

APRIL 3, 1997

**CHAPTER 4**  
**ECONOMIC DEVELOPMENT INVENTORY**  
**INVENTORY OF PERTINENT DATA**

# TOWN OF YARMOUTH ECONOMIC DEVELOPMENT INVENTORY

## EXECUTIVE SUMMARY

### ORGANIZATION OF ECONOMIC DEVELOPMENT CHAPTER OF THE COMPREHENSIVE PLAN

- \* The Comprehensive Plan Program has been divided into two phases with an economic development portion in both.
- \* This first portion, the "inventory", is basically a reporting of significant facts and trends in economic factors affecting Yarmouth.

### GENERAL GOALS AND POLICIES FOR ECONOMIC DEVELOPMENT

- \* This section includes three very general goals and some obvious policies relating to implementation, development review, education and technical assistance and town actions. In Phase II detailed goals, policies, and measurable objectives will be added and hopefully endorsed along with the completed chapter.
- \* This Chapter contains a summary of the present economic development policies of the Town to assist expanding and new businesses, implementing EOA's, and correcting barriers to development.

### TYPES OF BUSINESSES AND EMPLOYEES

- \* In February of 1995 the largest, single, local employer was the Town and Regional School District; after that the largest was Davenport Realty with a summer employment of 500, followed by Commonwealth Electric with 209 and Colonial Gas with 203.
- \* Between 1982 and 1992 the dollar amounts of retail sales in Yarmouth increased by almost 59%, but the number of establishments declined slightly from 231 to 209, reflecting the recession of 1991.
- \* Service establishments, on the other hand, grew from 154 to 196 over the same 10 year period, and with a 138% increase in receipts. Yarmouth had 44 hotels, motels, lodging establishments in 1992, 16% of those on Cape.
- \* Eating and drinking establishments, although highly competitive, increased from 64 to 84, in the 10 year period between 1982 and 1992.
- \* The U. S. Census reported that in 1990, 40% of our residents lived and worked here, with another 34% working in Hyannis. After that there was then a drop off to 10% who commuted to Dennis.
- \* Like other Cape towns, Yarmouth has valleys of employment in the winter months, almost 16% in March of 1994.

### **LABOR FORCE AND EMPLOYMENT**

- \* The occupations of Barnstable County residents reflect the socio-economic conditions here on the Cape with more than 15% reported in the "sales occupations" and almost 15% in "professional specialty occupations."
- \* Over the 10 year period 1982 - 1992 Yarmouth's employment showed startling increases in transportation, communications, and utilities (+291%), while service employment grew by 24% and government by 31%.
- \* Labor force reflected the cyclical character of the Cape and Yarmouth economy with August 1994 showing only 4.3% unemployment while January had 12.5% unemployment indicating a strong recovery from the recession.
- \* One of the major shifts in employment pattern has been the explosion in the number of people working in their own homes, many of them self-employed. Yarmouth showed a 13% growth in the '82-'92 decade.

### **MUNICIPAL TAX RELATED INFORMATION**

- \* Between FY'90 and FY'95 Yarmouth's tax rate increased by 103%, or from \$5.76 to \$11.67 per \$1,000 valuation. At the same time the town, on-Cape, that was most comparable in size, Falmouth, had a tax rate of \$10.75.
- \* The tax levy, the amount actually raised in dollars, increased between FY'90 and FY'95 by 34% and in Dennis by 35%. Statewide the levies increased an average of 28% for that 5 year period.
- \* An interesting statistic about this residential community, is that in FY'95 the average tax bill for a single family home was \$1353, while in Barnstable it was \$1893, and in Dennis \$1055.
- \* A significant source of revenue in Yarmouth is the room occupancy tax that is collected from hotels, motels. In FY'95 Yarmouth received \$1,157,000, up 15% from FY'90.

## **THE DEVELOPMENT AND PROCESS OF PREPARING THE YARMOUTH COMPREHENSIVE PLAN**

In the period between Sept. of 1989 and July 1991 some basic work on a Yarmouth Master Plan had been done by the Planning staff, outlines were developed, a questionnaire was sent to departments, and a "sketch plan" was prepared.

When the Cape Cod Commission came into being in April 1991, that agency's staff started work on guidelines for Local Comprehensive Plans. By July of 1991 contacts between the Cape Cod Commission and the towns had progressed far enough so that several of them were interested in undertaking a Comprehensive Plan program. Yarmouth adjusted its work outline to match the Commission's proposed scope and a preliminary proposal was prepared.

It was finally decided to divide the work program into two 2-year phases using the standard guidelines of the Cape Cod Commission. The Commission provided a formula amount of \$66,212 for financial assistance for the first phase. The Memorandum of Agreement was signed by the Yarmouth Board of Selectmen on October 20, 1992. At approximately the same time Yarmouth was named a "pilot" community representing its own particular size and character of community on Cape Cod.

The Board of Selectmen adopted, with formal votes, support for the program and naming the Planning Board as the official "Local Planning Committee" shortly thereafter.

Our program was unusual in that a large portion of the first phase was to be prepared by the existing planning staff with consulting services for outreach, coastal resources, recreation and open space, and transportation planning. The first new staff member, a contractual planning aide, was hired on December 8, 1992.

### **CRITICAL NEED FOR GOOD COMMUNICATIONS AND PUBLIC RELATIONS**

It was immediately recognized that a complex program such as the comprehensive plan needed a very good communications process.

In 1965 the Planning Board undertook a master plan program under the old Urban Planning Assistance Program (701). A consultant prepared the plan, and it was presented to Town Meeting, although the usual process would have been to have the Planning Board hold a hearing and adopt it as an advisory document. The result was an overwhelming rejection and the resignation of the Planning Board on the stage of Dennis-Yarmouth Regional High School! As a result the need for good communications and outstanding public relations has reverberated across the years!

Now we must present the final plan documents to Town Meeting for their approval! We have had an active outreach program, using an outreach consultant, and have used radio, TV, handouts, summary reports, and numerous graphics and cartography. This particular chapter describes the inventory of economic data about Yarmouth.

## **CHAPTER 4 ECONOMIC DEVELOPMENT INVENTORY**

### **I. EXPANSION OF ECONOMIC DEVELOPMENT CHAPTER**

The Economic Development Chapter of the Comprehensive Plan has been expanded and expedited so that work on it has been started during this first phase of the Comprehensive Plan, and will continue through the second phase. If adequately funded in Phase II, we expect to use the services of a consultant familiar with economic development issues to prepare a part of this program chapter.

### **CONTENTS OF ECONOMIC DEVELOPMENT INVENTORY**

This first section of the chapter will present data that not only is readily available, but is designed to answer the numerous inquiries which planning staff receive from the public about economic and financial items affecting the town. At this stage we have dealt mainly with reporting the facts and not with analysis, forecasting, and planning.

### **WHAT IS ECONOMIC DEVELOPMENT?**

There is about as wide a range of understanding of the meaning of economic development as there are people discussing it. Our understanding of the definition is as follows: economic development deals basically with two items that concern the municipal planner,

1. employment conditions, now existing, and their potential for the next 20 years, and
2. land area requirements for a wide variety of uses and our estimate of future needs.

"Economics," as a social science, is founded on a very different basis than that of a science, in that experimental, statistical, and quantitative items try to adequately describe "human" actions. In that case, there are not constant relations between factors. Therefore, particularly at the local level, there is a heavy emphasis on a quality educated value judgement (EVJ) to provide a frame of reference for analysis and a projection of needs and growth, since a mathematical approach can only be partially applied.

### **II. RELATIONSHIP OF ECONOMIC DEVELOPMENT TO THE LOCAL COMPREHENSIVE PLAN**

In the past 30 years Cape Cod has been one of the fastest growing regions in New England. In 1960 there were 70,286 people in Barnstable County, a number which increased to 186,605 in 1990, a 165% increase. The economy has been shifting from a seasonal tourist/fishing and agriculture base to a more diversified year-round base with significant business services, manufacturing, research, medical, as well as human services and education services for local residents. In the period 1982-92, year-round jobs increased from 54,444 to 67,045 jobs on the Cape, a 23% increase.

The major recession of 1991 and the end of the Cold War's military demands have affected all of New England in a staggering manner as regards loss of manufacturing jobs. Barnstable County lost 16% of its manufacturing jobs in the same 1982-92 period.

In order for "economic development" to be effective in Cape Cod communities, appropriate land must be available for development. This resource is not totally available in Yarmouth, so a close look at our land needs must be an important part of the analysis included in the Economic Development Chapter. Yarmouth consists of three villages that have now coalesced into one, essentially suburban, town. The Cape Cod Commission has a policy of encouraging concentrated development in targeted "activity centers," but that does not entirely fit with the Yarmouth situation either. Our purpose is to develop a strategy that will work with this town, and with the region, and that will give us a measure of both the land and employment we need, while at the same time identifying and encouraging potential growth of historical and cultural sites.

This strategy will certainly include but not be limited to: 1) a working partnership with business and governmental groups; 2) an on-going improvement of relevant necessary regulations; 3) and streamlining of redundant permitting processes.

But this first report on the Economic Development Chapter is essentially an inventory of what we have and current trends, which will lead to an overall plan in Phase II.

### **III. POSSIBLE GOALS FOR ECONOMIC DEVELOPMENT**

To start this portion of the report a series of goals, and actions is suggested that attempts to identify the direction of economic development in Yarmouth in broad general terms. Refinement and expansion to policies, standards, and measurable objectives will take place in the second phase after extensive public discussion and review, followed by Town Meeting action. These goals should therefore be viewed as a starting point from which more specific policies will be developed.

#### **SUGGESTED GOALS**

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

## **DEVELOPMENT REVIEW POLICIES**

1. DRI's should be evaluated for job creation, occupational and salary opportunities for local workers, and for their impact on decent affordable housing for employees.
2. The Town should encourage projects which provide permanent, year-round jobs and employee training opportunities for local residents.

## **IMPLEMENTATION**

1. The Town should work with the Cape Cod Economic Development Council, the Cape Cod Economic Roundtable, the Cape Cod Commission, adjoining town governments, the Yarmouth Chamber of Commerce, Cape Cod Ecumenical Council, health and human service organizations, and other business and senior groups, to identify and implement programs to improve the Yarmouth economy.
2. The Town should work with local, county, and state permitting organizations, to coordinate and streamline the development review process, to minimize delays and cost.

## **EDUCATION AND TECHNICAL ASSISTANCE**

1. The town should work with County government, businesses, and non-profit organizations as technical resources for economic development, and work as a liaison with state and federal agencies to obtain funding and services.
2. The Town should encourage and support the efforts of the business sector and various educational training institutions to prepare local workers for new job opportunities, with special attention to unemployed persons and to persons re-entering the labor force.
3. The Town should encourage and support the development of expanded higher educational and vocational programs on Cape Cod in order to enhance job opportunities and upgrade job skills.

## **PROPOSED TOWN ACTIONS**

1. The Town, in preparing its Comprehensive Plan, should meet with businesses and business organizations, to ascertain economic development needs in the community.
2. The Local Comprehensive Plan should identify areas for economic growth, as well as appropriate infrastructure needs. The Town should review and attempt to modify zoning and permitting processes to encourage diverse and desirable economic development.
3. The Town government should work with the private sector on initiatives to market the Town for business and tourist development. (This may include town financial support for marketing through block grant funding.)
4. The Town should consider offering incentives to promote desired economic development in the community, including Economic Opportunity Areas (EOA's), enterprise zones, and similar strategies.
5. The Town should encourage, consider, evaluate, and support new strategies that would result in desired economic development.

#### **IV. RELATIONSHIP OF PHASE I - ECONOMIC DEVELOPMENT INVENTORY TO OVERALL ECONOMIC DEVELOPMENT CHAPTER**

Our Phase I - Economic Development Chapter - Inventory is primarily a textual description of the town's economic activities supported by pertinent available statistical materials. It is designed to serve as the background data for the whole Chapter (Phase II.)

The various text and tables cover the following materials:-

- 1) an attached description of the activity,
- 2) comparisons with other towns,
- 3) past trends of changes or,
- 4) employment trends, where applicable, plus
- 5) land areas used and needed, when available. (supplied later in detail in Land Use Chapter)
- 6) a brief "executive summary" of the findings is also attached.

What this inventory is designed to do, therefore, is to describe economic conditions in the Town of Yarmouth, to provide enlightenment on employment trends, and in conjunction with the Land Use and Growth Management Element, to provide an analysis of present land areas and future requirements.

The Comprehensive Plan is following a course that is designed to help implement a balanced and sustainable economic development strategy in Yarmouth, capable of absorbing most of the effects of a fluctuating seasonal economy, by diversifying business activities and creating more year-round job opportunities, while protecting in a prudent and reasonable manner our fragile environmental conditions.

Tourism and retirement continue to be Yarmouth's leading economic sectors. It is already clear we need to remain focused on marketing this town's obvious strengths in these areas. Yarmouth also appears to have good potential for encouraging telecommunication businesses and to serve as an accessible location for computer, environmental business, and marine electronic industries. Yarmouth could look to promote "green" tourism and the historic and cultural heritage of the Town as a stimulus for economic growth. There appears to be other specialties where the Town could concentrate. Many of the Plan proposals should be related to those general categories.

