



June 2014

Cape Cod Young Professionals (CCYP) is excited to share the initial findings of the Shape the Cape survey data with our community. Shape the Cape was created to inform impactful community-wide actions to raise awareness, develop solutions, and reverse the trend of the declining population of people 25-44 years old on Cape Cod.

In September 2013, CCYP launched an ambitious plan for collecting data and ideas directly from the affected population. Over 5,200 people participated in the data collection phase, which included an electronic survey, phone interviews, and focus groups. Attached is a summary of the results, as collected and analyzed by the Dukakis Center for Urban and Regional Policy at Northeastern University. The full report will be available mid-July at www.shapethecape.org.

The Dukakis Center report offers critical information to the development of data-driven solutions to recruit and retain young people on Cape Cod. Collecting data is only the first step. Next, we need YOU to participate in community solution forums that will continue the dialogue and shape ideas and action for our community. The schedule of these forums will be available at www.shapethecape.org in the coming weeks.

In addition to creating these community forums, CCYP is developing three initiatives in response to the survey's compelling data regarding opportunities for 1) professional career development; 2) improved housing; and 3) civic engagement.

Preliminary data from the Dukakis Center report demonstrates that challenges related to mentoring, professional development, and peer network development play a pivotal role in the decision of young workers to leave our region to seek employment and launch entrepreneurial ventures elsewhere. CCYP is excited to announce the launch of the Career Connect Mentor Exchange program which will provide a supportive environment for entrepreneurs and those who are starting, changing, or advancing their careers on Cape Cod.

Housing affordability was identified as a key data point in the Dukakis Center report. The data identified that Cape home owners in this demographic are spending more than the recommended percent of their monthly gross income on a mortgage AND because of their homeowner status are less likely to consider leaving the Cape. In response to this, CCYP's housing initiative will be two-fold: First, we will partner with organizations across the Cape to expand housing consumer education and first time homeownership programs. Second, we will play an active role in facilitating and participating in community housing dialogues to inform future housing availability, inventory, and access to local lending.

Barriers to engagement in civic opportunities and knowledge of important local and regional civic issues were demonstrated in the survey data. As engagement in community is a critical part of CCYP's mission, we will partner across the community to increase civic education and involvement of our region's future leaders.

CCYP is excited to be in a position to lead the community toward solutions to retain and recruit young people to Cape Cod. We live in a very special place that will require unique solutions to maintain our regional fabric and integrity while growing career, housing and civic opportunities for a critical part of our region's demographic. Please join us.

A handwritten signature in blue ink, appearing to read "Anne Van Vleck".

Anne Van Vleck
Executive Director

A handwritten signature in blue ink, appearing to read "Lisa Guyon".

Lisa Guyon
CCYP Board President

Shape the Cape Frequently Asked Questions

What is "Shape the Cape"?

Shape the Cape, a project of CCYP, is designed to create focused community-wide actions to raise awareness, develop solutions, and reverse the trend of the declining population of people 25-44 years old on Cape Cod.

Why launch Shape the Cape?

From 2000 to 2010, there was a 26% decline in Barnstable County residents age 25-44. This trend creates an imbalance in the fabric of the community that will be detrimental for future generations. While there have been many conversations on the Cape about this demographic concern, Shape the Cape is engaging the affected population to find solutions that will recruit and retain young Cape Codders and reverse the outmigration trend of this population from our region.

What is CCYP's role?

CCYP commissioned a comprehensive survey organized by the Dukakis Center for Urban and Regional Policy at Northeastern University with financial support from the community. Armed with the data, CCYP will lead community-wide discussions and quarterback actions to support 25-44 year olds living and working on Cape Cod.

Who is involved?

Everyone! If you live on Cape Cod and want young people to thrive here, we need your support, no matter your age! CCYP has partnered with local businesses, civic leaders, and non-profits to share the survey data and develop solutions. Visit www.shapethecape.org for more information.

How has this work been funded and how will it be sustained?

The initial stages of Shape the Cape, including the survey and report authored by the Dukakis Center, was funded by corporate and individual donors, in addition to grants. Corporate supporters include Cape Associates, The Cooperative Bank of Cape Cod, Cape Cod Five Foundation, Cape Air, Cape Cod Healthcare, Maffei Landscape Contractors, Sun Self Storage, Nauset Disposal, Rogers & Gray Insurance, Brown Lindquist Fenuccio & Raber Architects, Inc. Grants were provided by the Cape Cod Chamber of Commerce: Economic Development Grant, The Cape Cod Foundation through the Clifford Fund, O'Keefe Family Charitable Fund, and the Jean B. Edgerly Memorial Fund, and a private family foundation.

