

# YARMOUTH COMPREHENSIVE PLAN

## CHAPTER 10

### ECONOMIC DEVELOPMENT - ANALYSIS AND PLAN

#### THE EXECUTIVE SUMMARY

September 1999

Full Report Prepared by:  
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Development Dept. and the  
Yarmouth Local Planning Committee

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#### I. Setting the Scene

The economic recession of the late 1980's significantly impacted Yarmouth's economy and that of the region. While both have emerged from the recession, intensified global competition and downsizing have increased concerns about the creation of good jobs throughout Cape Cod<sup>1</sup>.

Despite a record high job rate in Yarmouth, and a job growth rate that exceeds the state average in several employment fields, economic data indicate that Yarmouth's economy is strongly linked to the tourism and retirement sectors and would benefit from diversification. The seasonal economy produces seasonal swings in the unemployment rate and is a major concern to the community. Additional concerns about the local economy include the number of jobs that do not pay well enough to support a household. Residents have expressed the need for good jobs at good wages in Yarmouth.

The purpose of the Economic Development chapter is to examine these as well as other local economic development issues, including Yarmouth's economic profile data, economic development strengths and weaknesses, and common goals and objectives, and incorporate them into a future plan for the town that promotes sustainable economic growth and development. The town's economic development efforts should enhance its environmental, cultural, and historic strengths, and provide a diversity of employment opportunities for Yarmouth residents.

#### II. Coordination with Yarmouth's Comprehensive Plan

The Economic Development element serves as Chapter 6 of Yarmouth's Comprehensive Plan, now in progress. The Comprehensive Plan serves as the Town's response to the Cape Cod Regional Policy Plan and will guide planning and growth decisions for the Town. This chapter is an important one, as the town's economic development efforts affect local employment opportunities, land use, municipal finances, and environmental conditions.

#### III. Contents of this summary

This document, the "executive summary" of the Economic Development chapter, contains excerpts from and a synopsis of the *Town of Yarmouth Economic Development Plan*, including economic development goals, issues, analyses, and strategies.<sup>2</sup> The "long summary" document presents these items in greater detail and contains the chapter's technical data, background, and implementation items.

<sup>1</sup>Cape Cod Commission, 1996 Regional Policy Plan.

<sup>2</sup> The Town hired Karl F. Seidman Consulting Services to prepare its economic development plan. This document includes excerpts of that plan; the full consultant's report is published in the "long summary" document.

#### IV. Goals of the Economic Development Chapter

1. GOAL: To promote businesses that are compatible with Cape Cod's environmental, cultural, and economic strengths in order to ensure balanced economic development.
2. GOAL: To locate development so as to preserve Yarmouth's environment and cultural heritage, minimize adverse impacts, and enhance quality of life.
3. GOAL: To encourage creation and diversification of year-round employment opportunities.
4. GOAL: To improve the quality and attractiveness of new and existing development in Yarmouth, especially along the Route 28 corridor.
5. GOAL: To better address the labor force needs of local employers while also providing good employment opportunities that help retain residents and young adults.
6. GOAL: To strengthen existing tourism related businesses through upgrading facilities, diversification, and an extended season.

#### V. Yarmouth's Economic Profile

Yarmouth's economy has performed well in the last decade, paralleling the Cape's overall economic growth, although it was hit hard by the last economic recession (as was Massachusetts and Barnstable County). The Town lost 9% of its economic base between 1988 and 1991, but has grown consistently since then, like most of the Cape. In 1997, the town's total employment (at 7,965) exceeded its pre-recession peak for the first time.

#### Employment Base

The consultant's report indicates that Yarmouth has a smaller service sector and more diversified economy than other town, in the Barnstable-Yarmouth Metropolitan Statistical Area (MSA).<sup>3</sup> Retail and services are Yarmouth's largest employment sectors, with 32% and 24% of 1997 employment, respectively. Two other sectors, transportation, communications, and public utilities (TCPU), and finance, insurance, and real estate (FIRE) accounted for 23% of Yarmouth's 1997 jobs, while they accounted for only 5% of the MSA. Among the report's other findings are:

- Yarmouth is more dependent on tourism than other surrounding communities. Lodging, restaurants, and real estate account for 27% of its jobs, compared to 19% of the MSA.
- Employment in Yarmouth is highly seasonal, with total employment levels about one third higher in July than in January.
- Yarmouth's average annual wages, at \$25,789, were 4% higher than average MSA wages but 28% below the state average annual wage of \$35,724.
- Yarmouth is under represented in several fast growing service industries including business services, amusement and recreation, legal services, and engineering and management services, where it employment shares are about half the MSA level. These are also higher paying service industries with 1997 annual wages 25% to 50% above the average for private sector employment.

#### Growth Trends

While Yarmouth's overall job growth from 1987 to 1996 closely parallels Barnstable County, and to a lesser extent Massachusetts, its growth in individual sectors varies from state and county trends.

- Yarmouth's employment growth in TCPU and FIRE far outpaced the other areas. TCPU grew at twice the national rate and over five times the state and county rates, while FIRE grew 60% compared to 8% national growth and level state and county employment growth.
- Yarmouth's service sector jobs declined more steeply during the last recession than either the state or

<sup>3</sup> The Barnstable-Yarmouth Metropolitan Statistical Area consists of the following ten towns: Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans, Sandwich, and Yarmouth.

- county and has rebound more slowly. However, service sector jobs have increased strongly since 1994, exceeding the 1988 peak rate by 6% in 1996.
- Yarmouth's retail sector has fared poorly with jobs declining over 30% from 1988 to 1991, compared to less than a 10% loss for the state and county. The town's retail recovery has lagged behind the state and county reaching only 85% of its 1987 employment by 1996.

To identify Yarmouth's industry concentrations and under-represented sectors, location quotients (LQ) were calculated that compare Yarmouth's percent of total employment in a specific industry to that industry's share of total MSA employment. A LQ well above 1 indicates an industry concentration while a value below 1 indicates an under-represented industry. The location quotients (see Table 1) identified several important differences between Yarmouth and the Barnstable-Yarmouth MSA.

The service sector is the major source of regional job growth, growing 50% faster than the overall economy and accounting for almost 60% of the MSA's net new private sector jobs. Retail was the second largest source of growth, adding over 1600 new jobs in the MSA, but growing at a slower pace than the overall economy.

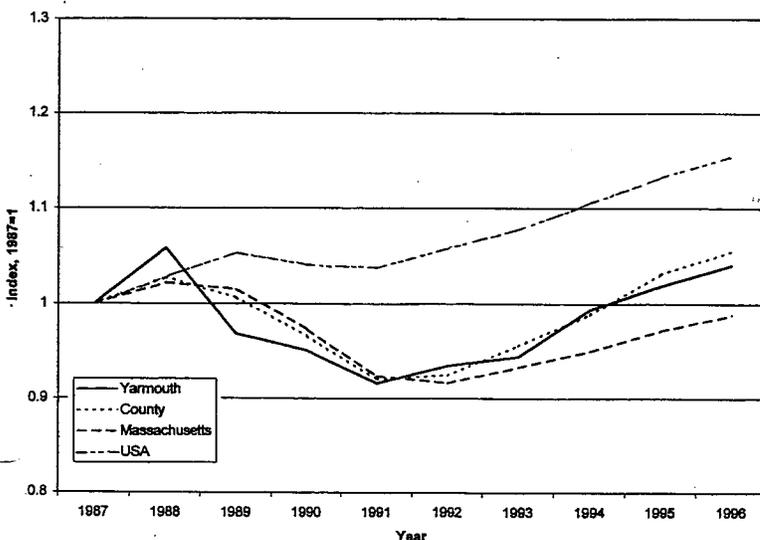
While Yarmouth's service sector grew at the same rate as the MSA, its major growth industries differ from those of the MSA, and the town is not sharing the regional growth in key sectors such as health, recreation, and business services:

- Health services, the region's largest service industry, added the most new jobs for the MSA where it grew at 3 times Yarmouth's rate.
- Amusement and recreation grew by 38% in the MSA, adding over 300 jobs, but is a very small and stable industry for Yarmouth.
- Auto repair and related services grew over three times faster in the MSA than in Yarmouth.

Table 1

Industry	Location Quotient
Electric, Gas, and Sanitary Services	4.77
Real Estate	2.72
Communications	2.71
Transportation, Communications and Utilities (TCPU)	2.33
Miscellaneous Repair Services	2.33
Membership Organizations	2.22
Finance, Insurance and Real Estate (FIRE)	1.86
Depository Institutions	1.85
Food Stores	1.67
Hotels and Lodging	1.39
Special Trades	1.27
Miscellaneous Retail	1.24
Eating and Drinking Establishments	1.20
Total Government	1.03
Retail Trade	1.00
Construction	0.98
Social Services	0.91
Personal Services	0.85
Wholesale Trade	0.71
Services	0.71
Building Materials and Garden Supplies	0.61
Insurance Agents & Brokers	0.61
Auto Repair and Parking	0.57
Legal Services	0.57
Engineering and Management Services	0.55
Health Services	0.53
Amusement and Recreation	0.47
Business Services	0.44
Manufacturing	0.43
Auto Dealers and Service	0.43
Furniture and Home Furnishings	0.36

Chart 1  
Total Employment, 1987 to 1996



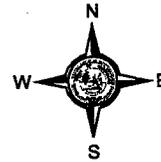
**Economic Development Implications**

The Consultant noted the following implications based on his analysis of the town's economic profile and growth trends:

- Tourism, as Yarmouth's most important economic cluster (accounting for at least 1/3 of jobs), must be a central economic development focus, even as the town seeks to diversify its economic base.
- While recent trends suggest that growth in Yarmouth's utility base is declining, the town should work to retain this crucial job base given its high wage levels.
- Yarmouth should seek to diversify its service base and gain a greater share of key regional growth industries such as health care, business services, engineering and management services and legal services.
- Yarmouth should also build on its banking and real estate concentration.

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7. Asset - Excellent recreational resources that include many attractive beaches, golf courses, and numerous conservation areas.

8. Asset - Existing historic areas in South Yarmouth and Yarmouthport.

9. Asset - Large concentration of lodging facilities that address diverse visitor needs, including resort motels, cottages, and "bed & breakfasts."

10. Asset - Vacant or under utilized development sites at key locations.

11. Asset - Town established development incentives, such as 8 EOAs and the R.O.A.D. zoning overlay district.

12. Action Item - Exit 7 area is the B3 zoning district's most important development opportunity; it has the potential for a technology or professional business park by combining multiple underdeveloped sites.

13. Action Item - Create a new business park with a new zoning district with a specialized set of uses targeted for technology-based business and professional offices.

14. Establish smaller EOAs, with standards and suitable projects for tax incentives within the 8 existing EOAs.

15. Action Item - Amend the Zoning Bylaw to allow TDR within targeted districts (Route 28 "Activity Centers" would be an option for receiving areas).

16. Action Item - Pursue several redevelopment projects with the potential for substantial economic benefits.

17. Action Item - Explore the creation of several marine districts at appropriate locations.

1. Goal - Improve the quality and attractiveness of new and existing developments in Yarmouth, especially along the Route 28 Corridor.

2. Goal - To better address the labor force needs of local employers, while also providing good employment opportunities that help retain residents and young adults.

3. Goal - To strengthen existing tourism related businesses through up-grading facilities, diversification, and an extended season.

4. Goal - To encourage the creation and diversification of year-round employment opportunities.

5. Goal - To locate development so as to preserve Yarmouth's environment and cultural heritage, minimize adverse impacts and enhance the quality of life.

6. Goal - To promote businesses that are compatible with Cape Cod's environmental, cultural, and economic strengths in order to ensure balanced economic development.

22. Action Item - Place an economic development section on the Town's website that provides information for existing businesses seeking assistance, to persons interested in starting a new business, or to an outside firm seeking to locate in Yarmouth.

21. Action Item - Christmas Tree Shop warehouse - great re-use opportunity - dissection centers subdividing into small units; multi-tenant business center.

20. - Action Item - Old Townhouse Row development potential constrained by amount and type of surrounding development, small amounts of vacant property in non-contiguous locations.

19. Action Item - Create a Yarmouth Village Center District as an attractive visitor destination, with shops and historic buildings.

18. Action Item - As part of the "Tourism Plan," develop the former drive-in site on Route 28 into a visitor, recreation, and art destination.

23. Strategy 1 - Formulate a "Yarmouth Tourism Plan"- Include plans for maintaining and improving key recreation areas.

24. Strategy 2 - Create a new business parks with 2 new zoning districts including specialized sets of uses targeted for technology-based business and professional offices.

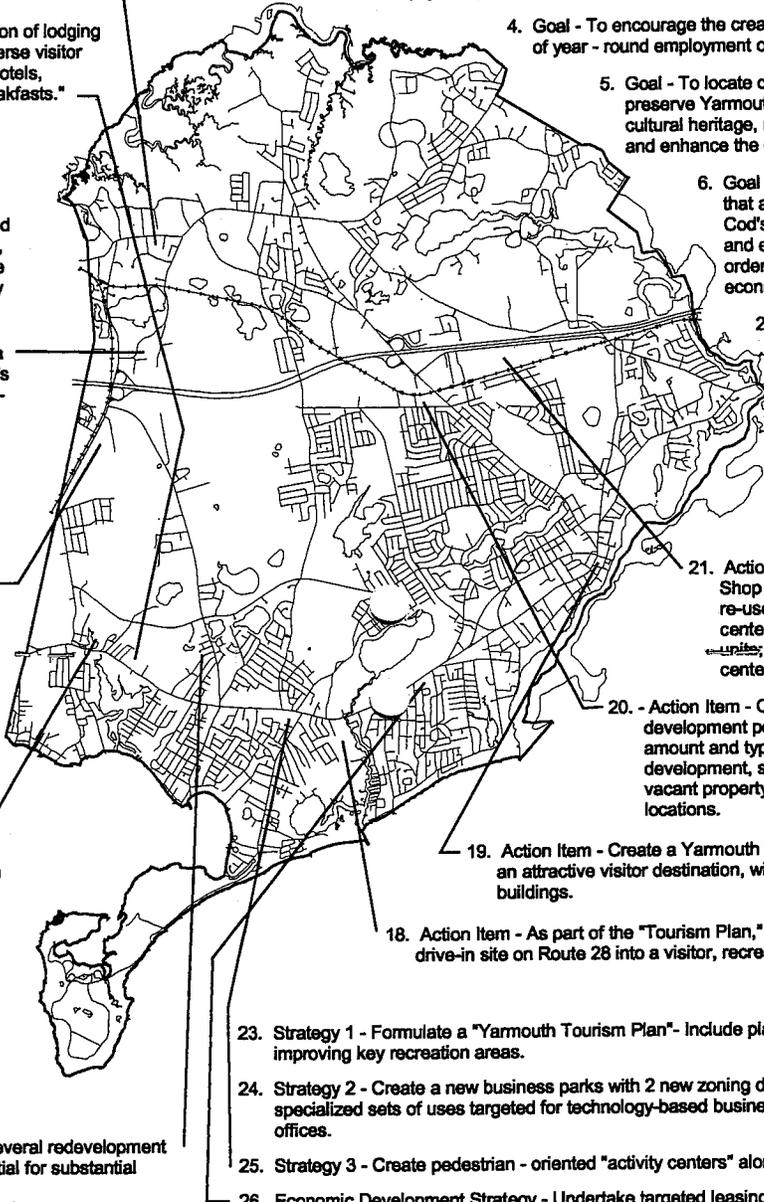
25. Strategy 3 - Create pedestrian-oriented "activity centers" along Route 28.

26. Economic Development Strategy - Undertake targeted leasing at strip centers to create specialized niche retail destinations.