#### **ECONOMIC DEVELOPMENT ACTIVITIES IN YARMOUTH**

##### **Summary of Economic Development Procedures**

The Board of Selectmen have adopted a procedure to assist businesses who wish to expand or relocate within the Town of Yarmouth. The business developer first meets

with the Site Plan Review Team, which consists of all of the permitting departments, building, health, fire, planning, etc., and outlines the scope of the proposed project. The Team comments on the needed inspections and permits. The Town Administrator is then notified of the proposed project, which is then discussed with the permit granting authorities to determine how best to assist the developer, if necessary. If the project is one which requires approval by the Cape Cod Commission, the regional planning and land use planning permitting agency, the application is forwarded to them by the Building Inspector or to the State Department of Community Development. The Town Administrator also brings the project to the Board of Selectmen for their review and if they endorse the project, letters of support are written to the Commission.

In the recent past this method was successful in helping to permit a Super Stop & Shop, a food market based in Massachusetts, to develop a 109,237 square foot super store in South Yarmouth, and for an expansion of the Christmas Tree Shops warehouse, a retailer based in Yarmouth, selling products in eastern Massachusetts, and also for expansion of the Cape Cod Bank and Trust Operations Center to replace a current facility in an unused 15,000-square foot warehouse, with a 12,000 square foot addition.

The Town of Yarmouth, through its Town Administrator, was an active participant with the Cape Cod Economic Development Council in seeking to have Cape Cod designated as an Economic Target Area (ETA) by the State of Massachusetts. This designation allows towns to designate areas of their communities as Economic Opportunity Areas (EOA's), which allows for tax incentives for new and expanding businesses. The Town has now successfully gained the designation of eight Economic Opportunity Areas by the State in order to provide tax incentives at the local level.

### **SUMMARY OF ECONOMIC OPPORTUNITY AREA (EOA) PROCEDURES**

After the initial meeting between the Town Administrator and the applicant, the Town Administrator would refer the application to the state agency administering the program, and secondly the Town Administrator would make an appropriate preliminary decision as to the viability of the project.

If the above happens, the applicant would be invited to a preliminary meeting with the Local Negotiation Team, who then would make a recommendation to the Selectmen.

If they decide to concur in the project, a pre-screening meeting between state officials and the Local Negotiation Team and the proponent would be held. That meeting would be the first step toward state certification and a negotiated local agreement. Any local negotiated agreement would be subject to Town Meeting approval.

Once state pre-approved, and a conditional negotiated agreement has been achieved, the matter would be presented to the voters. If they approve, the applicant would then proceed to obtain state certification and development permits.

The Local Negotiation Team will consist of a Selectmen, the Town Administrator, an Assessor, the Building Inspector, and an Economic Revitalization Committee member. It is estimated that the total time from inquiry to Town Meeting approval would be approximately 3 months.

The Town also had appropriated \$15,000 to have an independent study completed on "barriers to economic development. " The study developed a road map for amending the Town's zoning by-law and its internal procedures, to become "more user friendly" for those seeking permits within the Town. Fifteen thousand dollars has also been designated for use by the Yarmouth Chamber of Commerce for matching grant awards to businesses for improving landscaping and making facade improvements.

**TYPES OF BUSINESSES**

**EMPLOYERS**

## **V. INVENTORY OF ECONOMIC DEVELOPMENT - RELATED DATA**

At this stage we have gathered some interesting and significant data that helps give us a measure of economic activity in our community. For instance:-

### **TYPES OF BUSINESSES AND EMPLOYERS**

Located in Barnstable County approximately 96 miles south of Boston and occupying a land area of approximately 24 square miles, the Town is the fifth largest community in land area and third largest in population and equalized value on Cape Cod. On the basis of assessed valuation in fiscal year 1995, approximately 85% of the Town's property was residential, 1% was industrial, 11% commercial, 3% was personal property, and less than 1% was open space. On the basis of land area of course the pattern is quite different, with nearly 25% of the land area in public open space.

### **PRINCIPAL EMPLOYERS - Yarmouth**

The following are the large employers, other than the Town and Regional School District, located partially in the Town:

(Table 4-1)

<b><u>Company</u></b>	<b><u>Nature of Business</u></b>	<b><u>Current Employees</u></b>
Davenport Realty	Building and Motel	100 (Winter) 500 (Summer)
Commonwealth Electric	Electrical Company	209
Angelo's	Grocery Store	110 (Winter) 200 (Summer)
Christmas Tree Shops	Retail Store	186
Colonial Gas	Utility	203
Cape Cod Bank & Trust	Bank	142
New England Telephone	Utility	114 (Winter) 158 (Summer)
Windsor Nursing Home	Nursing & personal care	116
A&P	Grocery Store	110 (Winter) 130 (Summer)
MPG Newspapers	Newspaper	50
Bank of Boston	Commercial Bank	40

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Source: The employers themselves, as of February, 1995

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## EMPLOYMENT AND PAYROLLS - YARMOUTH

Table 4-1

### CALENDAR YEAR AVERAGE

	<u>1995</u>	<u>1994</u>	<u>1993</u>	<u>1992</u>	<u>1991</u>	<u>1990</u>	<u>1989</u>
Government	850	1011	974	1,079	1,036	1,029	1,010
Agriculture, Forestry & Fisheries	42	38	32	C	30	43	39
Contract Construction	348	324	291	313	330	441	564
Manufacturing	96	105	98	99	134	200	149
Transportation, Communications & Utilities	950	917	869	813	789	696	654
Wholesale & Retail Trade	2733	2667	2,478	2,300	2,243	2,377	2,438
Finance, Insurance & Real Estate	815	864	780	722	689	631	676
Services	<u>1802</u>	<u>1531</u>	<u>1,560</u>	<u>1,654</u>	<u>1,621</u>	<u>1,713</u>	<u>1,734</u>
Total Employment	<u>7642</u>	<u>7457</u>	<u>7,082</u>	<u>7,011</u>	<u>6,872</u>	<u>7,130</u>	<u>7,264</u>

Note: See Chart 4-1

Number of Establishments	675	654	610	602	628	676	665
Average Wage	\$ 22,689	\$ 22,400	\$ 21,944	\$ 21,625	\$ 20,949	\$ 19,733	\$ 19,031
Total Annual Payroll (\$000)	\$174,763	\$167,033	\$155,409	\$151,616	\$143,963	\$140,699	\$138,241

Source: Massachusetts Department of Employment and Training.

"C": + Confidential Data (less than 3 reporting employees, or 1 employer accounts for 80% or more of total).

## **TRENDS OF TOP BUSINESSES IN YARMOUTH 1982 - 1992**

### **TRENDS IN RETAIL TRADE INDUSTRIES IN YARMOUTH 1982-1992**

According to the Census of Business, Yarmouth's retail businesses, with their strong orientation towards summer business, reported that although the number of establishments had declined by 1.2% from 231 to 209 between 1982 and 1992, the dollar amounts of sales had increased by 58.8%; the number of food stores had grown from 19 to 27, with their sales increasing by 88.7%. Eating and drinking establishments, although highly competitive, grew from 64 to 84, between 1982 and 1992, and their sales increased by 97.8%; (see charts 4-1 and 4-2) after peaking at 5 units, auto dealers had dropped to just 2 by 1992 however. (See Table 4-2)

### **TRENDS IN SERVICE TRADE INDUSTRIES - 1982 - 1992**

Between 1982 and 1992 the number of service establishments reporting in Yarmouth grew from 154 to 196, with a reported increase in receipts of 137.7%.

The number of hotel, motel, and lodging establishments reporting to the Census of Service Trades in 1992 was 44, of the 281 in all of Barnstable County; that meant about 16% of those county motels were located in Yarmouth, which had only 11.3% of the Cape's population. Not really a great surprise when you consider the concentration of motels here. Still the total number of motels, etc. had dropped from 50 in 1982, to 44 in 1992, even though total sales were up 131.1% (see Table 4-3) (see Charts 4-3, and 4-4)

In that same 10 year time period overall service employment in Yarmouth increased from 1308 to 1825, up 39.5%. In this retirement community health services were significant, the number of establishments grew from 30 to 41, and their receipts increased from \$11.2 million to \$23.1 million, equal to a 104.9% growth. (see Table 4-3) (see Chart 4-5)

### **DOLLAR VALUE OF PRODUCTION OF RESOURCE BASED INDUSTRIES** **AGRICULTURE, FORESTRY, FISHERIES**

This combined category, which is used for employment purposes, affects Yarmouth primarily through agriculture found in the cranberry bogs, and virtually not at all in forestry, and only in small amount in fisheries, since the commercial fishermen are based mostly in other towns on Cape Cod.

In 1985 total employment of 62 was reported for the grouping in Yarmouth, but by 1994 it was reduced to just 38. In the same time frame Barnstable County's employment had increased from 1,095 to 1,127, +4.8%. Two hundred and ninety-two (292) units of agriculture, forestry, and fisheries reported with an annual payroll of \$22.6 million, county-wide in 1994.

## TRENDS OF TOP RETAIL TRADES 1982 - 1992

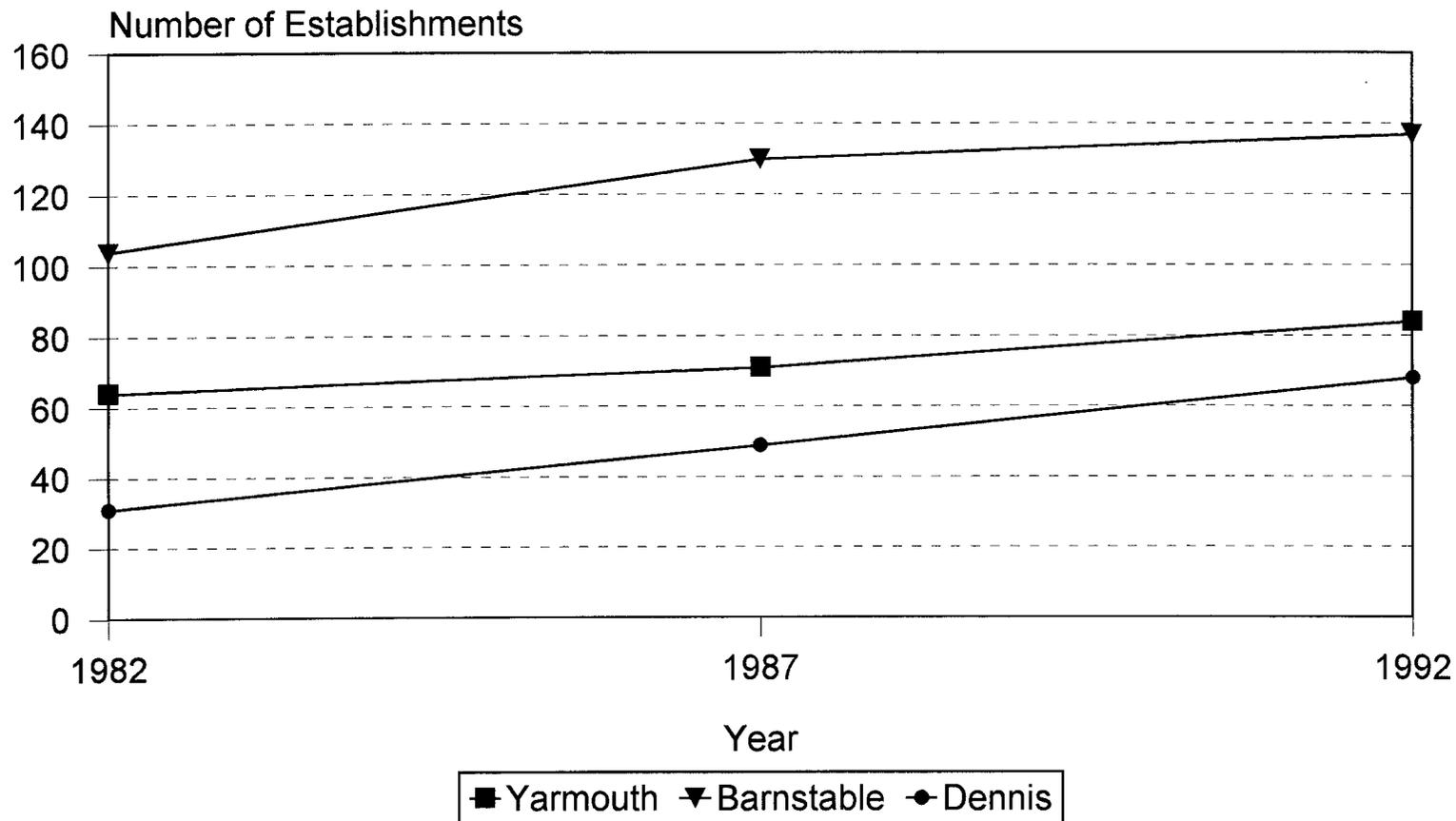
	YARMOUTH			DENNIS			BARNSTABLE TOWN			BARNSTABLE COUNTY		
	1982	1987	1992	1982	1987	1992	1982	1987	1992	1982	1987	1992
All Establishments	231	196	209	139	144	171	618	597	578	2465	2300	2321
Total Sales (\$000)	104241	149632	165554	54497	12819	144655	427208	784417	748993	1186854	2023335	2147200
Employees in March	1512	2103	1741	807	1299	1387	5886	7808	6194	16936	23442	19314
Food Stores	19	18	27	12	16	16	45	47	56	217	258	267
Sales Food Stores (\$000)	26357	11726	49730	19213	38657	36296	52258	83161	108148	243049	378649	493130
Auto Motive Dealers	3	5	2	0	2	4	29	32	26	69	85	72
Sales-Auto Dealers (\$000)	N/A	N/A	N/A	0	N/A	N/A	94367	224786	173593	153576	256793	311731
Eating & Drinking Establishments	64	71	84	31	49	68	104	130	137	534	652	698
Eating & Drinking Estimated Sales	20702	34666	40948	N/A	12041	23643	43265	67811	67844	164937	271620	299279

