livable wages for the Cape. | ○ | ○ | ○ | ○ | ○ |
| My employer provides affordable health insurance. | ○ | ○ | ○ | ○ | ○ |
| My employer provides adequate paid time off benefits (e.g., vacation, sick time, etc.) | ○ | ○ | ○ | ○ | ○ |
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | ○ | ○ | ○ | ○ | ○ |
| Other (please explain): | ○ | ○ | ○ | ○ | ○ |

11. Are you interested in starting your own business on Cape Cod?

○ Yes

○ No

## Living on Cape Cod

We would like to ask you some questions about whether or not you would like to move to Cape Cod and what would be the reasons for doing so.

12. In the past 12 months, have you seriously considered moving to Cape Cod? (Check one.)
    - ○ Yes
    - ○ No (Skip to question #15.)

13. How likely is it that you would move to Cape Cod? (Check one.)
    - ○ Very likely
    - ○ Somewhat likely
    - ○ Not very likely (Skip to question #15.)
    - ○ Not at all likely (Skip to question #15.)

14. Choose the most important reasons that would make you decide **to move to Cape Cod**. (Choose all that apply.)
    - ○ To be near family and friends who live on Cape Cod
    - ○ To be a care giver for a family member or friend on Cape Cod
    - ○ To be near a family member or friend who provides care for a member of my family
    - ○ To raise my family on Cape Cod
    - ○ A job offer for you
    - ○ A job offer for your spouse/partner
    - ○ Housing options within your budget
    - ○ Higher education opportunities
    - ○ Job training opportunities
    - ○ Social activities for people in my age group
    - ○ Community events (e.g., festivals, fundraisers, sporting events)
    - ○ Other (please explain):

      _____

      _____

      _____

## Services and Community Initiatives on Cape Cod

In the following section, we'd like to ask you some questions about services on Cape Cod and your awareness of initiatives in the community.

15. If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)
    - ( ) Commuter rail to work on Cape
    - ( ) Commuter bus to work on Cape
    - ( ) Dedicated bicycle lanes to bike to work on Cape
    - ( ) Trails for recreational biking
    - ( ) None

16. Tell us how much you agree or disagree that the following services are available to you on Cape Cod. (Check one for each service.)

| Services | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| Medical services (e.g., hospitals, emergency rooms, clinics, doctors) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Retail stores (e.g., clothing stores, grocery stores, pharmacies) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Consumer services (e.g., dry cleaners, salons) | ( ) | ( ) | ( ) | ( ) | ( ) |

17. Tell us how much you agree or disagree with the following statements about higher education opportunities and the cost of education on Cape Cod. (Choose one for each statement.)

| Higher Education | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are sufficient higher education institutions on Cape Cod. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There are sufficient technical schools or trade schools on Cape Cod. | ( ) | ( ) | ( ) | ( ) | ( ) |
| Cape Cod needs a four year college. | ( ) | ( ) | ( ) | ( ) | ( ) |
| If a four year college were located on Cape Cod, I would attend. | ( ) | ( ) | ( ) | ( ) | ( ) |
| Additional education or training would help me advance my career. | ( ) | ( ) | ( ) | ( ) | ( ) |
| I am financially able to pursue additional education opportunities. | ( ) | ( ) | ( ) | ( ) | ( ) |

18. Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)

| Initiative | Very Familiar | Familiar | Not Very Familiar | Not at all Familiar |
|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | ○ | ○ | ○ | ○ |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | ○ | ○ | ○ | ○ |
| Regionalization of public school districts | ○ | ○ | ○ | ○ |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | ○ | ○ | ○ | ○ |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | ○ | ○ | ○ | ○ |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | ○ | ○ | ○ | ○ |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems. | ○ | ○ | ○ | ○ |

19. Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)

| Initiative | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | ○ | ○ | ○ | ○ | ○ |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | ○ | ○ | ○ | ○ | ○ |
| Regionalization of public school districts | ○ | ○ | ○ | ○ | ○ |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | ○ | ○ | ○ | ○ | ○ |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | ○ | ○ | ○ | ○ | ○ |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | ○ | ○ | ○ | ○ | ○ |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems. | ○ | ○ | ○ | ○ | ○ |

20. If there are other factors that have affected your experience or opinion about working and living on Cape Cod that were not covered in this survey, please tell us about them.

_____

_____

_____

_____

_____

_____

_____

_____

_____

## Demographic Information

We would like to end this survey by asking you some demographic questions. Please remember that any information you provide on this survey will be kept confidential.

21. What is your sex? (Check one.)
    - ( ) Female
    - ( ) Male

22. In what year where you born? _____

23. Are you of Hispanic origin? (Check one.)
    - ( ) Yes
    - ( ) No

24. What is your race? (Check one.)
    - ( ) White
    - ( ) Black or African American
    - ( ) American Indian or Alaskan Native
    - ( ) Asian
    - ( ) Native Hawaiian or Other Pacific Islander
    - ( ) Two or more races
    - ( ) Other: (Please specify.)

    _____

25. What is the highest level of education you have completed? (Check one.)
    - ( ) Some high school
    - ( ) High school/GED
    - ( ) Some college
    - ( ) 2-year college degree (Associates)
    - ( ) 4-year college degree (BA, BS)
    - ( ) Graduate degree (MS/MA, PhD)
    - ( ) Professional degree (MD, JD)

26. What is your marital status? (Check one.)
    - ( ) Single, never married
    - ( ) Married
    - ( ) Living with partner
    - ( ) Widowed
    - ( ) Divorced
    - ( ) Separated

27. How many dependent children under age 18 live with you? (Check one.)

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5
- ○ 6
- ○ 7
- ○ 8
- ○ More than 8

28. How many adult dependents, such as elderly parents, do you have? (Check one.)

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ More than 4

29. Which range best represents your total personal income before taxes over the last 12 months? (Check one.)

- ○ Less than $10,000
- ○ $10,000 to $19,999
- ○ $20,000 to $29,999
- ○ $30,000 to $39,999
- ○ $40,000 to $49,999
- ○ $50,000 to $59,999
- ○ $60,000 to $69,999
- ○ $70,000 to $79,999
- ○ $80,000 to $89,999
- ○ $90,000 to $99,999
- ○ $100,000 or greater

## Thank you for completing the Shape the Cape survey!
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==========

## Raffle for One Month's Rent or Mortgage Payment up to $2,000

If you would like to enter the raffle, please provide your name and contact information so that CCYP can contact you if you are the lucky winner. Your information **will not** be associated with your survey responses. **Your responses will remain anonymous**.

First and Last Name: _____

Phone number: _____

Email Address: _____

Birth Date (mm/dd/yyyy): _____

# Cape Cod Young Professionals
# Shape the Cape Survey (Off-Cape)

According to the 2010 US Census, there are 26 percent fewer Cape Cod residents between the ages of 25 and 44 living on the Cape than in the year 2000. If this trend continues, it can create potential imbalances in the local workforce and in the fabric of the community.

Your participation in this survey will help Cape Cod Young Professionals (CCYP) identify factors that influence residents in this age group to live on Cape Cod or to move away. Your input will provide information that CCYP can use to formulate and implement solutions to slow and perhaps reverse this trend over time.

CCYP is sponsoring a raffle for people who complete this survey. CCYP will award a single winner with one monthly payment of their rent or mortgage up to $2,000. The raffle prize is a generous token of their appreciation of you for taking the time to complete this survey. At the end of the survey, you will have the opportunity to enter the raffle.

Please respond to the survey questions candidly based on your own experiences and knowledge. Be assured that all your responses will be kept confidential. You should take this survey only once and it should take about 15 minutes to complete.

## Where do you live and work?

1. In order to direct you to the appropriate set of questions, please tell us where you live and work. (Choose one.)
   - ( ) I live and work off Cape Cod. (Proceed to question #2.)
   - ( ) I live and work on Cape Cod. (Please ask for the On-Cape survey.)
   - ( ) I live on Cape Cod and work off Cape Cod. (Please ask for the On-Cape survey.)
   - ( ) I live off Cape Cod and work on Cape Cod. (Please ask for the Live off-Work on survey)

## Living on Cape Cod

We'd like to start the survey by asking you a few questions about where you lived on Cape Cod and why you moved off Cape Cod.

2. During the last year you lived on Cape Cod, where was your primary residence? (Check one.)

| | | | | |
|---|---|---|---|---|
| ( ) Barnstable | ( ) Bourne | ( ) Brewster | ( ) Chatham | ( ) Dennis |
| ( ) Eastham | ( ) Falmouth | ( ) Harwich | ( ) Mashpee | ( ) Orleans |
| ( ) Provincetown | ( ) Sandwich | ( ) Truro | ( ) Wellfleet | ( ) Yarmouth |

3. In what year did you move off Cape Cod? _____

4. For the following, rate how important each reason was for you when you decided to move off Cape Cod. (Check one for each reason.)

| Reason for Moving off Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A |
|---|---|---|---|---|---|
| I worked off Cape and moved to be closer to my job. | ○ | ○ | ○ | ○ | ○ |
| I was offered a job off Cape. | ○ | ○ | ○ | ○ | ○ |
| My spouse/partner was offered a job off Cape. | ○ | ○ | ○ | ○ | ○ |
| I could not develop a professional network on the Cape. | ○ | ○ | ○ | ○ | ○ |
| I moved for educational opportunities not available on the Cape. | ○ | ○ | ○ | ○ | ○ |
| I moved to be near family or friends who live off Cape. | ○ | ○ | ○ | ○ | ○ |
| I was no longer needed to be a care giver for a family member or friend on the Cape | ○ | ○ | ○ | ○ | ○ |
| I moved to be near a family member or friend who provides care for a member of my family | ○ | ○ | ○ | ○ | ○ |
| I could not develop a social network on the Cape. | ○ | ○ | ○ | ○ | ○ |
| I felt I was not part of a community on the Cape. | ○ | ○ | ○ | ○ | ○ |
| There were too few entertainment or social opportunities for my age group. | ○ | ○ | ○ | ○ | ○ |
| Other (please explain): | ○ | ○ | ○ | ○ | ○ |

## Working on Cape Cod

We would like to ask you some questions about your most recent job and work experience when you lived on Cape Cod. Because some people worked more than one job, please answer Questions 5-11 for the job you considered to be your primary job during the last year you lived on Cape Cod.

5. What was the location of your primary job? (Check one.)
   - ( ) Off Cape Cod
   - ( ) Off Cape Cod, but I telecommuted 2 or more days per week

| | | | | |
|---|---|---|---|---|
| ( ) Barnstable | ( ) Bourne | ( ) Brewster | ( ) Chatham | ( ) Dennis |
| ( ) Eastham | ( ) Falmouth | ( ) Harwich | ( ) Mashpee | ( ) Orleans |
| ( ) Provincetown | ( ) Sandwich | ( ) Truro | ( ) Wellfleet | ( ) Yarmouth |

6. For your primary job, did you work for an employer or were you self-employed? (Check one.)
   - ( ) Worked for an employer
   - ( ) Self-Employed

7. What industry did you work in for your primary job? (Check one.)
   - ( ) Agriculture and Forestry
   - ( ) Arts, Entertainment, and Recreation
   - ( ) Construction
   - ( ) Data Processing and Data Storage
   - ( ) Educational Services
   - ( ) Finance and Insurance
   - ( ) Fishing and Hunting
   - ( ) Health Care
   - ( ) Hotel and Food Services
   - ( ) Manufacturing
   - ( ) Non-profits
   - ( ) Office Administration and Support
   - ( ) Professional, Scientific, and Technical Services
   - ( ) Public Administration
   - ( ) Publishing, Broadcasting, and Telecommunications
   - ( ) Real Estate; Rental and Leasing
   - ( ) Retail Trade
   - ( ) Social Assistance
   - ( ) Transportation and Warehousing
   - ( ) Utilities
   - ( ) Waste Management and Remediation Services
   - ( ) Wholesale Trade
   - ( ) Other (please explain):

   _____

8. Was your primary job in your desired field of employment? (Check one.)
   - ( ) Yes (Skip to question #10)
   - ( ) No

9. What was the desired field that you wanted to work in? (Please explain.)

   _____

10. Was your primary job seasonal or year-round? (Check one.)
    - ( ) Seasonal
    - ( ) Year-round

11. Was your primary job full-time or part-time? (Check one.)
    - ( ) Full-Time
    - ( ) Part-Time

12. For the time you lived on Cape Cod, tell us how much you agreed or disagreed with the following statements about working on Cape Cod. (Check one for each statement.)

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There were enough jobs available in my chosen career field. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There were enough opportunities for promotion or advancement in my chosen career field. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There were enough jobs that required my education or experience. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There were enough employment opportunities for my spouse/partner. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There were enough career development resources for me. | ( ) | ( ) | ( ) | ( ) | ( ) |
| There were enough mentoring resources for me. | ( ) | ( ) | ( ) | ( ) | ( ) |
| Salaries and wages I earned were livable wages for Cape Cod. | ( ) | ( ) | ( ) | ( ) | ( ) |
| My employer provided affordable health insurance. | ( ) | ( ) | ( ) | ( ) | ( ) |
| My employer provided adequate paid time off benefits (e.g., vacation, sick time, etc.) | ( ) | ( ) | ( ) | ( ) | ( ) |
| I had flexibility in the work place (e.g., hours, telecommuting, etc.) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Other (please explain): | ( ) | ( ) | ( ) | ( ) | ( ) |

## Just a few more questions…

13. Choose the most important reasons that made you decide **to move off Cape Cod**. (Check all that apply.)
    - ❍ I wanted to be near family or friends who live off Cape Cod.
    - ❍ There were not enough job opportunities on Cape Cod in my field.
    - ❍ Available jobs on Cape Cod did not pay a living wage.
    - ❍ Housing costs were too high on Cape Cod.
    - ❍ There were not enough higher education opportunities on Cape Cod.
    - ❍ There were not enough job training opportunities on Cape Cod.
    - ❍ There were not enough social activities for people in my age group.
    - ❍ I did not feel I was part of a community on Cape Cod.
    - ❍ Other (please explain) _____

14. Choose the most important reasons that would cause you **to move back to Cape Cod**. (Choose all that apply.)
    - ❍ To be near family and friends who live on Cape Cod
    - ❍ To be a care giver for a family member or friend on Cape Cod
    - ❍ To be near a family member or friend who provides care for a member of my family
    - ❍ To raise my family on Cape Cod
    - ❍ A job offer for you
    - ❍ A job offer for your spouse/partner
    - ❍ Housing options within your budget
    - ❍ Higher education opportunities
    - ❍ Job training opportunities
    - ❍ Social activities for people in my age group
    - ❍ Community events (e.g., festivals, fundraisers, sporting events)
    - ❍ Other (please explain) _____

15. If there are other factors that have affected your experience or opinion about working and living on Cape Cod that were not covered in this survey, please tell us about them.