27. Economic Development Strategy - Expand the availability of development sites for technology and professional businesses. Identify potential sites, define project areas, collect data about them:

Notes:

1. Total number of policy and action items in the Long Summary text =
2. Number of those proposals shown above = 27
3. For a description of each item, see the Executive Summary or the Long Summary.
4. Most of the items shown on this map are those with areal implications. The Long Summary document contains a number of additional proposals.



**TOWN OF YARMOUTH**  
**COMPREHENSIVE PLAN**  
 ECONOMIC DEVELOPMENT  
 Chapter 10



## **VI. Economic Development Assets and Obstacles**

Yarmouth's key economic development assets were identified through focus groups, interviews, and economic analysis. These assets provide a foundation for the economic development plan since the town will be most successful with development plans that build on existing advantages and strengths. Critical economic development assets and advantages include:

- A central mid-Cape location with good access to Route 6.
- Proximity to Hyannis with its medical and business center, airport and transportation services, and tourist services.
- Excellent recreational resources that include many attractive beaches, four golf courses, and numerous conservation areas.
- Historic areas in South Yarmouth and Yarmouthport.
- A large concentration of lodging facilities that address diverse visitor needs including resorts, motels, cottages, and bed and breakfasts.
- A concentration of financial service, transportation, and utility businesses.
- Growing regional economic development capacity among multiple organizations, including the Cape Cod Chamber, Cape Cod Community College, the Cape Cod Technology Council, and the Barnstable County economic Council.
- Professional economic development staff within town government and Yarmouth Chamber of Commerce.
- Active volunteer commitment and involvement among town residents and businesses.
- Vacant or under-utilized development sites at key locations.
- Town established development incentives.

The focus groups and individual interviews also raised several perceived obstacles to economic development in Yarmouth. While some of the obstacles reflect economic and market conditions and extend beyond the town's control, or are best addressed at the state and regional level, the town should focus on mitigating the obstacles that fall within its domain. These key local obstacles for Yarmouth's economic development include:

- Fostering a shared vision for the future of Yarmouth's tourism industry and major redevelopment opportunities.
- Expanding the availability of attractive development sites.
- Improving local development regulations and the permitting process.
- Creating clear and stronger guidelines and incentives for priority redevelopment efforts.

## **VII. Development Opportunities For Vacant Property**

Yarmouth's commercial and industrial development is concentrated in two areas: the Route 28 corridor, zoned primarily B2, and the B3 Business zone, which parallels Route 6.

**Route 28:** While many vacant or under utilized sites exist on Route 28 ( and near Route 28, including Old Main St. and the Super Stop and Shop Plaza on Long Pond Road), most are small infill sites that offer little opportunity for significant economic development impact.

Despite these limitations, three opportunities with greater development impacts exist on the Route 28 corridor:

- Creating pedestrian oriented Village Centers along Route 28. The "Old South Yarmouth" area represents the best opportunity for a village center development.
- Developing the former drive-in site at 624 Route 28 into a recreation area and visitor destination.
- Undertaking targeted leasing at strip centers to create specialized niche retail destinations. Bochs Village on Route 28 in South Yarmouth is one center with the potential to create a unique retail center, perhaps around arts and crafts businesses.

**B-3 Corridor:** This district has Yarmouth's largest amount of undeveloped land zoned for business use. The vacant properties are largely concentrated along White's Path, on Old Town House Road., and near the Exit 7 interchange with Route 6.

- The Christmas Tree Shops warehouse (on White's Path) is the town's greatest building reuse opportunity. If continued use as a distribution center is not feasible, then reuse is likely to require sub-division into small units to address space needs of Cape businesses. The warehouse could service as a multi tenant business center, perhaps with some space used as a small business incubator for early stage firms.
- The Exit 7 area provides the B-3 district's most important development opportunity with the potential for a technology and professional business park by combining multiple undeveloped sites on Summer St, Enterprise Road, and Corporation Roads with a few small modestly developed parcels. This area includes 29.5 acres of undeveloped land with another 2 acres in seven lots with small industrial buildings. The site's close proximity to Route 6 and concentration of undeveloped land make it Yarmouth's best site for attracting the Cape's growing technology-based and professional service businesses.

### **VIII. Economic Development Plan: Recommended Strategies**

The recommended economic development plan includes five strategies that build on key economic development opportunities while addressing obstacles that constrain further development in Yarmouth. Furthermore, the plan focuses on the issues that can be effectively addressed through policies and projects at the local government level. Thus the plan emphasizes local initiatives to create a stronger community consensus on critical issues, advance significant real estate development opportunities, improve the local environment and regulatory process for business, and strengthen incentives and guidelines for priority development areas and projects.

These five economic development strategies are recommended to address the various opportunities and development obstacles:

**1. Formulate a Yarmouth tourism plan to create a conscious vision on how to position the town's tourism industry for the 21<sup>st</sup> century.** This plan should address critical issues facing the town's tourism businesses, including but not limited to:

- Updating of tourist accommodations and facilities.
- Expanding the shoulder season.
- creating appropriate new vision activities
- exploring the creation of marina districts
- strategically investing a portion of the town's room occupancy tax to advance the plan.

**2. Create a new business park adjacent to Exit 7 to expand the availability of development sites for technology.** The site's excellent access to Route 6 and existing B3 zoning make it attractive for new business development, especially for technology-based businesses and professional offices. After initial project feasibility and development analysis has been conducted (and development of the park proceeds), there are several steps the town and any future development entity could take to make the site more desirable and to ensure the quality of the site including:

- Creating a new zoning district for the park with a specialized set of permitted uses targeted to technology-based businesses and professional offices.
- Considering pre-permitting with the Cape Cod Commission to reduce the long delay businesses or developers would face at the site.
- Establishing development covenants for the site that ensure the quality of development with the business park.

**3. Plan for and establish a Village Center Redevelopment District in Old South Yarmouth to create an attractive, pedestrian-oriented public and business center.** Such a project could achieve two objectives:

- Establishing a public center or "Main St." area for town residents, which Yarmouth currently lacks.
- Creating an attractive visitor destination with shops, restaurants, waterfront access, and historic buildings.

Given current land use patterns and infrastructure, this project represents a long-term redevelopment opportunity that may take 5-10 years to fully implement. A critical first step is to prepare a Master Plan for the

area, which itself will require significant funding and the town's commitment to an extensive planning process.

**4. Strengthen Yarmouth's environment and civic infrastructure for businesses.** To create this more supportive business environment, work is needed on four fronts:

- Improving the Town's zoning and permitting process.
- Expanding incentives for building redevelopment and reuse.
- Expanding outreach to businesses and residents.
- Creating an economic development page on the town's web site.

**5. Help link businesses and residents to regional resources that support business growth and improve residents' access to jobs.** With expanded regional economic development programs, new state and federal funding for workforce development, and new leadership at Cape Cod Community College, Yarmouth businesses and residents have more resources available to help them address economic development and employment needs. The town government should work with the Regional employment Board (REB) to establish a Yarmouth location linked to the Hyannis Career Center to provide residents access to job listings and information in education and training opportunities.

The town can also take action to expand local business awareness of economic development resources:

- Work with the Yarmouth Chamber and Cape and Islands Community Development, Inc. to market lending and technical assistance services to businesses.
- Prepare, and periodically update, a simple summary of local, regional, and state business development resources and encourage businesses to utilize the Economic Development Coordinator for referrals to the appropriate program.
- Create linkages to key regional economic and workforce development agencies on a new economic development section of Yarmouth's web page.

#### **IX. Summary**

The Economic Development chapter is an important part of the Comprehensive Plan, as the town's future economic development plans will have significant impact on the quality of life in Yarmouth, including job opportunities, land use, and municipal finances. Yarmouth's economic development efforts should enhance the town's environmental, cultural, and historic strengths and provide a diversity of employment opportunities for its residents. Together with the various other chapters of the Plan, the Economic Development chapter will help guide Yarmouth's future development and promote sustainable growth and development for the town.

# **YARMOUTH COMPREHENSIVE PLAN**

## **CHAPTER 10**

### **ECONOMIC DEVELOPMENT ANALYSIS AND PLAN**

#### **LONG SUMMARY REPORT**

##### **PREVIOUSLY PREPARED AND/OR ENDORSED PLAN CHAPTERS**

- |                                     |            |
|-------------------------------------|------------|
| 1. Introduction                     |            |
| 2. Outreach program                 |            |
| 3. Population study                 |            |
| 4. Economic Development - Inventory |            |
| 5. Inter-Governmental Coordination  |            |
| 6. Recreation & Open Space          | April 1997 |
| 7. Coastal Resources                | April 1997 |
| 8. Water Resources                  | July 1997  |
| 9. Affordable Housing               | Feb. 1998  |
| 10. Wetlands                        | April 1998 |
| 11. Land Use & Growth Management    | Dec. 1998  |
| 12. Wildlife & Plant Habitat        | April 1999 |

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September 1999

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Note: Date for Charts 1-6 includes Yarmouth, Barnstable County, Mass., U.S.A.

Note: Date for Charts 7-8 includes Barnstable Town, Dennis, Yarmouth, and Barnstable/Yarmouth MSA.

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## **INTRODUCTION TO THE YARMOUTH COMPREHENSIVE PLAN**

### **CONTENTS OF THE COMPREHENSIVE PLAN**

The Yarmouth Comprehensive Plan contains five introductory chapters that are designed as reference documents and did not require Town Meeting action. They included such items as Population, Economic Development-Inventory, and physical conditions. Another grouping contained action items and plan proposals and has been submitted to Town Meeting for endorsement. There are now 7 of these that have been approved.

### **WHO IS PREPARING THE COMPREHENSIVE PLAN?**

Primary guidance for the Plan Chapters comes from the Local Planning Committee (Planning Board) with assistance from the Growth Policy Advisory Council. The public contact and coordination work is being done for Economic Development Analysis and Plan by a Steering Sub-Committee made up of members of Planning Board, Growth Policy Advisory Council, Yarmouth Economic Revitalization Committee, and the Route 28 Task Force. In this case much of the technical/professional work has been done by a consultant, Karl F. Seidman, with assistance from the Planning staff. The consultant's report makes up most of this "long summary".

### **PRESENTATION OF THE PLAN ELEMENTS**

One of the problems in presenting any town's comprehensive plan is that it is written basically for three different groups of people. The first, wants only the basics, and not a lot of detail, thus we have use "executive summaries" for Town Meeting. A second group is concerned with more basic technical and planning information, as included in this document. Finally, a few want our detailed research materials, or our consultant reports. We have prepared and used all three levels of report in our planning program.

### **PRESENTING THE COMPREHENSIVE PLAN**

In preparing such a far-reaching and complicated plan at the municipal level, we realize there must be an extensive and continuous outreach program. In addition to the required public hearing, we are using workshops, press releases, graphics, radio, and have expanded our use of television. Each of the Plan's chapters is a "stand alone" document in itself, so that it can be used separately.

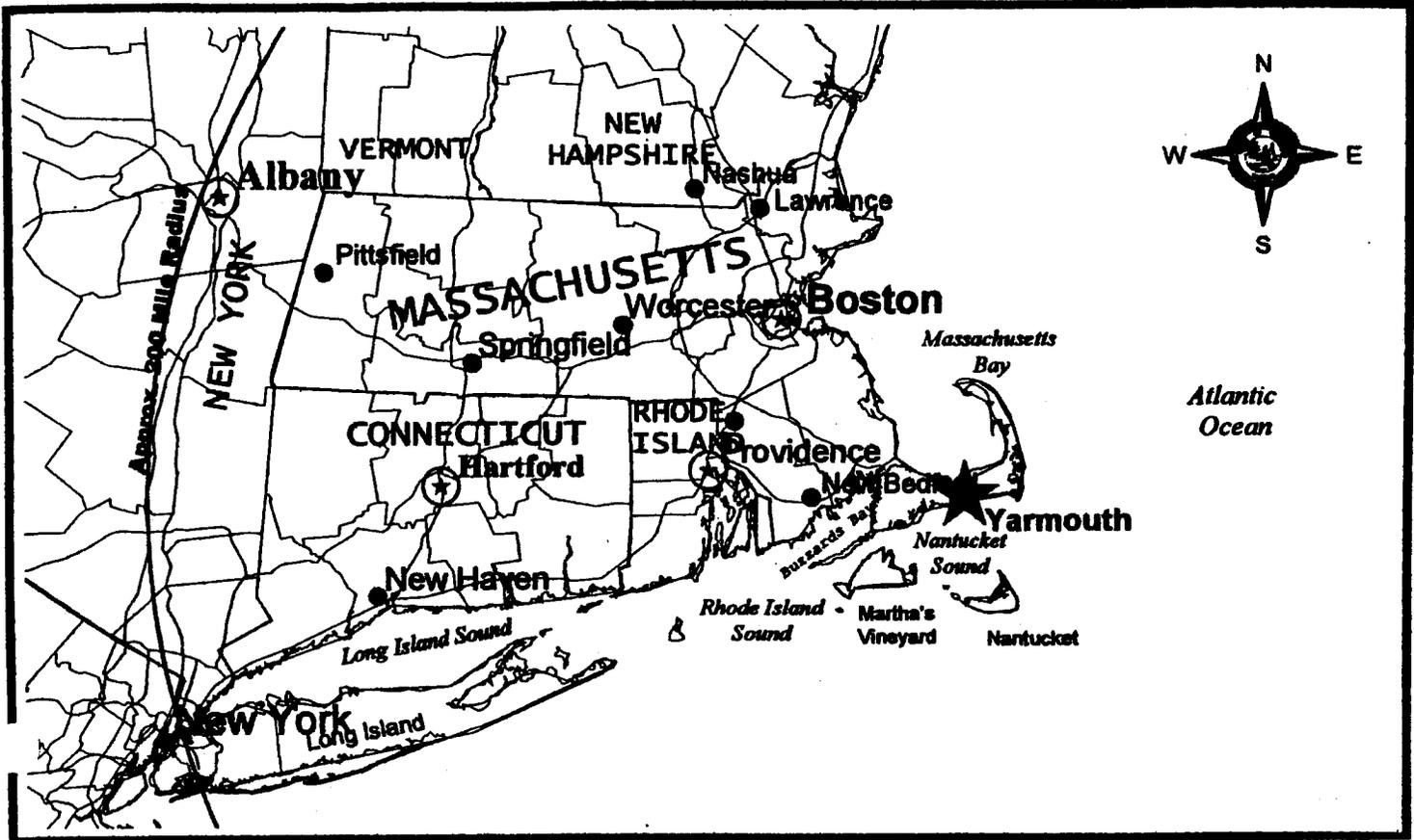
### **USE OF THE "LONG SUMMARY" APPROACH**

A middle-level of detail, as mentioned previously, or the so-called "long summary", is the document we have used most as back-up to the Plan. This document is one of those. It is in sufficient detail to satisfy most interested persons, and to act as a reference for Town Meeting action. These documents are bound in loose leaf notebook form so that they may be added to, or amended, or deleted fairly easily. They are not in fancy, glossy paper form on purpose! As far as we know we are the only Cape town using this approach!

### **COMPLETION OF THE COMPREHENSIVE PLAN**

Our basic work program has been divided into 18 Chapters. Twelve (12) of those are now completed and/or have been endorsed by Town Meeting. Work is on-going on the remaining 6 chapters; to these there are proposed to be added four or five more subjects. Historic Preservation, Energy, Social Services and perhaps Waterways and/or Libraries.

And finally at the end of the program there will be a "Composite" document summarizing the entire document and hopefully suitable for submission to the Cape Cod Commission.



### THE EFFECT OF AN "ECCENTRIC" REGIONAL LOCATION

The importance of the Cape Cod location cannot be over-emphasized. Yarmouth extends out into the Atlantic Ocean some 22 miles on a spit of sand pushed up by the last glaciation 50-100,000 years ago. It is both the best and worst of locations. On the one hand it is remote for some things and yet very accessible for others.