What are some of the key findings of the report?

- Increasing need for professional development and mentoring opportunities, as well as the need for professional advancement within a company to impact long term employment
 - There are challenges related to mentoring, professional development, and peer network development which play a pivotal role in the decision of young workers to leave our region and seek employment and launch entrepreneurial ventures elsewhere.
- Increasing need for the creation of housing opportunities for young families to remain on or move to Cape Cod
 - Homeowners are less likely to consider moving off Cape but are burdened with substantial mortgages that dissuade them from leaving.
- Barriers to engagement in civic opportunities and knowledge of key Cape-wide issues
 - The data indicated that this demographic doesn't know where to seek out civic opportunities and, if they do, their voices and contributions are over-shadowed by the perception that their demographic doesn't offer value.

What are the next steps after reviewing the report?

Think about solutions! Consider what would help you or a young person you know to thrive on Cape Cod. Share your ideas and concerns with us. There will be a series of topic-driven community forums to engage the public, and business, non-profit and governmental leaders on Cape Cod in the fall of 2014. The schedules will be published on www.shapethecape.org. If you can't make the meeting, you can participate via email: send your thoughts to melissa@capecodyoungprofessionals.org and your feedback will be shared during the forums.

SHAPING THE CAPE'S FUTURE

Shape the Cape and Study Objectives

Cape Cod, a peninsula off of the southeastern coast of Massachusetts, has a wealth of natural, historic, and cultural resources. These qualities make it a highly desirable place in which to live, work, vacation, and retire. Some consider the islands of Martha's Vineyard and Nantucket to be part of Cape Cod but for the purposes of this study, Cape Cod is defined strictly as Barnstable County (see Figure 1). This study is motivated by the recent decline in Cape Cod's population. After seven decades of rapid population growth, why has the Cape begun to lose residents, particularly among young adults, aged 25 to 44?

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

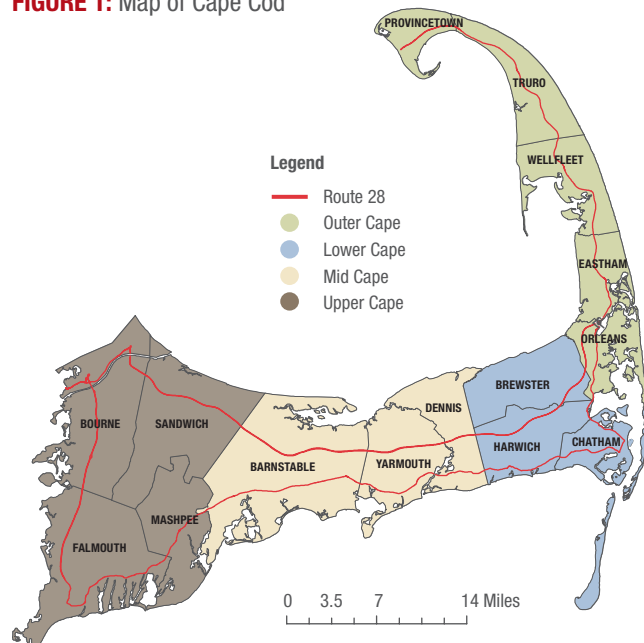
In addition to the survey, the Dukakis Center conducted four focus groups at various locations on the Cape and conducted telephone interviews with five former Cape Cod residents who have permanently moved off Cape. The focus groups and telephone interviews confirmed and supplemented the findings that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

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

Cape Cod Demographics

According to the first census of Barnstable County in 1790, Cape Cod was home to just over 17,000 residents (see Figure 2). The population would double by the eve of the American Civil War in 1860. For the remainder of the 19th century through 1920, the region's population declined, presumably as better job opportunities could be found elsewhere. It was not until 1940 that the Cape's population returned to its pre-civil war level. However, after World War II, Barnstable's population grew exponentially. With the completion of Route 6, the "Mid-Cape Expressway," the number of Cape residents skyrocketed from approximately 47,000 in 1950 to 148,000 in 1980. Barnstable County's population would continue to expand rapidly until 2000 when it peaked at 222,230, after which it stopped growing. By the 2010 US Census, the population had fallen by nearly three percent to 215,888 and the Census estimate for 2012 reveals a continued decline.