N/A = Not Available

Table 4-2

Sources: U.S. Census Retail Trade

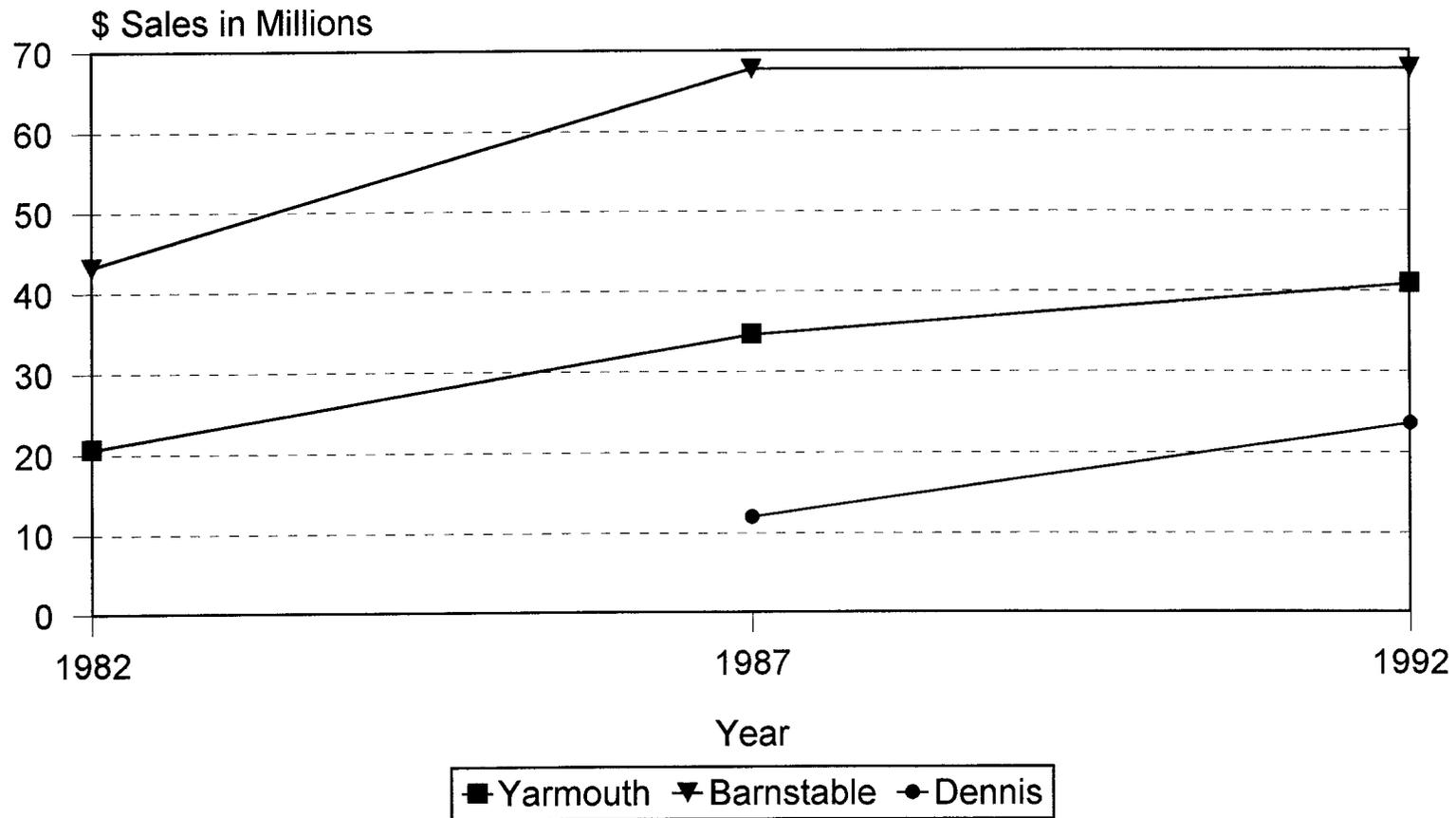
# Eating & Drinking Establishments



Source: U.S. Census

Chart 4-1

# Sales Trends of Eating & Drinking Establishments



Source: U.S. Census

Chart 4-2

**TRENDS OF TOP SERVICE TRADE INDUSTRIES IN BARNSTABLE COUNTY**

**YARMOUTH**

**BARNSTABLE**

**DENNIS**

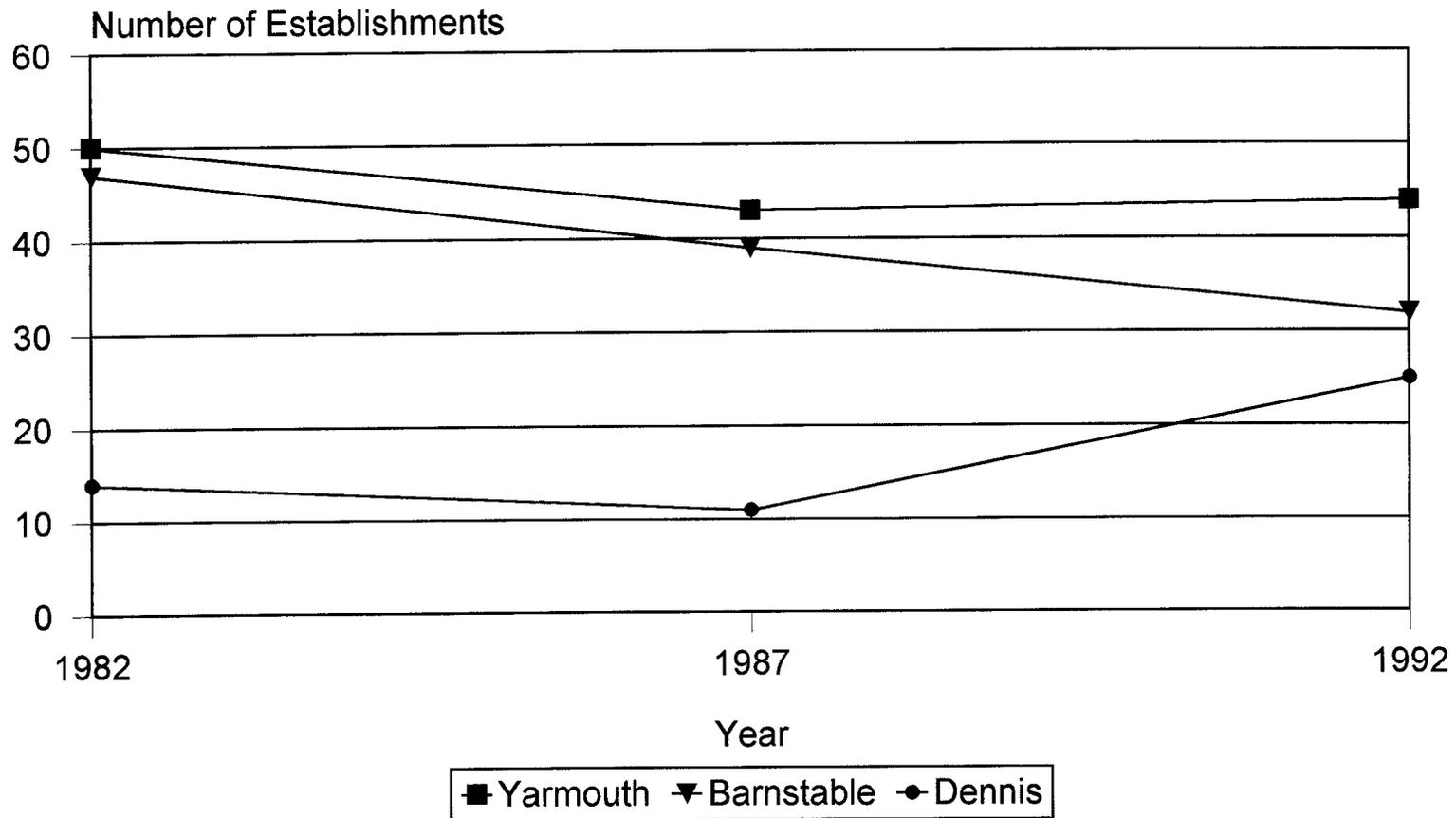
**BARNSTABLE COUNTY**

	1982	1987	1992	1982	1987	1992	1982	1987	1992	1982	1987	1992
ALL ESTABLISHMENTS	154	207	196	422	554	558	48	93	120	1375	1884	1906
TOTAL RECEIPTS (\$000)	46209	75351	109861	108651	203359	252132	6676	21174	38839	306513	573234	762207
EMPLOYEES ON MARCH 12	1308	1608	1925	3135	5409	4356	207	460	610	8722	14138	13157
HEALTH SERVICES EXCEPT HOSPITALS												
ESTABLISHMENTS	30	44	41	126	145	148	7	15	18	301	378	412
RECEIPTS (\$000)	11293	17414	23147	31353	63180	944777	N/A	4932	11954	75112	155104	248330
hotels/MOTELS/LODGING												
ESTABLISHMENTS	50	43	44	47	39	32	14	11	25	298	288	281
RECEIPTS (\$000)	14214	23871	32844	30392	60727	24801	2875	2554	8681	95677	144220	58529