_____

_____

_____

_____

_____

_____

_____

## Demographic Information

We would like to end this survey by asking you some demographic questions. Please remember that any information you provide on this survey will be kept confidential.

16. What is your sex? (Check one.)
    - ❍ Female
    - ❍ Male

17. In what year where you born? _____

18. Are you of Hispanic origin? (Check one.)
    - ❍ Yes
    - ❍ No

19. What is your race? (Check one.)
    - ❍ White
    - ❍ Black or African American
    - ❍ American Indian or Alaskan Native
    - ❍ Asian
    - ❍ Native Hawaiian or Other Pacific Islander
    - ❍ Two or more races
    - ❍ Other:

    _____ (Please specify.)

20. What is the highest level of education you have completed? (Check one.)
    - ❍ Some high school
    - ❍ High school/GED
    - ❍ Some college
    - ❍ 2-year college degree (Associates)
    - ❍ 4-year college degree (BA, BS)
    - ❍ Graduate degree (MS/MA, PhD)
    - ❍ Professional degree (MD, JD)

21. What is your marital status? (Check one.)
    - ❍ Single, never married
    - ❍ Married
    - ❍ Living with partner
    - ❍ Widowed
    - ❍ Divorced
    - ❍ Separated

22. How many dependent children under age 18 live with you? (Check one.)

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5
- ○ 6
- ○ 7
- ○ 8
- ○ More than 8

23. How many adult dependents, such as elderly parents, do you have? (Check one.)

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ More than 4

24. Which range best represents your total personal income before taxes over the last 12 months? (Check one.)

- ○ Less than $10,000
- ○ $10,000 to $19,999
- ○ $20,000 to $29,999
- ○ $30,000 to $39,999
- ○ $40,000 to $49,999
- ○ $50,000 to $59,999
- ○ $60,000 to $69,999
- ○ $70,000 to $79,999
- ○ $80,000 to $89,999
- ○ $90,000 to $99,999
- ○ $100,000 or greater

## Thank you for completing the Shape the Cape survey!
## CCYP deeply appreciates your time and input.

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## Raffle for One Month's Rent or Mortgage Payment up to $2,000

If you would like to enter the raffle, please provide your name and contact information so that CCYP can contact you if you are the lucky winner. Your information **will not** be associated with your survey responses. **Your responses will remain anonymous**.

First and Last Name: _____

Phone number: _____

Email Address: _____

Birth Date (mm/dd/yyyy): _____

## Summary Statistics Live-on-Work-On Sample

The following are summary tables for the live-on-work-on sample. The On-Cape survey (see Appendix A) was administered to respondents who identified themselves as living and working on Cape Cod. The live-on-work-on sample of respondents age 25 to 44 was 2,461 individuals.

### Living on Cape Cod

**Table D1. What town do you live in? (Check one.)**

| Town | Number of Respondents | Percent of Respondents |
|---|---|---|
| Barnstable | 650 | 26.4% |
| Bourne | 76 | 3.1% |
| Brewster | 145 | 5.9% |
| Chatham | 60 | 2.4% |
| Dennis | 199 | 8.1% |
| Eastham | 62 | 2.5% |
| Falmouth | 246 | 10.0% |
| Harwich | 199 | 8.1% |
| Mashpee | 129 | 5.2% |
| Orleans | 99 | 4.0% |
| Provincetown | 19 | 0.8% |
| Sandwich | 190 | 7.7% |
| Truro | 15 | 0.6% |
| Wellfleet | 54 | 2.2% |
| Yarmouth | 315 | 12.8% |
| **Total** | **2,458** | **100%** |

**Table D2. Choose the statement that best describes you as a Cape Cod resident. (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| I have lived on Cape Cod essentially all my life. | 680 | 27.7% |
| I grew up on Cape Cod, left for two or more years, and have moved back. | 641 | 26.1% |
| As an adult, I moved to Cape Cod. | 640 | 26.0% |
| As an adult, I lived for a period on Cape Cod, moved away, and then returned. | 71 | 2.9% |
| I spent summers on Cape Cod or visited Cape Cod before moving here as an adult. | 385 | 15.7% |
| Other | 42 | 1.7% |
| **Total** | **2,459** | **100%** |

For those respondents who selected "Other," the predominant explanations were they moved to Cape Cod with their families as a youth and moved for military or Coast Guard service.

**Table D3. For the following, rate how important each reason was to you for moving to (or moving back) to Cape Cod. (Check one for each reason.)**

| Reason for Moving to Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| To be near family members who live here[a] | 724 (41.0%) | 427 (24.2%) | 117 (6.6%) | 217 (12.3%) | 282 (16.0%) |
| To be a care giver for a family member or friend | 138 (7.9%) | 171 (9.8%) | 183 (10.4%) | 445 (25.4%) | 816 (46.5%) |
| To be near a family member or friend who provides care for a member of my family | 118 (6.7%) | 154 (8.8%) | 178 (10.2%) | 462 (26.4%) | 838 (47.9%) |
| To raise my family here | 515 (29.1%) | 484 (27.3%) | 198 (11.2%) | 232 (13.1%) | 342 (19.3%) |
| I was offered a job here[a]. | 589 (33.4%) | 364 (20.7%) | 170 (9.7%) | 171 (9.7%) | 467 (26.5%) |
| My spouse/partner was offered a job here[a]. | 318 (18.1%) | 236 (13.4%) | 151 (8.6%) | 273 (15.5%) | 780 (44.4%) |
| To enjoy the recreational opportunities | 400 (22.7%) | 828 (47.0%) | 271 (15.4%) | 156 (8.9%) | 106 (6.0%) |
| To enjoy the natural beauty[a] | 668 (37.7%) | 801 (45.2%) | 161 (9.1%) | 92 (5.2%) | 52 (2.9%) |
| To enjoy the cultural and artistic opportunities[a] | 223 (12.6%) | 534 (30.3%) | 578 (32.8%) | 295 (16.7%) | 133 (7.5%) |
| To enjoy the entertainment and nightlife opportunities | 76 (4.3%) | 311 (17.7%) | 688 (39.1%) | 498 (28.3%) | 185 (10.5%) |
| To participate in community events (e.g., festivals, fundraisers, sports events) | 195 (11.2%) | 541 (31.2%) | 538 (31.0%) | 323 (18.6%) | 138 (8.0%) |
| Other (please explain) | 105 (17.4%) | 45 (7.5%) | 45 (7.5%) | 51 (8.4%) | 358 (59.3%) |

[a] Women tended to rate this reason higher in importance than men did.

Common explanations for respondent who chose "Other" include moving back to live with a family member for financial reasons such as to save money, to support a family business, to be near a spouse/partner/significant other who has roots on Cape Cod, and for the quality of life.

**Table D4. For the following, rate how important each reason is for you to continue living on Cape Cod. (Check one for each reason.)**

| Reason for Living on Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| To be near family members who live here[a] | 1,255 (51.4%) | 617 (25.3%) | 143 (5.9%) | 209 (8.6%) | 217 (8.9%) |
| To be a care giver for a family member or friend[a] | 347 (14.4%) | 433 (18.0%) | 328 (13.6%) | 422 (17.6%) | 873 (36.3%) |
| To be near a family member or friend who provides care for a member of my family[a] | 302 (12.6%) | 324 (13.5%) | 359 (15.0%) | 458 (19.1%) | 958 (39.9%) |
| To raise my family here[a] | 1,048 (43.1%) | 659 (27.1%) | 250 (10.3%) | 196 (8.1%) | 280 (11.5%) |
| I have a job here. | 1,561 (64.1%) | 566 (23.2%) | 143 (5.9%) | 67 (2.8%) | 98 (4.0%) |
| My spouse/partner has a job here[a]. | 1,129 (46.5%) | 448 (18.4%) | 156 (6.4%) | 162 (6.7%) | 534 (22.0%) |
| I have a professional network here. | 710 (29.5%) | 816 (33.9%) | 428 (17.8%) | 205 (8.5%) | 250 (10.4%) |
| I have a social network here[a]. | 884 (36.4%) | 923 (38.0%) | 384 (15.8%) | 133 (5.5%) | 106 (4.4%) |
| To enjoy the recreational opportunities | 827 (34.0%) | 1,043 (42.9%) | 361 (14.8%) | 144 (5.9%) | 58 (2.4%) |
| To enjoy the natural beauty[a] | 1,136 (46.6%) | 1,016 (41.7%) | 196 (8.0%) | 61 (2.5%) | 30 (1.2%) |
| To enjoy the cultural and artistic opportunities[a] | 452 (18.7%) | 807 (33.4%) | 754 (31.2%) | 298 (12.3%) | 105 (4.3%) |
| To enjoy the entertainment and nightlife opportunities | 224 (9.3%) | 539 (22.3%) | 946 (39.1%) | 542 (22.4%) | 166 (6.9%) |
| To participate in community events (e.g., festivals, fundraisers, sports events)[a] | 486 (20.2%) | 915 (38.0%) | 634 (26.3%) | 274 (11.4%) | 100 (4.2%) |
| Other (please explain) | 83 (12.8%) | 33 (5.1%) | 51 (7.9%) | 42 (6.5%) | 437 (67.6%) |

[a] Women tended to rate this reason higher in importance than men did.

For respondents who chose "Other" reasons for continuing to live on Cape Cod, the reasons are both positive, such as strong family ties, and adverse, such as a property that is underwater or that it is too expensive to move.

## Working on Cape Cod

**Table D5. Were you unemployed anytime during the last 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 549 | 22.4% |
| No | 1,906 | 77.6% |
| **Total** | **2,455** | **100%** |

**Table D6. I was unemployed for some point during the last 12 months for the following reasons. (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I could not find a job. | 155 | 25.6% |
| I had a seasonal job. | 154 | 25.4% |
| I am as stay-at-home parent. | 144 | 23.8% |
| I am a caregiver to an adult. | 13 | 2.1% |
| I am a student. | 30 | 5.0% |
| Other | 110 | 18.2% |
| **Total** | **606** | **100%** |

**Table D7. What is the location of your primary job? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Barnstable | 771 | 39.3% |
| Bourne | 72 | 3.7% |
| Brewster | 60 | 3.1% |
| Chatham | 70 | 3.6% |
| Dennis | 113 | 5.8% |
| Eastham | 43 | 2.2% |
| Falmouth | 212 | 10.8% |
| Harwich | 111 | 5.7% |
| Mashpee | 51 | 2.6% |
| Orleans | 108 | 5.5% |
| Provincetown | 33 | 1.7% |
| Sandwich | 72 | 3.7% |
| Truro | 16 | 0.8% |
| Wellfleet | 29 | 1.5% |
| Yarmouth | 173 | 8.8% |
| Off Cape Cod | 9 | 0.5% |
| Off Cape Cod, but I telecommute 2 or more days per week | 21 | 1.1% |
| **Total** | **1,964** | **100%** |

**Table D8. For your primary job, do you work for an employer or are you self-employed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Work for an employer | 1,678 | 85.6% |
| Self-employed | 283 | 14.4% |
| **Total** | **1,961** | **100%** |

**Table D9. What industry do you work in for your primary job? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Agriculture and Forestry | 17 | 0.9% |
| Arts, Entertainment, and Recreation | 55 | 2.8% |
| Construction | 81 | 4.2% |
| Data Processing and Data Storage | 9 | 0.5% |
| Educational Services | 270 | 13.9% |
| Finance and Insurance | 182 | 9.4% |
| Fishing and Hunting | 8 | 0.4% |
| Health Care | 212 | 10.9% |
| Hotel and Food Services | 107 | 5.5% |
| Manufacturing | 16 | 0.8% |
| Non-profits | 170 | 8.7% |
| Office Administration and Support | 53 | 2.7% |
| Professional, Scientific, and Technical Services | 217 | 11.2% |
| Public Administration | 75 | 3.9% |
| Publishing, Broadcasting, and Telecommunications | 42 | 2.2% |
| Real Estate; Rental and Leasing | 42 | 2.2% |
| Retail Trade | 116 | 6.0% |
| Social Assistance | 31 | 1.6% |
| Transportation and Warehousing | 20 | 1.0% |
| Utilities | 3 | 0.2% |
| Waste Management and Remediation Services | 12 | 0.6% |
| Wholesale Trade | 22 | 1.1% |
| Other | 184 | 9.5% |
| **Total** | **1,944** | **100%** |

**Table D10. Is your primary job in your desired field of employment? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 1,574 | 80.1% |
| No | 390 | 19.9% |
| **Total** | **1,964** | **100%** |

**Table D11. Education and Working in One's Desired Field**

| Highest Level of Education | Is your primary job in your desired field? | | | |
|---|---|---|---|---|
| | Yes | No | Skipped Question | Total |
| Some high school | 8 | 1 | 2 | **11** |
| High school/GED | 83 | 27 | 45 | **155** |
| Some college | 239 | 108 | 110 | **457** |
| 2-year college degree (Associates) | 136 | 42 | 67 | **245** |
| 4-year college degree (BA, BS) | 641 | 167 | 195 | **1,003** |
| Graduate degree (MS/MA, PhD) | 397 | 39 | 62 | **498** |
| Professional degree (MD, JD) | 63 | 6 | 13 | **82** |
| Skipped Question | 7 | 0 | 3 | 10 |
| **Total** | **1574** | **390** | **497** | **2,461** |

**Table D12. Is your primary job full-time or part-time? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Full-Time[a] | 1,674 | 85.5% |
| Part-Time | 283 | 14.5% |
| **Total** | **1,957** | **100%** |
| [a] Men tended to be more likely to be employed full time than women were. | | |

**Table D13. How are you paid at your primary job? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Salary | 1,036 | 50.2% |
| Hourly | 767 | 37.2% |
| Hourly plus Tips | 54 | 2.6% |
| Commission | 170 | 8.2% |
| Cash | 35 | 1.7% |
| **Total** | **2,062** | **100%** |

**Table D14. Do you need to supplement your annual income from your primary job in any way? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 997 | 50.8% |
| No | 966 | 49.2% |
| **Total** | **1,963** | **100%** |

**Table D15. Median and Average Salaries for Survey Respondents**

| Description of Respondent | Median[1] Annual Salary | Average[1] Annual Salary |
|---|---|---|
| Live and work on Cape | $45,000 | $56,630 |
| Live on Cape Work off Cape | $75,000 | $69,588 |
| Live off Cape Work on Cape | $55,000 | $56,395 |
| Live and work off Cape | $65,000 | $62,955 |

[1] Median and average salary were calculated on the mid-point of salary ranges reported by the respondents in the demographics section of each survey.