FIGURE 1: Map of Cape Cod



Source: Mass GIS

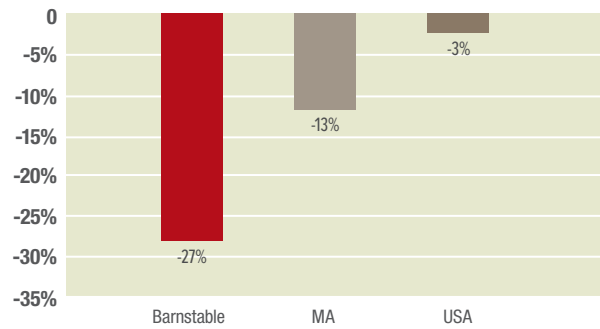


The most telling element of this reversal in population growth is its age profile. As shown in Figure 3, the number of residents in the age group of 25 to 44 declined by nearly 27 percent on Cape Cod between 2000 and 2010. During this same period, the population of this age group in Massachusetts (excluding the Cape) fell by just 13 percent, while nationally it declined by only three percent.

The 27 percent decline represents a net loss of nearly 15,000 young adult residents on Cape Cod over a single decade. At the same time, Barnstable County's population of 45 to 64 year olds increased by 20 percent, yet even this growth, fueled by the aging of the Baby Boom generation, was slower than the rest of Massachusetts (28%) and the US (32%), as shown in Figure 4. The growth in residents aged 65 or older, as shown in Figure 5, reveals that this age group is growing at about the same rate on Cape Cod (5%) as the rest of the Commonwealth (5%), but more slowly than in the US as a whole (15%).

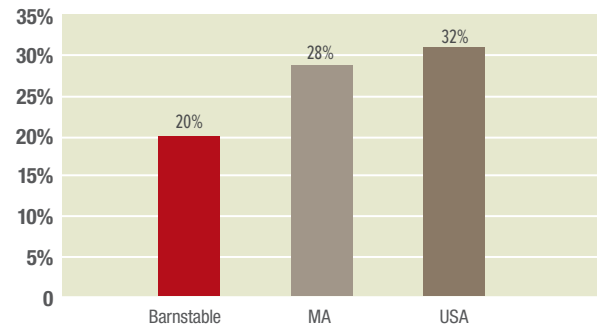
When considering the full population by age group, Figure 6 reveals the sharp decline in the population of those 44 and younger, especially within the 24 to 44 age group. Likewise, the number of households (see Figure 7) with members in the 25 to 44 age group fell by more than 8,400 between 2000 and 2010, while the number of households in the 45 to 64 age group and the 65 and older age group grew by more than 7,000 and 2,400, respectively. Essentially, Cape Cod is aging faster than nearly anywhere else in the Commonwealth.

FIGURE 3: Change in Population for 25 to 44 Year Olds on Cape Cod, in Massachusetts, and in the US between 2000 and 2010