While the Cape was indeed an off-beat site for years, the construction of the new inter-state highway system, starting in 1955, made it highly accessible for tourists and retirees. The Cape has boomed as a result. It is a boom that has been achieved at a price, traffic jams, pollution, overcrowding, noise, etc. It is a location that still attracts high-tech trained business persons especially in telecommunications related businesses. However, that kind of business and industry, although dependent on rapid communication, will cause further growth and stress. One of the main purposes of the Comprehensive Plan is to try to help deal with stresses related to change.

## “SETTING THE SCENE”

\*Since 1991 numerous changes have taken place in the economy and in the institutional framework used for addressing economic development on Cape Cod. In that time the Cape's and Yarmouth's economy has emerged from a major recession.

\*Cape Cod's economy continues to have different attributes from the rest of New England. Its population and job pool have continued to grow more rapidly than the rest of the state. Since 1991 jobs have grown twice as fast as the rate for Massachusetts.

\*Cape Cod and Yarmouth's economy is based on small businesses. 92% of the region's companies employ less than 20 people. In addition 12% of the Cape's residents are self-employed, twice as high as the state average.

\*The Cape's and Yarmouth's economy still produces seasonal swings in unemployment. For instance, in 1995 the winter unemployment peak was 11.8%, and the summer rate was only 4.3%.

\*In recent years many CapeCod towns have established economic development agencies, and have undertaken specific projects. Yarmouth has formed an Economic Revitalization Committee which has been active.

\*Concerns about the Cape Cod economy, include the number of jobs that do not pay enough to support a "household." The need for good jobs at good wages is constantly voiced.

\*It is economically important for Cape Cod and Yarmouth to maintain a strong human and health services support system. Not only do these sectors provide significant employment opportunities, especially in health care, they provide critical support that allow Cape workers to participate effectively in our economy. Still it has been estimated that at least 10,000 Cape Codders are not covered by any health insurance.

\*The constrained municipal tax base is an economic issue. Municipal costs and tax rates are rising, while Federal and State assistance is not keeping pace. Municipalities are anxious about future population growth that would affect the tax status of both young families and retirees on fixed incomes.

\*Cape Cod, and particularly Yarmouth, must continue to maintain its attractiveness and enhance its special regional character; they should focus on expanding the "shoulder seasons", while maintaining a strong competitive position driving the peak summer months.

\*Retirement, remains a strong economic sector for Yarmouth, and all Cape Cod. It relies primarily on the quality of life that the Cape offers. This region has good long-term potential for retirement as our longevity increases here and nationally.

\*Telecommunications is critical to economic development on Cape Cod. With the advent of computer modems and faxes we can overcome many of the geographical problems of our atypical location.

**APPENDIX C  
LIST OF ACRONYMS USED IN THE PLAN**

<b>CCCC</b>	<b>Cape Cod Community College</b>
<b>EOA</b>	<b>Economic Opportunity Area</b>
<b>FIRE</b>	<b>Finance, Insurance and Real Estate</b>
<b>LQ</b>	<b>Location Quotient</b>
<b>MSA</b>	<b>Metropolitan Statistical Area</b>
<b>REB</b>	<b>Regional Employment Board</b>
<b>ROAD</b>	<b>Revitalization Overlay Architectural District</b>
<b>SIC</b>	<b>Standard Industrial Classification</b>
<b>TCPU</b>	<b>Transportation, Construction, and Public Utilities</b>
<b>TDR</b>	<b>Transfer of Development Rights</b>

# **“ECONOMIC DEVELOPMENT PLAN”**

## **CHAPTER 10 YARMOUTH COMPREHENSIVE PLAN**

**DRAFT DATE: June 25, 1999**

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Town of Yarmouth**

**NOTE: the following is a verbatim transcript of the consultant’s report on economic development analysis and planning matters.**

# **Yarmouth Economic Development Plan**

## **Introduction**

This chapter presents an economic development plan for Yarmouth as part of the town's comprehensive plan. The economic development plan was prepared over a four-month period from February to May 1999 by a consultant working with an Economic Development Steering Committee representing the following boards and committees:

- \* Growth Policy Advisory Council
- \* Planning Board
- \* Route 28 Task Force
- \* Yarmouth Economic Revitalization Committee

Several research tasks were completed to better understand the local and regional economy, identify Yarmouth's critical economic development assets for and obstacles to further development, and incorporate the goals, views and concerns of local residents, businesses and officials into the economic development plan. These research tasks included:

- \* A review of existing reports and information;
- \* An analysis of state, regional and local economic data to profile Yarmouth's economic base, role in the regional economy, and key economic trends;
- \* Eight focus groups with different business sectors, economic development organizations, and town boards and committees;
- \* Individual interviews with selected officials and organizations;
- \* A review and inspection of potential development areas and vacant or under-utilized property; and
- \* A review of Yarmouth's Zoning Bylaw.

The findings from this research were critical to defining Yarmouth's economic development agenda and specific projects and activities included in the plan. These findings are presented, after a brief discussion of Yarmouth's economic development goals, in three sections that include an economic profile of Yarmouth, an assessment of economic development assets and obstacles, and a review of development sites and opportunities. Following the discussion of research findings, a five-part economic development plan is presented both in summary form and with an elaboration of action steps and activities under each plan component.

## **Chapter 1. Economic Development Goals**

The economic development plan seeks to advance several economic development goals that Yarmouth previously defined and that were reaffirmed during the planning process. These goals reflect Yarmouth's location on Cape Cod where preserving unique but fragile environment resources and diversifying a seasonal economy linked to tourism and retirees are major concerns. Furthermore, Yarmouth's goals reflect its status as a largely developed community seeking to address the impact of past development on the town's character and balance the concerns of a diverse resident and business community. Yarmouth's primary economic development goals, articulated in the April 1997 Economic Development Inventory, include:

- \* To promote businesses that are compatible with Cape Cod's environmental, cultural, and economic strengths in order to ensure balanced economic development.
- \* To locate development so as to preserve Yarmouth's environment and cultural heritage, minimize adverse impacts, and enhance the quality of life.
- \* To encourage the creation and diversification of year-round employment opportunities.

During the planning process, several additional goals were articulated that also inform this plan:

- \* To improve the quality and attractiveness of new and existing development in Yarmouth, especially along the Route 28 corridor.
- \* To better address the labor force needs of local employers while also providing good employment opportunities that help retain residents and young adults.
- \* To strengthen existing tourism-related businesses through upgrading facilities, diversification, and an extended season.

## **Chapter 2. Yarmouth Economic Profile**

Yarmouth has a diversified economy that has performed well during the 1990s, closely paralleling Cape Cod's overall economic growth. Yarmouth, like Massachusetts and Barnstable County, was hit hard by the last economic recession, losing almost 9% of its employment base from 1988 to 1991. Yarmouth's job base has grown consistently since 1991 at a faster rate than Massachusetts but at a pace that closely matches Barnstable County. In 1997, the town's total employment, at 7,965, exceeded its pre-recession peak for the first time.

**Employment Base.** While Yarmouth depends heavily on tourism, it has a smaller service sector and more diversified economic base than surrounding towns and the region. Retail and services are Yarmouth's largest employment sectors, with 32% and 24% of 1997 employment, respectively. However, two other sectors, transportation, communications and public utilities (TCPU) and finance, insurance and real estate (FIRE) accounted for 23% of Yarmouth's 1997 job base. In the Barnstable-Yarmouth Metropolitan Statistical Area<sup>1</sup> (MSA) and surrounding towns, services represent close to one-third of 1997 employment while TCPU and FIRE each account for only 5% of jobs. While Yarmouth has half the share of manufacturing jobs as the MSA, manufacturing in a minor economic sector, accounting for only 3.5% of total MSA employment. Yarmouth's 1997 average annual wages, at \$25,789, were 4% higher than average MSA wages but 28% below the state average annual wage of \$35,724. Yarmouth's TCPU sector, which paid 1997 average wages of \$42,941, 25% above the MSA level, was an important source of higher paying jobs.

To identify Yarmouth's industry concentrations and under-represented sectors, location quotients (LQ) were calculated that compare Yarmouth's percent of total employment in a specific industry to that industry's share of total MSA employment. A LQ well above 1 indicates an industry concentration while a value below 1 indicates an under-represented industry. The location quotients (see Table 1) identified several important differences between Yarmouth and the Barnstable-Yarmouth MSA:

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<sup>1</sup> The Barnstable-Yarmouth Metropolitan Statistical Area consists of the following ten towns: Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans, Sandwich, and Yarmouth

- \* Yarmouth is a center of communications and electric, gas and sanitary services where it accounts of over 1/3 of the MSA's 1997 employment. Electric, gas and sanitary services is a particularly strong concentration with Yarmouth's employment share almost 5 times that of the MSA. However, Yarmouth's role as a utility center has declined since 1993 as employment elsewhere in the MSA has grown rapidly.
- Restaurants and food stores account for 2/3 of Yarmouth's retail jobs versus 50% for the MSA  
Real estate accounts for 57% of Yarmouth FIRE sector, almost three times the share for the MSA. The real estate industry appears closely linked to tourism since employment levels are highly seasonal.

Table 1

Location Quotients, Yarmouth Relative to Barnstable-Yarmouth MSA

Industry	Location Quotient
Electric, Gas, and Sanitary Services	4.77
Real Estate	2.72
Communications	2.71
Transportation, Communications and Utilities (TCPU)	2.33
Miscellaneous Repair Services	2.33
Membership Organizations	2.22
Finance, Insurance and Real Estate (FIRE)	1.86
Depository Institutions	1.85
Food Stores	1.67
Hotels and Lodging	1.39
Special Trades	1.27
Miscellaneous Retail	1.24
Eating and Drinking Establishments	1.20
Total Government	1.03
Retail Trade	1.00
Construction	0.98
Social Services	0.91
Personal Services	0.85
Wholesale Trade	0.71
Services	0.71
Building Materials and Garden Supplies	0.61
Insurance Agents & Brokers	0.61
Auto Repair and Parking	0.57
Legal Services	0.57
Engineering and Management Services	0.55
Health Services	0.53
Amusement and Recreation	0.47
Business Services	0.44
Manufacturing	0.43
Auto Dealers and Service	0.43
Furniture and Home Furnishings	0.36

- \* Lodging and health services are Yarmouth's largest service industries, each accounting for 26% of 1997 service sector jobs. However, Yarmouth has a concentration of lodging jobs, 40% above the MSA share in 1997 but is under-represented in health services where its employment share is half that of the MSA.

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<sup>2</sup> Figures in all tables are based on data from the Massachusetts Department of Employment and Training, ES-202 data series.

- \* Yarmouth is under-represented in several fast-growing service industries including business services, amusement and recreation<sup>3</sup>, legal services, and engineering and management services, where its employment shares are about half the MSA level. These are also the higher paying service industries with 1997 annual wages 25% to 50% above the average for private sector employment.

Yarmouth is more dependent on tourism than the MSA with location quotients above 1 in lodging, restaurants, and real estate. These three industries account for 27% of Yarmouth's jobs versus 19% for the MSA.

With an economy closely linked to summer tourism, employment in both Yarmouth and the MSA is highly seasonal. Total employment levels are one-third higher in July than in January for both Yarmouth and the MSA, with private sector employment 40% higher in July than January for both areas. While Yarmouth's ratio of July to January employment closely matches the MSA for the retail sector and restaurants, it is far more seasonal in lodging, where July employment is almost 4.8 times the January level compared to a 3.4 ratio for the MSA. On the other hand, real estate employment is less seasonal in Yarmouth than the MSA with July/January employment ratios at 1.24 and 1.44, respectively.

Earnings in Yarmouth's tourism industries are well below average wages for both the town and the MSA. For Yarmouth, 1997 average annual wages in tourism industries ranged from 49% of the overall private sector average at restaurants to 78% in real estate firms. The MSA ratios were slightly higher, ranging from 66% at the restaurants to 86% in real estate firms.

Table 2  
1997 Average Annual Wages, Major Tourism-Related Industries

Industry	Yarmouth	Barnstable-Yarmouth MSA
Restaurants	\$12,057	\$13,118
Hotels and Lodging	\$13,963	\$16,066
Real Estate	\$19,052	\$21,058
Amusement and Recreation	\$9,328	\$16,818
Total Private Sector	\$24, 358	\$23,517

Growth Trends. While Yarmouth's overall job growth from 1987 to 1996 closely parallels Barnstable County, and to a lesser extent, Massachusetts, its growth in individual sectors varies from state and county trends. Employment growth from 1987 to 1996 by sector for the US, Massachusetts, Barnstable County and Yarmouth is presented in Charts 1 to 6 in Appendix A. To compare areas of greatly varying size, employment is represented as an index where 1987 employment is set equal to 1 and latter years are presented as a ratio of this base year. Several trends emerge from these charts:

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<sup>3</sup> The amusement and recreation industry includes movie production and distribution, movie theaters, video rental, theater production, bands and orchestras, bowling centers, commercial sports, museums and art galleries, and other amusement and recreational services.

- \* Barnstable County's employment growth more closely mirrors state and national trends than Yarmouth across most sectors, especially retail, services and FIRE.
- \* Yarmouth's employment growth in TCPU and FIRE far outpaced the other areas. TCPU grew at twice the national rate and over five times the state and county rates while FIRE grew 60% compared to 8% national growth and level state and county employment growth.
- \* Yarmouth's service sector jobs declined more steeply during the last recession than either the state or county and has rebounded more slowly. However, service sector jobs have increased strongly since 1994, exceeding the 1988 peak by 6% in 1996.
- \* Yarmouth's retail sector has fared poorly with jobs declining over 30% from 1988 to 1991, compared to less than a 10% loss for the state and county. The town's retail recovery has lagged behind the state and county reaching only 85% of its 1987 employment by 1996.

Table 3  
Employment Growth by Sector, 1993 to 1997

Yarmouth and Barnstable-Yarmouth MSA				
Sector	Yarmouth Actual Job Growth	MSA Actual Job Growth*	Yarmouth % Job Growth	MSA % Job Growth*
Services	342	3164	21.9%	22.6%
Retail	176	1607	7.4%	11.6%
Transportation and Utilities (TCPU)	97	256	10.9%	14.9%
Finance, Insurance & Real Estate (FIRE)	85	167	12.3%	7.4%
Manufacturing	22	-12	22.4%	-0.6%
Construction	43	507	14.8%	31.9%
Total, Private Sector	824	5515	13.5%	14.9%
Total, All Sectors	873	6552	12.3%	15.6%

\*Includes Yarmouth

To better identify industry growth trends and opportunities, employment growth from 1993 to 1997 was analyzed for Yarmouth and the Barnstable-Yarmouth MSA both for broad sectors and for industries based on 2-digit standard industry classifications (SIC). The data from this analysis is summarized in Tables 3 through 5. Yarmouth added 824 net private sector jobs from 1993 to 1997, a 13.5% increase slightly below the MSA's 14.9% growth. Services and retail added 518 jobs, accounting for 63% of net private employment growth followed by TCPU and FIRE which added 97 and 95 jobs, respectively. When compared to MSA growth rates, Yarmouth's job growth outpaced the MSA in FIRE, equaled the MSA in services and lagged the MSA in retail and TCPU. Yarmouth accounted for one-half of the MSA's job growth in FIRE employment, largely due to growth in real estate jobs, and one-third of new MSA jobs in the TCPU sector, demonstrating Yarmouth's role as a real estate and utility center for the region.

