



Town of Orleans Economic Development Plan

DIAGNOSTIC
JANUARY 25, 2022

streetsense.



The Town of Orleans' natural assets make it a choice place for visiting & doing business.

Nauset Beach



Skaket Beach & Rock Harbor



Town Cove & Ponds



Average Consumer Review (GoogleMaps): **4.8/5.0**

Average Consumer Review (GoogleMaps): **4.7/5.0**

Total No. of Reviews:

1,152

The beach is most popular for light recreation - swimming, sunbathing, walking, as well as food trucks and live entertainment.

Total No. of Reviews:

705

Skaket Beach is highly touted as a **scenic sunset location**, popular among families owing to safe swimming conditions

Rock Harbor is known for boat charters and CG36500 lifeboat.



Over 3,000 annual landing trips made and 1.2 million pounds of catch in Orleans.

Orleans' greatest assets - its natural resources and outdoor recreation anchors - influence economic activities across Town.

More than 2,400+ seasonal housing units in Town

Nearly 1 in 2 jobs are in Retail, Accommodation & Food Services, Arts/ Entertainment & Recreation

Source: Claritas 2021



Nearly half of all economic activity in Town occurs in four primary clusters

PRIMARY CLUSTERS

- Heavy concentration of business activity
- Important to both year-round residents and seasonal visitors

- A** - Town Cove Waterfront
- B** - Main St/Village Center
- C** - Finlay Industrial
- D** - Rte 6A/Eldredge Park Way

SECONDARY CLUSTERS

- Smaller share of business activity
- Limited mix of offerings

- E** - East Orleans
- F** - Rock Harbor
- G** - South Orleans

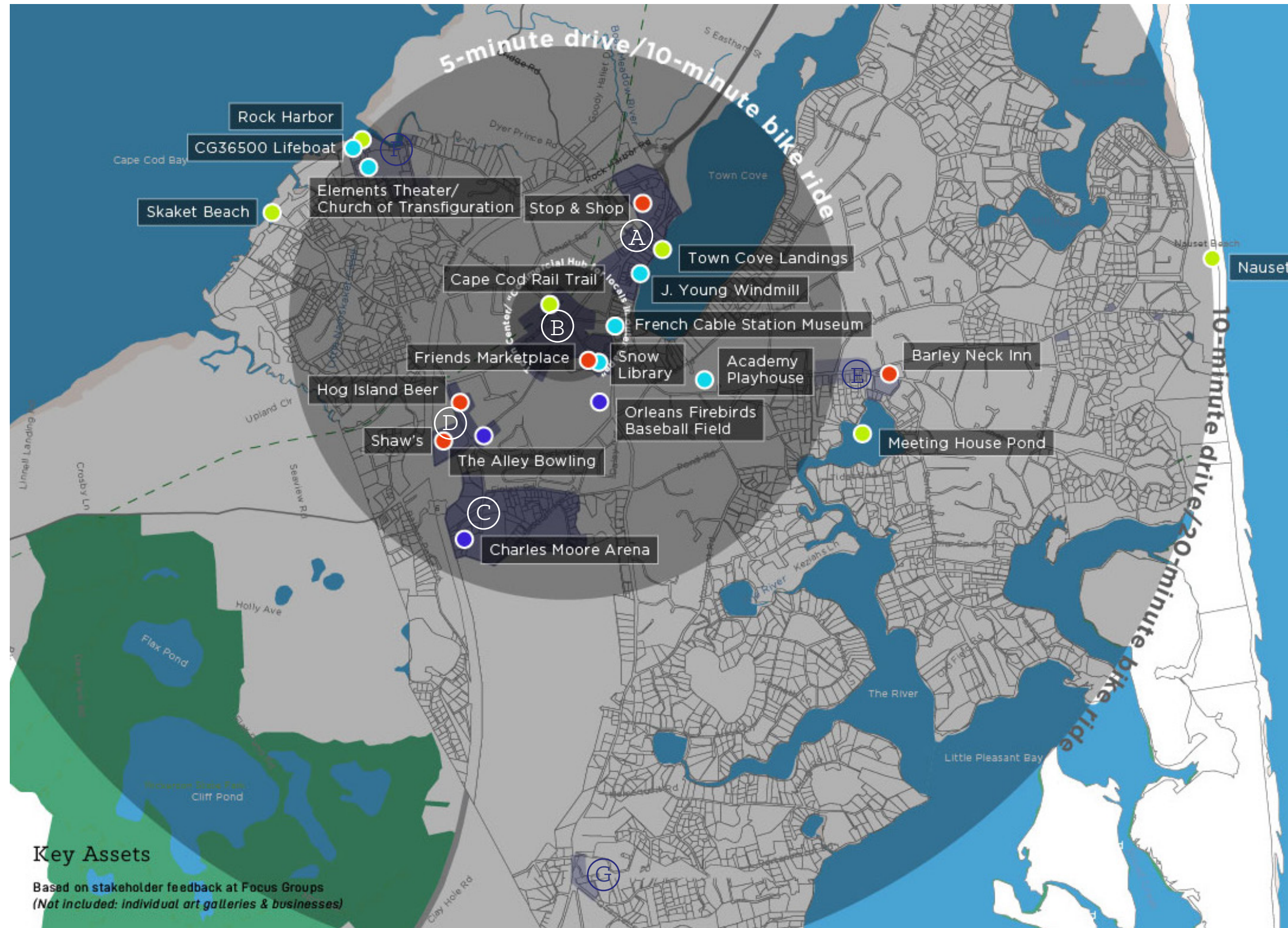
Source: Streetsense (2021)

Source: ESRI Business Analyst Online (2021)

Economic Cluster	Retail/Office Commercial SF	Total #. of businesses	Types of Businesses	Anchors/ Assets	Estimated # of Employees
A. Town Cove Waterfront	Medium	43	1. Retail Trade 2. Accommodation & Food Services 3. Other Services (except public administration)	<ul style="list-style-type: none"> ● Stop and Shop ● Town Cove Landings ● J Young Windmill 	347
B. Main Street/Village Center	Large	76	1. Retail Trade 2. Accommodation & Food Services 3. Professional Services	<ul style="list-style-type: none"> ● Friends Marketplace ● Snow Library ● Cape Cod Rail Trail 	600
C. Finlay Industrial	Medium	74	1. Construction 2. Retail Trade (Auto dealers/automotive services) 3. Other Services	<ul style="list-style-type: none"> ● Charles Moore Arena 	544
D. Rte 6A/Eldredge Park Way	Medium	28	1. Retail Trade 2. Accommodation & Food Services	<ul style="list-style-type: none"> ● Shaws ● Hog Island Beer ● The Alley Bowling 	213
E. East Orleans	Micro	8	-	<ul style="list-style-type: none"> ● Barley Neck Inn 	18
F. Rock Harbor	Micro	3	-	<ul style="list-style-type: none"> ● Rock Harbor ● Elements Theatre ● CG6500 LifeBoat 	25
G. South Orleans	Micro	11	-	<ul style="list-style-type: none"> ● US Post Office 	47

Micro <50,000 SF
Small 50-100k SF
Medium 100-200k SF
Large 200-500k SF

- Natural Outdoor Recreation
- Civic/Cultural
- Retail/Entertainment
- Sports



Town of Orleans Economic Assets

A. Town Cove/Waterfront

- Located adjacent to a natural asset- Town Cove
- Anchored by Stop& Shop and featuring **tourism-supporting businesses** such as fishing stores, boat dealers, bike trail rentals, surf shops and local inns/motels

B. Main St/Village Center

- Concentration of more than 70 retail and food service businesses (including tourism-supporting businesses such as art galleries)

C. Finlay Industrial

- Businesses are less consumer-facing and provide household and automotive repair services and construction services

D. Rte 6A/Eldredge Park Way

- Small retail/dining/entertainment cluster featuring store experiences that go beyond traditional retail transactions

Key Assets

Based on stakeholder feedback at Focus Groups
(Not included: individual art galleries & businesses)

ASSETS/ANCHORS

- Natural Outdoor Recreation
- Civic/Cultural
- Retail/Entertainment
- Sports

Orleans' natural assets also create opportunities in the blue economy.