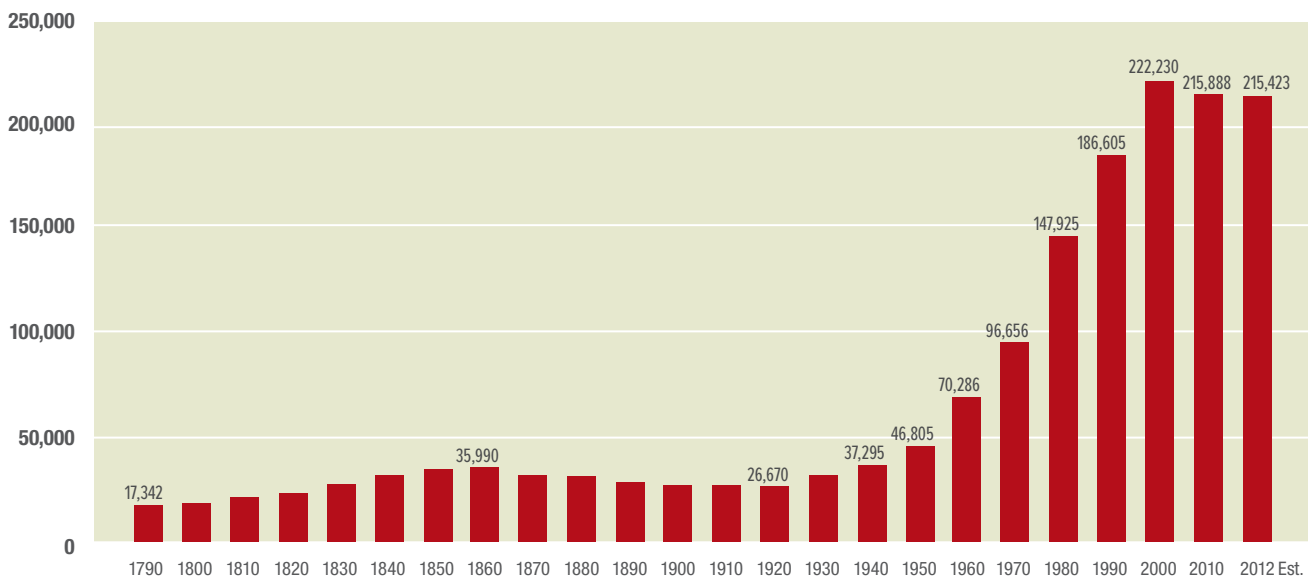
Source: US Census

FIGURE 4: Change in Population for 45 to 64 Year Olds on Cape Cod, in Massachusetts, and in the US between 2000 and 2010



Source: US Census

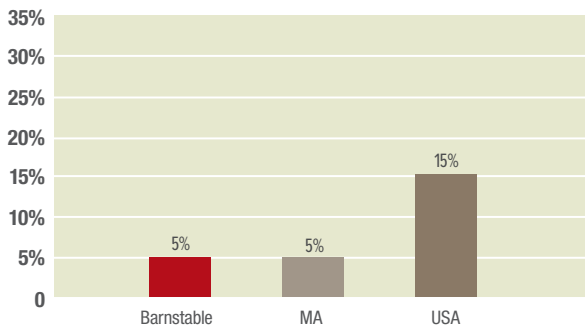
FIGURE 2: Population of Barnstable County 1790 to 2012



Source: US Census

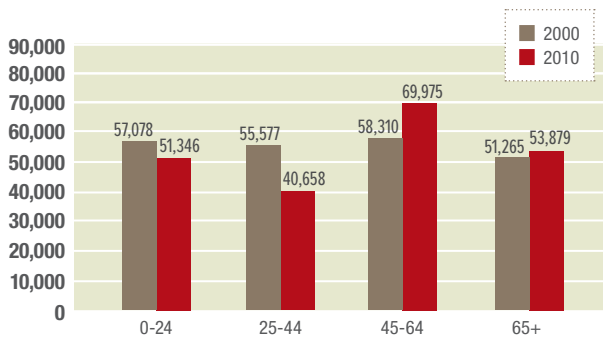
Given the marked changes in the demographic patterns on Cape Cod, CCYP and Cape Cod residents have cause to be concerned that if these trends continue, the decline of its young working age population could threaten the vitality of the region's economy and its diverse and dynamic community.

FIGURE 5: Change in Population for 65 and Older on Cape Cod, in Massachusetts, and in the US between 2000 and 2010



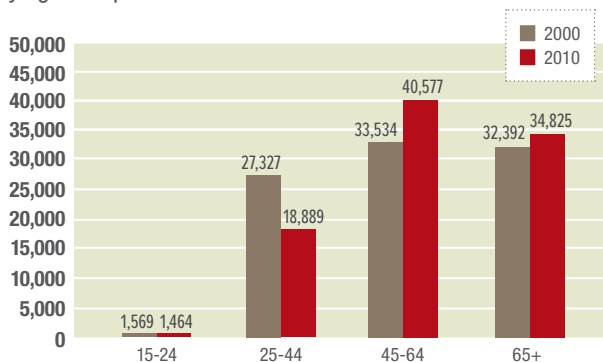
Source: US Census

FIGURE 6: Barnstable County Population by Age Group in 2000 and 2010



Source: US Census

FIGURE 7: Number of Households in Barnstable County by Age Group in 2000 and 2010



Source: US Census

Survey Methodology

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

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

TABLE 1: Sample Sizes for Each Survey

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

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

Statistical tests on the survey results are consistent with *a priori* expectations of any gender bias in the survey. For example women tend to be more family and socially-oriented and female respondents tended to rate reasons related to family, social networks, lifestyle, education, and spouse's

jobs higher in importance than men did. Likewise, men tend to be more career and wage oriented and male respondents tended to rate issues around availability of jobs, career advancement, and career development as more important than female respondents did.