Table 4  
Industries with Highest Job Growth in Yarmouth, 1993 to 1997

SIC Code	Industry	Yarmouth Actual Job Growth	Yarmouth % Job Growth	Balance of MSA % Job Growth <sup>4</sup>
86	Membership Organizations	99	119.3%	26.0%
83	Social Services	107	110.3%	33.8%
59	Misc. Retail	75	16.8%	20.4%
70	Hotels and Lodging	48	10.3%	4.0%
17	Special Trade Contractors	54	20.8%	44.2%
65	Real Estate	56	12.9%	6.2%
54	Food Stores	46	9.3%	-29.4%
72	Personal Services	28	41.2%	24.9%
58	Eating & Drinking Establishments	27	2.4%	13.9%
80	Health Services	25	5.2%	17.6%

Table 5  
Industries with Highest Job Growth in Barnstable-Yarmouth MSA, 1993 to 1997

SIC Code	Industry	MSA Actual Job Growth*	MSA % Job Growth*	Yarmouth % Job Growth
80	Health Services	966	16.6%	5.2%
17	Special Trade Contractors	495	39.4%	20.8%
59	Misc. Retail	492	19.8%	16.8%
83	Social Services	401	33.8%	110.3%
58	Eating & Drinking Establishments	772	11.8%	2.4%
75	Auto Repair, Services & Parking	318	88.6%	25.6%
79	Amusement Recreation	311	37.7%	1.4%
48	Communications	297	92.2%	-3.7%
73	Business Services	229	19.0%	21.9%
86	Membership Organizations	200	52.4%	119.3%
55	Auto Dealers & Service	178	15.7%	8.2%

\*Includes Yarmouth

The service sector is the major source of regional job growth, growing 50% faster than the overall economy and **accounting for almost 60% of the MSA's net new private sector jobs.** Retail was the second largest source of growth, adding over 1600 new jobs in the MSA, but growing at a slower pace than the overall economy.

While Yarmouth's service sector grew at the same rate as the MSA, Yarmouth's major growth industries differ from those of the MSA, and the town is not sharing in regional growth in key sectors such as health, recreation, and business services:

- \* Membership organizations and social service agencies doubled their employment, each adding around 100 jobs in Yarmouth from 1993 to 1997, a growth rate three times that of the MSA rate.

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<sup>4</sup> Yarmouth's growth was compared to the balance of the MSA. i.e., MSA employment less that of Yarmouth. to better compare growth in Yarmouth with regional growth outside Yarmouth.

- \* Lodging and personal services in Yarmouth both grew at close to twice the MSA rate, and were the second largest sources of new service jobs in the town.
- \* Health services, the region's largest service industry, added the most new jobs for the MSA where it grew at 3 times Yarmouth's rate.
- \* Amusement and recreation grew by 38% in the MSA, adding over 300 jobs, but is a very small and stable industry for Yarmouth.
- \* Auto repair and related services grew over three times faster in the MSA than in Yarmouth.

In business services, Yarmouth and MSA growth rates were comparable but Yarmouth's business services is very small, with under 100 jobs, while the MSA business services industry is a significant employer with over 1400 jobs, including 500 in computer services.

Yarmouth's retail sector out-paced the MSA in food stores, where Yarmouth added 46 jobs as the balance of the MSA lost 730 jobs, but lags MSA growth in restaurants, where MSA growth was 6 times that of Yarmouth, and auto dealers, which grew twice as fast outside Yarmouth.

Economic Development Implications. Several implications for Yarmouth's economic development plan emerge from the preceding analysis:

\*Tourism, as Yarmouth's most important economic cluster (accounting for at least 1/3 of jobs), must be a central economic development focus, even as the town seeks to diversify its economic base. The town's tourism economy is heavily concentrated in lodging, and to a lesser extent, restaurants and real estate, but lacks any sizeable presence in the non-recreational amusement and entertainment industry<sup>5</sup>. Furthermore, much of the lodging industry is concentrated in out-dated motels that are not positioned to help Yarmouth's sustain its market share in the Cape's tourism economy.

\*While recent trends suggest that growth in Yarmouth's utility base is declining, the town should work to retain this crucial job base given its high wage levels;

\*Yarmouth should seek to diversify its service base and gain a greater share of key regional growth industries such as health care, business services, engineering and management services and legal services. These service industries are growing, have higher average wages and depend less on tourism.

\*Yarmouth should also build on its banking and real estate concentration. Despite industry consolidation, the outlook for financial services on Cape Cod is good with its growing population and large number of retirees. Furthermore, Yarmouth's mid-cape location and existing banking base are advantages in attracting further financial sector growth.

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<sup>5</sup> Non-recreational amusement and entertainment includes movies, museums, galleries, theaters and other amusement services that do not involve sporting events or active recreation. It includes indoor and "rainy day" entertainment activities.

### **Chapter 3. Economic Development Assets and Obstacles**

Yarmouth's key economic development assets were identified through focus groups, interviews and economic analysis. These assets provide a foundation for the economic development plan since the town will be most successful with development plans that build on existing advantages and strengths. Critical economic development assets and advantages include:

***A central mid-Cape location with good access to Route 6.*** This location makes Yarmouth attractive to businesses that need a central location to serve Cape Cod and provide good access to the Cape's labor force. Similarly, Yarmouth's two Route 6 exits, which are close to several business districts, provide convenient transportation access for customers, employees and suppliers.

***Proximity to Hyannis with its medical and business center, airport and transportation services, and tourist services.*** Since Hyannis is the economic and transportation center for the mid-Cape region, Yarmouth benefits from its proximity to this activity in several ways. Businesses seeking easy access to Hyannis, but which cannot find suitable space in Hyannis or prefer a less congested area choose to locate in Yarmouth. For other firms, Yarmouth is a logical location for expansion, satellite or support activities. Yarmouth's tourism business also benefits from proximity to Nantucket and Martha's Vineyard ferries in Hyannis. The planned convention center in Hyannis would also benefit Yarmouth by expanding off-season demand for lodging and restaurants.

***Excellent recreational resources that include many attractive beaches, four golf courses, and numerous conservation areas.*** These recreation assets are critical to attracting visitors that support the tourism industry but also greatly enhance Yarmouth's quality of life, making it an attractive residential community.

***Historic areas in South Yarmouth and Yarmouthport.*** As with the town's recreational resources, these historic districts enhance the town's character, attractiveness, and quality of life for both residents and visitors.

***A large concentration of lodging facilities that address diverse visitor needs including resorts, motels, cottages, and bed and breakfasts.*** These facilities are essential to attracting the visitors that support Yarmouth's tourism-related businesses, generate substantial tax revenues to the town, and provide jobs and income to residents within the town and region.

***A concentration of financial service, transportation and utility businesses.*** These sectors are a source of higher paying jobs while providing business support services that add to Yarmouth's attractiveness as a business location.

***Growing regional economic development capacity among multiple organizations, including the Cape Cod Chamber, Cape Cod Community College, the Cape Cod Technology Council, and the Barnstable County Economic Development Council.*** These expanded regional economic development efforts offer two opportunities for Yarmouth. First, they promise expanded economic activity, especially in the tourism and high technology sectors, that Yarmouth can position itself to capture. Second, they expand the available resources for business development, workforce development and visitor attraction and services. Yarmouth can help local businesses and residents gain access to and benefit from these expanded resources.

***Professional economic development staff within the town government and Yarmouth Chamber of Commerce.*** With a part-time Economic Development Coordinator and a full-time Yarmouth Chamber Executive who is well versed in economic development, Yarmouth has a core staff capacity to implement economic development plans. This provides an advantage over many other communities on Cape Cod that lack dedicated economic development staff and will allow Yarmouth to advance a more comprehensive economic development agenda.

***Active volunteer commitment and involvement among town residents and businesses.*** Yarmouth's strong volunteer involvement in economic development is evident from the many town and chamber committees active in economic development as well as the regional leadership role of several Yarmouth business executives. These volunteers provide the civic leadership and vision that is essential for successful and sustained local economic development. One challenge, with multiple volunteer initiatives, is to ensure a common agenda, collaboration, and coordinated action among the different committees. Several positive steps in securing such collaboration have occurred, including the steering committee that is overseeing formulation of the economic development plan (representing four town boards and committees) and the site plan review process where multiple town boards and departments coordinate project review through staff representatives.

***Vacant or under-utilized development sites at key locations.*** While Yarmouth's commercial and industrial zoned land is largely developed, there are several larger sites and buildings with the potential to support new economic development. Vacant land sites include multiple land parcels adjacent to the Exit 7 interchange for Route 6, the town-owned former drive-in site, and several smaller in-fill sites along Route 28, Whites Path and Old Town House Road. Vacant or under-utilized buildings include Boch Village, the Super Stop and Shop Plaza, and the Christmas Tree Warehouse. The issues and development opportunities associated with these sites will be discussed in the following section.

***Town-established development incentives.*** Yarmouth has created two incentive programs to support new development and investment. First, the town created eight Economic Opportunity Areas (EOAs) that allow firms and developers to take advantage of state tax incentives and negotiate municipal property tax incentives. Second, town meeting recently approved the Road Overlay Architectural District (ROAD) which allows projects on Route 28 to obtain relief from certain zoning requirements.

**Yarmouth's ability to fully leverage these assets and realize the benefits of its many economic development opportunities is constrained by several obstacles. The most critical economic development obstacles raised in the focus groups and interviews include:**

***Mixed attitudes toward economic development that hamper strong town leadership and commitment to economic development.*** Among town residents and officials, there are conflicting attitudes toward economic development and its role in Yarmouth's future. While some sectors of the community strongly support continued economic development, others see development as a threat to the town's quality of life. There are also important differences

about the type and form of new development that Yarmouth should encourage, especially with regard to tourist-related businesses. These differences prevent the town's political leadership from initiating and supporting economic development activities and present an uncertain environment for firms and developers considering new investment in Yarmouth.

***The absence of a shared vision for the town's tourism industry, Route 28, and development areas near Route 6.*** While Yarmouth has taken steps to promote economic development, it lacks a clear and broadly shared vision of the type of economic uses and development that it wants to encourage. Without such a vision, it is difficult to define the steps needed to secure the desired development, establish development standards and guidelines, and avoid counter productive policies. This lack of a shared vision is most salient for the tourism industry, but also affects development opportunities on Route 28 and in the B-3 zone.

***Limited land availability to support new development.*** As a largely developed community, Yarmouth lacks significant undeveloped land zoned for business use to attract new businesses and support the growth of existing firms. According to the *Barriers to Economic and Community Development Report*, Yarmouth had approximately 90 acres of land to support new industrial or commercial development in 1995. Based on the Chamber of Commerce's site inventory, this land inventory has declined to 60 to 70 acres over the past four years.

***A cumbersome local permitting process that is viewed as inefficient, unpredictable, and unfriendly.*** During focus groups and individual interviews, business owners expressed frustration with Yarmouth's zoning process. Although they acknowledge recent improvements, such as the site plan review process and the hiring of a new building inspector, businesses still cite problems with the existing system. One commonly cited problem is the unpredictable nature of the process. Several businesses view Yarmouth's process as more time-consuming and costly, harder to navigate, and less helpful than other Cape Cod communities.

***Limited capacity to undertake complex economic development projects.*** While Yarmouth has professional economic development staff in the Community Development Department and the Chamber of Commerce, it lacks a development entity with the legal authority and resources to undertake more complex and long-term projects. Many communities use entities such as Local Development Corporations, Economic Development and Industrial Corporations, and Redevelopment Authorities to manage complex and long-term real estate projects. Since Yarmouth will increasingly rely on redevelopment to support new economic activity, it may need the capacity to facilitate or undertake complex projects.

***Insufficient guidance and incentives to support investment in redevelopment projects.*** Yarmouth's development incentives, through the EOA program and ROAD, are not large enough or well targeted to support redevelopment. The EOAs cover most of Yarmouth's business zones, so it does not provide an incentive to invest in the highest priority areas.

For both the EOAs and ROAD, guidelines do not exist to inform firms or developers about the types of projects that will be approved and the specific incentives that are available. Without these guidelines, businesses face substantial risk that they will invest considerable time and expense in a project that won't receive any incentives. Given modest commercial rents and high development costs, especially for redevelopment projects, Yarmouth will need substantial incentives to make most redevelopment projects feasible.

***The limited availability and high cost of housing for both seasonal and year-round employees.*** High housing costs and limited availability were cited as problems in most focus groups. The high demand for housing among retirees and for summer homes has increased housing costs and removed many properties from the year-round rental market. These housing market conditions make it more difficult to attract and retain employees, exacerbating the labor availability problem discussed below. Yarmouth, through its Fair Housing Committee and Housing Authority, has been active in developing the existing 271 affordable housing units (only 2.4% of the town's housing stock). Furthermore, Yarmouth has prepared and endorsed an Affordable Housing Plan as part of its comprehensive plan. Implementation of this plan should be recognized as an important economic development concern.

***Outdated telecommunications infrastructure for businesses needing state-of-the-art technology.*** Many technology-based business and regional economic development practitioners identified that lack of state-of-the-art telecommunications infrastructure as an obstacle to attracting and supporting high-technology businesses. Updated telecommunications infrastructure also is needed to serve tourists. As the Internet's role in communications, entertainment and information grows, tourists are likely to view it as a basic amenity. Cape Cod lacks extensive broad bandwidth connections to business centers and Bell Atlantic is reportedly slow to respond to business requests for high-speed connections, such as T-1 lines. This issue is a concern for Cape Cod, not only Yarmouth, and has the attention of regional organizations such as Cape Cod Connect and the Cape Cod Technology Council.

***Labor force availability and skills, especially for high technology and skilled professional positions.*** Several business and regional economic development practitioners cited the availability of skilled labor as a serious economic issue for Cape Cod. While recruiting skilled labor is a problem for businesses nationally, Cape Cod faces unique problems due to its lack of a four-year college or university, smaller labor force, and out-migration of young adults. These problems appear most intense for high technology and professional businesses that need highly skilled and technical employees. Tourism businesses also face seasonal labor shortages but can draw on a larger labor pool since their skill needs are less specialized. Several initiatives exist to address this issue, including creating a masters program in computer science and electrical engineering on Cape Cod with UMASS/Dartmouth, employee recruitment efforts by employers, and Cape Cod Community College's renewed commitment to specialized training for businesses. Nonetheless, workforce development is likely to be an increasingly important issue for

business as the skill requirements for jobs grow and labor availability remains tight.

While some of these obstacles reflect economic and market conditions that are beyond the town's control, or are best addressed at the state and regional level (e.g., telecommunications infrastructure), many are within the town's purview. Obstacles that can be addressed at the town level must be an important part of Yarmouth's economic development plan since they establish the enabling conditions to realize opportunities and accomplish the town's economic development goals. The key local obstacles to address in Yarmouth's economic development include:

- ▶ Fostering a shared vision for the future of Yarmouth's tourism industry and major redevelopment opportunities.
- ▶ Expanding the availability of attractive development sites.
- ▶ Improving local development regulations and the permitting process
- ▶ Creating clear and stronger guidelines and incentives for priority redevelopment efforts

#### **Chapter 4. Development Opportunities for Vacant Property**

Yarmouth's commercial and industrial development is concentrated in two areas:

- (1) The Route 28 corridor, primarily zoned B-2, contains a wide mix of businesses, including lodging, recreational attractions, restaurants, individual retailers, small strip shopping centers, banks, and various commercial offices;
- (2) The B-3 business zone paralleling Route 6 also has a diverse mix of businesses, including construction firms, utilities, manufacturers, high-tech businesses, transportation firms, professional offices, and the Union Station shopping center. This development is concentrated in several sub-areas, including along White's Path, Old Town House Road, Mid-Tech Drive, and Ansel Hallet Road.

Since both of these areas are largely developed, the opportunities for substantial new development are limited and are likely to involve redevelopment of existing properties. Given the complexity, cost and difficulty of redevelopment projects, the town needs to focus on projects with the potential for significant economic development impacts. These impacts will result from either a large project that can accommodate many firms or a distinct high quality development project that promises to alter the character and quality of surrounding development due to its location and surrounding development opportunities.