In Orleans, the blue economy consists of:

- **Dark blue industries:** commercial fishing and aquaculture, seafood processing, port and harbor industries, boat dealers, fish markets, marinas, water-based transportation
- **Light blue industries:** include arts and culture, museums and historical sites, and hotels, restaurants, and other tourism-related accommodations

Total employees
Total businesses
Total revenue

Barnstable
County

15,938

13,838

\$1,141,310,553

(or 14% of total business revenue)

Orleans

740

72

\$53,901,808

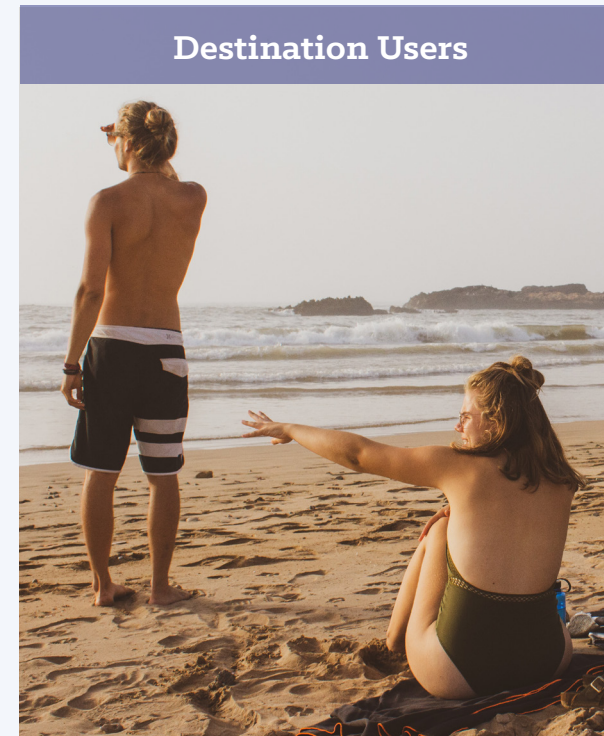
(or 13% of total business revenue)

Source: Cape Cod Blue Economy Project: A Call to Action. 2017

The non-residential customer segment is incredibly important to sustaining the current levels of business activity in Orleans' commercial districts.



- Year-round residents and workers - 95% White, median income \$77k, more than 80% of households with no children under the age of 18, median age of 61
- **Key categories of purchase for residents:** groceries, household supplies, general merchandise, and neighborhood services (clothing repair, medical/healthcare/wellness, veterinary)
- **Key categories of purchase for workers:** Food away from home (lunch and after work dining), groceries and household supplies



- Second home owners - longer stay, 1-3 times a year
 - **Key categories of purchase:** groceries, household supplies, general merchandise, and neighborhood services (clothing repair, medical/healthcare/wellness, veterinary)
 - Additionally, high spend on local arts & culture
- Vacationers - shorter stay, hotel/motel/inn/short term rentals
 - **Key categories of purchase:** Dining out, entertainment and recreation (arts/culture/unique experiences), novelty goods/souvenirs,

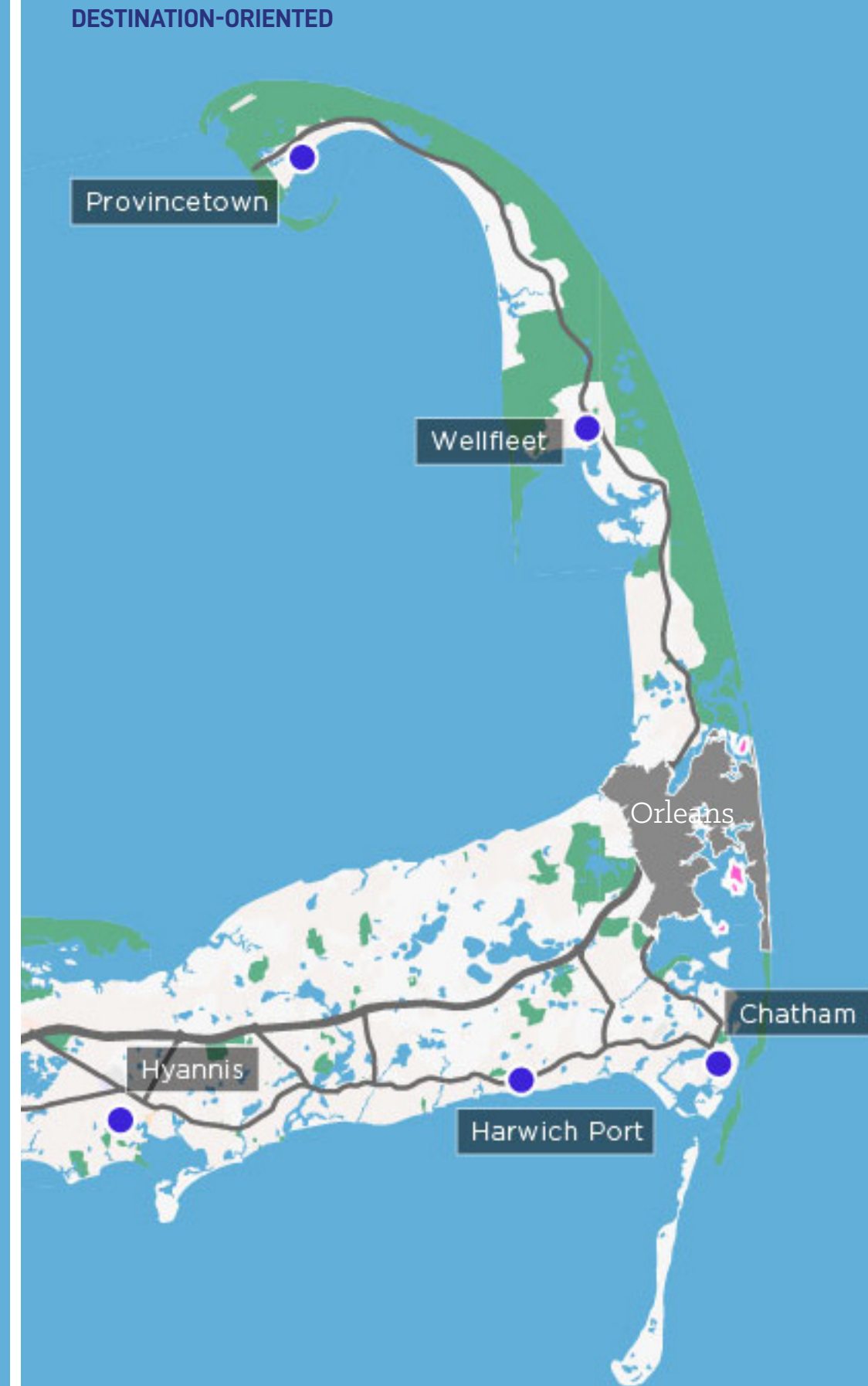
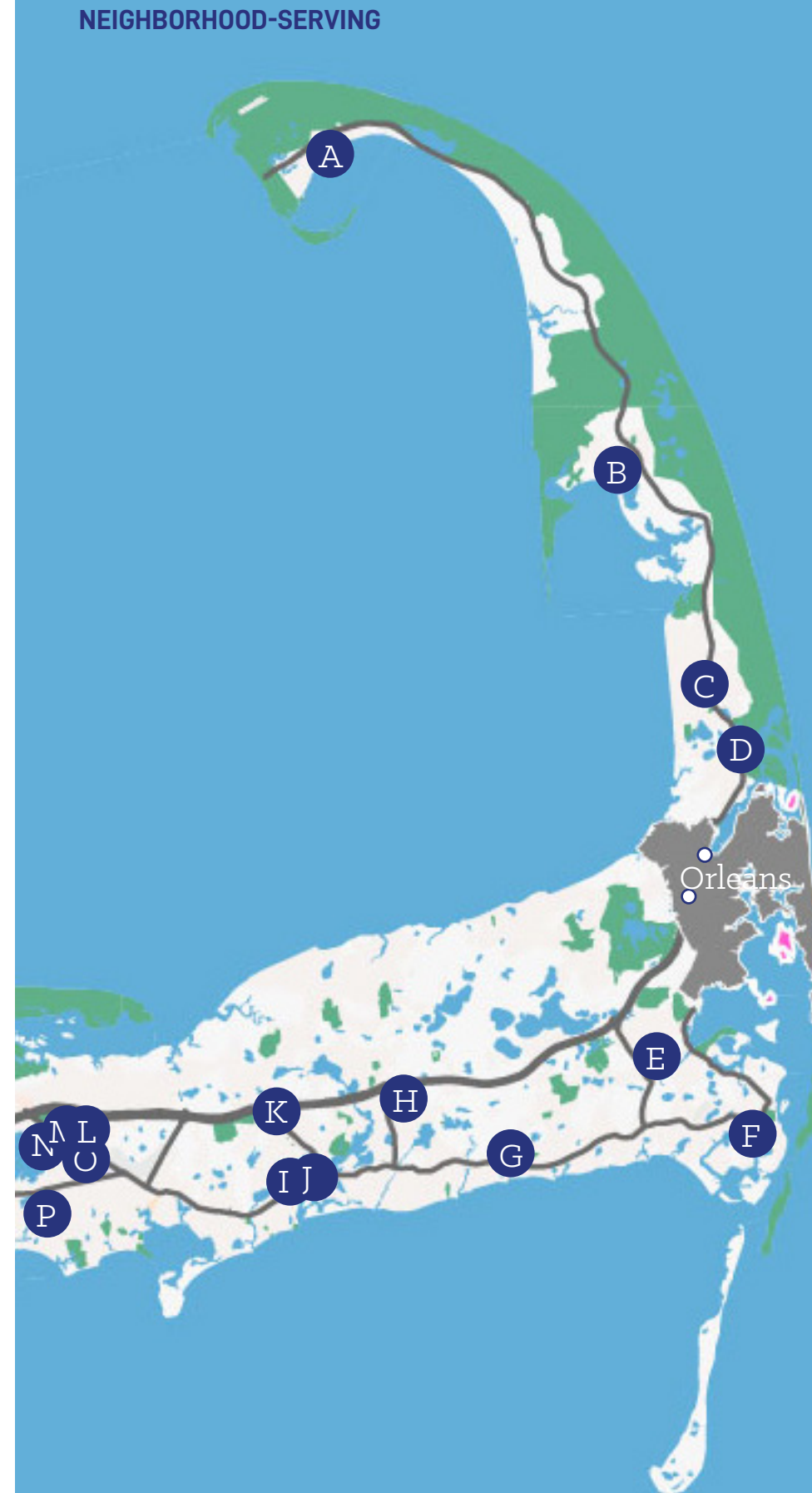