Source: U.S. Census of Service Trades

Table 4-3

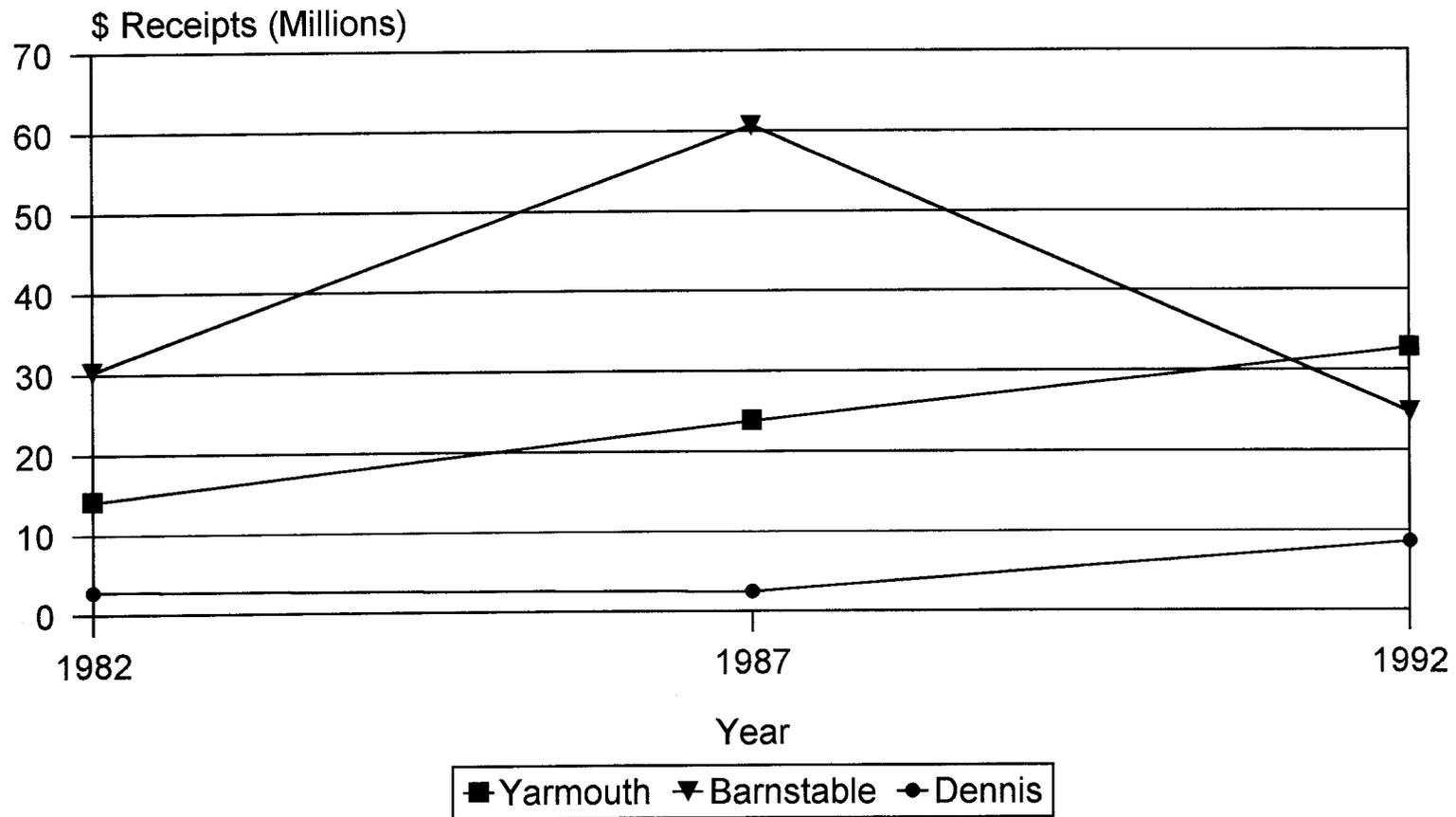
# Hotel & Motel Lodging Establishments



Source: U.S. Census

Chart 4-3

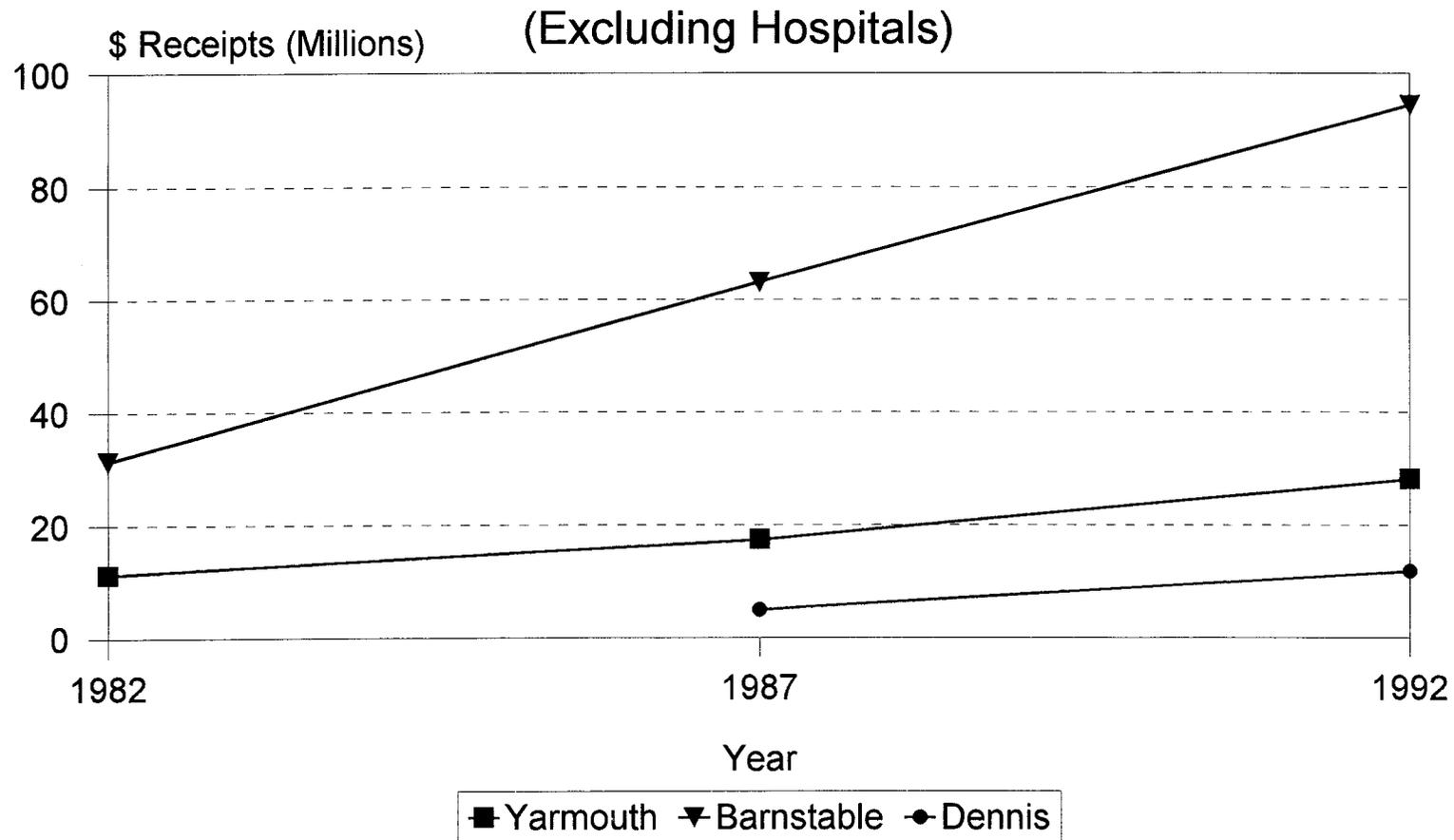
# Receipts Trends of Hotel & Motel Establishments



Source: U.S. Census

Chart 4-4

# Receipts Trends of Health Service Establishments



Source: U.S. Census

Chart 4-5

Seven of Yarmouth's cranberry bogs are owned by the town and are leased out to private operators. There are at least 7 other privately-owned bogs. Other data concerning them appear not be available at this time.

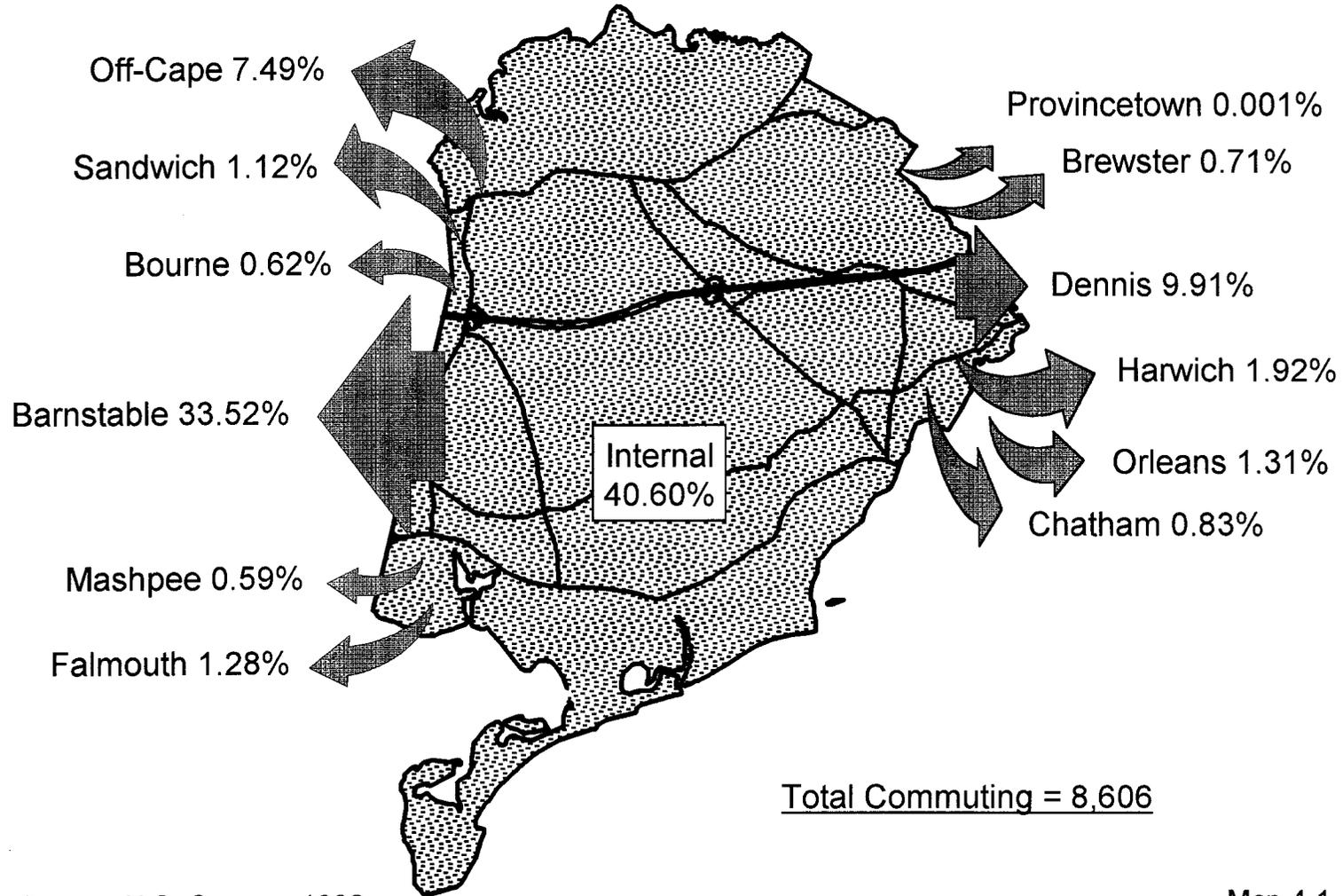
County-wide the number of cranberry farms increased from 54 to 61, from 1982 to 1992, and the acreage was up from 843 to 970 acres.

### **COMMUTING PATTERNS OF YARMOUTH RESIDENTS - 1990**

Extracted from the employment data of the 1990 U.S. Census (as taken from a 1 in 6 sample), data indicated that 51% of all Cape residents are employed within their own hometown, and 49% worked elsewhere, including 13% who commuted to jobs off-Cape.

The Yarmouth totals are somewhat different due to its Mid-Cape location and proximity to Hyannis. In our case just over 40% of the residents lived and worked in Yarmouth, and almost 34% worked in Hyannis. If there was any surprise in these totals it is that Hyannis wasn't higher. These two destinations are followed by Dennis, at 10% and Off-Cape, at 7.1/2%. The commuting destinations in the remaining measurable towns are all under 2%. (See Map 4-1)

# Commuting Destinations of Yarmouth Residents - 1990



Source: U.S. Census, 1990

Map 4-1

LABOR FORCE

EMPLOYMENT - SELF EMPLOYED

OCCUPATIONS

## **LABOR FORCE - EMPLOYMENT - OCCUPATIONS**

### **LABOR FORCE - BARNSTABLE COUNTY AND YARMOUTH**

- a. The 1990 Census reported that in Barnstable County there were 89,855 persons in the labor force, over 16 years of age, or 58.4% of the total population over 16, and of that total, 82,526 were employed and 6,314 (7.1%) were unemployed.  
(see Table 4-4) (see Chart 4-6)
- b. The make up of the labor force at the county-wide level was very interesting, and reflected the seasonal, recreational character of the Cape. Of the 82,526 employed almost 23% were in the retail trades and almost 10% were in construction. The ever increasing permanent retirement population was demonstrated by the 8.8% of the labor force in health services. (Table 4-5)
- c. On April 1, 1990 Yarmouth's "labor force" numbered 9,469 of the persons over 16, which were a total of 17,925, 7.9% of that labor force was unemployed, including 8.5% of the women in the labor force. (Table 4-6)
- d. The number of females over 16 in the Town that were in the labor force was 45.6% of the total, while that for the County was 51.7%. These numbers perhaps reflect that the female population over 16 and in the labor force was slightly younger than the male here. (see Table 4-6) In 1996 of the total females over 16 in Yarmouth, 44.0% of the total had children at home. For the County that number was 49.5%

### **EMPLOYMENT STATUS OF BARNSTABLE COUNTY RESIDENTS - 1990**

- a. The U.S. Census reported in 1990 that 67.8% of Massachusetts's population over 16 was considered in the labor force. Barnstable County was substantially less than that reflecting the older, retired population here, and Dennis and Yarmouth had even lower percentages than that at 52.8% each. (see Table 4-6)

**PERSONS IN LABOR FORCE - 1990**

	EMPLOYED PERSONS 16 YEARS AND OVER IN THE LABOR FORCE	TOTAL PERSONS 16 YEARS AND OVER	PERCENTAGE IN LABOR FORCE
YARMOUTH	8700	17925	52.8%
BARNSTABLE	18810	33052	61.4%
DENNIS	5581	11582	52.8%
BARNSTABLE COUNTY	82526	151207	59.4%
Massachusetts	3027950	4809772	67.8%