**Table D16. Why do you supplement your income? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I do not earn enough from my primary job to cover my basic living expenses. | 654 | 44.2% |
| I want to have extra spending money (disposable income). | 415 | 28.1% |
| I want to increase my savings. | 345 | 23.3% |
| Other | 65 | 4.4% |
| **Total** | **1,479** | **100%** |

**Table D17. Level of Education and Supplementing One's Income**

| Highest Level of Education | Do you need to supplement your annual income from your primary job in any way? | | | |
|---|---|---|---|---|
| | Yes | No | Skipped Question | Total |
| Some high school | 6 | 3 | 2 | **11** |
| High school/GED | 57 | 53 | 45 | **155** |
| Some college | 192 | 155 | 110 | **457** |
| 2-year college degree (Associates) | 90 | 89 | 66 | **245** |
| 4-year college degree (BA, BS) | 431 | 376 | 196 | **1,003** |
| Graduate degree (MS/MA, PhD) | 197 | 238 | 63 | **498** |
| Professional degree (MD, JD) | 21 | 48 | 13 | **82** |
| Skipped Question | 3 | 4 | 3 | **10** |
| **Total** | **997** | **966** | **498** | **2,461** |

**Table D18. How do you supplement your annual income? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I have a second or third job. | 457 | 27.1% |
| I am self-employed part-time. | 186 | 11.0% |
| I work at odd jobs. | 279 | 16.6% |
| I sell products from artistic or creative pursuits. | 114 | 6.8% |
| I rent out my house in the summer. | 24 | 1.4% |
| I have support from my family members. | 210 | 12.5% |
| I use credit, such as credit cards or personal loans. | 233 | 13.8% |
| I receive unemployment benefits from a seasonal job. | 4 | 0.2% |
| I receive public assistance such as WIC, SNAP, fuel assistance, etc. | 73 | 4.3% |
| Other | 104 | 6.2% |
| **Total** | **1,684** | **100%** |

**Table D19. Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)**

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are enough jobs available in my chosen career field. | 137 (5.6%) | 815 (33.2%) | 874 (35.6%) | 526 (21.4%) | 104 (4.2%) |
| There are enough opportunities for promotion or advancement in my chosen career field Women tended to rate this reason higher in importance than men did[a]. | 134 (5.5%) | 717 (29.2%) | 947 (38.6%) | 537 (21.9%) | 117 (4.8%) |
| There are enough jobs that require my education or experience. | 106 (4.3%) | 791 (32.3%) | 952 (38.9%) | 498 (20.3%) | 103 (4.2%) |
| There are enough employment opportunities for my spouse/partner. | 138 (5.6%) | 763 (31.2%) | 637 (26.1%) | 424 (17.3%) | 483 (19.8%) |
| There are enough career development resources for me. | 80 (3.3%) | 787 (32.1%) | 931 (38.0%) | 428 (17.5%) | 222 (9.1%) |
| There are enough mentoring resources for me. | 78 (3.2%) | 701 (28.7%) | 913 (37.3%) | 407 (16.6%) | 346 (14.2%) |
| Salaries and wages I earn are livable wages for the Cape Women tended to rate this reason higher in importance than men did[a]. | 108 (4.4%) | 724 (29.6%) | 762 (31.2%) | 794 (32.5%) | 58 (2.4%) |
| My employer provides affordable health insurance. | 333 (13.6%) | 889 (36.4%) | 409 (16.7%) | 467 (19.1%) | 344 (14.1%) |
| My employer provides adequate paid time off benefits (e.g., vacation, sick time, etc.) | 513 (21.0%) | 989 (40.4%) | 304 (12.4%) | 338 (13.8%) | 303 (12.4%) |
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | 597 (24.5%) | 923 (37.9%) | 454 (18.6%) | 300 (12.3%) | 162 (6.7%) |
| Other | 34 (7.6%) | 21 (4.7%) | 18 (4.0%) | 20 (4.5%) | 353 (79.1%) |

[a] Men tended to disagree more strongly to this statement than women did.

Among respondents who responded "Other" they noted that they

- Rely on their spouse's/partner's salaries
- Currently have a good job, but if they lost the job, they would have to leave Cape Cod
- Believe that they make a good salary, but not relative to housing costs on Cape Cod.

**Table D20. Are you interested in starting your own business on Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 1,008 | 42.0% |
| No | 1,391 | 58.0% |
| **Total** | **2,399** | **100%** |

## Housing on Cape Cod

**Table D21. Which of the following statements best describes your current living arrangement? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| I live alone. | 241 | 9.8% |
| I live with a spouse/partner. | 639 | 26.0% |
| I live with a spouse/partner and children. | 1,067 | 43.4% |
| I live with my children. | 131 | 5.3% |
| I live with a roommate(s). | 133 | 5.4% |
| I live with my parents (or another family member). | 189 | 7.7% |
| Other | 57 | 2.3% |
| **Total** | **2,457** | **100%** |

Among respondents who indicated other living arrangements the most common responses were

- Living with spouse and/or children and a grandparent(s)
- Living with spouse and/or children with another family member such as a sibling
- Living with spouse and/or children and a roommate(s).

**Table D22. Do you own or rent your primary residence on Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Own | 1,428 | 58.1% |
| Rent | 824 | 33.6% |
| Other arrangement | 205 | 8.3% |
| **Total** | **2,457** | **100%** |

Among the other arrangements, the most commonly provided explanations were

- Living with parents or in-laws
- Living in a house owned by a family member such as parents or grandparents
- Living in employer provided housing.

**Table D23. Likelihood of Home Ownership and Marital Status**

| Marital Status | Do you own or rent your primary residence on Cape Cod? | | | | |
|---|---|---|---|---|---|
| | Own | Rent | Other arrangement | Skipped Question | Total |
| Single, never married | 170 | 351 | 121 | 1 | **643** |
| Married | 1,052 | 249 | 54 | 1 | **1,356** |
| Living with partner | 114 | 131 | 18 | 0 | **263** |
| Widowed | 4 | 2 | 1 | 0 | **7** |
| Divorced | 71 | 74 | 8 | 2 | **155** |
| Separated | 14 | 13 | 3 | 0 | **30** |
| Skipped Question | 3 | 4 | 0 | 0 | **7** |
| **Total** | **1,428** | **824** | **205** | **4** | **2,461** |

**Table D24. Are you considering buying a single-family house or condominium over the next 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes, a single-family house | 290 | 35.3% |
| Yes, a condominium | 21 | 2.6% |
| No | 510 | 62.1% |
| **Total** | **821** | **100%** |

**Table D25. Approximately how much do you pay each month for your mortgage, including principle, interest, and taxes? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 25 | 1.8% |
| $501 to $750 | 31 | 2.2% |
| $751 to $1,000 | 78 | 5.5% |
| $1,001 to $1,250 | 137 | 9.6% |
| $1,251 to $1,500 | 278 | 19.5% |
| $1,501 to $1,750 | 271 | 19.0% |
| $1,751 to $2,000 | 264 | 18.5% |
| $2,001 to $2,500 | 206 | 14.4% |
| $2,501 to $3,000 | 93 | 6.5% |
| $3,001 to $3,500 | 19 | 1.3% |
| $3,501 to $4,000 | 13 | 0.9% |
| $4,001 or more | 11 | 0.8% |
| **Total** | **1,426** | **100%** |

**Table D26. Percent of Income[1] Spent on Mortgage and Rent**

| Measure | Median | Average |
|---|---|---|
| Percent of Gross Income Spent on Mortgage | 35% | 54% |
| Percent of Gross Income Spent on Summer Rent | 30% | 47% |
| Percent of Gross Income Spent on Winter Rent | 30% | 47% |

[1] The percent of mortgage to gross income was calculated by finding midpoint of the reported ranges for mortgage and income for each respondent.

**Table D27. Approximately how much do you pay in rent each month during the summer (June to August)? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 58 | 7.1% |
| $501 to $750 | 155 | 18.9% |
| $751 to $1,000 | 200 | 24.3% |
| $1,001 to $1,250 | 172 | 20.9% |
| $1,251 to $1,500 | 142 | 17.3% |
| $1,501 to $1,750 | 41 | 5.0% |
| $1,751 to $2,000 | 33 | 4.0% |
| $2,001 to $2,500 | 10 | 1.2% |
| $2,501 to $3,000 | 7 | 0.9% |
| $3,001 to $3,500 | 1 | 0.1% |
| $3,501 to $4,000 | 3 | 0.4% |
| $4,001 or more | 0 | 0% |
| **Total** | **822** | **100%** |

**Table D28. Approximately how much do you pay in rent each month during the winter (September to May)? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 57 | 6.9% |
| $501 to $750 | 168 | 20.4% |
| $751 to $1,000 | 206 | 25.0% |
| $1,001 to $1,250 | 177 | 21.5% |
| $1,251 to $1,500 | 134 | 16.3% |
| $1,501 to $1,750 | 37 | 4.5% |
| $1,751 to $2,000 | 28 | 3.4% |
| $2,001 to $2,500 | 4 | 0.5% |
| $2,501 to $3,000 | 3 | 0.4% |
| $3,001 to $3,500 | 0 | 0% |
| $3,501 to $4,000 | 2 | 0.2% |
| $4,001 or more | 8 | 1.0% |
| **Total** | **824** | **100%** |

**Table D29. What type of lease do you have? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Year-round lease | 762 | 92.9% |
| Winter rental (September to May or similar) | 58 | 7.1% |
| **Total** | **820** | **100%** |

**Table D30. If there were more rental housing on Cape Cod that is within your budget, what type of unit would you want for year-round living? (Check all that apply.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Studio apartment | 42 | 3.8% |
| 1 bedroom apartment | 164 | 14.7% |
| 2-3 bedroom apartment | 243 | 21.8% |
| 1-2 bedroom house | 382 | 34.2% |
| 3+ bedroom house | 264 | 23.7% |
| Other | 21 | 1.9% |
| **Total** | **1,116** | **100%** |

Among respondents who checked "Other," there was no definitive pattern of additional types of desired rental housing, however, pet friendly rentals was mentioned.

**Table D31. What is your desired location to rent? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Within walking distance of village centers | 373 | 27.8% |
| Willing walking distance of commercial zones with employment opportunities | 137 | 10.2% |
| Within walking distance of beaches | 382 | 28.4% |
| Rural neighborhoods | 384 | 28.6% |
| Other | 68 | 5.1% |
| **Total** | **1,344** | **100%** |

Feedback for other desired locations included

- Deemphasizing location for emphasis on affordable housing
- Being within a 10 minute drive to jobs, village centers, and public schools
- Being near recreation and commercial areas

## Services and Community Initiatives on Cape Cod

**Table D32. If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Commuter rail to work off Cape | 778 | 20.5% |
| Commuter bus to work off Cape | 213 | 5.6% |
| Commuter bus to work on Cape | 383 | 10.1% |
| Dedicated bicycle lanes to bike to work on Cape | 686 | 18.1% |
| Trails for recreational biking | 926 | 24.5% |
| None | 800 | 21.1% |
| **Total** | **3,786** | **100%** |

**Table D33. Tell us how much you agree or disagree that the following services are available to you on Cape Cod. (Check one for each service.)**

| Services | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| Medical Services (for example, hospitals, emergency rooms, clinics, doctors) | 784 (31.9%) | 1,339 (54.5%) | 244 (9.9%) | 65 (2.6%) | 24 (1.0%) |
| Retail Stores (for example, clothing stores, grocery stores, pharmacies)[a] | 439 (17.9%) | 1,400 (57.0%) | 474 (19.3%) | 134 (5.5%) | 9 (0.4%) |
| Consumer Services (for example, dry cleaners, salons) | 547 (22.3%) | 1,629 (66.5%) | 190 (7.8%) | 33 (1.3%) | 49 (2.0%) |

[a] Men tended to agree more strongly that this service was available on the Cape than women did.

**Table D34. Tell us how much you agree or disagree with the following statements about higher education opportunities and the cost of education on Cape Cod. (Chose one for each statement.)**

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are sufficient higher education institutions on Cape Cod. | 57 (2.3%) | 566 (23.1%) | 1,115 (45.5%) | 567 (23.1%) | 146 (6.0%) |
| There are sufficient technical schools or trade schools on Cape Cod. | 121 (5.0%) | 1,189 (48.6%) | 610 (25.0%) | 182 (7.4%) | 342 (14.0%) |
| Cape Cod needs a four year college[a]. | 1,025 (41.9%) | 892 (36.5%) | 289 (11.8%) | 40 (1.6%) | 200 (8.2%) |
| If a four year college were located on Cape Cod, I would attend[a]. | 475 (19.5%) | 519 (21.3%) | 477 (19.6%) | 171 (7.0%) | 795 (32.6%) |
| Additional education or training would help me advance my career. | 700 (28.7%) | 1,050 (43.0%) | 329 (13.5%) | 96 (3.9%) | 266 (10.9%) |
| I am financially able to pursue additional education opportunities[b]. | 225 (9.2%) | 675 (27.6%) | 823 (33.7%) | 550 (22.5%) | 172 (7.0%) |

[a] Women tended to agree more strongly about this statement than men did.
[b] Men tended to agree more strongly about this statement than men did.