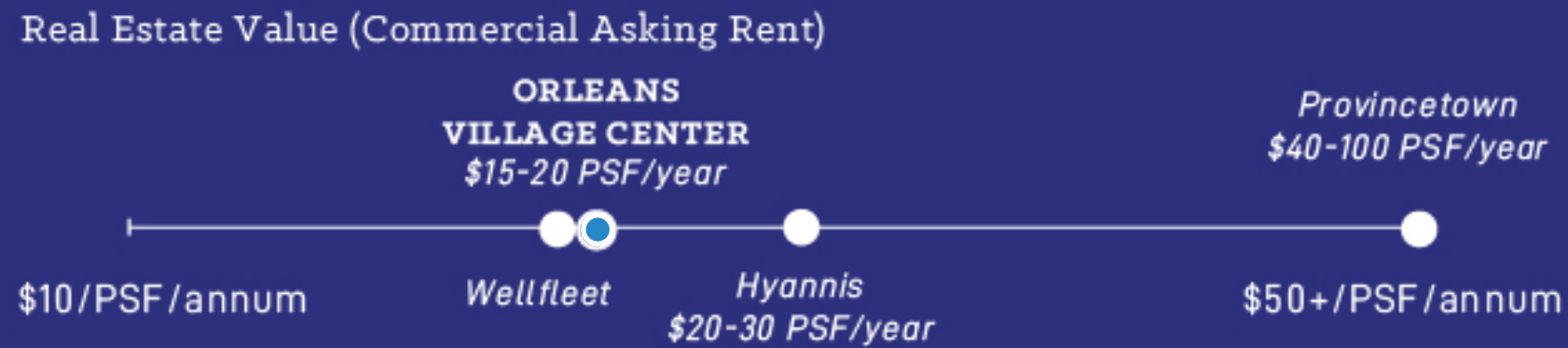
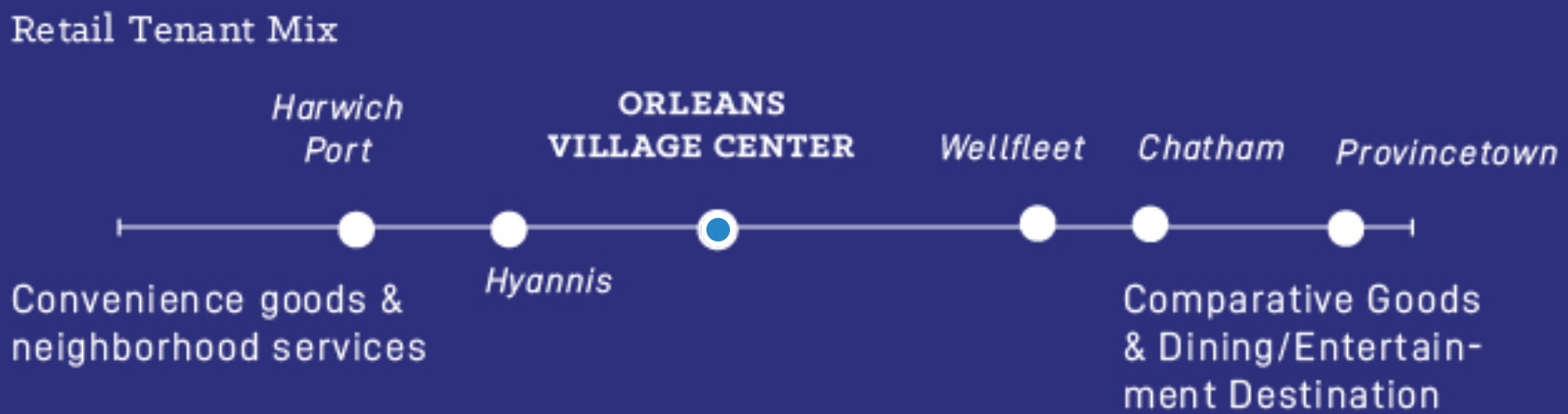
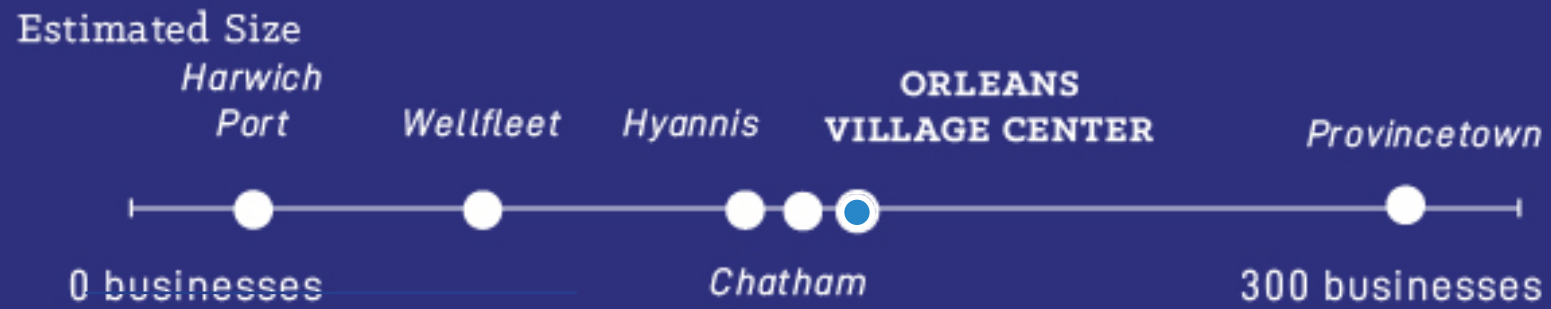
As a visitor destination, Orleans faces strong competition from nearby markets.

Competitive Landscape: Neighborhood Serving and Destination Oriented

There are limited-service grocers and convenience stores in outer Cape. However, **West of Harwich, the neighborhood goods and service options expand significantly for customers,** making Orleans a less competitive neighborhood goods and services location.