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

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

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

Moving to Cape Cod

When asked to identify the most important reasons for why current residents moved to Barnstable County, nearly 83 percent responded “to enjoy the natural beauty” of the Cape (see Table 2). Nearly 70 percent responded “to enjoy the recreational opportunities.” Nearly two-thirds (65%) said that they moved “to be near family members who live here” and 56 percent responded “to raise a family here.” Reasons related to job offers only came in fifth place.

LIVE-ON-WORK-ON SAMPLE CHARACTERISTICS

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

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

Working on Cape Cod

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

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

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

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

The largest proportions of respondents identified the industry in which they work as Educational Services (14%), Professional, Scientific, and Technical Services (11%), and Healthcare (11%). The smallest proportions, those repre-

senting less than one percent of respondents, included Agriculture and Forestry, Data Processing and Data Storage, Fishing and Hunting, Manufacturing, Utilities, and Waste Management and Remediation Services.

Despite many positive indications that the vast majority of respondents were in full time positions in their desired fields, the survey respondents were essentially divided regarding whether or not they needed to supplement their annual income. Slightly more than half of respondents (51%) stated the need to supplement their income while the remaining 49 percent reported that they did not. The most common reason respondents gave for having to supplement their income is not earning enough from their primary jobs to cover basic living expenses followed by wanting to have extra spending money, and to increase savings.

When respondents were asked how strongly they agreed or disagreed with a series of statements about working on Cape Cod, the survey revealed widespread concern about the Cape Cod work environment (see Table 4).

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

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

Housing on Cape Cod

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

TABLE 2: Most Important Reasons for Moving to Cape Cod

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

^a Women tended to rate higher in importance
^b Men tended to rate higher in importance

TABLE 3: Most Important Reasons for Continuing to Live on Cape Cod

Reason for Continuing to Live on Cape Cod	Percentage of Respondents Rating Very Important and Important
To enjoy the natural beauty ^a	88%
I have a job here.	87%
To enjoy the recreational opportunities	77%
To be near family members who live here ^a	77%
I have a social network here ^a .	74%
To raise a family here ^a	70%
My spouse/partner has a job here ^a .	65%
I have a professional network here.	63%

^a Women tended to rate higher in importance

TABLE 4: Perceived Lack of Jobs, Career Development Resources, and Living Wages on Cape Cod

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

^a Men tended to disagree more strongly than women.

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

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

TABLE 5: Percent of Income¹ Spent on Mortgage and Rent

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

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

TABLE 6: If there were more transportation options on Cape Cod, which would you use? (Check all that apply.)

Mode	Number of Responses	Percent Who Would Use Additional Transportation Modes
Trails for recreational biking	926	25%
None	800	21%
Commuter rail to work off Cape	778	21%
Dedicated bicycle lanes to bike to work on Cape	686	18%
Commuter bus to work on Cape	383	10%
Commuter bus to work off Cape	213	6%
Total	3,786	100%

Over 70 percent of respondents paid monthly mortgages in the range of \$1,251 to \$2,500. Likewise, over 80 percent of winter and summer rents clustered within the range of \$501 to \$1,500. As Table 5 reveals, the median proportion of gross income spent by survey respondents on their mortgage payments was approximately 35 percent, meaning that half

of all the respondents to the survey were paying more than 35 percent of their income in mortgage. Similarly, half of all renters were spending at least 30 percent of their gross income on rent.

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

Cape Cod Services

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

Transportation

The survey asked which modes of transportation respondents would use if there were more choices available on Cape Cod. Recreational bike trails were identified as the mode they would use the most. The next most common response was not using any of the options, followed by commuter rail for commuting off Cape and dedicated bike lanes for commuting on Cape. Commuter bus options garnered the lowest proportion of responses. These transportation preferences are summarized in Table 6.