**Table D35. Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)**

| Initiative | Very Familiar | Familiar | Not Very Familiar | Not at all Familiar |
|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER[a] | 583 (23.8%) | 1,144 (46.7%) | 489 (20.0%) | 235 (9.6%) |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands[a] | 267 (10.9%) | 569 (23.3%) | 998 (40.8%) | 610 (25.0%) |
| Regionalization of public school districts | 393 (16.1%) | 874 (35.8%) | 768 (31.4%) | 408 (16.7%) |
| Update of flood maps by the Federal Emergency Management Agency (FEMA)[a] | 450 (18.4%) | 763 (31.2%) | 796 (32.6%) | 433 (17.7%) |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 232 (9.5%) | 591 (24.2%) | 900 (36.8%) | 720 (29.5%) |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns[a] | 91 (3.7%) | 235 (9.6%) | 1,109 (45.4%) | 1,010 (41.3%) |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems[a] | 390 (16.0%) | 791 (32.4%) | 778 (31.9%) | 482 (19.7%) |

[a] Men tended to be more familiar with this initiative than women were.

**Table D36. Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)**

| Reason for Moving to Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | 627 (25.6%) | 983 (40.1%) | 584 (23.8%) | 190 (7.8%) | 67 (2.7%) |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 830 (34.0%) | 1,057 (43.3%) | 386 (15.8%) | 87 (3.6%) | 80 (3.3%) |
| Regionalization of public school districts [a] | 427 (17.5%) | 945 (38.7%) | 572 (23.4%) | 186 (7.6%) | 312 (12.8%) |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) [a] | 454 (18.6%) | 1,022 (42.0%) | 619 (25.4%) | 157 (6.4%) | 184 (7.6%) |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth [a] | 710 (29.0%) | 1,069 (43.7%) | 400 (16.3%) | 140 (5.7%) | 128 (5.2%) |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 443 (18.2%) | 956 (39.2%) | 663 (27.2%) | 173 (7.1%) | 202 (8.3%) |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems [a] | 1,262 (51.7%) | 893 (36.6%) | 176 (7.2%) | 45 (1.8%) | 66 (2.7%) |

[a] Women tended to find this service more important than men did.

**Table D37. In the past 12 months, have you seriously considered moving off Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes [a] | 1,144 | 46.5% |
| No | 1,314 | 53.5% |
| **Total** | **2,458** | **100%** |

[a] Men tended to be more likely to move off the Cape.

**Table D38. How likely is it that you would move off Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Very likely | 279 | 24.3% |
| Somewhat likely | 537 | 46.9% |
| Not very likely | 310 | 27.1% |
| Not at all likely | 20 | 1.7% |
| **Total** | **1,146** | **100%** |

**Table D39. Choose the most important reasons that would make it "very likely" or "somewhat likely" that you would move off of Cape Cod. (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I want to be near family or friends who live off Cape Cod. | 200 | 7.2% |
| There are not enough job opportunities on Cape Cod in my field. | **496** | **17.8%** |
| Available jobs on Cape Cod do not pay a living wage. | **498** | **17.8%** |
| Housing costs are too high on Cape Cod. | **561** | **20.1%** |
| There are not enough higher education opportunities on Cape Cod. | 220 | 7.9% |
| There are not enough job training opportunities on Cape Cod. | 157 | 5.6% |
| There are not enough social activates for people my age group. | **358** | **12.8%** |
| I do not feel I am part of a community on Cape Cod. | 219 | 7.8% |
| Other | 85 | 3.0% |
| **Total** | **2,794** | **100%** |

## Other Factors that Affected Working and Living on Cape Cod

The final open ended question on the survey asks respondents to discuss any other factors that have affected their experience or opinion about living and working on Cape Cod that were not covered in the survey. Many of these responses reiterated concerns over the:

- Lack of jobs that pay living wages
- High cost of housing and high cost of living on Cape Cod
- Ability to find well paying, year-round jobs for themselves or by their spouses, partners, or significant
- Economic and social challenges related to the seasonality of Cape Cod's tourism industry.

Additional themes found in the responses address topics that were lightly covered in the survey or not at all. These themes are:

- Drug and alcohol addiction, including prescription drugs
- Too much focus on tourists and retirees and not enough focus on families and young people
- Retired residents are too willing to accept the status quo and do not support any changes
- Little social mingling between Cape Cod natives and "wash ashores" exemplified by the saying, "if you were not born here, then you do not belong here."
- Lack of specialized health care
- Lack of affordable child care
- Lack of public transportation and sidewalks makes communities more isolated
- Cape Cod is not business friendly in terms of complex permitting, high taxes, and constrained infrastructure
- Lack of chain stores on Cape Cod and having to travel off Cape Cod to access discount department stores and home improvement stores

Among the live-on-work-off respondents, many reiterated concerns over the need for more job opportunities on Cape Cod and additional higher paying job opportunities in Cape Cod. Additional themes found in the live-on-work-off responses were:

- The need for additional commuter train service
- Concern over a drug and crime problem on Cape Cod
- Commitment to enduring long commutes to enjoy the Cape Cod life style and scenic beauty.

Many off-Cape respondents recapped their frustration over the lack of jobs and high cost of housing and high cost of living. Some respondents described their lingering fondness for Cape Cod's scenic beauty and lifestyle and would like to move back, but could not give up their current jobs, salary, or future opportunity for advancement. Some respondents expressed that they would like to raise their children on the Cape, but are concerned over the lack of funding for public schools and the increasing drug and alcohol abuse problems, and rising crime rates.

## Demographics

**Table D40. What is your sex? (Choose one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Female | 1,757 | 71.7% |
| Male | 695 | 28.3% |
| **Total** | **2,452** | **100%** |

**Table D41. Age of Respondents calculated from the survey year of 2013 and the open-ended question "In what year were you born?"**

| Measure | Age (years) |
|---|---|
| Average | 34.6 |
| Median | 34 |

**Table D42. Are you of Hispanic origin? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 50 | 2.1% |
| No | 2,383 | 97.9% |
| **Total** | **2,433** | **100%** |

**Table D43. What is your race? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| White | 2,291 | 93.7% |
| Black or African American | 28 | 1.1% |
| American Indian or Alaskan Native | 15 | 0.6% |
| Asian | 20 | 0.8% |
| Native Hawaiian or Other Pacific Islander | 0 | 0.0% |
| Two or more races | 47 | 1.9% |
| Other | 43 | 1.8% |
| **Total** | **2,444** | **100%** |

**Table D44. What is the highest level of education you have completed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Some high school | 11 | 0.4% |
| High school/GED | 155 | 6.3% |
| Some college | 457 | 18.6% |
| 2-year college degree (Associates) | 245 | 10.0% |
| 4-year college degree (BA, BS) | 1,003 | 40.9% |
| Graduate degree (MS/MA, PhD) | 498 | 20.3% |
| Professional degree (MD, JD) | 82 | 3.3% |
| **Total** | **2,451** | **100%** |

**Table D45. What is your marital status? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Single, never married | 643 | 26.2% |
| Married | 1,356 | 55.3% |
| Living with partner | 263 | 10.7% |
| Widowed | 7 | 0.3% |
| Divorced | 155 | 6.3% |
| Separated | 30 | 1.2% |
| **Total** | **2,454** | **100%** |

**Table D46. How many dependent children under age 18 live with you? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 1,125 | 46.2% |
| 1 | 477 | 19.6% |
| 2 | 578 | 23.7% |
| 3 | 186 | 7.6% |
| 4 | 60 | 2.5% |
| 5 | 8 | 0.3% |
| 6 | 1 | 0.0% |
| 7 | 1 | 0.0% |
| **Total** | **2,436** | 100% |

**Table D47. How many adult dependent, such as elderly parents, do you have? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 2,081 | 88.7% |
| 1 | 159 | 6.8% |
| 2 | 88 | 3.8% |
| 3 | 12 | 0.5% |
| 4 | 5 | 0.2% |
| More than 4 | 1 | 0.0% |
| **Total** | **2,346** | **100%** |

**Table D48. Which range best represents your total personal income before taxes over the last 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $10,000 | 102 | 4.2% |
| $10,000 to $19,999 | 193 | 7.9% |
| $20,000 to $29,999 | 302 | 12.4% |
| $30,000 to $39,999 | 376 | 15.4% |
| $40,000 to $49,999 | 345 | 14.1% |
| $50,000 to $59,999 | 297 | 12.2% |
| $60,000 to $69,999 | 258 | 10.6% |
| $70,000 to $79,999 | 153 | 6.3% |
| $80,000 to $89,999 | 120 | 4.9% |
| $90,000 to $99,999 | 69 | 2.8% |
| $100,000 or greater | 225 | 9.2% |
| **Total** | **2,440** | **100%** |

## Summary Statistics Live-on-Work-Off Sample

The following are summary tables for the live-on-work-off sample. The On-Cape survey (see Appendix A) was administered to respondents who identified themselves as living on Cape Cod, but working off Cape Cod. The live-on-work-off sample of respondents age 25 to 44 was 170 individuals.

### Living on Cape Cod

**Table E1. What town do you live in? (Check one.)**

| Town | Number of Respondents | Percent of Respondents |
|---|---|---|
| Barnstable | 34 | 20.1% |
| Bourne | 17 | 10.1% |
| Brewster | 7 | 4.1% |
| Chatham | 5 | 3.0% |
| Dennis | 7 | 4.1% |
| Eastham | 2 | 1.2% |
| Falmouth | 20 | 11.8% |
| Harwich | 11 | 6.5% |
| Mashpee | 8 | 4.7% |
| Orleans | 8 | 4.7% |
| Provincetown | 0 | 0% |
| Sandwich | 32 | 18.9% |
| Truro | 0 | 0% |
| Wellfleet | 1 | 0.6% |
| Yarmouth | 17 | 10.1% |
| **Total** | **169** | **100%** |

**Table E2. Choose the statement that best describes you as a Cape Cod resident. (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| I have lived on Cape Cod essentially all my life. | 27 | 15.9% |
| I grew up on Cape Cod, left for two or more years, and have moved back. | 47 | 27.6% |
| As an adult, I moved to Cape Cod. | 50 | 29.4% |
| As an adult, I lived for a period on Cape Cod, moved away, and then returned. | 7 | 4.1% |
| I spent summers on Cape Cod or visited Cape Cod before moving here as an adult. | 30 | 17.6% |
| Other | 9 | 5.3% |
| **Total** | **170** | **100%** |

**Table E3. For the following, rate how important each reason was to you for moving to (or moving back) to Cape Cod. (Check one for each reason.)**

| Reason for Moving to Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| To be near family members who live here | 57 (40.01%) | 29 (20.4%) | 11 (7.7%) | 20 (14.1%) | 25 (17.6%) |
| To be a care giver for a family member or friend | 5 (3.5%) | 22 (15.5%) | 11 (7.7%) | 42 (29.6%) | 62 (43.7%) |
| To be near a family member or friend who provides care for a member of my family | 5 (3.6%) | 18 (12.9%) | 17 (12.1%) | 42 (30.0%) | 58 (41.4%) |
| To raise my family here | 48 (33.8%) | 43 (30.3%) | 15 (10.6%) | 16 (11.3%) | 20 (14.1%) |
| I was offered a job here. | 16 (11.4%) | 17 (12.1%) | 6 (4.3%) | 27 (19.3%) | 74 (52.9%) |
| My spouse/partner was offered a job here. | 24 (17.1%) | 25 (17.9%) | 12 (8.6%) | 25 (17.9%) | 54 (38.6%) |
| To enjoy the recreational opportunities | 45 (31.9%) | 53 (37.6%) | 22 (15.6%) | 9 (6.4%) | 12 (8.5%) |
| To enjoy the natural beauty | 63 (44.1%) | 51 (35.7%) | 16 (11.2%) | 5 (3.5%) | 8 (5.6%) |
| To enjoy the cultural and artistic opportunities | 17 (12.0%) | 44 (31.0%) | 40 (28.2%) | 25 (17.6%) | 16 (11.3%) |
| To enjoy the entertainment and nightlife opportunities | 12 (8.4%) | 23 (16.1%) | 41 (28.7%) | 45 (31.5%) | 22 (15.4%) |
| To participate in community events (e.g., festivals, fundraisers, sports events) | 17 (12.0%) | 53 (37.3%) | 31 (21.8%) | 26 (18.3%) | 15 (10.6%) |
| Other (please explain) | 9 (18.8%) | 5 (10.4%) | 1 (2.1%) | 2 (4.2%) | 31 (64.6%) |

For respondents who chose "Other," no new dominant themes emerged about moving to Cape Cod. A few of respondents mentioned military service.