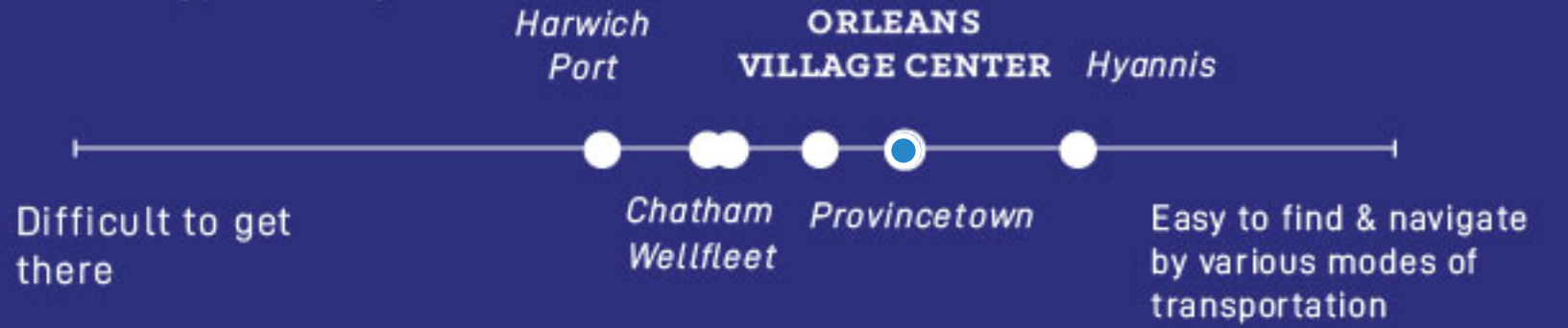
Regional, destination-oriented commercial districts that serve lower Cape includes a number of downtown Main Streets that are highly activated during peak seasonal months.







Accessibility/Visibility



Public Realm (Street & Sidewalk Conditions)



Public Realm (Public Spaces)



Private Realm (Storefront Conditions & Building Facades)



Orleans has made significant investments to the public realm at Main St/Village Center. However, Town Cove remains auto-oriented despite its adjacency to the waterfront.

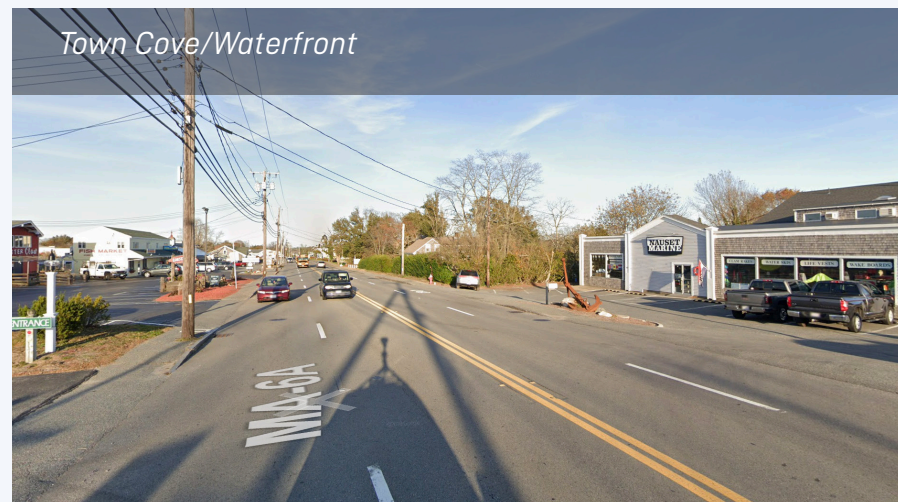
Element	Town Cove/Waterfront				Main St/Village Center			
	A	B	C	n/a	A	B	C	n/a
Sidewalks		●			●			
Amenities - Street Trees and Benches			●		●			
Lighting			●		●			
Wayfinding/Signage			●			●		
Roadbed and Crosswalks	●					●		

Baseline Comparison:

Average Small Community Grade (based on Commonwealth Rapid Recovery program data)



Overall Grade **C**



Overall Grade **A**



Many properties on Main St have been well-maintained and incorporate a mix of facade textures, colors and materials. However, this effort is inconsistent - many properties are setback for parking or feature blank/inactive facades.

Element	Town Cove/Waterfront			
	A	B	C	n/a
Public Art				●
Storefront Signage		●		
Outdoor Display/ Dining*		●		
Storefront Window			●	
Facade		●		
Storefront Lighting		●		

Overall Grade **B-**



Element	Main St/Village Center			
	A	B	C	n/a
Public Art		●		
Storefront Signage	●			
Outdoor Display/ Dining*		●		
Storefront Window	●			
Facade		●		
Storefront Lighting		●		

Overall Grade **B+**



Despite adjacency to the Cape Cod Rail Trail, Main St/Village Center does not have protected bike lane networks and safe bike parking facilities.

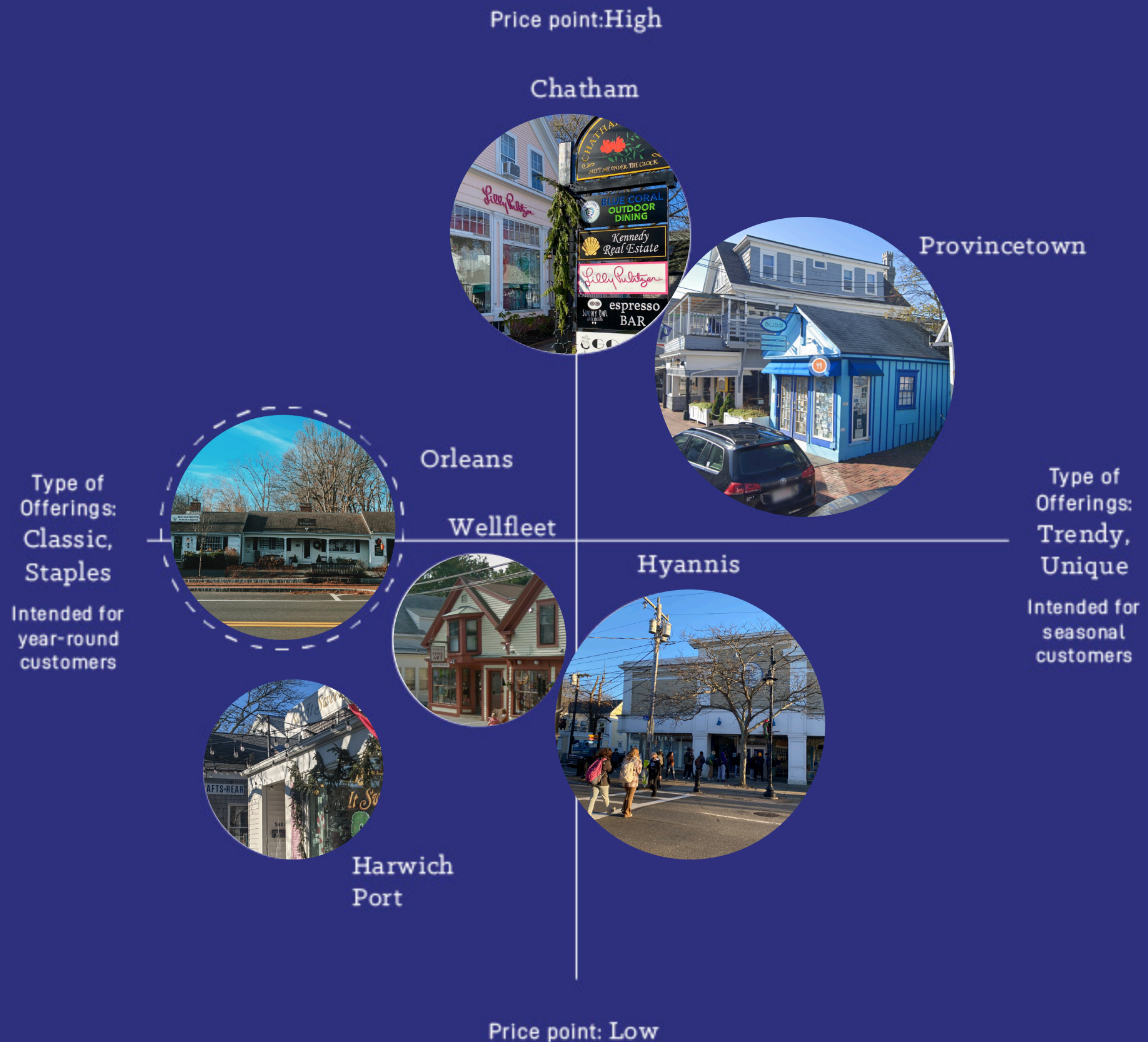
The parking ratio is within reasonable range - 2.4 parking spaces per 1,000 SF of commercial space.