Route 28 Corridor. While many vacant or under-utilized sites exist on the Route 28 corridor, most are small in-fill sites that are unlikely to generate much impact or change the character of surrounding development. An inventory of vacant land and building space prepared by the Yarmouth Chamber of Commerce lists 41 sites on Route 28, including:

- 15 sites with over 30 vacant retail or office rental units;
- 20 free-standing buildings;
- 5 vacant land sites; and
- 1 abandoned house.

Several additional vacant commercial units and buildings are near Route 28, including Old Main Street and the Super Stop and Shop Plaza on Long Pond Road. The vast majority of these properties offer little opportunity for significant economic development impact. Most freestanding buildings are small properties on small land lots surrounding by other occupied developments. Vacant commercial units offer an opportunity to attract new business but are managed by current building owners. Finally, most vacant land sites are very small, ranging from .33 acre to 1.5 acres and are surrounded by other development, limiting the ability to create a larger development site. One option to increase the potential size of the small development sites is to widen the B-2 business zoning district to permit the assembly of larger development sites from contiguous land.

Despite these limitations, three opportunities with greater development impacts exist on the Route 28 corridor:

***Creating pedestrian-oriented Village Centers along Route 28. The "Old South Yarmouth" area represents the best opportunity for a Village Center development.***

This project promises to have significant impact by creating a new type of development area with multiple benefits. It could address residents' desire for a pedestrian oriented town center, improve access to and use of the Bass River, and create an attractive visitor destination. The project might entail public improvements to create a pedestrian-oriented street layout in a larger area and reduce traffic congestion, stronger linkages to and amenities at the Bass River, and new development west and south of Old Main Street. This area's attractive historic buildings, proximity to the Bass River, and vacant land sites on Mill Lane, Delivery Road and Old Main Street enhance its redevelopment potential.

***Developing the former drive-in site at 624 Route 28 into a recreation area and visitor destination.*** Given its size and location near lodging and visitor activities, this site has the potential to add to Yarmouth's visitor attractions while also providing recreational amenities for town residents. Planning for this site should be integrated with the broader tourism plan discussed in the recommendation section.

***Undertaking targeted leasing at strip centers to create specialized niche retail destinations. Boch Village on Route 28 in South Yarmouth is one center with the potential to create a unique retail center, perhaps around arts and crafts businesses.*** Since Boch Village is entirely vacant, it presents an opportunity to lease space to complimentary stores that create a specialty retail destination.

Yarmouth's Façade Improvement Program has helped upgrade the Route 28 corridor and should be continued. Together with efforts to demolish severely blighted buildings, it will help advance small-scale development projects and improve the appearance of this critical corridor that shapes Yarmouth's image.

**B-3 Corridor.** This district has Yarmouth's largest amount of undeveloped land zoned for business use, including a concentration of sites adjacent to the Exit 7 interchange with Route 6. According to the Chamber inventory, there are 32 listings of vacant property in this corridor that

include:

- 12 vacant land sites
- 10 vacant condominium or rental units; and
- 12 freestanding buildings.

These vacant properties are largely concentrated along White's Path, on Old Town House Road, and near the Exit 7 interchange with Route 6.

While White's Path has 3 vacant land sites ranging from 3.6 to 5.85 acres and the Christmas Tree Shops warehouse, the potential impact of development sites in this area are limited for several reasons. First, the vacant land is surrounded by existing businesses, limiting the capacity to create a critical mass of new development without relocating existing businesses at significant cost. Second, two land sites have a long narrow configuration that limits the type and amount of building space that they can accommodate. Finally, there is limited potential to alter the character of this area since it is largely developed and constrained by both Route 6 and the Penn Central Railroad line.

The Christmas Tree Shops Warehouse is the town's greatest building reuse opportunity. If continued use as a distribution center is not feasible, then reuse is likely to require sub-division into small units to address the space needs of Cape businesses. If a willing developer can be found, the warehouse could service as multi-tenant business center, perhaps with some space used as a small business incubator for early-stage firms.

Old Townhouse Road also offers limited economic development opportunities with a small amount of vacant property in non-contiguous locations. The Chamber inventory lists only three land sites (totaling 8 acres), two freestanding buildings, and 3 vacant retail units. Beyond the small scale, the development potential is constrained by the amount and type of surrounding development.

The Exit 7 area provides the B-3 district's most important development opportunity with the potential for a technology and professional business park by combining multiple undeveloped sites on Summer Street, Enterprise Road, and Corporation Roads with a few small modestly developed parcels. This area includes 29.5 acres of undeveloped land and another 2 acres in seven lots with small industrial buildings. The site's close proximity to Route 6 and concentration of undeveloped land make it the town's best site for attracting the Cape's growing technology-based and professional service businesses.

## **Chapter 5. Economic Development Plan: Recommended Strategies**

The recommended economic development plan includes five strategies that build on key economic development opportunities while addressing obstacles that constrain further development in Yarmouth. Furthermore, the plan focuses on the issues that can be effectively addressed through policies and projects at the local government level. Thus, the plan emphasizes local initiatives to create a stronger community consensus on critical issues, advance significant

real estate development opportunities, improve the local environment and regulatory process for business, and strengthening incentives and guidelines for priority development areas and projects. Major opportunities that inform the plan include:

Building on renewed regional promotion efforts to ensure that Yarmouth's tourism industry retains its market share, benefits from a growing shoulder season, and successfully adjusts to new trends and opportunities.

Capturing a larger share of regional growth in technology-based and professional service businesses

Leveraging expanded regional resources at the Cape Cod Chamber, Cape Cod Community College, the Regional Employment Board, the Cape and Islands Community Development, Inc., and the Barnstable County Economic Development Council.

Pursuing two redevelopment projects with the potential for substantial economic development benefits.

Building on recent positive town actions and a good relationship with the Chamber of Commerce to create a more responsive and supportive business environment.

**Key obstacles addressed in the plan include:**

Fostering a shared vision for the future of Yarmouth's tourism industry and major redevelopment opportunities.

Expanding the availability of attractive development sites.

Improving local development regulations and the permitting process.

Creating clear and stronger guidelines and incentives for priority redevelopment efforts.

**Five economic development strategies are recommended to realize these opportunities and address development obstacles:**

*Formulate a Yarmouth tourism plan to create a consensus vision on how to position the town's tourism industry for the 21<sup>st</sup> century. This plan should address critical issues facing the town's tourism businesses, including but not limited to:*

*Updating of tourist accommodations and facilities*

*Expanding the shoulder season*

*Creating appropriate new visitor activities*

*Exploring the creation of Marina districts*

*Strategically investing a portion of the town's room occupancy tax to advance the plan.*

*Create a new business park adjacent to Exit 7 to expand the availability of development sites for technology and professional businesses.*

*Plan for and establish a Village Center Redevelopment District in Old South Yarmouth to create an attractive, pedestrian-oriented public and business center.*

***Strengthen Yarmouth's environment and civic infrastructure for businesses through a more consistent and efficient permitting process, expanded incentives for redevelopment and building reuse, creating an Ambassadors Program to conduct business outreach, and establishing an economic development web site.***

***Help link businesses and residents to regional resources that support business growth and improve residents access to jobs.***

Each of these strategies is discussed in greater detail in the following sections, which include key action steps to implement the strategy.

### ***Strategy 1: Formulate a Yarmouth Tourism Plan***

Tourism is Yarmouth's largest economic sector and the primary economic engine for Cape Cod. It also provides significant town revenue through property taxes and the room occupancy tax. Despite the importance of tourism to Yarmouth's economy and fiscal health, there is no long-term plan for the town's tourism sector. A tourism plan will serve several purposes. First, it can generate community consensus on the future of the town's tourism sector by fostering greater mutual understanding of the concerns of tourist businesses and residents, identifying shared concerns and agendas, and working out differences on contentious issues. Second, the plan can expand collaboration and connections among different parts of the town's tourism businesses, such as those in South Yarmouth and Yarmouthport. Third, it can set priorities for, and improve coordination among, town government, the Chamber of Commerce, and individual businesses around a plan for the future. This is a good time to prepare such a plan with the strong regional tourist promotion activities and widely shared priorities to expand the shoulder tourist season and broaden activities for off-season visitors to Yarmouth and Cape Cod.

The first implementation step is to create a Tourism Committee to build a consensus vision and plan. To be effective and create community-wide support for the plan, the committee needs to include tourism businesses, other businesses, residents, environmental organizations, and town leaders. It may also be helpful to have representatives from key regional organizations. The issues to address in the tourism plan include, but are not limited to:

- Upgrading existing accommodations
- Exploring the creation of Marina districts to attract marina-related businesses, additional visitors, and recreational mariners
- Maintaining and improving key recreation areas
- Expanding visitor activities and attractions
- Steps to reduce the environmental and traffic impacts of tourist businesses and activities
- Strengthening the shoulder season
- Plans for the former drive-in site
- Town, Yarmouth Chamber, and Cape Cod Chamber roles in marketing and promotion
- Seasonal employee recruitment and housing.

Funding for the planning effort could be shared between the tourism industry, the town government, and industry and regional organizations such as the Cape Cod Chamber of Commerce, the Cape Cod Commission, the Yarmouth Restaurant Association, and Barnstable County.

In addition to undertaking the tourism plan, the town and Chamber of Commerce should establish a shoulder season calendar of events and activities in and around Yarmouth. While the Yarmouth Chamber already publishes an off-season guide and calendar, there may be opportunities to better coordinate existing activities, add new events, and increase Yarmouth's connection to nearby or regional events. For example, at one focus group, participants mentioned that the Yarmouth Seaside Festival and the Dennis-Yarmouth Youth Soccer League tournament often occur on the same weekend. There is also a perception that Yarmouth does not host many events, partly due to the difficulty of securing town permits.

Finally, Yarmouth should *invest* a share of its room occupancy tax receipts, on a matching basis with the local tourism industry to implement components of the tourism plan. Since future room occupancy taxes depend on the health and competitiveness of the local lodging and tourism sector, there is a common interest between the town and tourism businesses. Yarmouth should work with the industry to find ways to strategically use some of this revenue to expand local room occupancy rates and this "exported" revenue base. Events, projects, and activities that build the shoulder season seem a particularly wise use of these funds since they expand year-round occupancy and directly increase town revenues.

## ***Strategy 2: Create a New Business Park***

With the concentration of vacant and minimally developed land sites adjacent to the Exit 7 interchange with Route 6, Yarmouth has an opportunity to address one of its major economic development obstacles—the scarcity of land sites for new development. The site's excellent access to Route 6 and existing B-3 zoning make it attractive for new business development, especially for technology-based businesses and professional offices. The Exit 7 area already has some high tech and professional development on Willow Street and Mid Tech Drive, which increases the ability to market the site as a high tech and office district area. Since many of these sites are under a single owner, the process of a unified business park development will be easier than if many smaller landowners existed. Some of the obstacles to development include the area's location in the Aquifer Protection District of the Zoning Bylaw, the current lot configurations, road quality, and some existing small-scale development in the area. However, these obstacles could be overcome through careful planning and a strong development plan and effort.

The first step to advance this project is to undertake an analysis of the project's feasibility and development requirements. Actions steps to help complete this analysis include:

Identifying the potential sites, collecting data on their size, condition and constraints, and defining the project area.

Meeting with the affected landowners to gauge their interest in such a project.

Securing funding for a feasibility analysis that includes a market analysis, preliminary site and infrastructure plan, and financial analysis.

## Exploring options for entities to develop, market, and manage the park

If development of the park proceeds, there are several steps that the town and any future development entity could take to make the site more desirable and to ensure the quality of development:

Create a new zoning district for the park with a specialized set of permitted uses targeted to technology-based businesses and professional offices. The current B-3 zoning is a broad catchall business zone that could undermine the project's goal of helping Yarmouth capture more of the higher quality development and higher wage jobs in these sectors.

Consider pre-permitting the site with the Cape Cod Commission to reduce the long delay businesses or developers would face at the site.

Establish development covenants for the site that ensure the quality of development with the business park. Such covenants are common at technology, office and industrial parks, serving to protect the investment of developers and businesses concerned with how adjacent development affects the image and value of their properties. These covenants could be approved wholesale by the town prior to development on individual parcels and would mitigate the need for town site plan and signage review of individual projects.

### ***Strategy 3: Create an Old South Yarmouth Village Center Redevelopment District and Master Plan as the First Opportunity to Create Village Center Development along Route 28***

The Old South Yarmouth area represents a second major development opportunity for the town. Through public investment in infrastructure and amenities, in-fill development of vacant sites, and redevelopment of several buildings, an attractive, pedestrian-oriented Village Center can be created linking the Bass River, the current historic district, and under-utilized sites west of Old Main Street. Such a project could achieve two objectives for the town:

Establishing a public center or "Main Street" area for town residents, which Yarmouth currently lacks.

Creating an attractive visitor destination with shops, restaurants, waterfront access, and historic buildings.

Given current land use patterns and infrastructure, this project represents a long-term redevelopment opportunity that may take 5 to 10 years to fully implement. However, the potential benefits for Yarmouth and the opportunity to create a new and attractive area of town warrants the long-term investment.

Since this project entails a complex and large redevelopment effort, a critical first step is to prepare a Master Plan for the area. The Master Plan would create a development vision for the

district that defines the street and sidewalk network, public amenities, potential development areas and parcels, desired uses, and the development design and character. Based on the Master Plan, specific public improvement projects would be undertaken and developers solicited for the most critical parcels. Creating a Master Plan will require both significant funding and town commitment to an extensive planning process. Several initial steps can be taken to move toward creating a Master Plan:

Collect data to support a master planning effort and define the redevelopment area, including existing parcels, assets, and attractions in the area, blighted and under-utilized sites, existing infrastructure, and planned improvements.

Research potential sources to help fund a Master Plan

Research organizational options and tools to support implementation of a Master Plan

#### ***Strategy 4: Strengthen Yarmouth's Businesses Environment and Civic Infrastructure***

While Yarmouth has taken several steps to improve the environment for creating and operating a business, it is still viewed as a more difficult place to do business and less business-friendly than several other Cape Cod communities. Through creating a better environment and stronger civic infrastructure to support businesses, Yarmouth can help retain and grow its existing business base while attracting new firms. Since the site plan review process and Economic Development Coordinator are viewed positively by the businesses, there is a real opportunity to build on these successes to change historic perceptions. To create this more supportive business environment, work is needed on four fronts:

- Improving the town's zoning and permitting process
- Expanding and targeting development incentives
- Expanding outreach to businesses and residents
- Using the Internet to market Yarmouth and improve business access to information and services

Specific recommendations in each of these areas are detailed below.

##### **Improving the Zoning and Permitting Process**

Business owners and others view Yarmouth's zoning regulations and permitting process as a serious obstacle to economic development. As discussed earlier, the process is viewed as cumbersome, unpredictable and unfriendly. The *Barriers to Economic Development Report* identified many problems with the Zoning Bylaw and permitting process and made sound recommendations to address them. Yarmouth should continue to work on implementing these recommendations. However, there are other actions, not addressed in *Barriers Report*, that are important for Yarmouth to take to improve its business environment. These actions focus on creating a more accessible and responsive permitting process in which town staff is proactive in helping businesses and residents understand and efficiently meet requirements to complete a project. Yarmouth can also make far more effective use of the Internet to make zoning and permitting information more accessible and reduce staff time in responding to simple information

requests. Businesses and residents increasingly are using the Internet to reduce the time and cost of securing information and completing transactions. By aligning itself with this trend, Yarmouth can gain the benefits of the Internet while signaling its commitment to making it easier for firms and residents to transact business with the town. Specific recommendations include:

Build on the successful Site Plan Review Process to create a customer-service approach among department staff. This customer-service approach involves having staff review plans, identify problems and find potential solutions prior to site plan review meetings. The site plan review meeting can then be used not only to surface issues but to help the applicant identify the best way to address these problems and secure required permits. This process requires interdepartmental discussion of overlapping issues prior to the site plan review meeting and participation by staff with the authority and capacity to offer solutions and negotiate issues at the site plan review meeting.