**Table E4. For the following, rate how important each reason is for you to continue living on Cape Cod. (Check one for each reason.)**

| Reason for Living on Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| To be near family members who live here | 70 (41.7%) | 47 (20.8%) | 11 (6.5%) | 23 (13.7%) | 17 (10.1%) |
| To be a care giver for a family member or friend | 15 (9.1%) | 30 (18.2%) | 23 (13.9%) | 35 (21.2%) | 62 (37.6%) |
| To be near a family member or friend who provides care for a member of my family | 17 (10.4%) | 26 (16.0%) | 21 (12.9%) | 39 (23.9%) | 60 (36.8%) |
| To raise my family here | 74 (44.8%) | 34 (20.6%) | 18 (10.9%) | 24 (14.5%) | 15 (9.1%) |
| I have a job here. | 25 (15.1%) | 17 (10.2%) | 22 (13.3%) | 37 (22.3%) | 65 (39.2%) |
| My spouse/partner has a job here. | 50 (30.3%) | 32 (19.4%) | 16 (9.7%) | 25 (15.2%) | 42 (25.5%) |
| I have a professional network here. | 18 (10.8%) | 38 (22.8%) | 32 (19.2%) | 30 (18.0%) | 49 (29.3%) |
| I have a social network here. | 48 (29.1%) | 65 (39.4%) | 24 (14.5%) | 13 (7.9%) | 15 (9.1%) |
| To enjoy the recreational opportunities | 63 (37.5%) | 66 (39.3%) | 18 (10.7%) | 14 (8.3%) | 7 (4.2%) |
| To enjoy the natural beauty | 79 (47.3%) | 63 (37.7%) | 11 (6.6%) | 9 (5.4%) | 5 (3.0%) |
| To enjoy the cultural and artistic opportunities | 30 (18.0%) | 45 (26.9%) | 56 (33.5%) | 22 (13.2%) | 14 (8.4%) |
| To enjoy the entertainment and nightlife opportunities | 20 (11.9%) | 22 (13.1%) | 63 (37.5%) | 43 (25.6%) | 20 (11.9%) |
| To participate in community events (e.g., festivals, fundraisers, sports events) | 32 (19.3%) | 59 (35.5%) | 39 (23.5%) | 25 (15.1%) | 11 (6.6%) |
| Other (please explain) | 6 (12.5%) | 2 (4.2%) | 1 (2.1%) | 7 (14.6%) | 32 (66.7%) |

For respondents who chose "Other," no new dominant themes emerged about continuing to live on Cape Cod.

## Working on Cape Cod

**Table E5. Were you unemployed anytime during the last 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 30 | 17.6% |
| No | 140 | 82.4% |
| **Total** | **170** | **100%** |

**Table E6. I was unemployed for some point during the last 12 months for the following reasons. (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I could not find a job. | 14 | 40.0% |
| I had a seasonal job. | 3 | 8.6% |
| I am as stay-at-home parent. | 7 | 20.0% |
| I am a caregiver to an adult. | 0 | 0.0% |
| I am a student | 4 | 11.4% |
| Other | 7 | 20.0% |
| **Total** | **35** | **100%** |

**Table E7. What is the location of your primary job? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Barnstable | 1 | 0.7% |
| Bourne | 1 | 0.7% |
| Brewster | 0 | 0% |
| Chatham | 0 | 0% |
| Dennis | 0 | 0% |
| Eastham | 0 | 0% |
| Falmouth | 1 | 0.7% |
| Harwich | 0 | 0% |
| Mashpee | 0 | 0% |
| Orleans | 1 | 0.7% |
| Provincetown | 0 | 0% |
| Sandwich | 0 | 0% |
| Truro | 0 | 0% |
| Wellfleet | 0 | 0% |
| Yarmouth | 0 | 0% |
| Off Cape Cod | 104 | 71.7% |
| Off Cape Cod, but I telecommute 2 or more days per week | 37 | 25.5% |
| **Total** | **145** | **100%** |

**Table E8. For your primary job, do you work for an employer or are you self-employed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Work for an employer | 129 | 89.0% |
| Self-employed | 16 | 11.0% |
| **Total** | **145** | **100%** |

**Table E9. What industry do you work in for your primary job? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Agriculture and Forestry | 5 | 3.6% |
| Arts, Entertainment, and Recreation | 4 | 2.9% |
| Construction | 7 | 5.0% |
| Data Processing and Data Storage | 4 | 2.9% |
| Educational Services | 15 | 10.8% |
| Finance and Insurance | 13 | 9.4% |
| Fishing and Hunting | 3 | 2.2% |
| Health Care | 11 | 7.9% |
| Hotel and Food Services | 1 | 0.7% |
| Manufacturing | 2 | 1.4% |
| Non-profits | 9 | 6.5% |
| Office Administration and Support | 1 | 0.7% |
| Professional, Scientific, and Technical Services | 22 | 15.8% |
| Public Administration | 0 | 0% |
| Publishing, Broadcasting, and Telecommunications | 2 | 1.4% |
| Real Estate; Rental and Leasing | 1 | 0.7% |
| Retail Trade | 3 | 2.2% |
| Social Assistance | 1 | 0.7% |
| Transportation and Warehousing | 3 | 2.2% |
| Utilities | 2 | 1.4% |
| Waste Management and Remediation Services | 0 | 0% |
| Wholesale Trade | 2 | 1.4% |
| Other | 28 | 20.1 |
| **Total** | **139** | **100%** |

There were no dominant themes among the responses for "Other." However, boating and marine related jobs were mentioned several times.

**Table E10. Is your primary job in your desired field of employment? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 131 | 90.3% |
| No | 14 | 9.7% |
| **Total** | **145** | **100%** |

**Table E11. Education and Working in One's Desired Field**

| Highest Level of Education | Is your primary job in your desired field? | | | |
|---|---|---|---|---|
| | Yes | No | Skipped Question | Total |
| Some high school | 0 | 0 | 0 | **0** |
| High school/GED | 6 | 0 | 1 | **7** |
| Some college | 14 | 3 | 5 | **22** |
| 2-year college degree (Associates) | 3 | 1 | 1 | **5** |
| 4-year college degree (BA, BS) | 75 | 8 | 12 | **95** |
| Graduate degree (MS/MA, PhD) | 30 | 1 | 6 | **37** |
| Professional degree (MD, JD) | 2 | 1 | 0 | **3** |
| Skipped Question | 1 | 0 | 0 | **1** |
| **Total** | **131** | **14** | **25** | **170** |

**Table E12. Is your primary job full-time or part-time? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Full-Time | 132 | 91.0% |
| Part-Time | 13 | 9.0% |
| **Total** | **145** | **100%** |

**Table E13. How are you paid at your primary job? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Salary | 110 | 70.1% |
| Hourly | 27 | 17.2% |
| Hourly plus Tips | 2 | 1.3% |
| Commission | 15 | 9.6% |
| Cash | 3 | 1.9% |
| **Total** | **157** | **100%** |

**Table E14. Do you need to supplement your annual income from your primary job in any way? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 50 | 34.5% |
| No | 95 | 65.5% |
| **Total** | **145** | **100%** |

**Table E15. Why do you supplement your income? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I do not earn enough from my primary job to cover my basic living expenses. | 26 | 31.7% |
| I want to have extra spending money (disposable income). | 31 | 37.8% |
| I want to increase my savings. | 23 | 28.0% |
| Other | 2 | 2.4% |
| **Total** | **82** | **100%** |

**Table E16. Level of Education and Supplementing One's Income**

| Highest Level of Education | Do you need to supplement your annual income from your primary job in any way? | | | |
|---|---|---|---|---|
| | Yes | No | Skipped Question | Total |
| Some high school | 0 | 0 | 0 | **0** |
| High school/GED | 5 | 1 | 1 | **7** |
| Some college | 8 | 9 | 5 | **22** |
| 2-year college degree (Associates) | 2 | 2 | 1 | **5** |
| 4-year college degree (BA, BS) | 23 | 60 | 12 | **95** |
| Graduate degree (MS/MA, PhD) | 12 | 19 | 6 | **37** |
| Professional degree (MD, JD) | 0 | 3 | 0 | **3** |
| Skipped Question | 1 | 0 | 0 | **1** |
| **Total** | **51** | **94** | **25** | **170** |

**Table E17. How do you supplement your annual income? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I have a second or third job. | 24 | 31.2% |
| I am self-employed part-time. | 9 | 11.7% |
| I work at odd jobs. | 12 | 15.6% |
| I sell products from artistic or creative pursuits. | 6 | 7.8% |
| I rent out my house in the summer. | 3 | 3.9% |
| I have support from my family members. | 7 | 9.1% |
| I use credit, such as credit cards or personal loans. | 12 | 15.6% |
| I receive unemployment benefits from a seasonal job. | 0 | 0% |
| I receive public assistance such as WIC, SNAP, fuel assistance, etc. | 2 | 2.6% |
| Other | 2 | 2.6% |
| **Total** | **77** | **100%** |

No new themes emerged from respondents explaining "Other."

**Table E18. Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)**

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are enough jobs available in my chosen career field. | 5 (3.0%) | 26 (15.4%) | 46 (27.2%) | 84 (49.7%) | 8 (4.7%) |
| There are enough opportunities for promotion or advancement in my chosen career field. | 8 (4.8%) | 33 (19.6%) | 50 (29.8%) | 65 (38.7%) | 12 (7.1%) |
| There are enough jobs that require my education or experience. | 7 (4.2%) | 26 (15.6%) | 59 (35.3%) | 63 (37.7%) | 12 (7.2%) |
| There are enough employment opportunities for my spouse/partner. | 14 (8.4%) | 49 (29.5%) | 35 (21.1%) | 42 (25.3%) | 26 (15.7%) |
| There are enough career development resources for me. | 3 (1.8%) | 22 (13.1%) | 66 (39.3%) | 49 (29.2%) | 28 (16.7%) |
| There are enough mentoring resources for me. | 3 (1.8%) | 24 (14.3%) | 60 (35.7%) | 49 (29.2%) | 32 (19.0%) |
| Salaries and wages I earn are livable wages for the Cape. | 15 (9.0%) | 48 (28.7%) | 45 (26.9%) | 51 (30.5%) | 8 (4.8%) |
| My employer provides affordable health insurance. | 41 (24.4%) | 63 (37.5%) | 14 (8.3%) | 18 (10.7%) | 32 (19.0%) |
| My employer provides adequate paid time off benefits (e.g., vacation, sick time, etc.) | 52 (31.3%) | 56 (33.7%) | 8 (4.8%) | 17 (10.2%) | 33 (19.9%) |
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | 55 (33.3%) | 51 (30.9%) | 18 (10.9%) | 21 (12.7%) | 20 (12.1%) |
| Other | 4 (10.0%) | 3 (7.5%) | 1 (2.5%) | 2 (5.0%) | 30 (75.0%) |

No new themes emerged from respondents explaining "Other."

**Table E19. Are you interested in starting your own business on Cape Cod?**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 74 | 44.3% |
| No | 93 | 55.7% |
| **Total** | **167** | **100%** |

## Housing on Cape Cod

**Table E20. Which of the following statements best describes your current living arrangement? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| I live alone. | 20 | 11.8% |
| I live with a spouse/partner. | 35 | 20.7% |
| I live with a spouse/partner and children. | 90 | 53.3% |
| I live with my children. | 6 | 3.6% |
| I live with a roommate(s). | 5 | 3.0% |
| I live with my parents (or another family member). | 9 | 5.3% |
| Other | 4 | 2.4% |
| **Total** | 169 | 100% |

Common arrangements reported under "Other" include living with family members such as parents or in-laws and living in a family owned house.

**Table E21. Do you own or rent your primary residence on Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Own | 117 | 68.8% |
| Rent | 34 | 20.0% |
| Other arrangement | 19 | 11.2% |
| **Total** | 170 | 100% |

**Table E22. Likelihood of Home Ownership and Marital Status**

| Marital Status | Do you own or rent your primary residence on Cape Cod? | | | | |
|---|---|---|---|---|---|
| | Own | Rent | Other arrangement | Skipped Question | Total |
| Single, never married | 13 | 12 | 3 | 0 | **28** |
| Married | 93 | 14 | 10 | 0 | **117** |
| Living with partner | 3 | 2 | 3 | 0 | **8** |
| Widowed | 0 | 0 | 0 | 0 | **0** |
| Divorced | 6 | 5 | 2 | 0 | **13** |
| Separated | 0 | 0 | 1 | 0 | **1** |
| Skipped Question | 2 | 1 | 0 | 0 | **3** |
| **Total** | **117** | **34** | **19** | **0** | **170** |

**Table E23. Are you considering buying a single-family house or condominium over the next 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes, a single-family house | 16 | 47.1% |
| Yes, a condominium | 0 | 0.0% |
| No | 18 | 52.9% |
| **Total** | **34** | **100%** |

**Table E24. Approximately how much do you pay each month for your mortgage, including principle, interest, and taxes? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 3 | 2.5% |
| $501 to $750 | 2 | 1.7% |
| $751 to $1,000 | 6 | 5.1% |
| $1,001 to $1,250 | 8 | 6.8% |
| $1,251 to $1,500 | 13 | 11.0% |
| $1,501 to $1,750 | 24 | 20.3% |
| $1,751 to $2,000 | 24 | 20.3% |
| $2,001 to $2,500 | 26 | 22.0% |
| $2,501 to $3,000 | 5 | 4.2% |
| $3,001 to $3,500 | 5 | 4.2% |
| $3,501 to $4,000 | 0 | 0% |
| $4,001 or more | 2 | 1.7% |
| **Total** | **118** | **100%** |

**Table E25. Percent of Gross Income Spent on Mortgage and Rent**

| Measure | Median | Average |
|---|---|---|
| Percent of Gross Income Spent on Mortgage | 26% | 39% |
| Percent of Gross Income Spent on Summer Rent | 23% | 33% |
| Percent of Gross Income Spent on Winter Rent | 23% | 33% |

**Table E26. Approximately how much do you pay in rent each month during the summer (June to August)? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 3 | 8.8% |
| $501 to $750 | 4 | 11.8% |
| $751 to $1,000 | 9 | 26.5% |
| $1,001 to $1,250 | 4 | 11.8% |
| $1,251 to $1,500 | 8 | 23.5% |
| $1,501 to $1,750 | 2 | 5.9% |
| $1,751 to $2,000 | 3 | 8.8% |
| $2,001 to $2,500 | 1 | 2.9% |
| $2,501 to $3,000 | 0 | 0% |
| $3,001 to $3,500 | 0 | 0% |
| $3,501 to $4,000 | 0 | 0% |
| $4,001 or more | 0 | 0% |
| **Total** | **34** | **100%** |