Baseline Comparison:

Average Small Community Grade (based on Commonwealth Rapid Recovery program data)

B-

In order to better serve both residents and visitors, the Town will need to enhance experiential offerings at its commercial districts - including new types of tenants that offer services that cannot be replicated digitally - and create highly active public spaces that extend dwell time and drive foot traffic to businesses.



Buy Online, Pick Up In Store



Demand for buy online, pick up in store (BOPIS) has surged 40 % since the start of the pandemic.

E-commerce volumes grew as much in the first quarter of 2020 as in the previous ten years.¹

Health/Personal Care and Neighborhood Services



Health spending in the U.S. increased by 4.6% in 2019 to \$3.8 trillion or \$11,582 per capita.²

In response, top U.S. retailers are quickly joining the healthcare industry, including Walmart, Walgreens and CVS.

Local and Artisan



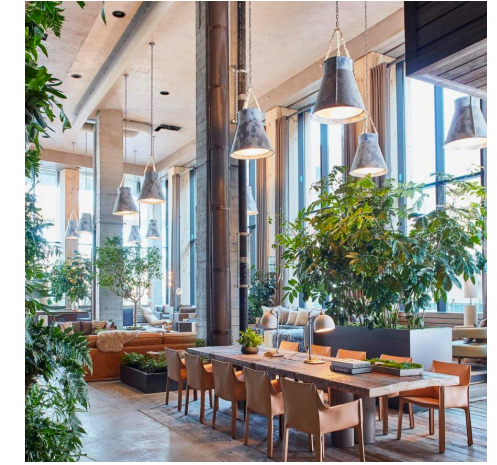
Consumers' increased time spent at/near homes (following lock down/work-from-home policies) has grown a Shop Local/locavore movement in consumer spending. 56% of consumers are shopping in neighborhood stores or buying more locally sourced products.⁴

In-person Experiences & Connections



Although restaurants and entertainment venues have been hardest hit during the pandemic, consumer sentiments indicate that Americans are indeed missing the pre-pandemic dining experience and socializing. 60% of Americans polled have consistently said the activity they are most comfortable with is dining out.

Hybrid Hospitality Hotels



In Massachusetts, approximately 40% of adults live in households with at least one adult who worked remotely due to COVID-19.

Up to 32 percent of workers, or 1.4 million, in Massachusetts could effectively work remotely in the long term.³

¹ "Retail Speaks: Seven Imperatives for the Industry". McKinsey & Company and Retail Industry Leaders Association, 2021.

² "National Health Expenditures, 2019: Steady Spending Growth Despite Increases in Personal Health Care Expenditures in Advance of the Pandemic". American Medical Association, 2020.

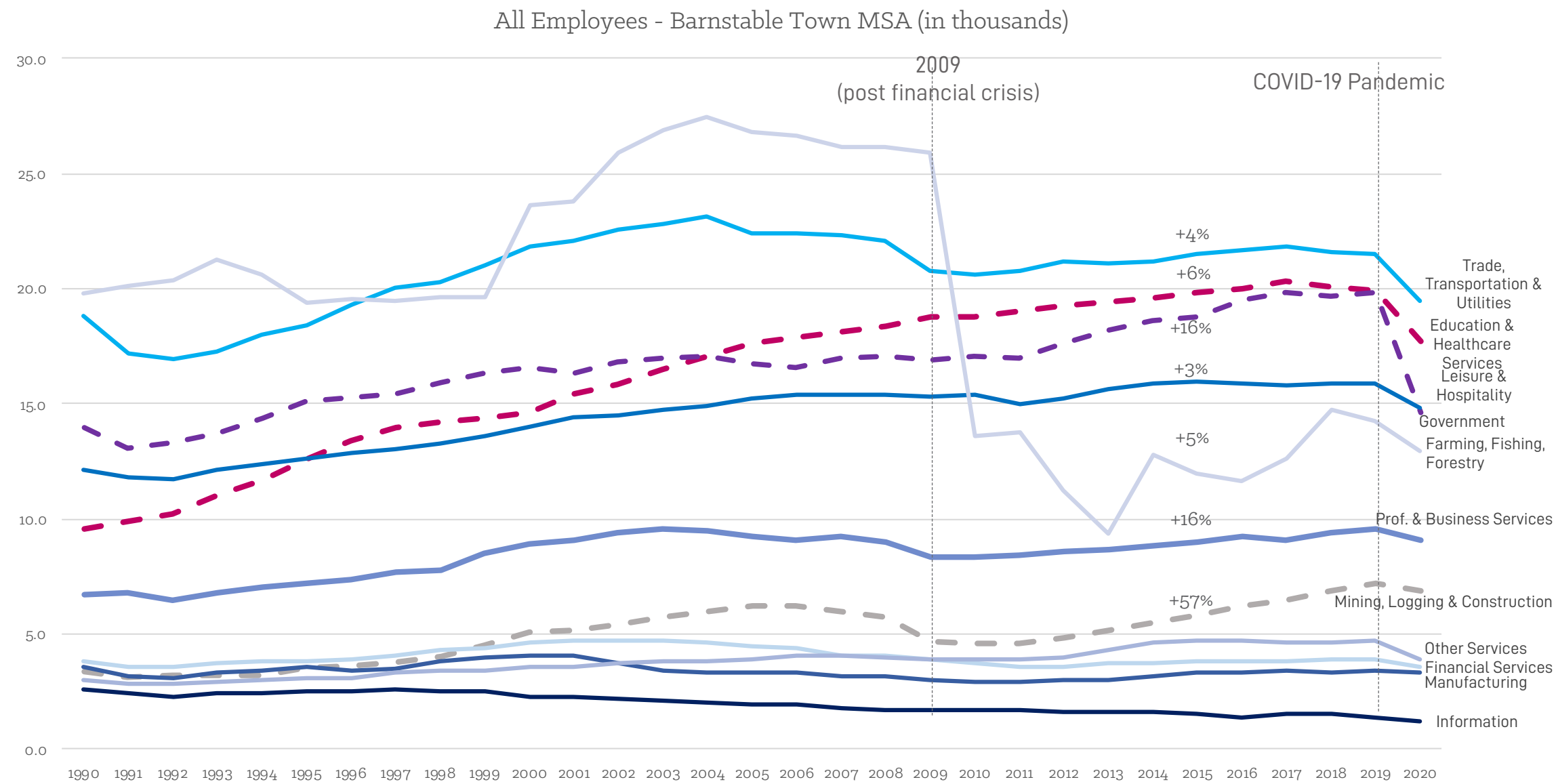
³ "Preparing for the Future of Work in the Commonwealth of Massachusetts" Mckinsey & Company, 2021

⁴ "How is COVID-19 changing the retail consumer?" Accenture 2020



Regional employment growth in the Blue
Economy presents opportunities for Orleans.

The economic landscape in the Cape is unique. While the majority of growth across the state were in two key sectors ‘Professional/Business Services’ and ‘Education & Healthcare’, Barnstable MSA saw greatest growth in ‘Leisure & Hospitality’ and ‘Mining, Logging, Construction’.



Source: State and Area Employment - Bureau of Labor Statistics (1990-2020)

Orleans should continue to build on its competitive advantages and explore opportunities in sectors in which it has significantly less than its “fair share” of jobs in the County.

Orleans is specialized in ‘Retail Trade’, ‘Arts/Entertainment/Recreation’, ‘Financial Activities’, and ‘Educational Services’ - in other words, it is exporting goods and services to consumers from outside Town, and therefore importing additional spending and dollars from these consumers.

While the rest of Barnstable County is experiencing significant growth in ‘Natural Resources’, ‘Construction’ and ‘Accommodation & Food Services’, Orleans has significantly less than its “fair share” of jobs in these sectors in the County - indicating that Orleans may have an opportunity to capture employment in these sectors with the right infrastructure and businesses.