Have the Old Kings Highway Regional Historic District Commission participate in the site plan review process for projects within its jurisdiction.

Provide more accessible and user-friendly information, including the requirements and steps needed for common projects and diagrams that illustrate how requirements apply to a site and building.

Make the Zoning Bylaw, related information, fee schedules, and applications available on the town's Internet site.

Improve the consistency and efficiency of the permitting process by having town boards set policy via clear and consistent guidelines and rely on professional staff to review projects and work out the details.

Set benchmarks for completing required town actions and track progress in meeting these benchmarks.

Create bylaw provisions to allow appropriate home business

### **Expand Incentives for Redevelopment and Building Reuse**

With the vast majority of commercial and industrially zone land already developed, Yarmouth's future development will increasingly depend on redevelopment of existing properties. Moreover, redevelopment can upgrade and improve the attractiveness of under-utilized properties and less desirable uses within the town, especially along Route 28.

While redevelopment is a clear priority for Yarmouth, the town has not established strong enough incentives to stimulate private investment in redevelopment projects. Redevelopment is constrained by low rents but high land and regulatory costs. While Yarmouth cannot change market rents, it can improve the economics of redevelopment by allowing increased development density to increase the revenue potential of a site and reducing development costs through tax incentives and a more efficient permitting process. Given the environment impacts of higher densities and the cost of tax incentives, Yarmouth should carefully target these redevelopment

incentives to the highest priority sites and areas. Specific actions to expand redevelopment incentives include:

Amend the Zoning Bylaw to allow Transfer of Development Rights (TDR) within targeted districts. By transferring development rights, the town will be allowing increased development densities at some sites while reducing it at others. The Route 28 activity centers in the town's land use plan are one option for target areas in which to use TDR.

Identify zoning requirements that would be acceptable to alter under the Road Overlay Architectural District and create explicit standards for the required Plans and Special Permits. By establishing explicit guidelines, the town will be signaling what it will accept and create a greater incentive to undertake a project using ROAD. Such guidelines also provide a model for desired development character and quality.

Establish smaller target areas, standards and suitable projects for tax incentives within Yarmouth's eight Economic Opportunity Areas. Small target areas will help use these EOAs as an incentive to encourage development within priority areas. Guidelines for tax incentives will allow the town to set specific goals it seeks to achieve through the incentives while letting businesses know when tax incentives are a realistic option for their project.

#### **Expanding Outreach to Businesses and Residents**

Yarmouth should establish a Business Ambassador Program with the Yarmouth Chamber to conduct consistent outreach to new and existing businesses. Ambassadors would introduce firms to Yarmouth's economic development services and identify potential business needs and issues. The Ambassadors Program will achieve three objectives. First, it will help build Yarmouth's reputation as a welcoming and helpful community for businesses. Second, it will connect businesses to services or assistance to support their growth. Third, it will identify common concerns, issues and needs to inform the future economic development agenda for Yarmouth and regional organizations.

In addition to better informing businesses about economic development services, there is need to expand community awareness concerning the contribution of economic development to Yarmouth's quality of life and fiscal health. Expanded outreach and education on the proposed economic development plan is a first step to promote such awareness. Annual updates and outreach meetings to report on implementation progress and document accomplishments will help maintain community awareness on the importance of economic development goals.

#### **Create an Economic Development Page on the Town's Web Site**

Yarmouth's town web site does not have an economic development section that provides information for existing business seeking assistance, people interested in starting a new business in town, or a firm interested in locating in Yarmouth. Since the Internet and World Wide Web are increasingly the primary information source for businesses, Yarmouth needs to better utilize this communication resource for economic development (and other) purposes. The economic

development section should include:

Information on how to start a business in Yarmouth,

Information on local and regional economic development services, including linkages to key sites

A section that promotes Yarmouth as a business location with demographic and economic information, a list of available sites and building space, and information on available incentives

An email connection to the Economic Development Coordinator

Links to the Yarmouth Chamber of Commerce and Yarmouth Restaurant Association sites

### *Strategy 5: Link Businesses and Residents to Regional Economic Development Resources*

With expanded regional economic development programs, new state and federal funding for workforce development, and new leadership at Cape Cod Community College (CCCC), Yarmouth businesses and residents have more resources available to help them address economic development and employment needs. While the Yarmouth Chamber of Commerce and town Economic Development Coordinator already play an important role in linking local businesses to state and regional programs, these efforts can be expanded and institutionalized, especially in the workforce development and business financing areas.

Yarmouth can build stronger relationships with workforce development agencies both to help residents gain access to employment information and services and to assist firms to use state and regional resources to train their workforce. Federal and state policies are shifting the delivery system for workforce development programs toward "One Stop Career Centers" that provide a central access point for both employers and job-seekers to gain information, referrals and services for job training and employment. To help residents benefit from this new system, the town government should **work with the Regional Employment Board (REB) to establish a Yarmouth location linked to the Hyannis Career Center to provide residents access to job listings and information on education and training opportunities.** Through the Chamber, Economic Development Coordinator, and School Department, Yarmouth can participate more actively in the Regional Employment Board (REB) and Cape Cod Community College efforts to expand business-focused education and training programs. Specific steps to expand such participation include:

Informing the REB and CCCC about employer training needs identified through outreach efforts

Using REB technical assistance funding to help Yarmouth firms access state incumbent working training funds

Meeting periodically with the REB and CCCC to learn about their initiatives and training opportunities for Yarmouth residents and firms

Securing a seat on the REB for a Yarmouth town or business community representative.

Since the goal is to better link available education and training resources with the needs of Yarmouth residents and businesses, workforce development activities should evolve based on the

town's knowledge of local needs and its experience working with training resources. For example, the town might identify and help create new work-study or school-to-work programs in the regional high school or broker the creation of a specialized training program for a group of Yarmouth employers.

**Three other discrete actions can expand local business awareness of economic development resources:**

Work with the Yarmouth Chamber and Cape and Islands Community Development, Inc. to market lending and technical assistance services to businesses.

Prepare, and periodically update, a simple summary of local, regional, and state business development resources and encourage businesses to utilize the Economic Development Coordinator for referrals to the appropriate program.

Create linkages to key regional economic development and workforce development agencies on a new economic development section of Yarmouth's web page.

## **APPENDIX B SUMMARY OF FOCUS GROUPS**

### **Banking Focus Group, March 23, 1999**

Attendees: Mary Lenihan, Citizens Bank, Steve Cody and Glen VanWickle, Compass Bank, Andy Young, Cape Cod Five.

### **Yarmouth's Assets and Advantages**

- Location bridging developed and less developed sections of the Cape.
- Active Chamber of Commerce.
- Beaches and Bass River.
- Lodging and motel rooms are the key economic activity with the mix of lodging that includes B&Bs in Yarmouthport, resorts and motels.
- Technology businesses that are locating on Cape Cod and the Cape Cod Tech Council's efforts to attract and promote high tech on Cape Cod ("Silicon Sandbar").

### **Yarmouth's Economic Development Barriers and Needs**

- High tech/telecommunications businesses waiting for cable modem access.
- Labor shortages for summer help and for skilled technical labor.
- Shortage of affordable housing.
- Zoning and permitting process and attitudes in Town Hall
- Key barrier is the availability of space. Need to focus on redevelopment opportunities; small lots on Rt.28 are an obstacle to redevelopment. Town needs to be more allowing on non-conforming parcels.

### **Key redevelopment opportunities:**

- Christmas Tree Warehouse,
- White's Path,
- Old Main Street
- Parts of Rt.28: Great Island, Drive-in site.

### **Infrastructure Issues and needs**

- Traffic congestion.
- Improvements to Station Ave. and Willow Street Rt. 6 intersection.

### **Business Finance Issues and Needs**

- Cape and Islands Community Development, Inc. (CDI) has funds to address start-ups and gap financing but not lending out all the money they have.
- Cape Cod Chamber provides technical assistance to its members.
- SCORE is active along with the Business Information Center at Cape Cod Community College. SBDC is not active on the Cape.
- CDI programs could be marketed more actively.

### **Priority Economic Development Projects and Activities**

- Reuse of vacant retail buildings

- More housing for low income
- need to update motel industry and create incentives for owners to upgrade. Transfer of development rights is one potential incentive.

### **High Tech and Manufacturing Focus Group, March 23, 1999**

Attendees: Sally Syrjala, Cape's Kitchen, Inc., Charlotte Turgeon, Eclipse, Ray Cleary, and building owner on Mid Tech Drive

#### **Yarmouth's Assets and Advantages**

Quality of life  
Close to highway  
Mid-Cape location  
Under-utilized land and buildings

#### **Yarmouth's Economic Development Barriers and Needs**

Cost of supplies and trucking to Cape Cod  
Electricity reliability and cost  
Below grade telecommunications infrastructure

#### **Obstacle to Business Growth**

Lack of space for expansion and storage area for supplies  
Transportation and infrastructure-Willow Street intersection is problem.  
Permitting too slow and too diffuse. Staff doesn't always know permitting regulations. The new building commissioner is working to improve things. It is critical that the building department is helpful since it is the first point of contact for permitting.

#### **Suggestions and Opportunities to Expand Technology Businesses**

Identify and develop concentrated areas as technology centers and get Bell Atlantic to focus on upgrading infrastructure to these areas.  
Define areas for growth and industrial parks and make it easier to develop there.  
Flexibility in reuse of older buildings, including allowing more parking and timeliness in approving permits  
Tax incentives to compete with off-Cape areas  
Fast-track permitting for firms with high wage jobs  
The Cape Cod Technology Council is doing a good job promoting the Cape with a web site, Route 6 signs, and Cape Cod Jobs Fair.  
Falmouth and Mashpee are viewed as more business-friendly and have pre-permitted development projects that make it easier for a firm to locate there

#### **Labor Force Issues and Experience**

No problems attracting employees. There are many talented, skilled workers on Cape Cod  
Labor problem is over-rated; some firms are unwilling to pay good wages needed to attract skilled workers.  
Experience with job training system and high schools is not very good. JTEC focuses too much on entry level jobs, and interns from Cape Cod Technical High School did not have a good level of skills.

### **Professional Services Focus Group, March 24, 1999**

Attendees: Ann Scott, Cape Cod Child Development Program, Ed Sweeny, attorney and Chair, Yarmouth Economic Revitalization Committee, Jim Quirk, Attorney

#### **Yarmouth's Assets and Advantages**

- Good highway access
- Less congested than Barnstable
- Availability of business and professional services within Yarmouth
- Concentration of medical service, utilities and financial service firms
- Economic Development Coordinator position and expanded coordination of economic development services
- B-3 district as a location for existing and future high tech businesses
- Internal drainage and water resources protection issues in business districts

#### **Yarmouth's Economic Development Barriers and Needs**

- Difficulty of the regulations and process to obtain permits
- Land availability for new development
- Old building stock that does not accommodate existing business need and has to be rebuilt
- Small size lots on Route 28 that make redevelopment very difficult
- Absence of a home occupation/business bylaw that responds to changing role of home businesses in the economy

#### **Key redevelopment opportunities:**

- Area west of Cape Cod Hospital in Hyannis as a medical and professional services district
- A Marina district near the harbor

#### **Business Finance Issues and Needs**

- Several local Cape Cod banks are competitive and active in making business loans.
- As banks merge and regionalize, commercial banking services on Cape Cod will decline
- Start-up and old family businesses don't understand bank requirements and lack capacity to put together a business plan. They need low cost services to address this need.

#### **Labor Force Issues and Experience**

- Schools, especially Cape Cod Technical High School, is most responsive to preparing students for business
- Cape Cod Community College is looking to expand its professional and business-focused training
- Suffolk University and Fisher College also offer degrees and training in business, secretarial jobs and paralegal work.
- Service firms often want experienced people not just entry-level workers.

#### **Priority Economic Development Projects and Activities**

- Address infrastructure problems that constrain development, e.g., road systems, water protection
- Redevelopment incentives and projects: ROAD district, change zoning to allow non-conforming lots to be built on, continue successful façade improvement program
- Streamline permitting process. Site plan review process is a good first step.

### **Retail, Insurance and Real Estate Focus Group, March 24, 1999**

Attendees: Doreen Bilzekian, Christmas Tress Shops, David F. Bisbee, Davenport Realty, Dick Martin, Dick Martin and Associates, Chair, Route 28 Task Force, Steven P. Moskowitz, Bock Realty

### **Yarmouth's Assets and Advantages**

Prime location on Cape Cod. Central location for services, utilities, warehouse and distribution

Active tourist corridor and facilities. Tourist activities provide the greatest contribution to the tax base and support much of the retail sector.

### **Yarmouth's Economic Development Barriers and Needs**

Tourism industry and quality of properties in West Yarmouth is at risk and needs updating to become less "ticky-tacky"

Existing vacant retail space is too large for market in Yarmouth. Need to sub-divide properties into small units, in the 1,000 square foot range

Large regional and national chains want to be in Hyannis on Route 132

Lack of affordable housing and housing for summer workers

Lack of attractions and offerings for visitors other than beaches, especially for shoulder season.

Lack of large parcels to create redevelopment opportunities

### **Zoning and Permitting Issues**

It has become financially impractical to get through the zoning process. It requires a year for something to happen.

Large time and expense to get a no decision

There is not a level playing field with clear, consistent regulations

Building Department has been a problem, lacking knowledge, help and answers to questions

Ned to clarify what the applicant needs to do to get permits and provide this information up front

Other communities on Cape Cod are more helpful with permitting decisions less subjective

### **Priority Economic Development Projects and Activities**

Develop stronger year-round tourist/visitor attractions; use drive-in site for this purpose

Adopt zoning to encourage updating of older motels and support redevelopment

Update and improve Route 28 corridor to make it more attractive, reflect a Cape Cod image

Continue and expand efforts and to help businesses improve, upgrade and beautify their properties

### Lodging Industry Focus Group, March 30, 1999

Attendees: Karen Fortier, Old School House Bed and Breakfast, Peter Slovak, American/All Seasons Motel, Steve Bernstein, Bed and Breakfast Owner

### Yarmouth's Assets and Advantages for Lodging and Tourism Industry

- Beaches are a main attraction
- Excellent restaurants
- Central mid-Cape location
- Very family friendly with many activities for children and families
- Range of accommodations
- Golf courses
- Accessibility to ferries and airport for trips to Nantucket and Martha's Vineyard

### Yarmouth's Barriers and Needs for Tourism

- Traffic congestion
- Having a reason to come off-season. Lack of visitor attractions. Existing restaurants and stores do not stay open in shoulder season
- Need of existing accommodations and attractions to upgrade
- Help Yarmouth maintain and improve the character of its tourism sector but also move into the 21<sup>st</sup> century.
- Zoning regulations that limit Bed and Breakfasts to 5 rooms. B&B need option to expand beyond 5 rooms up to 10 or 11 rooms without becoming licensed as a motel.