**Table E27. Approximately how much do you pay in rent each month during the winter (September to May)? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $500 | 2 | 5.9% |
| $501 to $750 | 4 | 11.8% |
| $751 to $1,000 | 10 | 29.4% |
| $1,001 to $1,250 | 5 | 14.7% |
| $1,251 to $1,500 | 9 | 26.5% |
| $1,501 to $1,750 | 1 | 2.9% |
| $1,751 to $2,000 | 2 | 5.9% |
| $2,001 to $2,500 | 1 | 2.9% |
| $2,501 to $3,000 | 0 | 0% |
| $3,001 to $3,500 | 0 | 0% |
| $3,501 to $4,000 | 0 | 0% |
| $4,001 or more | 0 | 0% |
| **Total** | **34** | **100%** |

**Table E28. What type of lease do you have? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Year-round lease | 31 | 91.2% |
| Winter rental (September to May or similar) | 3 | 8.8% |
| **Total** | **34** | **100%** |

**Table E29. If there were more rental housing on Cape Cod that is within your budget, what type of unit would you want for year-round living? (Check all that apply.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Studio apartment | 4 | 7.4% |
| 1 bedroom apartment | 6 | 11.1% |
| 2-3 bedroom apartment | 9 | 16.7% |
| 1-2 bedroom house | 17 | 31.5% |
| 3+ bedroom house | 18 | 33.3% |
| Other | 0 | 0% |
| **Total** | **54** | **100%** |

**Table E30. What is your desired location to rent? (Check all that apply.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Within walking distance of village centers | 17 | 27.4% |
| Willing walking distance of commercial zones with employment opportunities | 5 | 8.1% |
| Within walking distance of beaches | 22 | 35.5% |
| Rural neighborhoods | 15 | 24.2% |
| Other | 3 | 4.8% |
| **Total** | **62** | **100%** |

## Services and Community Initiatives on Cape Cod

**Table E31. If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Commuter rail to work off Cape | 107 | 36.8% |
| Commuter bus to work off Cape | 44 | 15.1% |
| Commuter bus to work on Cape | 13 | 4.5% |
| Dedicated bicycle lanes to bike to work on Cape | 28 | 9.6% |
| Trails for recreational biking | 60 | 20.6% |
| None | 39 | 13.4% |
| **Total** | **291** | **100%** |

**Table E32. Tell us how much you agree or disagree that the following services are available to you on Cape Cod. (Check one for each service.)**

| Services | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| Medical Services (for example, hospitals, emergency rooms, clinics, doctors) | 56 (33.3%) | 88 (52.4%) | 16 (9.5%) | 6 (3.6%) | 2 (1.2%) |
| Retail Stores (for example, clothing stores, grocery stores, pharmacies) | 28 (16.7%) | 102 (60.7%) | 26 (15.5%) | 12 (7.1%) | 0 (0%) |
| Consumer Services (for example, dry cleaners, salons) | 39 (23.1%) | 111 (65.7%) | 17 (10.1%) | 2 (1.2%) | 0 (0%) |

**Table E33. Tell us how much you agree or disagree with the following statements about higher education opportunities and the cost of education on Cape Cod. (Chose one for each statement.)**

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are sufficient higher education institutions on Cape Cod. | 3 (1.8%) | 33 (19.5%) | 72 (42.6%) | 51 (30.2%) | 10 (5.9%) |
| There are sufficient technical schools or trade schools on Cape Cod. | 10 (5.9%) | 76 (45.0%) | 41 (24.3%) | 16 (9.5%) | 26 (15.4%) |
| Cape Cod needs a four year college. | 72 (42.9%) | 53 (31.5%) | 18 (10.7%) | 8 (4.8%) | 17 (10.1%) |
| If a four year college were located on Cape Cod, I would attend. | 36 (21.3%) | 32 (18.9%) | 29 (17.2%) | 13 (7.7%) | 59 (34.9%) |
| Additional education or training would help me advance my career. | 48 (28.6%) | 62 (36.9%) | 27 (16.1%) | 13 (7.7%) | 18 (10.7%) |
| I am financially able to pursue additional education opportunities. | 43 (25.4%) | 54 (32.0%) | 35 (20.7%) | 25 (14.8%) | 12 (7.1%) |

**Table E34. Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)**

| Initiative | Very Familiar | Familiar | Not Very Familiar | Not at all Familiar |
|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | 58 (34.3%) | 74 (43.8%) | 23 (13.6%) | 14 (8.3%) |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 29 (17.3%) | 36 (21.4%) | 64 (38.1%) | 39 (23.2%) |
| Regionalization of public school districts | 23 (13.7%) | 44 (26.2%) | 69 (41.1%) | 32 (19.0%) |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | 30 (17.9%) | 57 (33.9%) | 51 (30.4%) | 30 (17.9%) |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 12 (7.1%) | 38 (22.5%) | 63 (37.3%) | 56 (33.1%) |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 4 (2.4%) | 18 (10.7%) | 75 (44.6%) | 71 (42.3%) |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 28 (16.9%) | 57 (34.3%) | 52 (31.3%) | 29 (17.5%) |

**Table E35. Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)**

| Reason for Moving to Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | 48 (28.4%) | 74 (43.8%) | 30 (17.8%) | 14 (8.3%) | 3 (1.8%) |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 66 (39.1%) | 72 (42.6%) | 18 (10.7%) | 4 (2.4%) | 9 (5.3%) |
| Regionalization of public school districts | 30 (17.8%) | 59 (34.9%) | 42 (24.9%) | 9 (5.3%) | 29 (17.2%) |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | 37 (21.9%) | 64 (37.9%) | 42 (24.9%) | 14 (8.3%) | 12 (7.1%) |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 41 (24.3%) | 77 (45.6%) | 24 (14.2%) | 12 (7.1%) | 15 (8.9%) |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 32 (18.9%) | 61 (36.1%) | 50 (29.6%) | 13 (7.7%) | 13 (7.7%) |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 76 (45.0%) | 69 (40.8%) | 16 (9.5%) | 2 (1.2%) | 6 (3.6%) |

**Table E36. In the past 12 months, have you seriously considered moving off Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 89 | 52.4% |
| No | 81 | 47.6% |
| **Total** | **170** | **100%** |

**Table E37. How likely is it that you would move off Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Very likely | 30 | 33.7% |
| Somewhat likely | 40 | 44.9% |
| Not very likely | 17 | 19.1% |
| Not at all likely | 2 | 2.2% |
| **Total** | **89** | **100%** |

**Table E38. Choose the most important reasons that would make it "very likely" or "somewhat likely" that you would move off of Cape Cod. (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I want to be near family or friends who live off Cape Cod. | 16 | 6.6% |
| There are not enough job opportunities on Cape Cod in my field. | 56 | 23.0% |
| Available jobs on Cape Cod do not pay a living wage. | 44 | 18.1% |
| Housing costs are too high on Cape Cod. | 35 | 14.4% |
| There are not enough higher education opportunities on Cape Cod. | 20 | 8.2% |
| There are not enough job training opportunities on Cape Cod. | 14 | 5.8% |
| There are not enough social activates for people my age group. | 29 | 11.9% |
| I do not feel I am part of a community on Cape Cod. | 15 | 6.2% |
| Other | 14 | 5.8% |
| **Total** | **243** | **100%** |

Common themes among "Other" reasons for seriously considering moving off Cape Cod are if the respondent's job moves further off Cape, for better public schools and more activities for children, and to avoid a perceived drug abuse problem on the Cape.

## Other Factors that Affected Working and Living on Cape Cod

The final open ended question on the survey asks respondents to discuss any other factors that have affected their experience or opinion about living and working on Cape Cod that were not covered in the survey. Many of these responses reiterated concerns over

- More job opportunities on Cape Cod
- More better paying job opportunities in Cape Cod.

Additional themes found in the responses address topics that were lightly covered in the survey or not at all. These themes include

- Need for additional commuter train service
- Drug and crime problem on Cape Cod
- Enduring long commutes to enjoy the Cape Cod life style and scenic beauty.

## Demographics

The final set of questions on the survey asked respondents to share some demographic information such as sex, age, ethnicity/race, education, marital status, number of minor and adult dependents, and income.

**Table E39. What is your sex? (Choose one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Female | 83 | 48.8% |
| Male | 87 | 51.2% |
| **Total** | **170** | **100%** |

**Table E40. Age of Respondents calculated from the survey year of 2013 and the open-ended question "In what year were you born?**

| Measure | Average Age (years) |
|---|---|
| Average | 35.4 |
| Median | 35 |

**Table E41. Are you of Hispanic origin? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 3 | 1.8% |
| No | 167 | 98.2% |
| **Total** | **170** | **100%** |

**Table E42. What is your race? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| White | 161 | 95.3% |
| Black or African American | 0 | 0% |
| American Indian or Alaskan Native | 1 | 0.6% |
| Asian | 0 | 0% |
| Native Hawaiian or Other Pacific Islander | 2 | 1.2% |
| Two or more races | 2 | 1.2% |
| Other | 0 | 0% |
| **Total** | **169** | **100%** |

**Table E43. What is the highest level of education you have completed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Some high school | 0 | 0% |
| High school/GED | 7 | 4.1% |
| Some college | 22 | 13.0% |
| 2-year college degree (Associates) | 5 | 3.0% |
| 4-year college degree (BA, BS) | 95 | 56.2% |
| Graduate degree (MS/MA, PhD) | 37 | 21.9% |
| Professional degree (MD, JD) | 3 | 1.8% |
| **Total** | **169** | **100%** |

**Table E44. What is your marital status? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Single, never married | 28 | 16.8% |
| Married | 117 | 70.1% |
| Living with partner | 8 | 4.8% |
| Widowed | 0 | 0.0% |
| Divorced | 13 | 7.8% |
| Separated | 1 | 0.6% |
| **Total** | **167** | **100%** |

**Table E45. How many dependent children under age 18 live with you? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 65 | 38.5% |
| 1 | 32 | 18.9% |
| 2 | 53 | 31.4% |
| 3 | 15 | 8.9% |
| 4 | 3 | 1.8% |
| 5 | 1 | 0.6% |
| 6 | 0 | 0.0% |
| 7 | 0 | 0.0% |
| 8 | 0 | 0.0% |
| More than 8 | 0 | 0.0% |
| **Total** | **169** | **100%** |

**Table E46. How many adult dependent, such as elderly parents, do you have? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 140 | 85.9% |
| 1 | 12 | 7.4% |
| 2 | 8 | 4.9% |
| 3 | 1 | 0.6% |
| 4 | 2 | 1.2% |
| More than 4 | 0 | 0.0% |
| **Total** | **163** | **100%** |

**Table E47. Which range best represents your total personal income before taxes over the last 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $10,000 | 4 | 2.4% |
| $10,000 to $19,999 | 1 | 0.6% |
| $20,000 to $29,999 | 12 | 7.2% |
| $30,000 to $39,999 | 8 | 4.8% |
| $40,000 to $49,999 | 19 | 11.4% |
| $50,000 to $59,999 | 16 | 9.6% |
| $60,000 to $69,999 | 16 | 9.6% |
| $70,000 to $79,999 | 18 | 10.8% |
| $80,000 to $89,999 | 18 | 10.8% |
| $90,000 to $99,999 | 11 | 6.6% |
| $100,000 or greater | 43 | 25.9% |
| **Total** | **166** | **100%** |

# Appendix F: Summary of Results for the Live-off-Work-on Sample

The following are summary tables for the live-off-work-on sample. The Live-off Work-on survey (see Appendix B) was administered to respondents who identified themselves as living off Cape Cod and working on Cape Cod. The live-off-work-on sample of respondents age 25 to 44 was 86 individuals.

## Working on Cape Cod

**Table F1. What is the location of your primary job? (Check one.)**

| Town | Number of Respondents | Percent of Respondents |
|---|---|---|
| Barnstable | 39 | 45.4% |
| Bourne | 11 | 12.8% |
| Brewster | 3 | 3.5% |
| Chatham | 2 | 2.33% |
| Dennis | 3 | 3.5% |
| Eastham | 0 | 0% |
| Falmouth | 9 | 10.5% |
| Harwich | 4 | 4.7% |
| Mashpee | 2 | 2.3% |
| Orleans | 4 | 4.7% |
| Provincetown | 1 | 1.2% |
| Sandwich | 6 | 7.0% |
| Truro | 0 | 0% |
| Wellfleet | 0 | 0% |
| Yarmouth | 2 | 2.3% |
| **Total** | **86** | **100%** |

**Table F2. For your primary job, do you work for an employer or are you self-employed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Work for an employer | 73 | 84.9% |
| Self-employed | 13 | 15.1% |
| **Total** | **86** | **100%** |

**Table F3. What industry do you work in for your primary job? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Agriculture and Forestry | 0 | 0.0% |
| Arts, Entertainment, and Recreation | 2 | 2.3% |
| Construction | 6 | 7.0% |
| Data Processing and Data Storage | 3 | 3.5% |
| Educational Services | 4 | 4.7% |
| Finance and Insurance | 8 | 9.3% |
| Fishing and Hunting | 0 | 0.0% |
| Health Care | 4 | 4.7% |
| Hotel and Food Services | 9 | 10.5% |
| Manufacturing | 2 | 2.3% |
| Non-profits | 11 | 12.8% |
| Office Administration and Support | 2 | 2.3% |
| Professional, Scientific, and Technical Services | 11 | 12.8% |
| Public Administration | 1 | 1.2% |
| Publishing, Broadcasting, and Telecommunications | 3 | 3.5% |
| Real Estate; Rental and Leasing | 2 | 2.3% |
| Retail Trade | 4 | 4.7% |
| Social Assistance | 3 | 3.5% |
| Transportation and Warehousing | 5 | 5.8% |
| Utilities | 0 | 0.0% |
| Waste Management and Remediation Services | 0 | 0.0% |
| Wholesale Trade | 0 | 0.0% |
| Other | 6 | 7.0% |
| **Total** | **86** | **100%** |

**Table F4. Is your primary job in your desired field of employment? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 74 | 87.1% |
| No | 11 | 12.9% |
| **Total** | **85** | **100%** |