Table 4-4

TABLE 4-5

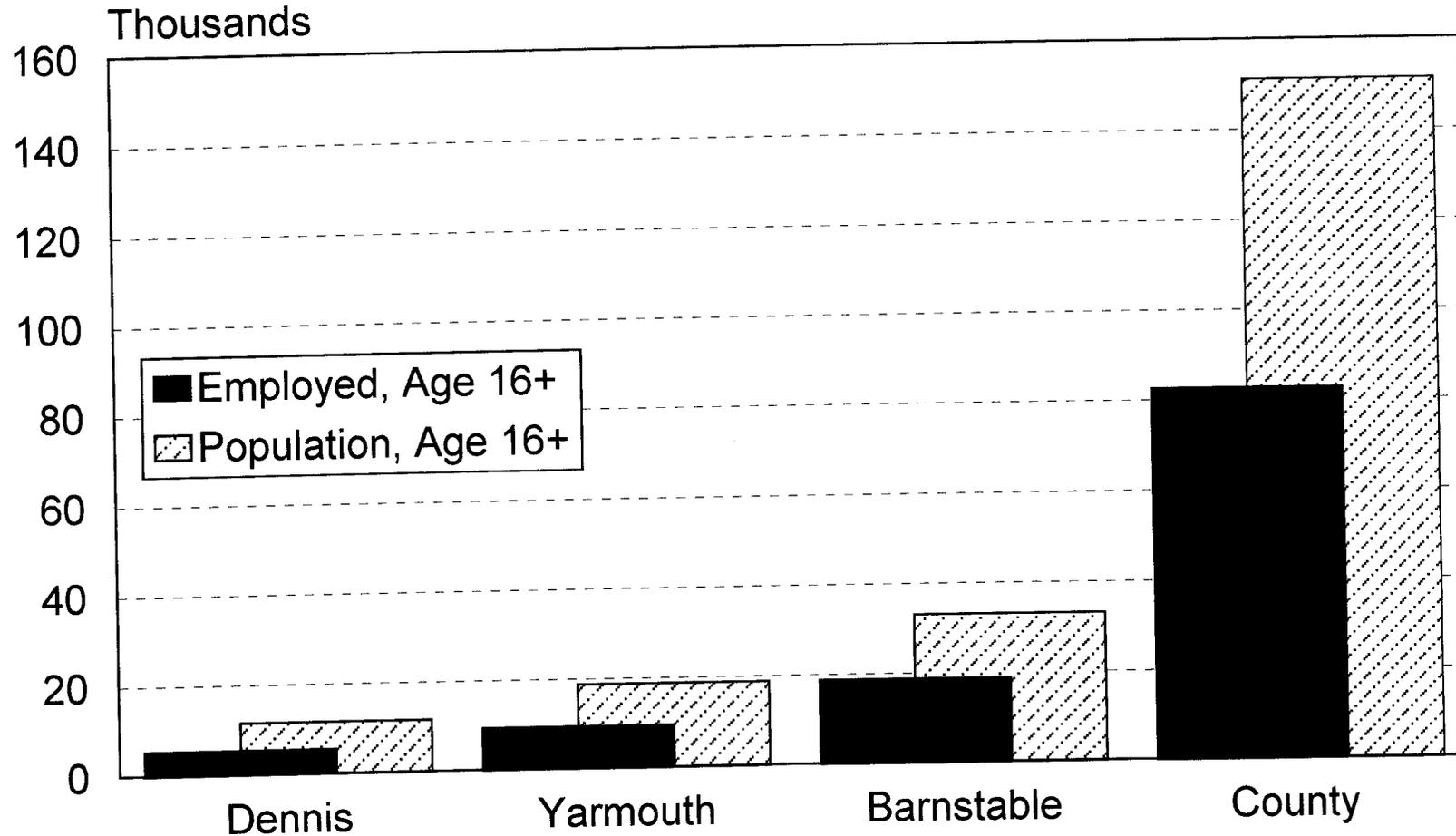
LABOR FORCE CHARACTERISTICS - BARNSTABLE COUNTY - 1990

<u>INDUSTRY</u>	<u>*EMPLOYED PERSONS, 16 YRS. AND OVER</u>	<u>% OF EMP. PERSONS</u>
TOTALS	82,526	100.00%
AGRICULTURE, FORESTRY, AND FISHERIES	2,655	3.22%
MINING	77	0.09%
CONSTRUCTION	8,191	9.93%
MANUFACTURING, NONDURABLE GOODS	2,890	3.50%
MANUFACTURING, DURABLE GOODS	3,531	4.28%
TRANSPORTATION	3,278	3.97%
COMMUNICATIONS AND OTHER PUBLIC UTILITIES	2,351	2.85%
WHOLESALE TRADES	1,885	2.28%
RETAIL TRADE	18,846	22.84%
FINANCE, INSURANCE AND REAL ESTATE	6,031	7.31
BUSINESS AND REPAIR SERVICES	3,290	3.99%
PERSONAL SERVICES	4,200	5.09%
ENTERTAINMENT AND RECREATION SERVICES	1,163	1.41%
HEALTH SERVICES	7,314	8.86%
EDUCATIONAL SERVICES	5,275	6.39%
OTHER PROFESSIONAL AND RELATED SERVICES	7,004	8.49%
PUBLIC ADMINISTRATION	4,545	5.51

SOURCE: U.S. CENSUS - 1990

# Persons In Labor Force

1990



Source: U.S. Census

Chart 4-6

**EMPLOYMENT STATUS OF BARNSTABLE COUNTY RESIDENTS 1990**

PERSONS 16 AND OVER  
OVER

FEMALES 16 AND

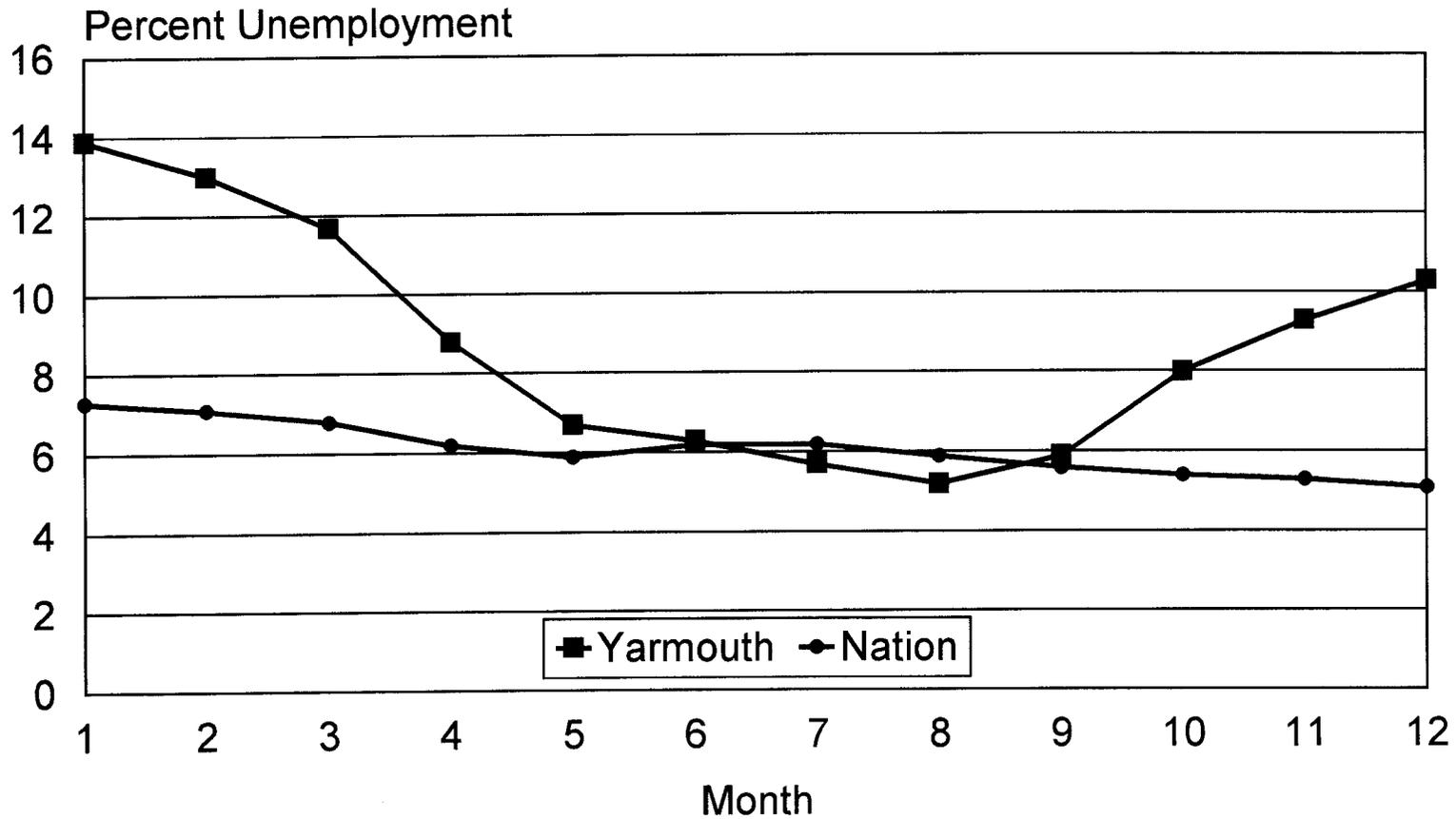
	TOTAL	#IN LABOR FORCE	%	EMPLOYED	UN-EMPLOYED	% OF LABOR FORCE	TOTAL FEMALES	# IN LABOR FORCE	EMPLOYED	UN-EMPLOYED	IN LABOR FORCE WITH CHILDREN
YARMOUTH	17925	9469	52.8%	8700	751	7.9%	9943	4541	4140	398	1996
BARNSTABLE	33052	20305	61.4%	18810	1467	7.2%	17651	9382	8783	599	4568
DENNIS	11582	6116	52.8%	5581	529	8.7%	6422	2911	2649	262	1400
BARNSTABLE COUNTY	151207	89855	59.4%	825526	6314	7.1%	81202	41998	38903	3021	20808
MASS.	4809772	3261863	67.8%	3027950	218000	6.7%	2541677	1532804	1442252	88731	703795

SOURCE: U.S. Census

Table 4-6

# Percent Unemployment

## 1994



Source: Mass. Dept. of Employment & Training

Chart 4-8

## LABOR FORCE LEVELS AND UNEMPLOYMENT RATES- BARNSTABLE COUNTY 1992 - 1994

MONTH	YARMOUTH				DENNIS				BARNSTABLE TOWN				BARNSTABLE COUNTY			
	1992	1994	RATE UNEMPLOYMENT		1992	1994	RATE UNEMPLOYMENT		1992	1994	RATE UNEMPLOYMENT		1992	1994	RATE UNEMPLOYMENT	
JAN.	9280	9345	13.8	13.9	6067	5963	15.4	14.9	19728	20060	12.3	12.5	88065	91579	13.8	14.2
FEB.	9271	9328	14.0	13.0	6078	5951	15.9	14.0	19662	20103	12.4	11.9	87932	91194	14.0	13.5
MAR.	9528	9313	15.9	11.7	6337	5946	18.9	12.8	20190	20066	14.2	10.6	90407	91484	15.9	12.3
APR.	9508	9416	11.2	8.8	6246	5973	13.3	9.3	20517	20380	11.0	8.0	90496	92345	11.5	8.8
MAY	9967	10008	8.6	6.7	6544	6339	10.7	7.0	21758	21870	9.5	6.7	94948	99123	9.0	6.9
JUNE	11005	11058	8.6	6.3	7117	6923	9.4	6.3	23838	24086	8.8	6.1	104060	110064	8.3	6.1
JULY	11473	11769	7.2	5.7	7505	2408	9.0	5.5	25110	25627	8.3	5.5	108930	117462	7.3	5.4
AUG.	11357	11480	6.9	5.2	7396	7262	8.3	5.5	24711	25068	7.5	5.3	107695	115197	6.8	5.1
SEP.	10504	10563	7.8	5.9	6772	6677	8.3	6.1	22993	22955	8.9	5.5	99568	105508	7.7	5.4
OCT.	10039	10136	8.8	8.0	6459	6369	9.1	7.6	21754	21908	9.0	7.0	94940	99577	8.5	7.0
NOV.	10002	9988	13.0	9.3	6373	6269	12.4	8.9	21279	21260	11.6	7.0	93854	96041	12.7	8.2
DEC.	9979	9922	13.8	10.3	6413	6254	13.9	10.2	20946	20950	11.2	7.3	93463	94980	12.7	9.1
AVE.	10159	10194	10.6%	8.6%	6609	6449	11.9%	8.8%	21874	22028	10.2%	7.6%	96197	100380	10.5%	8.3%

SOURCE: Massachusetts Dept. of Employment and Training

Table 4-7

- b. The Mass Dept. of Employment and training reported that the Barnstable County resident labor force averaged 96,197 in 1992, up 3% from 1991. Employed residents increased 4% between 1991 and 1992 to 86,140. County labor force levels fluctuated in 1992 between 91,194 in February and 117,462 in July of that year. (see Table 4-7)
- c. Labor force figures of course tended to follow a somewhat similar pattern, with Barnstable County having the lowest labor force in February, Yarmouth also was smallest in March, at 9,313, Dennis in February, and Barnstable Town in January. The peaks in labor force were uniformly in July in all four communities summarized. Thus an overall average labor force or unemployment rate is rather meaningless because of the seasonal variations. (see Table 4-7) (see Chart 4-8)

## **OCCUPATIONS OF COUNTY RESIDENTS - 1980-1990**

The occupational mix of Barnstable County residents is generally reflective of the socio-economic conditions on the Cape. But conditions are quite different from the metropolitan areas of the rest of the state. Using the count of 82,526 employed persons over age 16, the 1990 Census identifies six major groupings of occupations that are most prevalent on the Cape. Given the seasonal service conditions here it is not surprising to find that the single largest grouping of occupations is the "sales occupations", 12,472, 15.11% of the total. That however is closely followed "professional specialty occupations" with 12,357, 14.97% of the total. This would appear to be reflective of the large retirement population. In fairly short order "administrative support occupations, including "clerical" 14.05%," service occupations, except protective and household" 13.38%", executive, administrative, and managerial occupations" 13.16%", and precision production, craft and repair occupations, 12.42% follow.

## **EMPLOYMENT TRENDS**

Using the Massachusetts Department of Employment and Training figures, the "Cape Trends" publication of the Cape Cod Commission gives an interesting picture of employment in Yarmouth, the two adjoining towns, and Barnstable County. Clearly there is good news and bad news! (see Table 4-8) and (Chart 4-7)

Over the 10 year period from 1982 to 1992 Yarmouth's employment in "Transportation, Communications, Utilities" increased from 208 to 813, a 291% increase! Dennis employment decreased by 47%, and Barnstable's by 25% for this category. Overall, County-wide employment was quite stable, growing from 3003 to 3087, or a 3% increase. Why the sudden change? It appears to be the result of expanded operations of Colonial Gas, Commonwealth Electric, TCI Cablevision, Newspapers, and Telecommunications operations here.