Services

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

Educational Resources

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

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

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

Cape Cod Community Initiatives

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

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

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

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

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

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

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

Likelihood of Moving Off Cape Cod

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

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

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

Key Survey Findings from the Off-Cape Cod Sample

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

LIVE-OFF-WORK-OFF SAMPLE CHARACTERISTICS

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

The least important reasons for moving were not enough job training opportunities, not feeling a part of a community, and "Other." Many of the off-Cape respondents who chose

“Other” reiterated their opinions over the lack of jobs, lack of job advancement opportunities, high cost of housing, high cost of living, a desire to pursue a broader world perspective for themselves or their children, and to find a different social circle, including for the purpose of dating. The summary statistics for these reasons are offered in Table 7.

TABLE 7: Choose the most important reasons that made you decide to move off Cape Cod? (Check all that apply.)

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

TABLE 8: Choose the most important reasons that would cause you to move back to Cape Cod. (Check all that apply.)

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

When asked to give the most important reasons that would cause an off-Cape respondent to return to Cape Cod, the most common reason was to be near friends and family, followed by having a job offer, and for raising a family. The least cited reasons for moving back are to be near family or friends who provide care for the respondent’s family member, for job training opportunities, and “Other.” Respondents also explained that they would move back to the Cape if they had a high paying job to come back to and/or could find an affordable home. Respondents offered retirement as another reason for moving back and several explained that they still enjoy summer vacations on the Cape, but would not want to live on Cape Cod. The responses for these reasons are summarized in Table 8.

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

Summary of Focus Groups and Phone Interviews

Four focus groups were conducted in February and March of 2014 with a total of 47 people participating. The median age of the focus group participants was 33 years and 55 percent of the participants were female and 43 percent were male; one person did not answer the gender question. The locations and times of day were varied among the focus groups in order to give a range of opportunities for interested parties to participate. Two focus groups were located in Barnstable, one was in West Barnstable, and one was in Brewster. The West Barnstable and Brewster focus groups were conducted during the noon lunch hour and the two Barnstable focus groups were held in the early evening. Focus group participants were asked to discuss challenges of living and working on Cape Cod, while focusing on potential solutions. They were asked to brainstorm solutions and these were the recurrent themes:

- Bring more year-round jobs in manufacturing, technology, healthcare, and cloud based businesses to Cape Cod
- Increase the chances of bringing other industry sectors to the Cape beside tourism-based industries
- Provide internship opportunities and more higher education options to retain and attract students
- Provide a centralized web-based source of job listings and career development resources
- Provide a centralized web-based source of community, recreational, and social activities
- Provide housing resources for working age and working class adults

- Increase civic engagement
- Build bridges to the retired segment of the Cape Cod population and town leaders
- Create a Cape Cod identity or brand
- Create a unified sense of a Cape Cod community (as opposed to the current town silos).

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

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

Comparison of Cape Cod to Other Coastal Communities

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

Like Cape Cod, New Hanover County and San Luis Obispo County are coastal communities with relatively high geographic isolation and an abundance of natural beauty. Unlike these two communities, young adults on Cape Cod form a much smaller percentage of the population. Those between the ages of 20 and 44 comprise just 23 percent of Cape Cod's

population, but 37 percent in New Hanover County and 34 percent in San Luis Obispo County. Though San Luis Obispo County and Cape Cod are losing population among those ages 5 to 19 and 25 to 44, Cape Cod is experiencing a significant net loss of population among all those under the age of 45 (net loss of 18 percent between 2000 and 2012 versus a mere one percent loss in San Luis Obispo County).

All age groups in New Hanover County are increasing. This could be attributed to the fact that New Hanover County is the only one of the three with a large urban center. The city of Wilmington is home to nearly 110,000 residents, which is more than half of the county's population (American Community Survey, 2012). San Luis Obispo County's largest city, also named San Luis Obispo, is roughly the size of the Town of Barnstable and has many fewer urban amenities than Wilmington. This could be contributing to the eight percent decrease in population among ages 25 to 44 in San Luis Obispo County (US Census Bureau, 2000 and 2010). On Cape Cod, that same age range is declining at a rate of nearly 28 percent. Conversely, that same age group is increasing at a rate of 14 percent in New Hanover County. Urban amenities like active nightlife and walkable communities in compact city centers attract and retain young adult populations.

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

workers (12 percent) as San Luis Obispo County and a higher percentage than New Hanover County's seven percent.

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

Next Steps for *Shape the Cape*

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

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

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

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

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

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

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

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

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

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

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

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

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