**Table F5. Is your primary job full-time or part-time? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Full-Time | 76 | 89.4% |
| Part-Time | 9 | 10.6% |
| **Total** | **85** | **100%** |

**Table F6. Is your primary job seasonal or year-round? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Seasonal | 2 | 2.4% |
| Year-Round | 83 | 97.6% |
| **Total** | **85** | **100%** |

**Table F7. How are you paid at your primary job? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Salary | 60 | 64.5% |
| Hourly | 22 | 23.7% |
| Hourly plus Tips | 1 | 1.1% |
| Commission | 10 | 10.8% |
| Cash | 0 | 0.0% |
| **Total** | **93** | **100%** |

**Table F8. Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)**

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are enough jobs available in my chosen career field. | 9 (10.5%) | 27 (31.4%) | 29 (33.7%) | 16 (18.6%) | 5 (5.8%) |
| There are enough opportunities for promotion or advancement in my chosen career field. | 4 (4.7%) | 26 (30.2%) | 36 (41.9%) | 16 (18.6%) | 4 (4.7%) |
| There are enough jobs that require my education or experience. | 7 (8.1%) | 29 (33.7%) | 31 (36.0%) | 17 (19.8%) | 2 (2.3%) |
| There are enough employment opportunities for my spouse/partner. | 4 (4.7%) | 21 (24.7%) | 24 (28.2%) | 21 (24.7%) | 15 (17.6%) |
| There are enough career development resources for me. | 5 (5.8%) | 28 (32.6%) | 29 (33.7%) | 12 (14.0%) | 12 (14.0%) |
| There are enough mentoring resources for me. | 5 (5.8%) | 28 (32.8%) | 25 (29.1%) | 13 (15.1%) | 15 (17.4%) |
| Salaries and wages I earn are livable wages for the Cape. | 4 (4.7%) | 31 (36.0%) | 25 (29.1%) | 22 (25.6%) | 4 (4.7%) |
| My employer provides affordable health insurance. | 17 (20.2%) | 34 (40.5%) | 14 (16.7%) | 13 (15.5%) | 6 (7.0%) |
| My employer provides adequate paid time off benefits (e.g., vacation, sick time, etc.) | 20 (23.3%) | 49 (57%) | 6 (7.0%) | 6 (7.0%) | 5 (5.8%) |
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | 23 (26.7%) | 42 (48.8%) | 13 (15.1%) | 5 (5.8%) | 3 (3.5%) |
| Other | 2 (14.3%) | 0 (0.0%) | 0 (0.0%) | 1 (7.1%) | 11 (78.6%) |

**Table F9. Are you interested in starting your own business on Cape Cod?**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 15 | 17.4% |
| No | 71 | 82.6% |
| **Total** | **86** | **100%** |

## Living on Cape Cod

**Table F10. In the past 12 months, have you seriously considered moving to Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 34 | 39.5% |
| No | 52 | 60.5% |
| **Total** | **86** | **100%** |

**Table F11. How likely is it that you would move to Cape Cod? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Very likely | 7 | 20.6% |
| Somewhat likely | 10 | 29.4% |
| Not very likely | 16 | 47.1% |
| Not at all likely | 1 | 2.9% |
| **Total** | **34** | **100%** |

**Table F12. Choose the most important reasons that would make you decide to move to Cape Cod. (Check all that apply.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| To be near family and friends who live on Cape Cod | 0 | 0.0% |
| To be a care giver for a family member or friend on Cape Cod | 1 | 2.9% |
| To be near a family member or friend who provides care for a member of my family | 2 | 5.7% |
| To raise my family on Cape Cod | 10 | 28.6% |
| A job offer for you | 6 | 17.1% |
| A job offer for your spouse/partner | 2 | 5.7% |
| Housing options within your budget | 7 | 20.0% |
| Higher education opportunities | 0 | 0.0% |
| Job Training opportunities | 0 | 0.0% |
| Social activities for people in my age group | 2 | 5.7% |
| Community events (e.g., festivals, fundraisers, sporting events, etc.) | 2 | 5.7% |
| Other | 3 | 8.6% |
| **Total** | **35** | **100%** |

## Services and Community Initiatives on Cape Cod

**Table F13. If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| Commuter rail to work off Cape | 43 | 37.4% |
| Commuter bus to work on Cape | 20 | 17.4% |
| Dedicated bicycle lanes to bike to work on Cape | 6 | 5.2% |
| Trails for recreational biking | 21 | 18.3% |
| None | 25 | 21.7% |
| **Total** | **115** | **100%** |

**Table F14. Tell us how much you agree or disagree that the following services are available to you on Cape Cod. (Check one for each service.)**

| Services | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| Medical Services (for example, hospitals, emergency rooms, clinics, doctors) | 14 (16.3%) | 54 (62.8%) | 9 (10.5%) | 0 (0.0%) | 9 (10.5%) |
| Retail Stores (for example, clothing stores, grocery stores, pharmacies) | 11 (12.8%) | 55 (64.0%) | 12 (14.0%) | 6 (7.0%) | 2 (2.3%) |
| Consumer Services (for example, dry cleaners, salons) | 12 (14.0%) | 59 (68.6%) | 7 (8.1%) | 1 (1.2%) | 7 (8.1%) |

**Table F15. Tell us how much you agree or disagree with the following statements about higher education opportunities and the cost of education on Cape Cod. (Chose one for each statement.)**

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There are sufficient higher education institutions on Cape Cod. | 3 (3.5%) | 13 (15.1%) | 39 (45.3%) | 19 (22.1%) | 12 (14.0%) |
| There are sufficient technical schools or trade schools on Cape Cod. | 2 (2.4%) | 36 (42.4%) | 16 (18.6%) | 7 (8.2%) | 24 (28.2%) |
| Cape Cod needs a four year college. | 25 (29.4%) | 36 (42.4%) | 13 (15.3%) | 2 (2.4%) | 9 (10.6%) |
| If a four year college were located on Cape Cod, I would attend. | 6 (7.1%) | 19 (22.6%) | 20 (23.8%) | 10 (11.9%) | 29 (34.5%) |
| Additional education or training would help me advance my career. | 15 (17.4%) | 37 (43.0%) | 16 (18.6%) | 6 (7.0%) | 12 (14.0%) |
| I am financially able to pursue additional education opportunities. | 8 (9.4%) | 28 (32.9%) | 22 (25.6%) | 17 (19.8%) | 10 (11.6%) |

**Table F16. Tell us how familiar you are with the following initiatives under way on Cape Cod. (Check one for each initiative.)**

| Initiative | Very Familiar | Familiar | Not Very Familiar | Not at all Familiar |
|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | 27 (31.4%) | 38 (44.2%) | 10 (11.6%) | 11 (12.8%) |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 14 (16.3%) | 22 (25.6%) | 23 (26.7%) | 27 (31.4%) |
| Regionalization of public school districts | 4 (4.7%) | 19 (22.1%) | 34 (39.5%) | 28 (32.6%) |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | 19 (22.1%) | 28 (32.6%) | 23 (26.7%) | 16 (18.6%) |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 2 (2.3%) | 18 (20.9%) | 31 (36.0%) | 35 (40.7%) |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 3 (3.5%) | 11 (12.8%) | 30 (34.9%) | 42 (48.8%) |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 10 (11.6%) | 29 (33.7%) | 18 (20.9%) | 29 (33.7%) |

**Table F17. Tell us how important the following initiatives are to you regarding the future of Cape Cod. (Check one for each initiative.)**

| Reason for Moving to Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| Extending train service to the Cape during the summer through the CapeFLYER | 26 (30.2%) | 38 (44.2%) | 15 (17.4%) | 7 (8.1%) | 0 (0.0%) |
| OpenCape project to expand high speed Internet access to Cape Cod and the Islands | 24 (27.9%) | 47 (54.7%) | 11 (12.8%) | 4 (4.7%) | 0 (0.0%) |
| Regionalization of public school districts | 5 (6.0%) | 40 (47.6%) | 29 (34.5%) | 10 (11.9%) | 0 (0.0%) |
| Update of flood maps by the Federal Emergency Management Agency (FEMA) | 17 (19.8%) | 37 (43.0%) | 23 (26.7%) | 9 (10.5%) | 0 (0.0%) |
| Establishment of a Bridgewater State University satellite campus in South Yarmouth | 19 (22.4%) | 43 (50.6%) | 15 (17.6%) | 8 (9.4%) | 0 (0.0%) |
| Centralized electronic system to submit applications for permits and licenses for all Cape Cod towns | 11 (12.9%) | 50 (58.8%) | 16 (18.8%) | 8 (9.4%) | 0 (0.0%) |
| Efforts to improve water quality in coastal estuaries and freshwater ponds that are being impacted by nitrogen and phosphorus from septic systems | 38 (44.7%) | 39 (45.9%) | 5 (5.9%) | 3 (3.5%) | 0 (0.0%) |

## Demographics

**Table F18. What is your sex? (Choose one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Female | 51 | 59.3% |
| Male | 35 | 40.7% |
| **Total** | **86** | **100%** |

**Table F19. Age of Respondents calculated from the survey year of 2013 and the open-ended question "In what year were you born?**

| Measure | Average Age (years) |
|---|---|
| Average | 33.4 |
| Median | 33 |

**Table F20. Are you of Hispanic origin? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 2 | 2.3% |
| No | 84 | 97.7% |
| **Total** | **86** | **100%** |

**Table F21. What is your race? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| White | 81 | 94.2% |
| Black or African American | 0 | 0.0% |
| American Indian or Alaskan Native | 0 | 0.0% |
| Asian | 3 | 3.5% |
| Native Hawaiian or Other Pacific Islander | 0 | 0.0% |
| Two or more races | 0 | 0.0% |
| Other | 2 | 2.3% |
| **Total** | **86** | **100%** |

**Table F22. What is the highest level of education you have completed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Some high school | 1 | 1.2% |
| High school/GED | 4 | 4.7% |
| Some college | 8 | 9.3% |
| 2-year college degree (Associates) | 7 | 8.1% |
| 4-year college degree (BA, BS) | 40 | 46.5% |
| Graduate degree (MS/MA, PhD) | 22 | 25.6% |
| Professional degree (MD, JD) | 4 | 4.7% |
| **Total** | **86** | **100%** |

**Table F23. What is your marital status? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Single, never married | 20 | 23.3% |
| Married | 46 | 53.5% |
| Living with partner | 9 | 10.5% |
| Widowed | 1 | 1.2% |
| Divorced | 9 | 10.5% |
| Separated | 1 | 1.2% |
| **Total** | **86** | **100%** |

**Table F24. How many dependent children under age 18 live with you? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 49 | 57.0% |
| 1 | 16 | 18.6% |
| 2 | 13 | 15.1% |
| 3 | 6 | 7.0% |
| 4 | 2 | 2.3% |
| 5 | 0 | 0.0% |
| 6 | 0 | 0.0% |
| 7 | 0 | 0.0% |
| **Total** | **86** | 100% |

**Table F25. How many adult dependent, such as elderly parents, do you have? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 76 | 90.5% |
| 1 | 7 | 8.3% |
| 2 | 1 | 1.2% |
| 3 | 0 | 0.0% |
| 4 | 0 | 0.0% |
| More than 4 | 0 | 0.0% |
| **Total** | **84** | **100%** |

**Table F26. Which range best represents your total personal income before taxes over the last 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $10,000 | 1 | 1.2% |
| $10,000 to $19,999 | 2 | 2.3% |
| $20,000 to $29,999 | 11 | 12.8% |
| $30,000 to $39,999 | 10 | 11.6% |
| $40,000 to $49,999 | 14 | 16.3% |
| $50,000 to $59,999 | 13 | 15.1% |
| $60,000 to $69,999 | 14 | 16.3% |
| $70,000 to $79,999 | 3 | 3.5% |
| $80,000 to $89,999 | 6 | 7.0% |
| $90,000 to $99,999 | 6 | 7.0% |
| $100,000 or greater | 6 | 7.0% |
| **Total** | **86** | **100%** |

# Summary of Results for the Live-off-Work-off Sample

The following are summary tables for the live-off-work-off sample. The Off-Cape survey (see Appendix C) was administered to respondents who identified themselves as both living and working off of Cape Cod. The live-off-work-off sample of respondents age 25 to 44 was 308 individuals.