At the same time Yarmouth's "services" employment grew from 1335 to 1854, a 39% growth. Dennis grew by 208% and Barnstable by 48%, plus overall "service employment" grew by 46% in the County, or from 14,167 to 20,734. This all was reflective of the seasonal service-employment recovery on the Cape.

"Government" employment in Yarmouth grew by 31% in this time frame and by 37% in Dennis and 23% in Barnstable. Overall "government" showed a 19% increase. Part of this growth clearly was in response to population growth. Yarmouth's larger increase was in part because of the regional high school located here.

Both "Finance, Insurance, and Real Estate" and "wholesale and retail trades" showed little change over the 82-92 decade; the first showed no change at all, the latter dropped slightly by 3% in Yarmouth. Overall employment was up 27% in F.I.R.E. and 20% in wholesale and retail trades.

**Table 4-8**

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National trends in "manufacturing" were reflected by a 16% drop in Yarmouth, at the County level of a 24% decline, and by a 28% reduction in the Town of Barnstable.

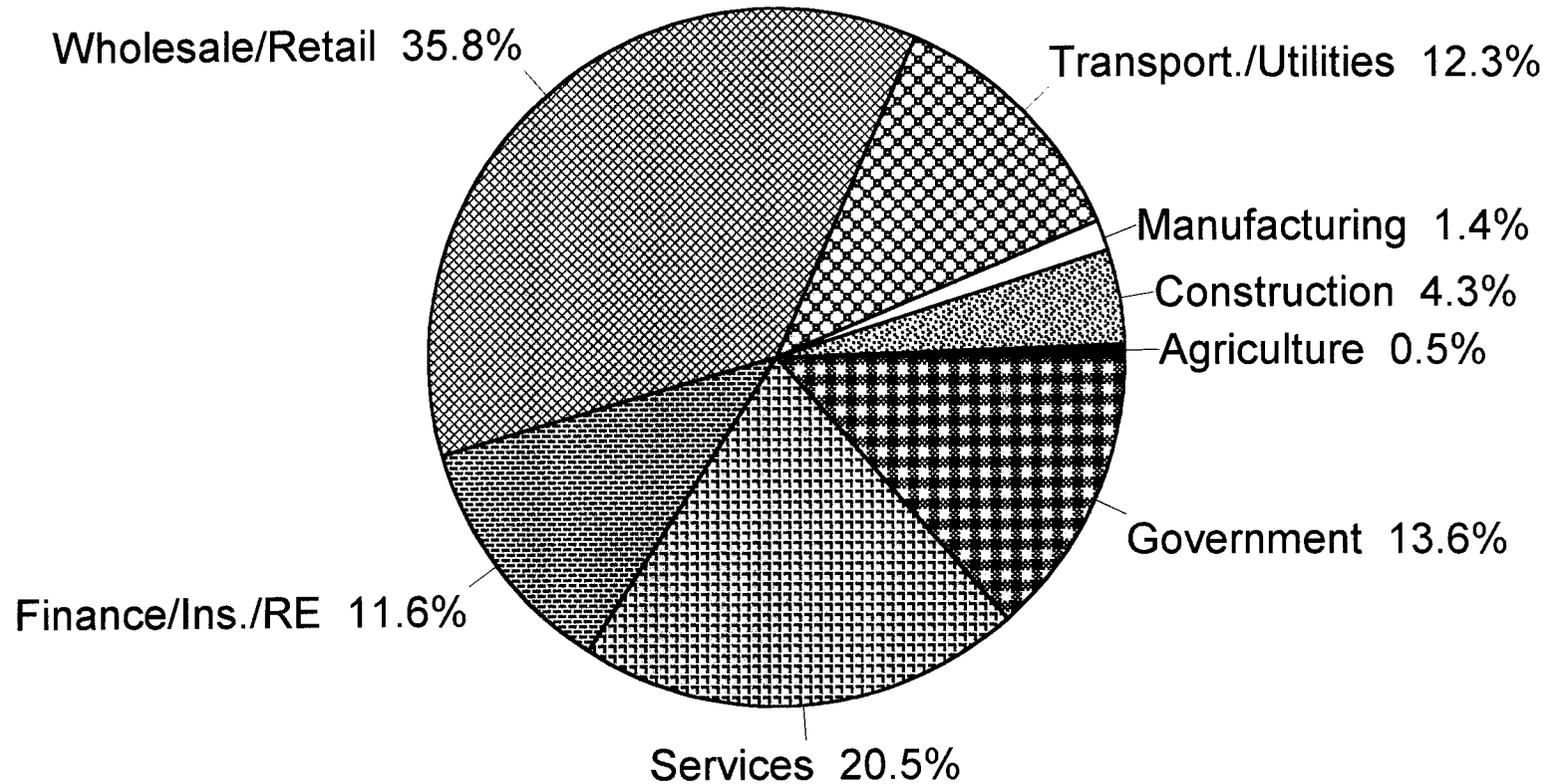
Overall for all covered employment Yarmouth grew from 5,922 to 7,011 or 18%, Dennis by 53%, and Barnstable by 16%. The Barnstable County employment grew by a substantial 23% from 54,555 to 67,045, 12,601 new jobs between 1982 and 1992.

EMPLOYMENT TRENDS BY INDUSTRY IN BARNSTABLE COUNTY TOWN - 1982 - 1992

	YARMOUTH			DENNIS			BARNSTABLE			BARNSTABLE COUNTY		
	1982	1992	%CHANGE	1982	1992	%CHANGE	1982	1992	%CHANGE	1982	1992	%CHANGE
AGRICULTURE, FORESTRY & FISHERIES	29	N/A	N/A	43	118	+174%	118	241	+104%	766	1018	+33%
Construction	287	313	+9%	167	115	-0.31	663	675	+2%	2412	2487	+3%
Manufacturing	131	99	-24%	37	40	+8%	1438	1030	-28%	3524	2959	0.33
Transportation, Communication, Utilities	208	813	+291%	200	106	-0.47	1404	1060	-28%	3009	3087	+3%
Wholesale, Retail Trades	2383	2300	-0.03	1257	1701	+35%	6517	7548	+16%	19554	23391	+20%
Financial, Insurance, Real Estate	724	722	+0%	57	139	+144%	885	2010	+14%	2791	3556	+27%
Services	1335	1654	+24%	369	1137	+208%	5014	7416	+48%	14167	20734	+46%
Government	825	1079	+31%	234	320	+37%	1658	2043	+23%	8189	9779	+19%
All Industries	5922	7011	+18%	2410	3676	+53%	18083	21042	+16%	54444	67045	+23%

# Employment By Business/Industry

Yarmouth - 1995



Source: Mass. Department of Employment & Training

Chart 4-7

National trends in "manufacturing" were reflected by a 16% drop in Yarmouth, at the County level by a 24% decline, and by a 28% reduction in the Town of Barnstable.

Overall for all covered employment Yarmouth grew from 5,922 to 7,011 or 18% Dennis by 53%, and Barnstable by 16%. The Barnstable County employment grew by a substantial 23%, from 54,555 to 67,045, or 12,601 new jobs between 1982 and 1992. (see Table 4-8) (Chart 4-9)

### **LABOR FORCE AND UNEMPLOYMENT TRENDS - INCLUDING SEASONAL TRENDS - 1994**

The "Cape Trends" publication has an interesting table showing labor force and employment rate fluctuation for the towns in Barnstable County during the year 1994. (see Table 4-7) and (Chart 4-8) That was the year that the Cape showed major recovery from the recession of 1990-91. The cyclical and seasonal tendencies of employment on the Cape have been well documented and 1994 was no exception! For Barnstable County, August was the month of the lowest unemployment rate at 4.3%, it was also lowest in Yarmouth at 4.3%, Dennis at 4.1%, and Barnstable Town at 4.4%. These were relatively low numbers indicating a good recovery. January had the highest unemployment rate at 12.1% for the County, 12.5% in Yarmouth, 8.1% in Dennis, and 9.7% in Barnstable Town. (see Table 4-7) and (see Chart 4-9)

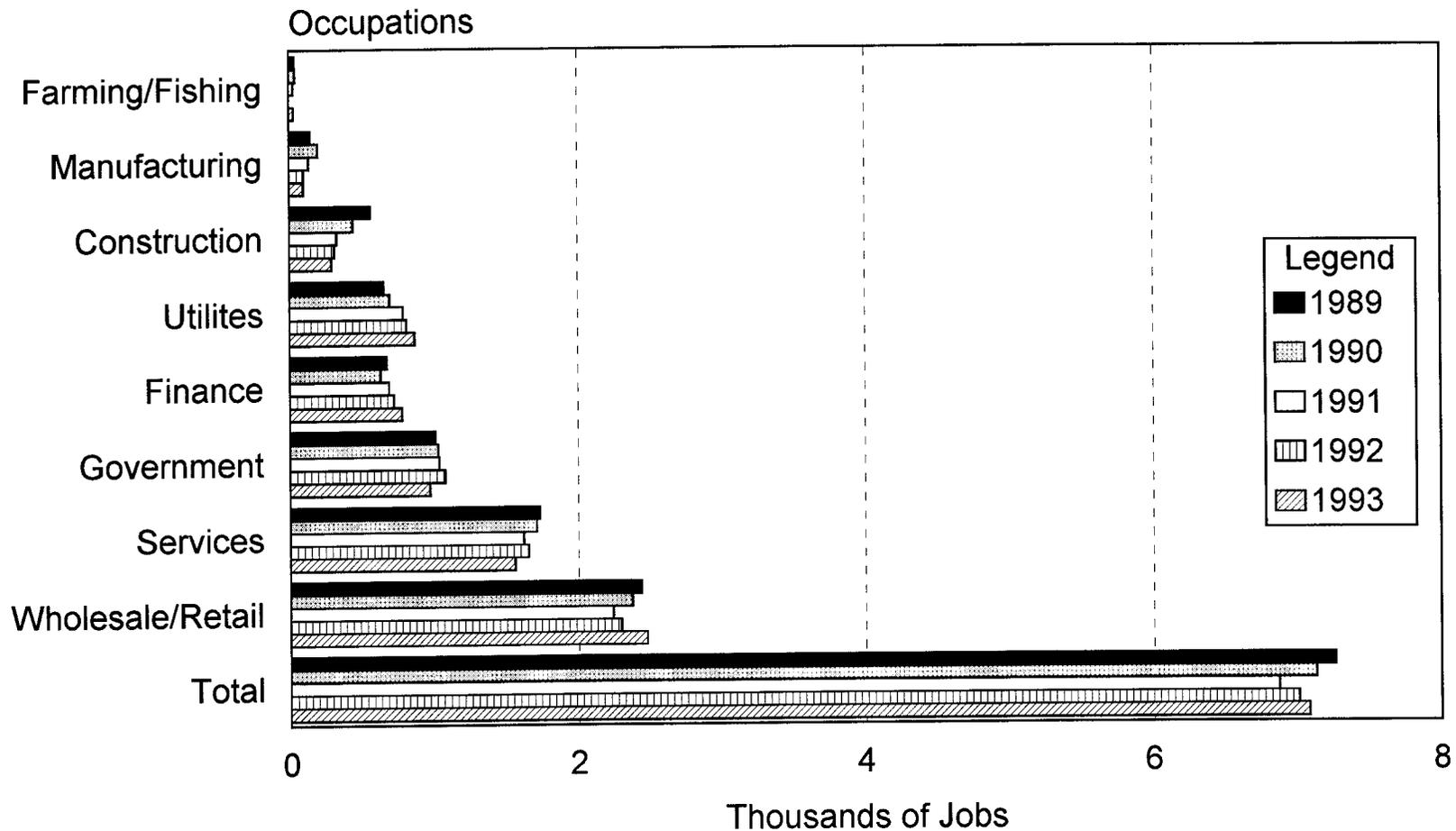
### **SELF - EMPLOYED RESIDENTS - BARNSTABLE COUNTY 1980-1990**

One of the major shifts in employment patterns nationally has been the explosion in numbers of people employed in their own homes, many of them self employed. Barnstable County has not been immune from this change. The self-employed residents category grew in the County by almost 3,378 persons from 1980 to 1990, a 53% increase. The figure for 1995 will be most interesting when available, it will be no doubt, an even greater percentage.

Yarmouth appears to have experienced this change somewhat less than other towns, increasing by 87 units in the same time frame, representing only a 13% growth. Still it is known the number has grown more rapidly in the last 5 years. It is not totally apparent whether the very strict Yarmouth zoning by-law in the matter of home occupations had anything to do with the slower increase, but it is estimated we have at least 800 home businesses here, many of them related to telecommunications.

# Yarmouth Labor Force Characteristics

1989 - 1993



Source: Massachusetts Dept. of Employment & Training

Chart 4-9

**MUNICIPAL TAX RELATED INFORMATION**

## **MUNICIPAL TAX RELATED INFORMATION**

The Yarmouth Community Development Office often receives inquiries not only about the general local economy, but about the finances of our local government as well. Some of the significant data are listed below.

### **MUNICIPAL PROPERTY TAX RATES**

Perhaps the most frequently asked question relates to the municipal tax rate and those of the adjoining towns. In these days of supposed 100% valuation the "rate" has become more meaningful than previously when municipal assessments were widely varying percentages of the existing market values.