Capture of County Employment

Source: All Primary Jobs - LEHD OnTheMap, Bureau of Labor Statistics (2019)

Legend

- Orleans' Specialized Industries
- Industries that Orleans may be able to capture employment in based on regional growth

1 - “Fair Share” is calculated as the percent of the overall job base that industry represents in Orleans divided by the percent of the overall job base that it represents in Barnstable County as a whole

2 - Industries in dark purple under “Recent Regional Growth” grew by more than 5%, while those in light purple decreased by more than 5% in the five years preceding COVID.

3 - The average annual wage for Construction in Cape Cod is \$63,492 (based on 2019 Cape Cod CEDS Report) - 11% above the median wage of \$56,290.

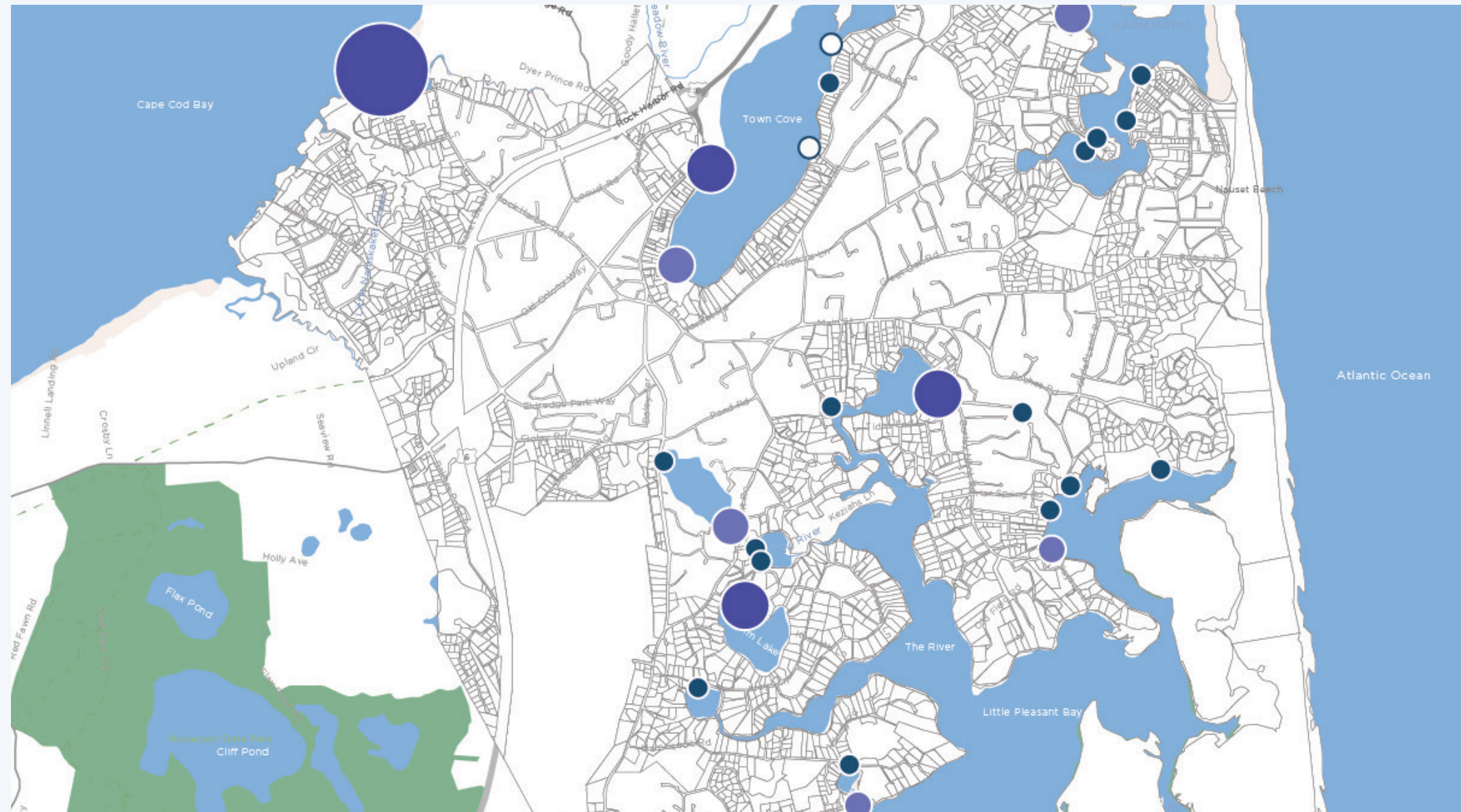
Element	Fair Share Capture ¹	Recent Regional Growth ²
Natural Resources		
Agriculture, Forestry, Fishing & Hunting	0.32	+
Mining, Logging & Construction		
Mining, Quarrying, and Oil & Gas	0.00	+
Construction ³	0.68	=
Trade, Transportation & Utilities		
Utilities	0.00	=
Wholesale Trade	1.02	=
Retail Trade	1.68	+
Transportation and Warehousing	0.07	-
Information		
Information	0.50	-
Financial Activities		
Finance and Insurance	1.78	+
Real Estate and Rental and Leasing	1.13	+
Prof. & Business Services		
Prof., Scientific, & Technical Services	1.16	+
Mgmt of Companies and Enterprises	0.16	+
Administration & Support, Waste Mgmt & Remediation	0.82	+
Education & Healthcare Services		
Educational Services	1.42	=
Health Care and Social Assistance	0.49	=
Leisure & Hospitality		
Arts, Entertainment, and Recreation	1.67	+
Accommodation and Food Services	0.99	+
Other Services		
Other Services (excl. Public Administration)	1.19	=
Government		
Public Administration	0.63	=
Manufacturing		
Manufacturing	1.12	+



The Town faces environmental threats that limit its fair share of Blue Economies.

Shoaling and boat parking constraints threaten the blue economy as navigation and public safety issues continue to force recreational and commercial boats to neighboring Towns with deep water access.

Source: Town of Orleans



LANDINGS BY
PARKING SPACE
AVAILABILITY



In order to mitigate the decline of Dark Blue economies, and the impacts that may have on light blue industries such as tourism and accommodation/food services, the **Cape Cod Commission** has recommended adding and enhancing existing landings and commercial fishing infrastructure such as, Bulkhead repairs, addition of hoisting boom, fuel service upgrade, dredging, ice, parking, aquaculture support, and more dock space.