## Living on Cape Cod

**Table G1. During the last year you lived on Cape Cod, where was your primary residence? (Check one.)**

| Town | Number of Respondents | Percent of Respondents |
|---|---|---|
| Barnstable | 83 | 27.3% |
| Bourne | 9 | 3.0% |
| Brewster | 22 | 7.2% |
| Chatham | 10 | 3.3% |
| Dennis | 23 | 7.6% |
| Eastham | 11 | 3.6% |
| Falmouth | 42 | 13.8% |
| Harwich | 13 | 4.3% |
| Mashpee | 9 | 3.0% |
| Orleans | 11 | 3.6% |
| Provincetown | 1 | 0.3% |
| Sandwich | 28 | 9.2% |
| Truro | 3 | 1.0% |
| Wellfleet | 6 | 2.0% |
| Yarmouth | 33 | 10.9% |
| **Total** | **308** | **100%** |

**Table G2. In what year did you move off the Cape?**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 1988 | 2 | 0.7% |
| 1992 | 1 | 0.3% |
| 1993 | 2 | 0.7% |
| 1994 | 1 | 0.3% |
| 1995 | 4 | 1.3% |
| 1996 | 5 | 1.6% |
| 1997 | 3 | 1.0% |
| 1998 | 2 | 0.6% |
| 1999 | 3 | 1.0% |
| 2000 | 15 | 4.9% |
| 2001 | 9 | 3.0% |
| 2002 | 12 | 3.9% |
| 2003 | 15 | 4.9% |
| 2004 | 21 | 6.9% |
| 2005 | 24 | 7.9% |
| 2006 | 25 | 8.2% |
| 2007 | 22 | 7.2% |
| 2008 | 23 | 7.6% |
| 2009 | 18 | 5.9% |
| 2010 | 29 | 9.5% |
| 2011 | 15 | 4.9% |
| 2012 | 29 | 9.5% |
| 2013 | 24 | 7.9% |
| **Total** | **304** | **100%** |

**Table G3. For the following, rate how important each reason was for you when you decided to move off Cape Cod. (Check one for each reason.)**

| Reason for Moving Off Cape Cod | Very Important | Important | Not Very Important | Not at all Important | N/A or Don't Know |
|---|---|---|---|---|---|
| I worked off Cape and moved to be closer to my job | 111 (37.6%) | 35 (11.9%) | 13 (4.4%) | 35 (11.9%) | 101 (34.2%) |
| I was offered a job off Cape | 147 (49.3%) | 49 (16.4%) | 11 (3.7%) | 25 (8.4%) | 66 (22.1%) |
| My spouse/partner was offered a job off Cape | 51 (17.2%) | 28 (9.5%) | 10 (3.4%) | 37 (12.5%) | 170 (57.4%) |
| I could not develop a professional network on the Cape | 83 (28.1%) | 100 (33.9%) | 29 (9.8%) | 28 (9.5%) | 55 (18.6%) |
| I moved for educational opportunities not available on the Cape | 115 (39.0%) | 50 (16.9%) | 22 (7.5%) | 32 (10.8%) | 76 (25.8%) |
| I moved to be near family or friends who live off Cape | 31 (10.7%) | 42 (14.5%) | 27 (9.3%) | 83 (28.6%) | 107 (36.9%) |
| I was no longer needed to be a care giver for a family member or friend on the Cape | 2 (0.7%) | 6 (1.9%) | 10 (3.5%) | 65 (22.5%) | 206 (71.3%) |
| I moved to be near a family member or friend who provides care for a member of my family | 2 (0.7%) | 2 (0.7%) | 9 (3.1%) | 68 (23.5%) | 208 (72.0%) |
| I could not develop a social network on the Cape | 25 (8.5%) | 70 (23.9%) | 49 (16.7%) | 72 (24.6%) | 77 (26.3%) |
| I felt I was not part of a community on the Cape | 19 (6.5%) | 53 (18.2%) | 46 (15.8%) | 87 (29.8%) | 87 (29.8%) |
| There were too few entertainment or social opportunities for my age group | 59 (20.6%) | 94 (32.9%) | 36 (12.6%) | 51 (17.8%) | 46 (16.1%) |
| Other (please explain) | 63 (39.1%) | 16 (9.9%) | 3 (1.9%) | 9 (5.9%) | 70 (43.5%) |

Many respondents who chose "Other" reiterated their frustration over the lack of jobs, lack of job advancement opportunities, high cost of housing, and high cost of living. Additional themes among these explanations include moving off Cape Cod to

- Pursue higher education
- Avoid increasing drug and crime problems
- Pursue a broader world perspective for the respondents or their children
- Pursue a different social circle, including for purposes of dating.

## Working on Cape Cod

**Table G4. What was the location of your primary job? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Barnstable | 81 | 26.6% |
| Bourne | 7 | 2.3% |
| Brewster | 15 | 4.9% |
| Chatham | 16 | 5.3% |
| Dennis | 16 | 5.3% |
| Eastham | 5 | 1.6% |
| Falmouth | 32 | 10.5% |
| Harwich | 6 | 2.0% |
| Mashpee | 11 | 3.6% |
| Orleans | 18 | 5.9% |
| Provincetown | 2 | 0.7% |
| Sandwich | 10 | 3.3% |
| Truro | 3 | 1.0% |
| Wellfleet | 6 | 2.0% |
| Yarmouth | 24 | 7.9% |
| Off Cape Cod | 46 | 15.1% |
| Off Cape Cod, but I telecommute 2 or more days per week | 6 | 2.0% |
| **Total** | **304** | **100%** |

**Table G5. For your primary job, did you work for an employer or are you self-employed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Work for an employer | 280 | 92.4% |
| Self-employed | 23 | 7.6% |
| **Total** | **303** | **100%** |

**Table G6. What industry did you work in for your primary job? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Agriculture and Forestry | 6 | 2.0% |
| Arts, Entertainment, and Recreation | 15 | 4.9% |
| Construction | 12 | 3.9% |
| Data Processing and Data Storage | 1 | 0.3% |
| Educational Services | 19 | 6.2% |
| Finance and Insurance | 16 | 5.2% |
| Fishing and Hunting | 3 | 1.0% |
| Health Care | 13 | 4.3% |
| Hotel and Food Services | 85 | 27.9% |
| Manufacturing | 2 | 0.7% |
| Non-profits | 13 | 4.3% |
| Office Administration and Support | 5 | 1.6% |
| Professional, Scientific, and Technical Services | 33 | 10.8% |
| Public Administration | 4 | 1.3% |
| Publishing, Broadcasting, and Telecommunications | 6 | 2.0% |
| Real Estate; Rental and Leasing | 1 | 0.3% |
| Retail Trade | 34 | 11.1% |
| Social Assistance | 2 | 0.7% |
| Transportation and Warehousing | 7 | 2.3% |
| Utilities | 0 | 0.0% |
| Waste Management and Remediation Services | 0 | 0.0% |
| Wholesale Trade | 1 | 0.3% |
| Other | 27 | 8.9% |
| **Total** | **305** | **100%** |

**Table G7. Was your primary job in your desired field of employment? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 139 | 45.6% |
| No | 166 | 54.4% |
| **Total** | **305** | **100%** |

**Table G8. Was your primary job seasonal or year-round? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Seasonal | 114 | 37.3% |
| Year-Round | 192 | 62.7% |
| **Total** | **306** | **100%** |

**Table G9. Was your primary job full-time or part-time? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Full-Time | 225 | 74.3% |
| Part-Time | 78 | 25.7% |
| **Total** | **303** | **100%** |

**Table G10. Tell us how much you agree or disagree with the following statements about working on Cape Cod. (Check one for each statement.)**

| Statement | Strongly Agree | Agree | Disagree | Strongly Disagree | N/A or Don't Know |
|---|---|---|---|---|---|
| There were enough jobs available in my chosen career field. | 18 (5.9%) | 49 (16.0%) | 85 (27.7%) | 141 (45.9%) | 14 (4.6%) |
| There were enough opportunities for promotion or advancement in my chosen career field. | 8 (2.6%) | 37 (12.1%) | 91 (29.8%) | 140 (45.9%) | 29 (9.5%) |
| There were enough jobs that require my education or experience. | 7 (2.3%) | 47 (15.4%) | 102 (33.3%) | 134 (43.5%) | 16 (5.2%) |
| There were enough employment opportunities for my spouse/partner. | 4 (1.3%) | 29 (9.6%) | 49 (16.2%) | 77 (25.4%) | 144 (47.5%) |
| There were enough career development resources for me [a]. | 5 (1.6%) | 30 (9.9%) | 120 (39.5%) | 107 (35.2%) | 42 (13.8%) |
| There were enough mentoring resources for me. | 5 (1.7%) | 47 (15.6%) | 92 (30.5%) | 93 (30.8%) | 65 (21.5%) |
| Salaries and wages I earned were livable wages for the Cape [a]. | 10 (3.3%) | 65 (21.3%) | 84 (27.5%) | 124 (40.7%) | 22 (7.2%) |
| My employer provided affordable health insurance. | 27 (9.0%) | 73 (24.3%) | 46 (15.3%) | 71 (23.7%) | 83 (27.7%) |
| My employer provided adequate paid time off benefits (e.g., vacation, sick time, etc.) | 28 (9.2%) | 94 (31.0%) | 46 (15.2%) | 66 (21.8%) | 69 (22.8%) |
| I have flexibility in the work place (e.g., hours, telecommuting, etc.) | 25 (8.3%) | 103 (34.2%) | 48 (15.9%) | 73 (24.3%) | 52 (17.3%) |
| Other | 8 (8.8%) | 2 (2.2%) | 1 (1.1%) | 3 (3.3%) | 77 (84.6%) |

No new themes emerged from respondents regarding explanations for "Other."

**Table G11. Choose the most important reasons that made you decide to move off Cape Cod? (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| I wanted to be near family or friends who live off Cape Cod | 53 | 6.5% |
| There were not enough job opportunities on Cape Cod in my field | 215 | 26.3% |
| Available jobs on Cape Cod did not pay a living wage | 114 | 13.9% |
| Housing costs were too high on Cape Cod | 108 | 13.2% |
| There were not enough higher education opportunities on Cape Cod | 116 | 14.2% |
| There were not enough job training opportunities on Cape Cod | 36 | 4.4% |
| There were not enough social activities for people in my age group | 115 | 14.1% |
| I did not feel I was part of a community | 32 | 3.9% |
| Other | 29 | 3.5% |
| **Total** | **818** | **100%** |

Aside from job and cost of living related reasons, explanations for "Other" revealed the following themes:

- Moving to broaden one's social circle, including dating
- Moving to access more cultural and social activities
- Moving for educational opportunities.

**Table G12. Choose the most important reasons that would cause you to move back to Cape Cod. (Check all that apply.)**

| Response | Number of Responses | Percent of Responses |
|---|---|---|
| To be near family and friends who live on Cape Cod | 208 | 18.1% |
| To be a care giver for a family member or friend on Cape Cod | 90 | 7.8% |
| To be near a family member or friend who provides care for a member of my family | 26 | 2.3% |
| To raise my family on Cape Cod | 152 | 13.2% |
| A job offer for you | 187 | 16.2% |
| A job offer for your spouse/partner | 121 | 10.5% |
| Housing options within your budget | 126 | 10.9% |
| Higher education opportunities | 38 | 3.3% |
| Job training opportunities | 26 | 2.3% |
| Social activities for people in my age group | 82 | 7.1% |
| Community events (e.g. festivals, fundraisers, sporting events, etc.) | 73 | 6.3% |
| Other | 22 | 1.9% |
| **Total** | **1,151** | **100%** |

Among respondents who chose "Other," many would not consider moving back to Cape Cod. Others said they would move if they had a high paying job and/or could find an affordable home. Respondents offered retirement as another reason for moving back to Cape Cod and several said they still enjoy summer vacations on the Cape.

## Other Factors that Affected Working and Living on Cape Cod

The last question on the off-Cape survey asks respondents to discuss any other factors that have affected their experience or opinion about living and working on Cape Cod that were not covered in the survey. Many respondents emphasized their opinions concerning the lack of jobs that pay living wages and high cost of housing and high cost of living. Some respondents described their fondness for Cape Cod's scenic beauty and lifestyle and would like to move back, but could not give up their current jobs, salary, or the opportunity for advancement. Some respondents expressed that they would like to raise their children on the Cape, but are concerned over the lack of funding for public schools and the increasing drug and alcohol abuse problems, and rising crime rates.

## Demographics

**Table G13. What is your sex? (Choose one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Female | 201 | 65.7% |
| Male | 105 | 34.3% |
| **Total** | **306** | **100%** |

**Table G14. Age of Respondents calculated from the survey year of 2013 and the open-ended question "In what year were you born?**

| Measure | Average Age (years) |
|---|---|
| Average | 31.9 |
| Median | 31 |

**Table G15. Are you of Hispanic origin? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Yes | 5 | 1.6% |
| No | 299 | 98.4% |
| **Total** | **304** | **100%** |

**Table G16. What is your race? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| White | 301 | 97.7% |
| Black or African American | 2 | 0.6% |
| American Indian or Alaskan Native | 0 | 0.0% |
| Asian | 0 | 0.0% |
| Native Hawaiian or Other Pacific Islander | 0 | 0.0% |
| Two or more races | 4 | 1.3% |
| Other | 1 | 0.6% |
| **Total** | **301** | **100%** |

**Table G17. What is the highest level of education you have completed? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Some high school | 0 | 0.0% |
| High school/GED | 4 | 1.3% |
| Some college | 22 | 7.1% |
| 2-year college degree (Associates) | 11 | 3.6% |
| 4-year college degree (BA, BS) | 167 | 54.2% |
| Graduate degree (MS/MA, PhD) | 91 | 29.5% |
| Professional degree (MD, JD) | 13 | 4.2% |
| **Total** | **308** | **100%** |

**Table G18. What is your marital status? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Single, never married | 126 | 41.2% |
| Married | 137 | 44.8% |
| Living with partner | 32 | 10.5% |
| Widowed | 1 | 0.3% |
| Divorced | 8 | 2.6% |
| Separated | 2 | 0.7% |
| **Total** | **306** | **100%** |

**Table G19. How many dependent children under age 18 live with you? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 202 | 66.2% |
| 1 | 42 | 13.8% |
| 2 | 48 | 15.7% |
| 3 | 10 | 3.3% |
| 4 | 2 | 0.7% |
| 5 | 1 | 0.3% |
| 6 | 0 | 0.0% |
| 7 | 0 | 0.0% |
| **Total** | **305** | **100%** |

**Table G20. How many adult dependent, such as elderly parents, do you have? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| 0 | 276 | 92.9% |
| 1 | 12 | 4.0% |
| 2 | 9 | 3.0% |
| 3 | 0 | 0.0% |
| 4 | 0 | 0.0% |
| More than 4 | 0 | 0.0% |
| **Total** | **297** | **100%** |

**Table G21. Which range best represents your total personal income before taxes over the last 12 months? (Check one.)**

| Response | Number of Respondents | Percent of Respondents |
|---|---|---|
| Less than $10,000 | 8 | 2.6% |
| $10,000 to $19,999 | 17 | 5.6% |
| $20,000 to $29,999 | 22 | 7.2% |
| $30,000 to $39,999 | 37 | 12.1% |
| $40,000 to $49,999 | 36 | 11.8% |
| $50,000 to $59,999 | 29 | 9.5% |
| $60,000 to $69,999 | 28 | 9.2% |
| $70,000 to $79,999 | 23 | 7.5% |
| $80,000 to $89,999 | 24 | 7.8% |
| $90,000 to $99,999 | 16 | 5.2% |
| $100,000 or greater | 66 | 21.6% |
| **Total** | **306** | **100%** |

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