### Tourism Opportunities

- Expanding shoulder tourism season. It expands town room tax revenue and is better for residents that expanding summer tourist activity.
- B&B cater to the off-season, serving people from the Boston-Providence area seeking rest and relaxation without children.
- Expand awareness, marketing of historic buildings and attractions.
- Increased connections between north side and south side tourist activities
- Use the drive-in site to create a year-round visitor destination

### Potential Town Role with Tourism Industry

- Increased communication about tourism industry and its role in the town with residents
- Continue to fund the summer trolley on Route 28, make a longer term commitment to it
- Expand marketing efforts to increase recognition of Yarmouth and its attractions
- Invest in a better web site
- Establish a town tourism committee to address tourism-related issues

### Zoning and Permitting Issues

- ROAD District is a good first step
- Deal with existing blighted properties, getting them to comply with existing regulations or demolish seriously blighted properties, such as Chez Lenore
- Permit the transfer of development rights for motels to help upgrade properties. This would allow a small budget hotel to combine with another, larger property and be improved.

### Labor Force and Training Needs

Chamber and town offer helpful courses for the lodging industry. Chamber does training on marketing and business management. Town offers CPR training by the Fire Department  
Year-round properties can find help but it is very hard to find seasonal employees and to house them

### Tourist Attractions Focus Group, March 30, 1999

Attendees: Lou Nickanello, Sports World, Don Daly, Town of Yarmouth Recreation Department, Wayne Kurker, Hyannis Marina, Marion Broderick

### Yarmouth's Economic Development Barriers and Needs for Tourism

Lack of "mission statement" about where the town is headed  
Yarmouth doesn't have an identity, a downtown or town center that defines the town  
Neighborhood resistance to plans to expand business or to establish new business zones, such as a Marina district or a recreation zone  
Present zoning makes large expansion of recreation businesses very expensive. Cape Cod Commission is an obstacle for medium sized businesses.  
Need to modernize facilities and add new activities  
Lack of sewers on Route 28 corridor  
Traffic congestion  
Lack of things to do. Not enough attractions and activities for rainy days and off-season  
Lack of information on transportation to Cape Cod and Europe  
Absence of a "world class" hotel in Yarmouth or Barnstable

### Tourism Opportunities

Marina zone and development  
Hyannis Conference Center  
Parker's River and drive-in site as a recreation area or marina

### Labor Force and Training Needs

Getting employees is a problem  
College students and high school students now must return before labor day  
Cost of summer housing is also an obstacle to recruit employees  
Some employers are housing workers  
Haven't had much success recruiting high school students as employees for part-time and summer jobs.

### Zoning and Permitting Issues

Our business and others were conforming but zoning changes made us non-conforming  
Too onerous to go through the permitting process for small projects such as an addition  
Town should target businesses to attract and allow them by right, rather than requiring the business to go to a town board for a special permit

### Priority Economic Development Projects and Activities

Offer incentives to attract business that diversify the economy and offer year round jobs  
Create a way for lodging businesses coordinate to set aside blocks of rooms for large groups, meetings, etc.  
Create a Marina District

**Town Leadership Focus Group, March 30, 1999**

Attendees: Joellen Daley, Harris Contos, Marion Broderick, Susan McAuliff, David Lillie, and nine additional participants.

**Economic Development Goals**

- Diversify Economy
- Update tourism industry and attract higher income market segments
- Improve Yarmouth's image and attractiveness
- Expand technology-based businesses
- Help start new businesses and retain existing businesses
- A stronger year-round economy

**Yarmouth's Assets and Advantages**

- Central location
- Proximity to Hyannis
- Natural beauty and resources: beaches, marshes, recreational facilities, Bass River, waterfront
- Well managed town government and low tax rate
- Town committees active in addressing economic development issues
- Economic Development Coordinator position

**Yarmouth's Economic Development Barriers and Needs**

- Community outreach and getting residents to agree on and support goals
- Lack of office buildings suitable to high technology and professional businesses
- Lack of good development sites
- Telecommunications infrastructure
- Overloaded infrastructure and east-west traffic congestion
- Zoning requirements to upgrade older properties and non-conforming properties.
- Permitting requirements and process: too many contradictory regulations and lack of a "can do" and helpful attitude among town employees
- Absences of active marketing effort to recruit businesses
- Availability of housing for summer employees

**Priority Economic Development Projects and Activities**

- Enhance south Yarmouth four corners area
- Outreach to existing businesses to retain them
- Adopt service-oriented approach to permitting process
- Future concept and plan for Union Station shopping area and White's Path area
- Expand thematic events and building an events calendar
- Expanded outreach and education on town's agenda and its importance

**Chamber of Commerce/Economic Development Focus Group, April 8, 1999**

**Attendees: Peter Bryanton, Town of Yarmouth, Bob Dubois, Yarmouth Area Chamber of Commerce, John O'Brien, Jeannine Marshall, Cape & Islands Community Development, Inc., Cape Cod Chamber of Commerce, Lynne M. Poyant, Hyannis Area Chamber of Commerce**

**Regional Economic Development Strategy**

Strengthen the visitor industry by stretching out the season. More targeted marketing efforts to 20 top zip codes where 80 to 90% of visitors come from. Focus on spring and fall advertising

Attract more technology-based businesses to Cape Cod through targeted recruitment efforts in six state area

**Workforce Development Issues**

For tourism industry, the Cape Cod Chamber is heavily involved in customer service training. Local chambers, including the Yarmouth Area Chamber offer these courses.

Summer employees are a problem, especially with college students returning to school earlier

Workforce and training for the technology sector needs to be expanded. Several initiatives include working with UMASS/Dartmouth to offer an Masters degree program in computer science and electrical engineering, working with the Cape Cod Community College to expanded industry-focused vocational training, and expanding high school computer education and facilities.

Existing school-to-work programs don't interact enough with businesses.

Business-school partnerships are expanding, especially around MCAS preparation and support

**Business Financing and Technical Assistance**

Cape Cod Chamber of Commerce has technical assistance specialists to work with member firms

Cape & Islands Community Development, Inc. is providing technical assistance and gap financing, especially to start-ups and small businesses. Provide subordinate loans in conjunction with private lenders. With a new US Dept of Agriculture 500,000 loan fund, Cape & Islands CDI now has a funding sources for Yarmouth businesses.

Cape has twice the concentration of self-employment than Massachusetts.

Business Information Center has information resources, research librarians and SCORE volunteers to help businesses.

**Yarmouth Area Chamber Role**

Make referrals to Cape Cod Chamber and Cape & Islands CDI for technical assistance

Help businesses understand local permitting process and refer to local attorneys

Since Cape Cod marketing is handled well by Cape Cod Chamber, Yarmouth Chamber focuses on building off-season business by creating off-season packages,

Help first time visitors become acquainted with Yarmouth through guides, etc.

Try to get seasoned visitors to come back and extend their stay

### Yarmouth Economic Development Issues and Needs

Educate residents on why economic development is important to the town

Lack of affordable summer housing for employees

Inventory of tourism-related facilities is tired and needs updating to meet the visitor needs and preferences

Town codes makes upgrading and expansion difficult (anything over 7,500 square feet requires sprinklers, ban on new motel and hotel rooms, etc.)

Lack of indoor activities for rainy days

Need to implement transfer of development rights, allow mixed use and higher density development to provide incentives for redevelopment, upgrading properties, and address housing needs

### **Appendix C**

#### **List of Acronyms Used in the Plan**

CCCC	Cape Cod Community College
EOA	Economic Opportunity Area
FIRE	Finance, Insurance and Real Estate
LQ	Location Quotient
MSA	Metropolitan Statistical Area
REB	Regional Employment Board
ROAD	Revitalization Overlay Architectural District
SIC	Standard Industrial Classification
TCPU	Transportation, Construction, and Public Utilities
TDR	Transfer of Development Rights

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2. Cape Cod Chamber of Commerce, *Annual Report 1997-98*
3. Cape Cod Commission, *Regional Policy Plan*, November 1996
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5. Cape Cod Commission and Town of Yarmouth, *Memorandum of Understanding between the Cape Cod Commission and the Town of Yarmouth*, October 12, 1995
6. Cape and Islands Community Development, Incorporated, 1998 Annual Report
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9. Town of Yarmouth, *Study of Barriers to Economic Development*, prepared for the Cape Cod Economic Development Council by Cape Planning and Grants, August 9, 1995
10. Town of Yarmouth, Comprehensive Plan Chapter 4, *Economic Development Inventory*, April 3, 1997
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13. Yarmouth Area Chamber of Commerce, *Yarmouth Cape Cod, 1998-1999 Guide*

### Economic Data

1. Massachusetts Department of Employment and Training, ES-202 Data Series, for the Town of Yarmouth, Town of Dennis, Town of Barnstable, and the Barnstable-Yarmouth Metropolitan Statistical Area annual employment and average wage data.
2. United States Bureau of Economic Analysis, Regional Economic Information System for United States, Massachusetts, and Barnstable County annual employment data

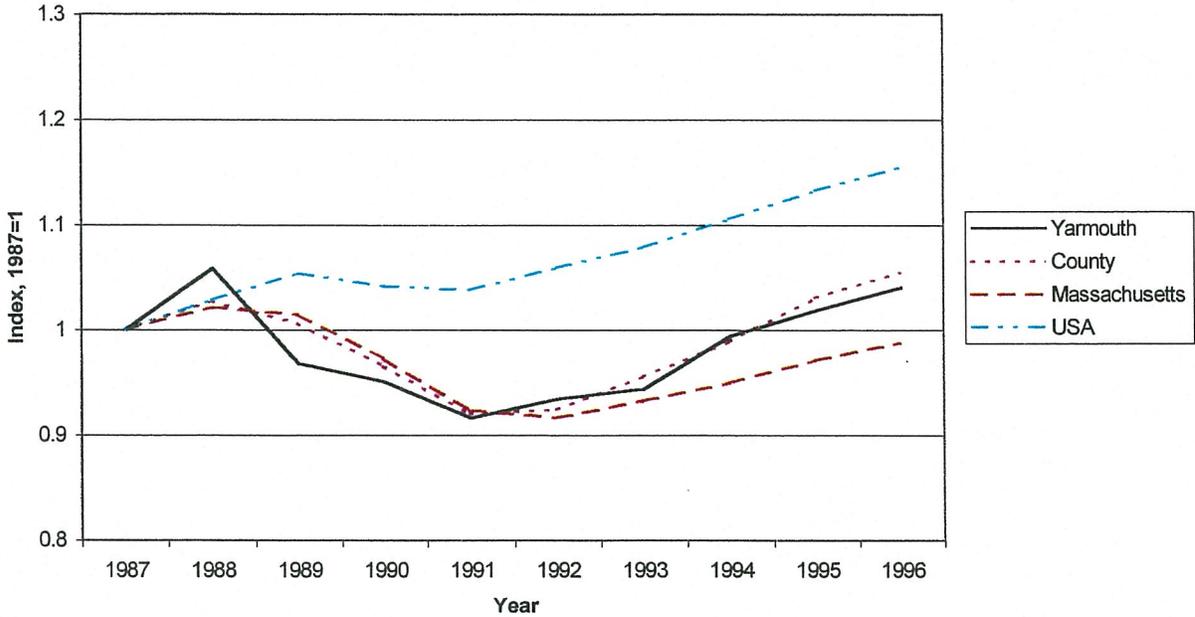
### Interviews

1. Andrea Adams and Jim O'Connell, Cape Cod Commission, March 24, 1999
2. Peter Bryanton, Town of Yarmouth Economic Development Coordinator, March 23, 1999
3. DeWitt Davenport, Davenport Realty, April 8, 1999
4. Representative Tom George, April 6, 1999
5. Alan Lawson, Attorney, Yarmouth Finance Committee member, April 8, 1999
6. Robert C. Lawton, Jr., Town of Yarmouth Town Administrator, March 30, 1999
7. David Lilley, Citizens for Responsible Development, April 6, 1999
8. Lisa McNeil, Center for Sustainable Economic Development, April 13, 1999
9. Dick Rand, Cape Cod Community College, April 13, 1999
10. Senator Henri Rauschenbach, April 1, 1999
11. Dean Sawyer, Cape Cod Regional Employment Board, April 13, 1999