Between FY'90 and FY'95 Yarmouth's tax rate increased from \$5.76 per 1,000 dollars of valuation to \$11.67 per 1,000. This represented an increase of 102.6%. Over the same time frame Barnstable increased by 67.7%. In FY'96 the two highest tax rates on Cape Cod were Sandwich at \$14.32 and Mashpee at \$14.16 per \$1,000 of value. The Town most comparable in size to Yarmouth, Falmouth, had a tax rate of \$10.73 in FY'96. The two towns with the lowest tax rates in FY'96 were Truro, \$6.92, and Wellfleet at \$8.33. (see Chart 4-10)

### **AVERAGE TAX BILLS OF SINGLE - FAMILY HOMES**

Since Yarmouth is predominantly a residential community another frequently asked question, especially by people proposing to move into town, is what their annual property tax bill will be. As might be expected mid-Cape towns compare very favorably with the state median of tax bills for single family homes, all are about equal to it or substantially lower. The statewide median for FY'95 for single family homes was \$1,872, for Barnstable it was \$1,893, and at a lower level \$1,353 in Yarmouth and \$1,055 in Dennis. (see Chart 4-11)

### **PROPERTY TAX LEVIES**

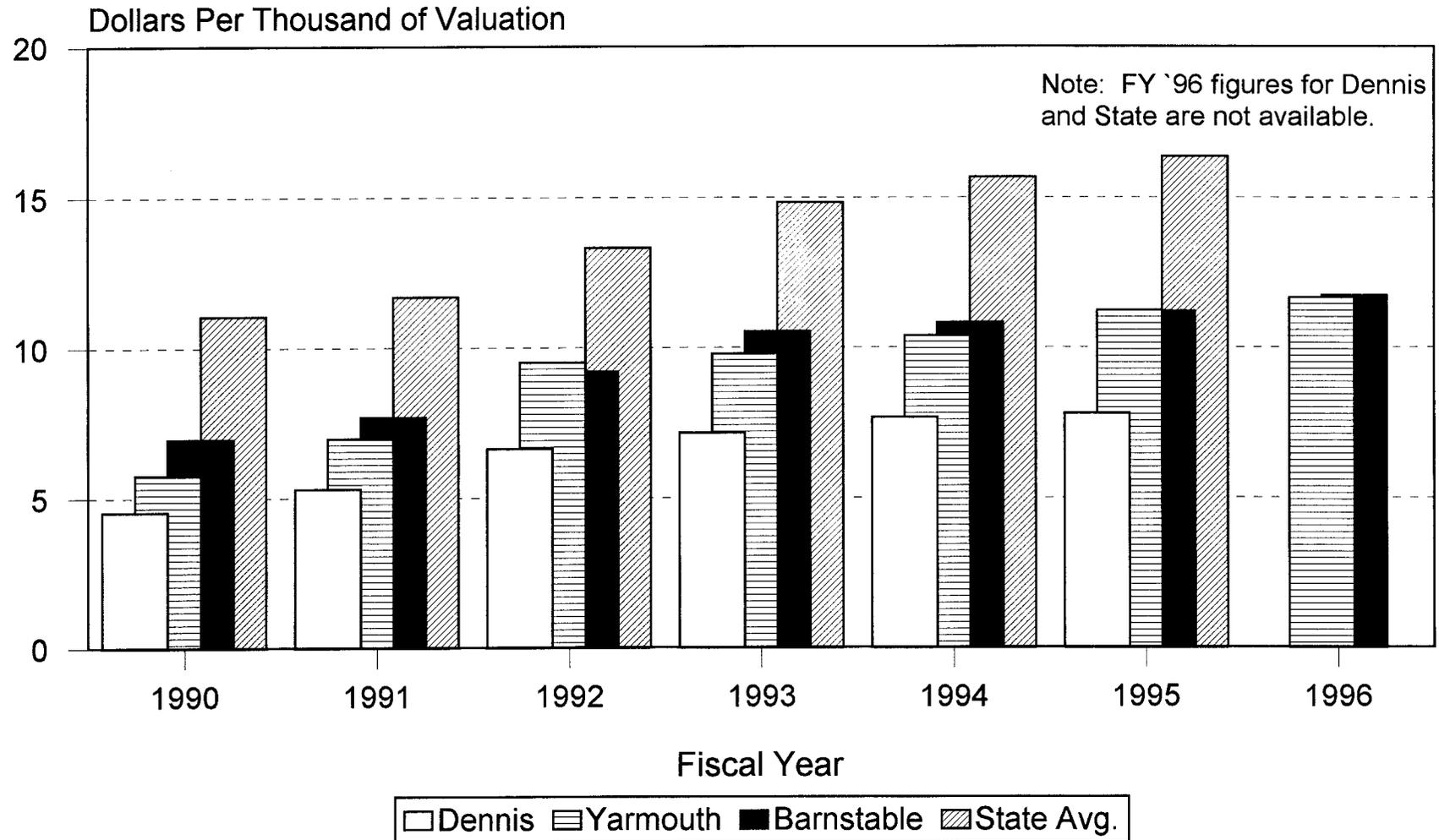
The amount raised by the property tax in the Commonwealth is very, very, substantial. This situation has been well described and discussed often, especially since state funds as a source of revenue have substantially dried up in the last 6 years, and Proposition 2 and 1/2 has constrained municipal increases in the property tax. Between FY'90 and FY'95 the property tax levy in Yarmouth increased from \$17,393,000 to 23,329,000, a 34.1% increase. Barnstable increased by 23.1% and Dennis by 34.5% over the same time. The tax levies statewide increased by 27.7% on average over the same period. (see Chart 4-12)

### **EQUALIZED VALUATIONS**

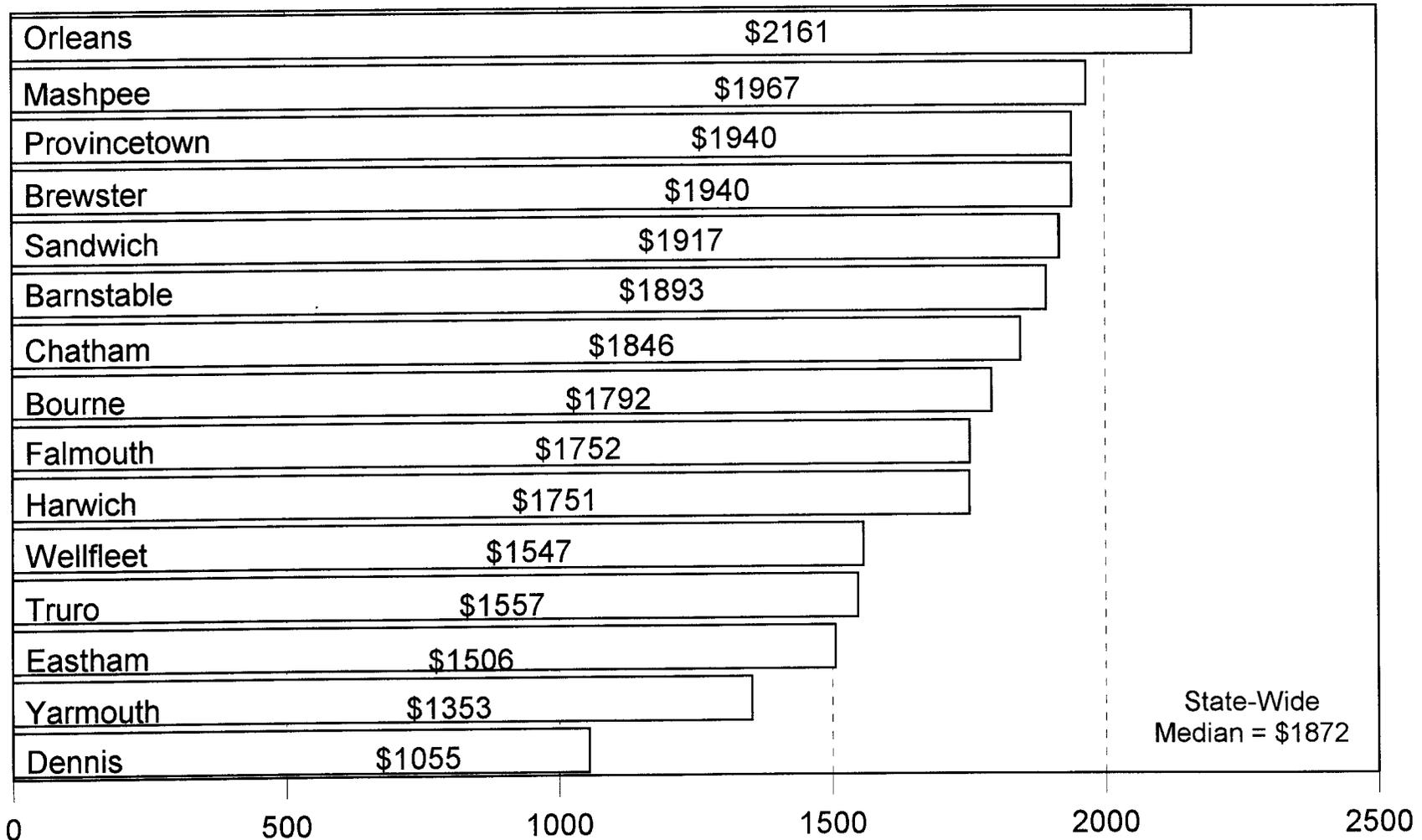
Since there is some variation in the local municipal assessment practices still, the state determines an approximate percentage of assessed valuation against market value of property, and publishes figures on equalized values for each municipality plus

# Municipal Property Tax Rates

Fiscal Year 1990 - Fiscal Year 1996



# Average Single Family Residence Tax Bill On Cape Cod Fiscal Year 1995

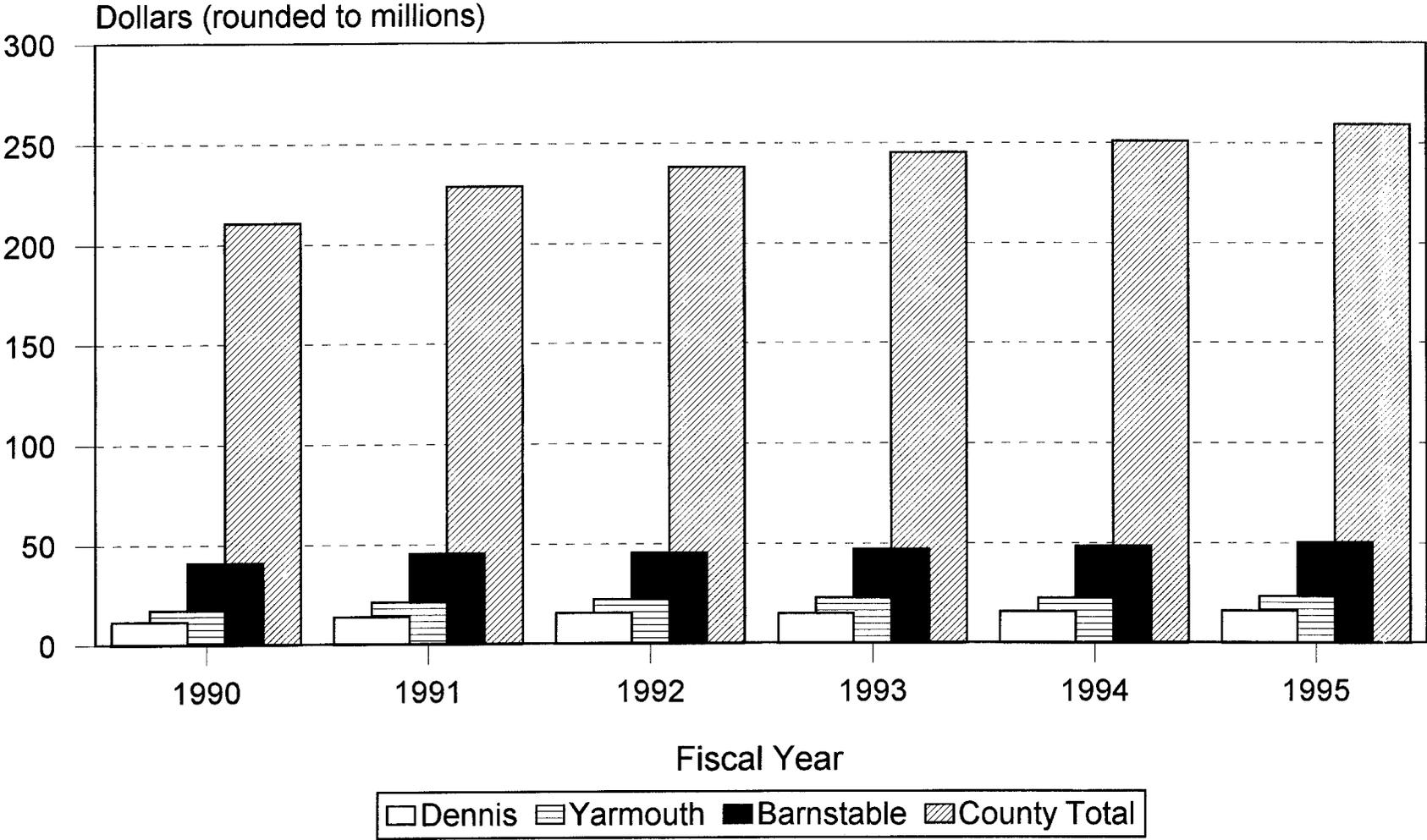


Source: Massachusetts Dept. of Revenue, Division of Local Services

Chart 4-11

# Property Tax Levies

## Fiscal Year 1990 - Fiscal Year 1995



Source: Massachusetts Dept. of Revenue

values of exempt (mostly public and institutional) properties. That amount has increased somewhat erratically over the FY'90 - FY'95 time frame, due mainly to regular local re-assessment programs.