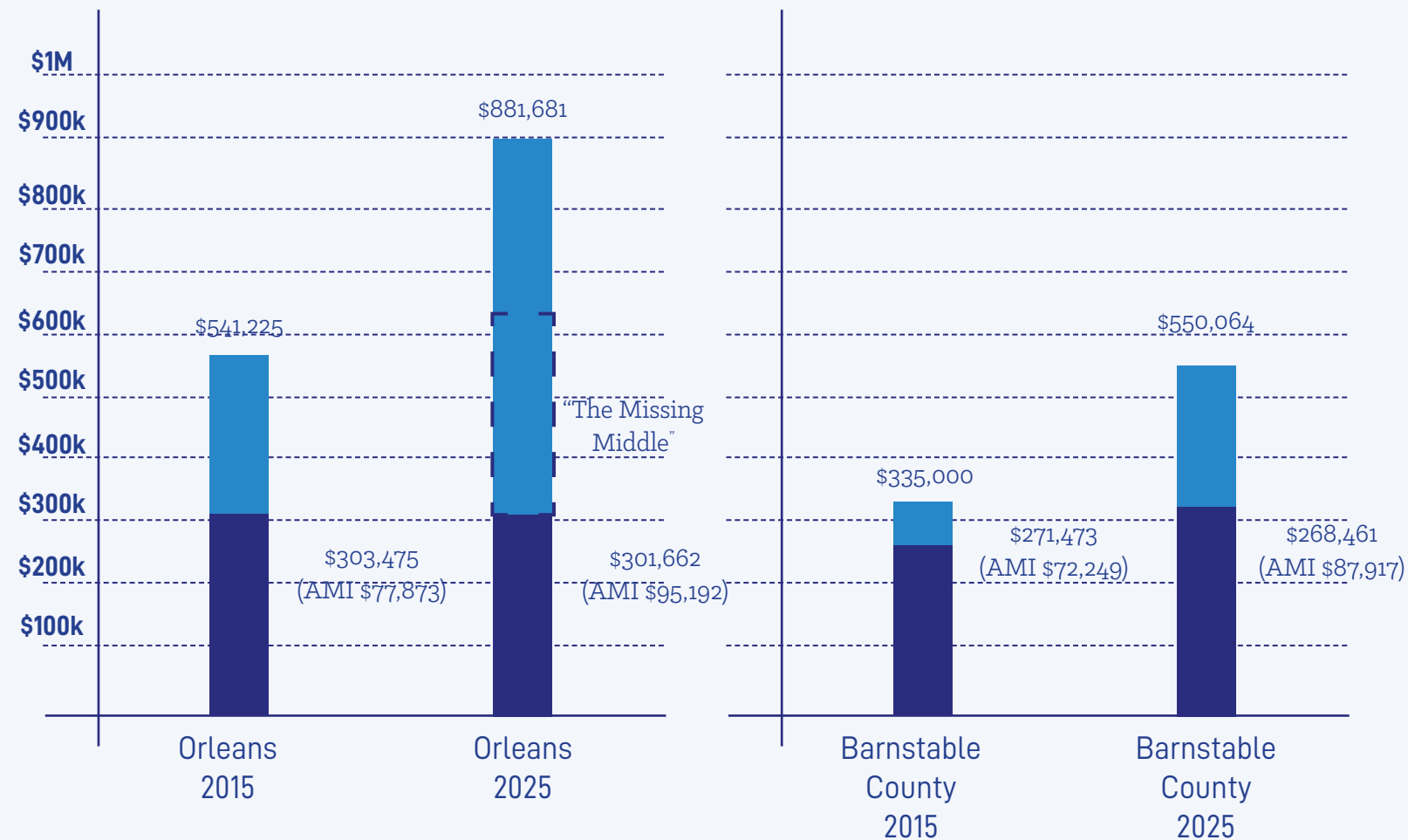


The Town will need to address labor and housing challenges to leverage its economic competitive advantages.

In addition to having a year-round resident population that is largely not in the labor force, housing rates exceed 'affordable' limits for most blue-collar and service sector workers.

By 2025, Cape Cod Commission projects that the gap between median home values and affordable housing prices will widen across the Cape without significant action to **increase and diversify housing stock for year-round buyers**.

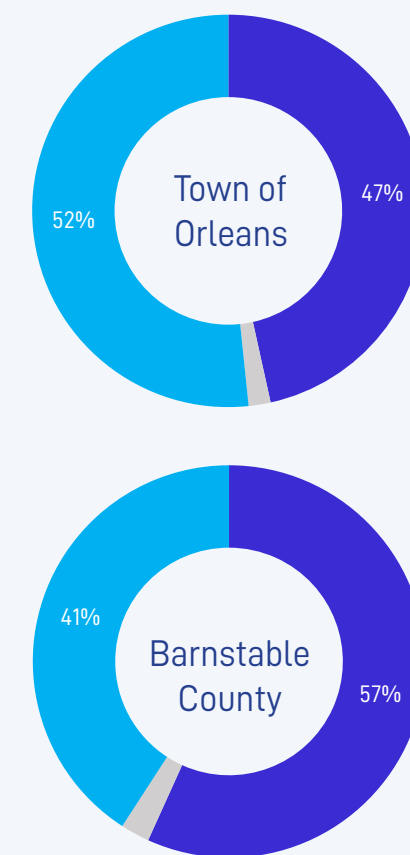
More than half of the local Town population (aged 16+) is not in the labor force.



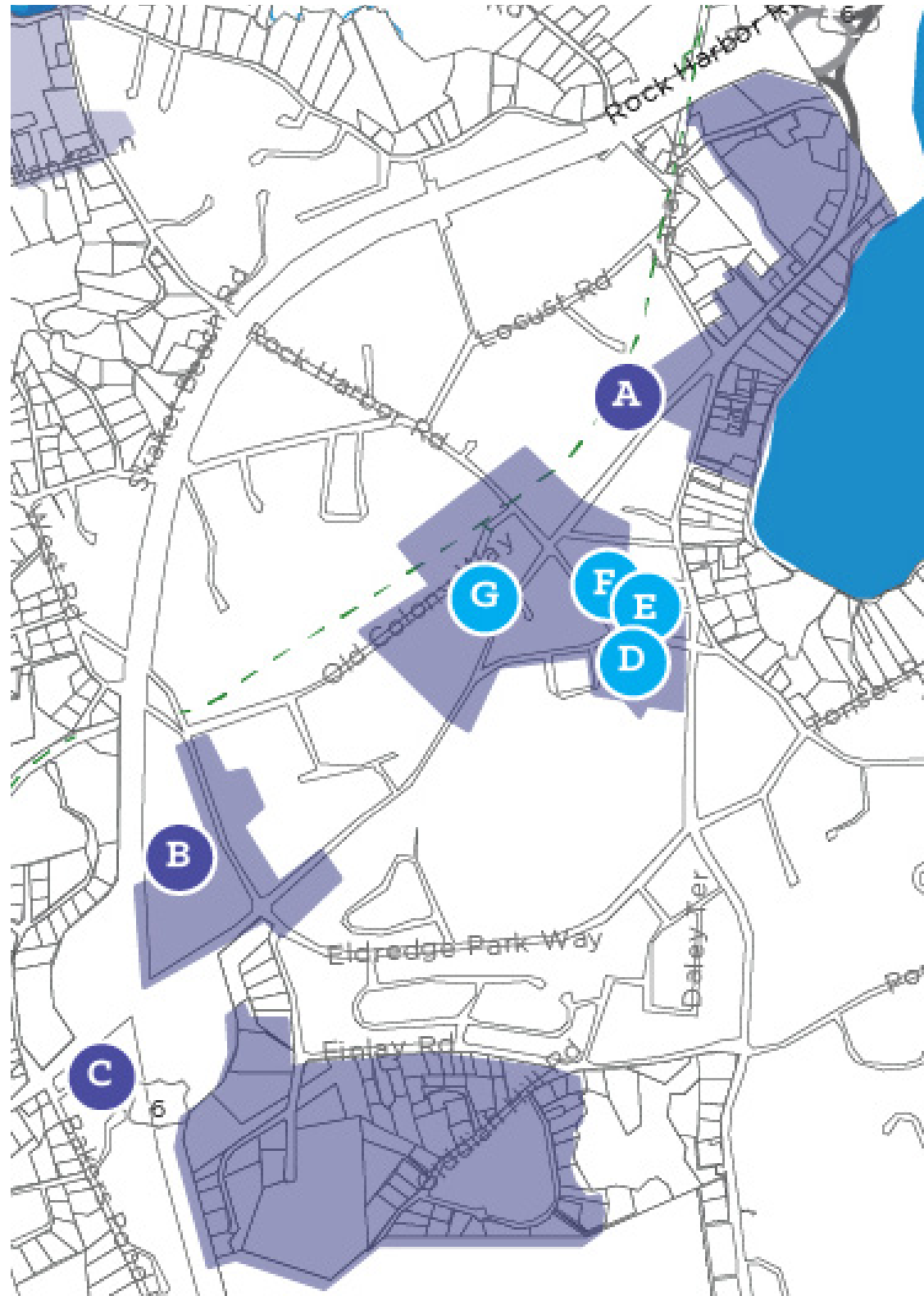
Source: Cape Cod Commission 2017 Housing Market Analysis

- Affordable Home Price (based on Annual Median Household Income (AMI))
- Median Home Values

- Civilian - Employed
- Not in Labor Force
- Civilian - Unemployed



Source: Claritas 2021



Opportunity Sites to Grow Downtown Living

Although Main St/Village Center has been zoned to allow increased density and a mix of uses (including residential), the area's property owners have not been able to leverage development opportunity owing to septic requirements in the Town's code, or due to challenges in succession planning.