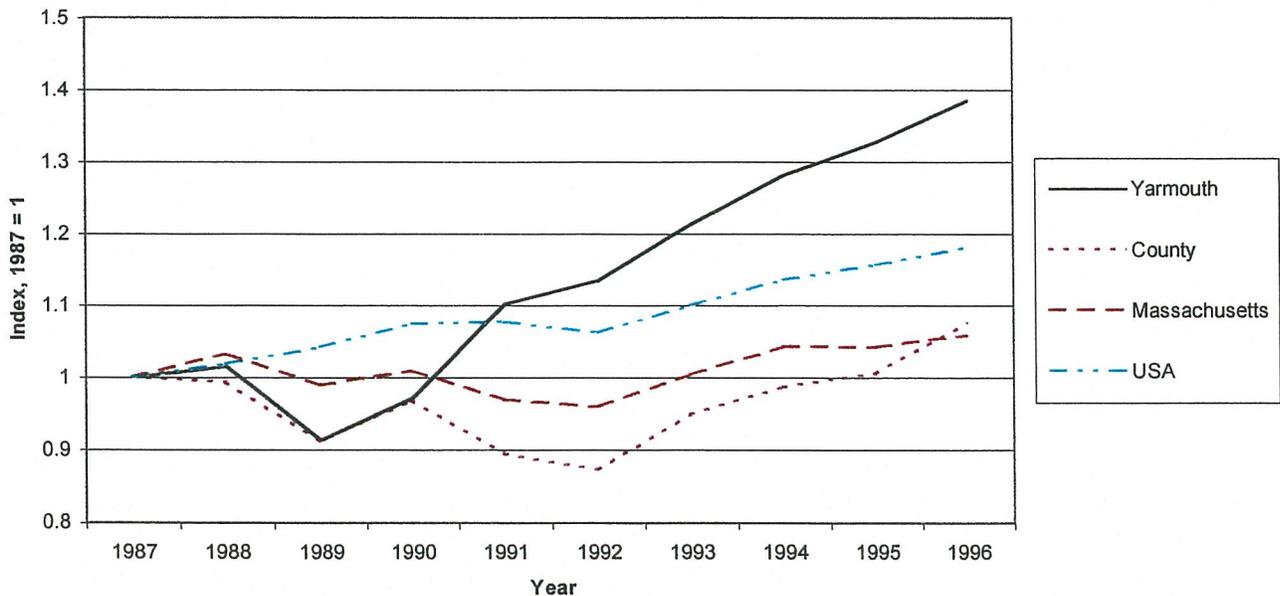


## Appendix A Charts on Employment Growth and Composition<sup>6</sup>

**Chart 1  
Total Employment, 1987 to 1996**

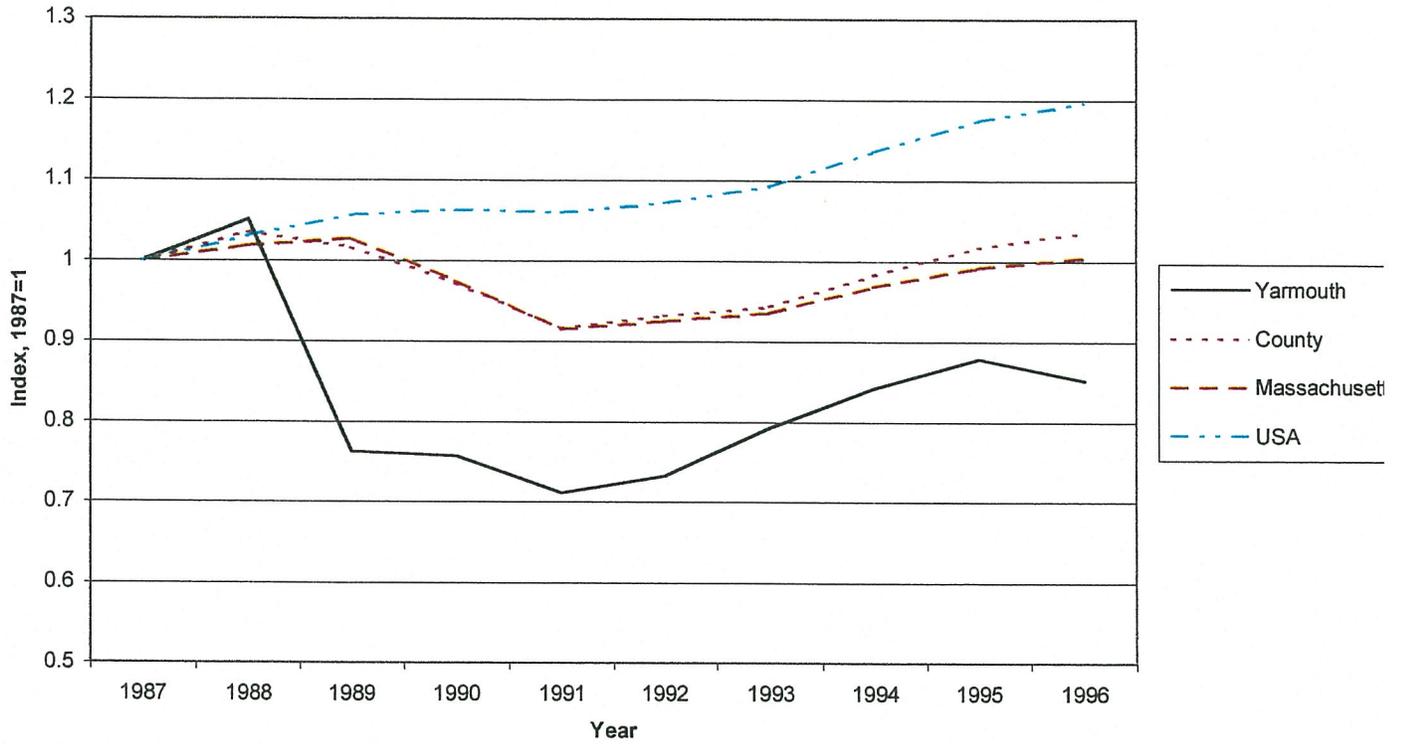


**Chart 2  
Transportation and Public Utilities Employment, 1987 to 1996**

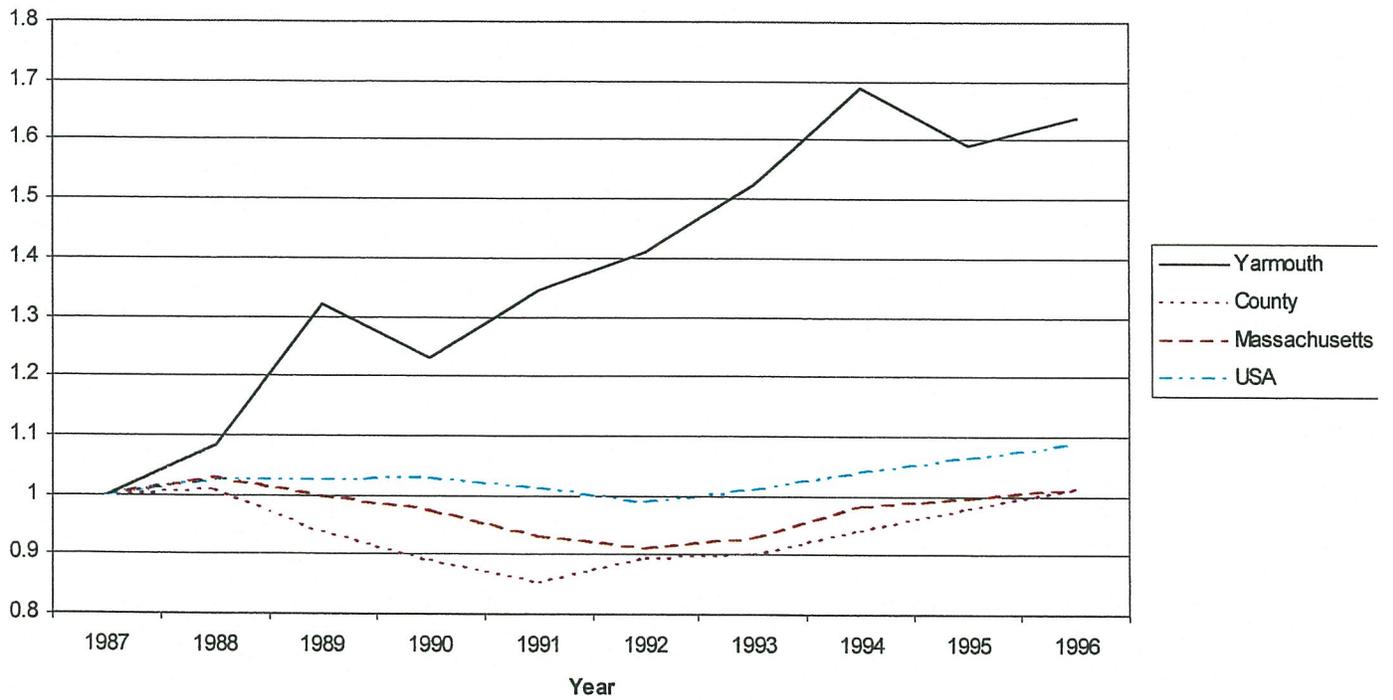


<sup>6</sup> Charts 1 through 6 are based on data from the Regional Economic Information System, US Department of Commerce Bureau of Economic Analysis. Charts 7 and 8 are based on data from the Massachusetts Department of Employment and Training ES-202 Data Series

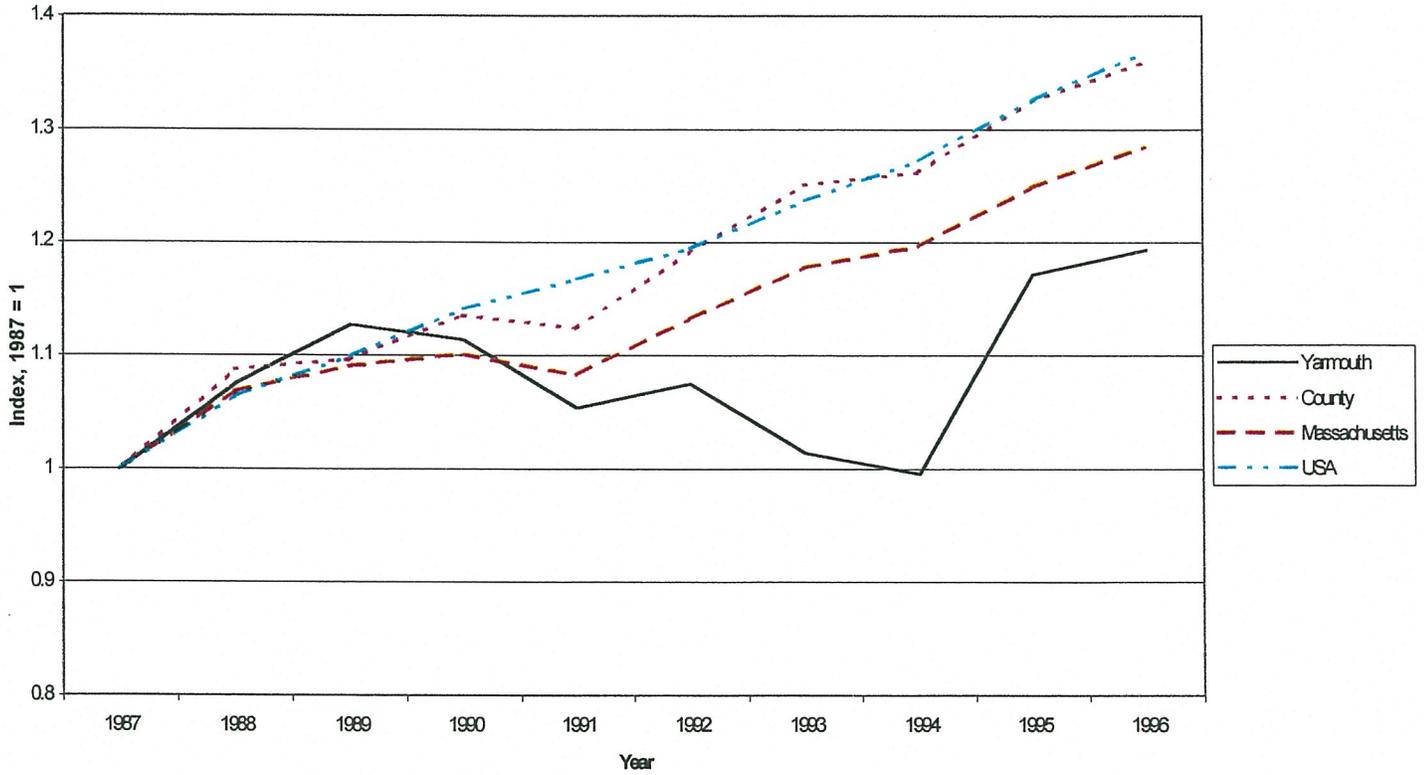
**Chart 3**  
Retail Employment, 1987 to 1996



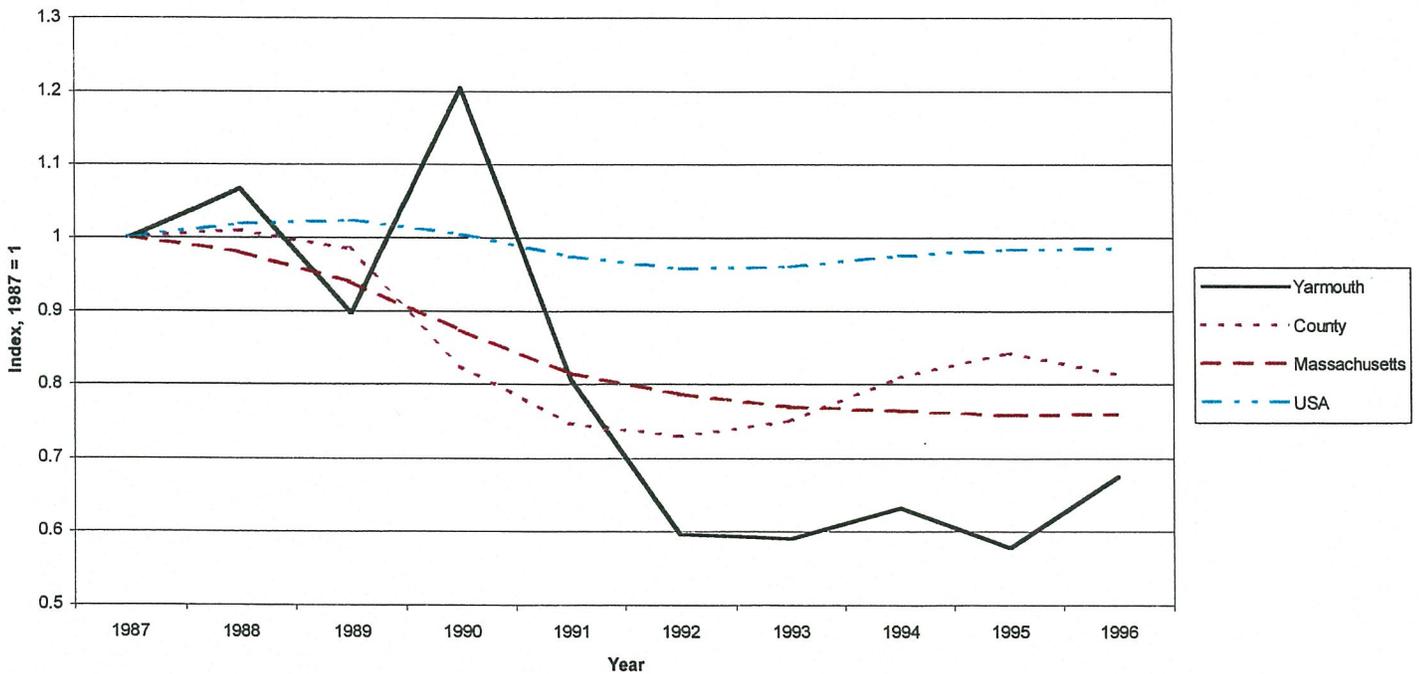
**Chart 4**  
Finance, Insurance and Real Estate Employment, 1987 to 1996



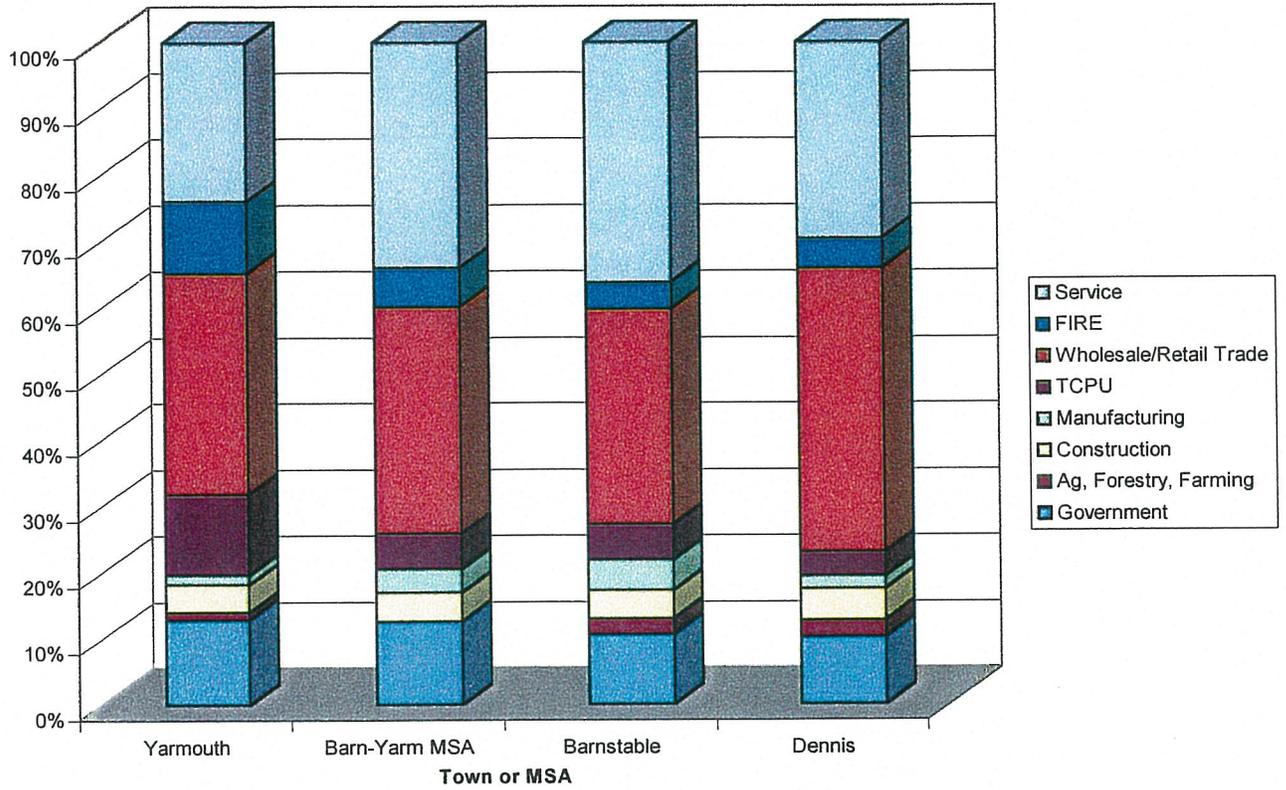
**Chart 5**  
**Service Employment, 1987 to 1996**



**Chart 6**  
**Manufacturing Employment, 1987 to 1996**



**Chart 7**  
**Comparison of Employment Distribution, 1997**



**Chart 8**  
**Comparison of Employment Distribution, 1997**