A look at the associated chart illustrates that erratic upward change. Yarmouth increased from \$1,031,078,037 to \$2,259,700,000 in value from FY'84 to FY'94, a 151.9% increase. Even though this calculation is done every two years, the jumps and drops are still apparent. Virtually all Cape towns saw a drop from FY'90 to FY'92 and even FY'94 because of the 1991 recession and a drop in residential property values, including Yarmouth, Barnstable, and Dennis. (see Chart 4-13)

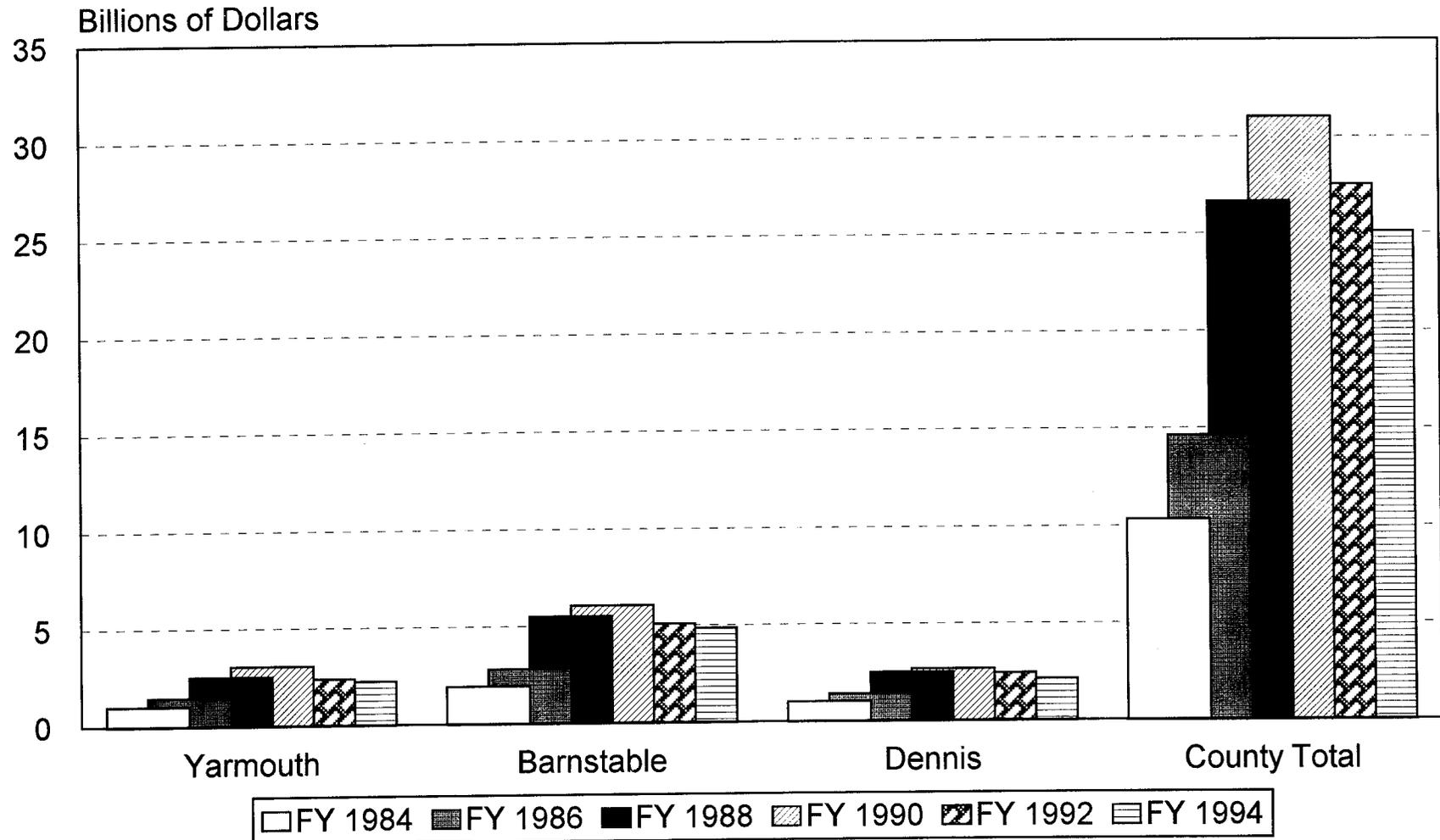
### **ROOM OCCUPANCY REVENUE COLLECTED**

A significant source of revenue in the town comes from the 4% room occupancy tax that is collected. Yarmouth has one of the largest municipal amounts in the state due to its numerous motels. One thing that can be ascertained from the chart is that income from this source is very reflective of the state's and the region's economic condition.

From FY'90 To FY'95 Yarmouth revenues from this source grew from \$1,007,140 to \$1,157,200, a 14.9% increase. County-wide the increase was 23.2%. At the same time Barnstable decreased by 1.40% and Dennis increased by 20.4%. (see Chart 4-14)

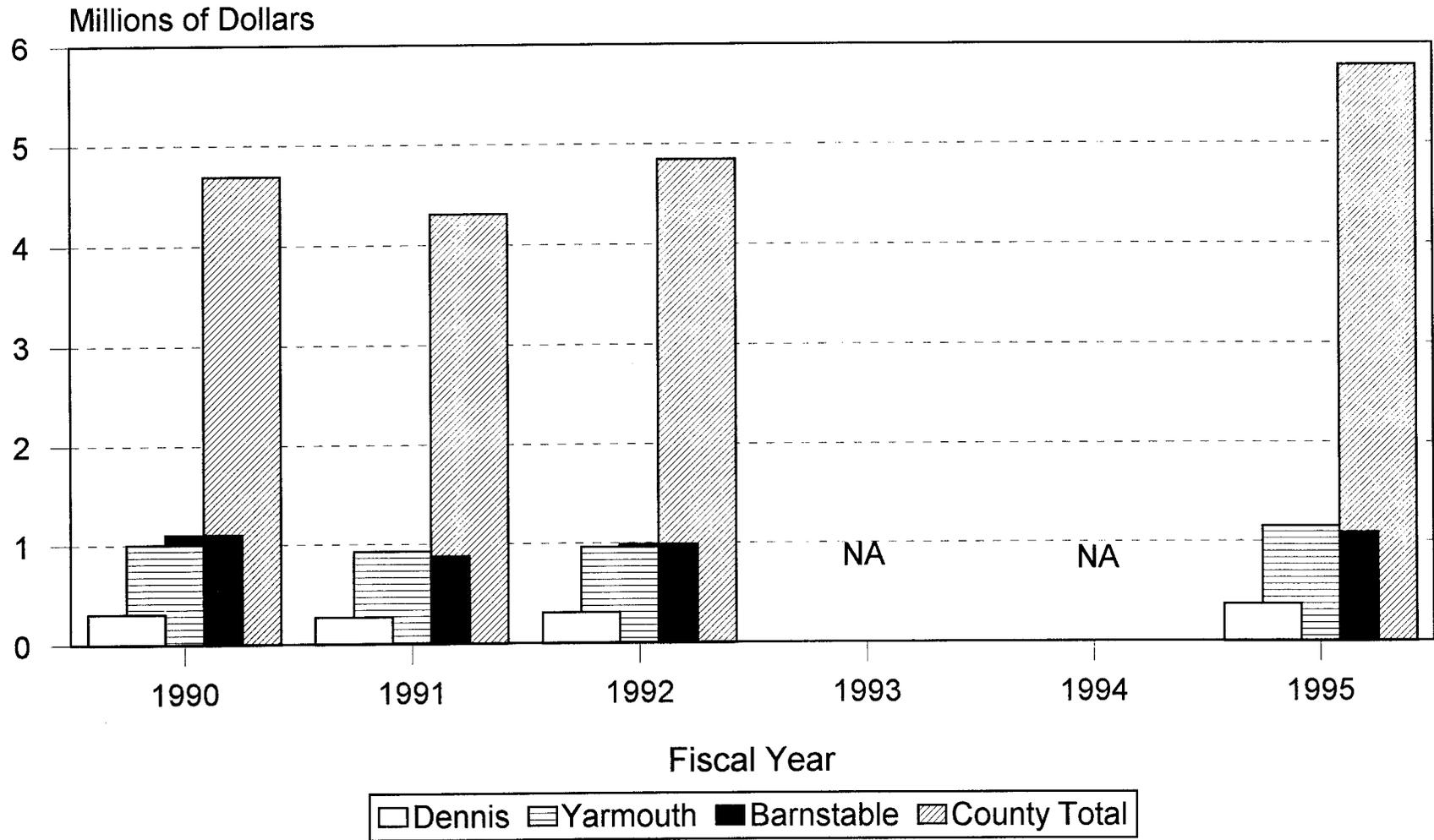
# Municipal Equalized Valuations

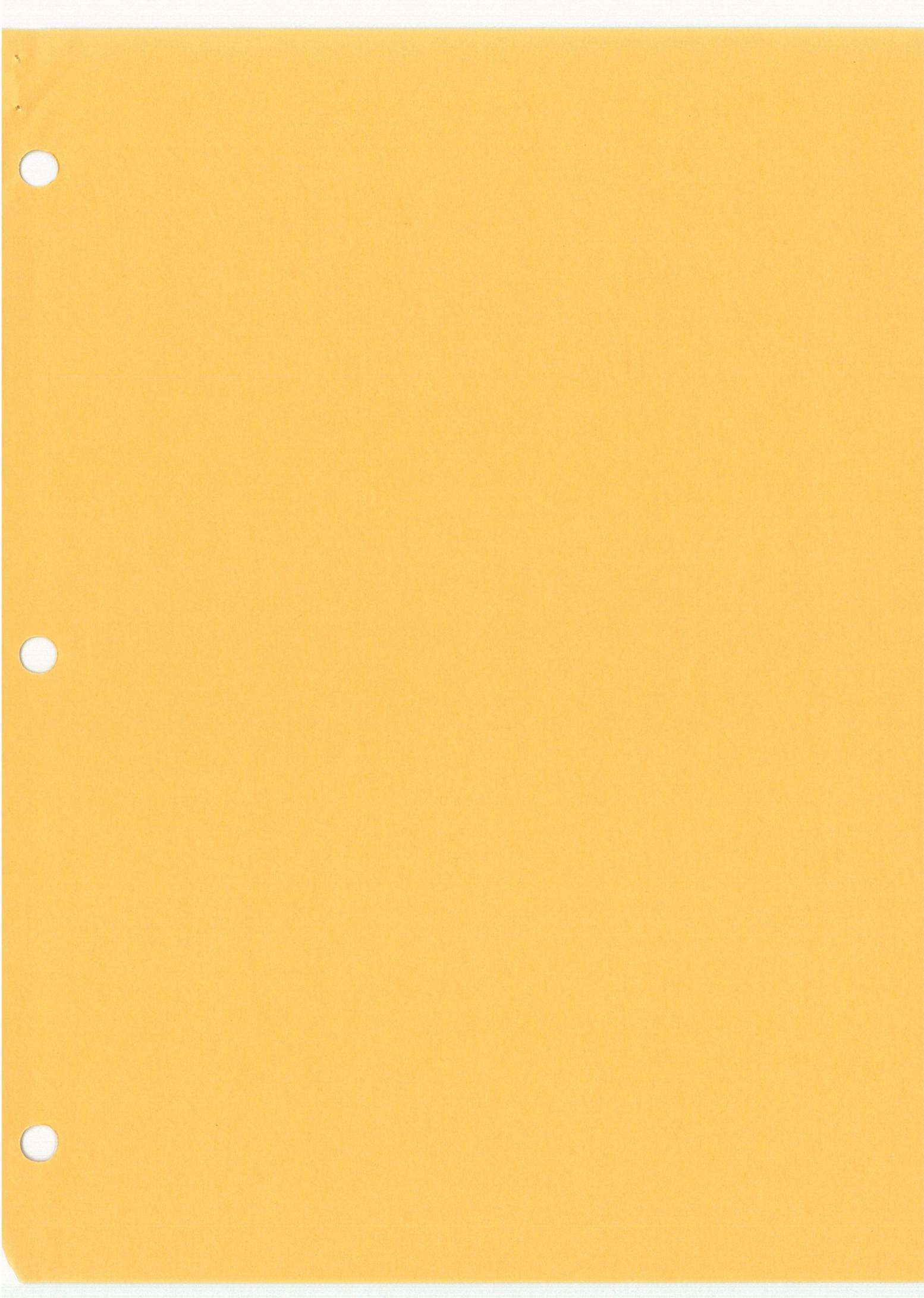
1984 - 1994



# Room Occupancy Revenue Collected

Fiscal Year 1990 - Fiscal Year 1995





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