RIPE:

C - 55-57 Main St: 90,000+ SF (Main St/Village Center)

D - 56 Main St: 31,000+ SF (Main St/Village Center)

E - 5 Cummings Rd: 8,000+ SF (Main St/Village Center)

F - 17 Old Colony Way: 90,000+ SF (Main St/Village Center)

RECENT TRANSACTION/ DEVELOPMENT PLAN:

A - Governor Prence (Town-Owned): 200,000+ SF (Town Cove/Waterfront) - affordable housing and community uses

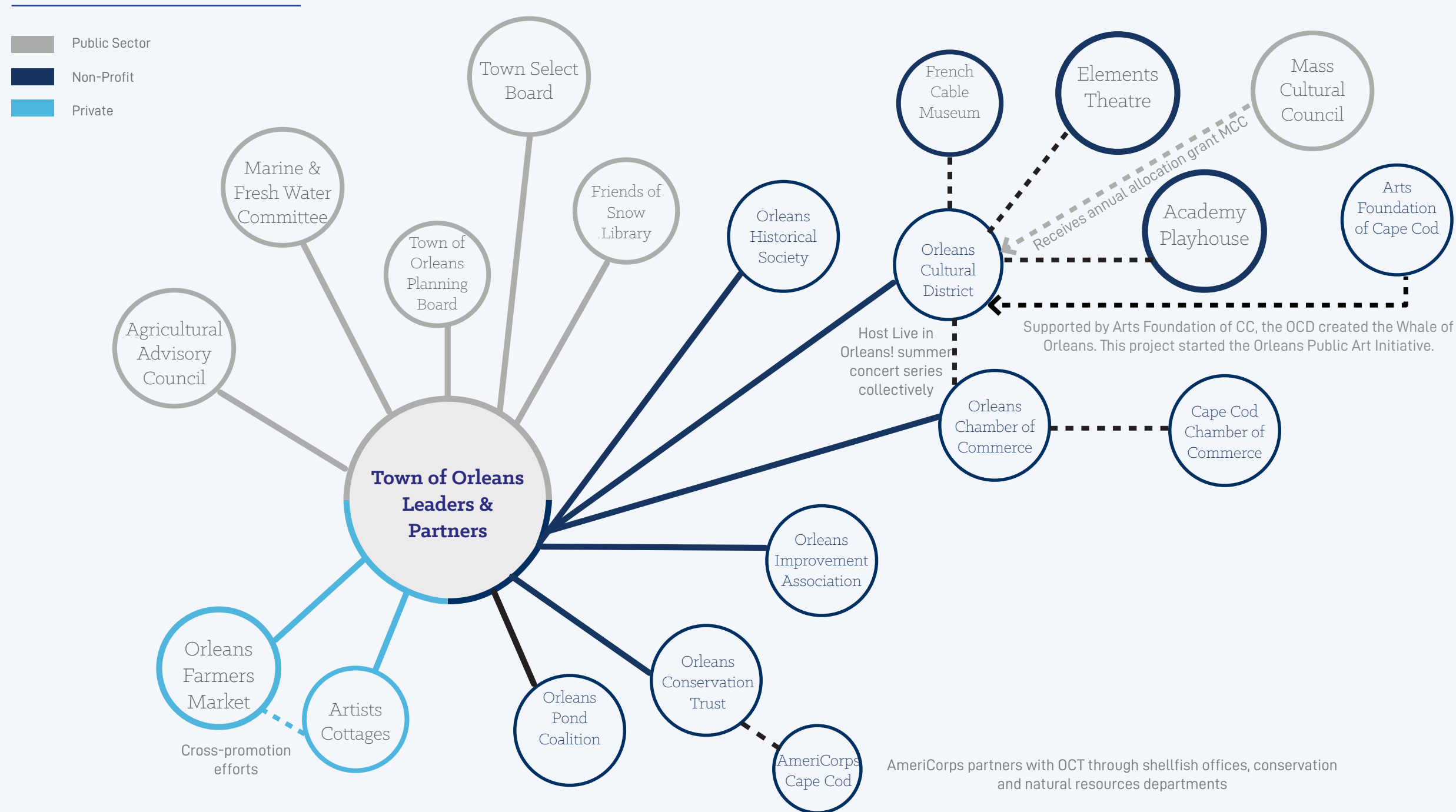
B - Penrose: 145,000+ SF (Rte 6A/Eldredge) - affordable housing

C - Bayberry Sq: 150,000+ SF (Rte 6A/Eldredge) - market rate housing



The Town needs to better coordinate economic development efforts.

There is currently a missing individual or entity acting as the Town’s leader in economic development, and whose primary role is to advance a common vision for economic development and coordinate efforts across relevant community-based groups.



Note: The Town's Village Center Market Study report similarly notes this lack of leadership and managing entity for economic development efforts - whether focused on downtown or across Town.

Furthermore, many of the Town’s community organizations that work to advance tourism efforts and business support are limited in resources and capacity. In fact, most organizations in Town are run by part-time and volunteer staff.

Organization	Type	Key Initiatives/Functions	# of Staff	Average Membership Cost	Size of Budget/Revenue	Key Funding Sources
Orleans Cultural District	Non-Profit	Public art, cultural events, historic restoration	1	N/A	Small	Mass Cultural Council grants
Orleans Chamber of Commerce	Non-Profit	Business promotion, events, and networking	1	\$305	Small	Membership dues, Town contributions
Hyannis HyArts Cultural District	Public	HyArts Artists Shanties, arts and cultural activities	1	N/A	Large	Town budget, revenue from Artist shanties, Mass Cultural Council grants
Provincetown Chamber of Commerce	Non-Profit	Tourism marketing, promotion, events, and business networking	2	\$335	Large	Provincetown Tourism Fund (consisting of 35% of local room tax receipts, or about \$700k)
Chatham Chamber of Commerce	Non-Profit	Business promotion, events, and networking	2 (visitor center: 10 staff)	\$270	Medium	Membership dues
Wellfleet Chamber of Commerce	Non-Profit	Business promotion, events, and networking	-	\$235	Small	Membership dues

Source: Streetsense (based on multiple Town budget reports, organizational annual reports, membership fee brochures, etc.)

Small <\$100k
Medium \$100-200k SF
Large \$200k<



Guiding Principles

**Town of Orleans
Today**

A naturally-occurring seasonal
tourism destination and blue
economy

Anchored by diverse range of
natural assets - beaches, estu-
aries, lakes, ponds

Commercial hub for year-round
Outer Cape retirees

Serviced by wide range of com-
munity-based volunteer groups

**Town of Orleans
Tomorrow**

Well-protected and preserved
natural assets

Sustainable year-round outdoor
recreation and a thriving blue
economy

Attainable year-round Outer
Cape downtown living desti-
nation for retirees, families and
young professionals

Commercial hub and arts/cul-
tural center for outer Cape

Discussion - Early Ideas/Direction for Economic Development Plan

* - Indicates recommendations made in previous studies/plans

	<p>Manage and protect natural assets</p> <p>To sustain tourism activity, retail spending, and blue economies</p>	<p>Promote growth in Village Center & Town Cove/Rte 6A Waterfront</p> <p>To support year-round labor pool, grow resident customer base, and diversity commercial tenants</p>	<p>Create memorable seaside town experiences</p> <p>To extend visitor dwell time and increase local spending</p>
Public Infrastructure	<p>Enhance existing landings and commercial fishing infrastructure*</p> <p>Create safer bike connections that connect seaside assets to Village Center + Rail Trail*</p>	<p>Enhance broadband access for Village Center & Town Cove residents and visitors</p>	<p>Increase Town Cove waterfront public access points</p> <p>Enhance public spaces at Village Center to build critical mass of outdoor experiences/events</p>
Redevelopment & Tenant mix		<p>Focus on building residential density at Village Center/Town Cove for 'missing middle' income households and 'down sizers'*</p> <p>Create an anchor destination at Village Center that serves as a community hub/cultural arts center</p>	<p>Support enhancement/development of hotel/hospitality assets</p>
Sales & Promotion		<p>Partner with regional blue economy and hospitality workforce training programs to build home-grown, skilled year-round labor</p>	<p>Develop a brand and marketing plan to promote businesses, arts/culture, and tourism destinations/assets</p> <p>Develop small business technical assistance program to support entry of new, experiential-focused tenants</p>

Identify economic development leadership roles and resources

To align community efforts toward common economic development goals

Create a role for a full-time Town economic development and tourism director & marketing staff*

Create an economic development and tourism fund to support implementation of priority strategies*



Town of Orleans Economic Development Plan

DIAGNOSTIC
JANUARY 25, 2022

streetsense.